City of Kingston
Report to Council
Report Number 24-172

To:	**Mayor and Members of Council**
From:	**Paige Agnew, Commissioner, Growth & Development Services**
Resource Staff:	**Tim Park, Director, Planning Services**
Date of Meeting:	**August 13, 2024**
Subject:	**Community Area Land Needs Assessment**

Council Strategic Plan Alignment:

Theme: 1. Support Housing Affordability

Theme: 3. Build an Active and Connected Community

Theme: 5. Drive Inclusive Economic Growth

Goal: 1.1 Promote increased supply and affordability of housing.

Goal: 1.2 Promote increase in purpose-built rental housing.

Goal: 5.3 Diversify Kingston's economic base.

Goal: 5.10 Ensure the downtown remains vibrant.

Executive Summary:

On December 5, 2023, Council endorsed the Medium Population, Housing and Employment Growth Scenario for the City of Kingston for the 2021-2051 time period (Report Number 24-016). Based on this growth scenario, the city is projected to grow from 154,100 people in 2021 to 220,900 people by 2051, representing 66,800 new residents, 29,300 new housing units and 33,400 new jobs over the next 27 years. The current Official Plan, which is intended to guide growth until 2036, only planned for a population of 141,500 people by 2036 which the city has already surpassed. This updated forecast forms the basis of the Community Area Land Needs

and Intensification Analysis prepared by Watson & Associates Economists Ltd. (Watson), as presented in this report. The purpose of this analysis is to determine if there is sufficient land in the urban boundary to accommodate forecasted housing growth to 2051 and to provide recommendations on future urban "Community Area" land requirements, which include residential land requirements, institutional, and commercial land requirements, along with land required to accommodate infrastructure such as roads, stormwater management ponds, parks, etc. to support the residential uses. Employment area land requirements for the city are also being reviewed, and the assessment will be provided in the near future in a separate report to Council.

The key findings and recommendations of the Community Area Land Needs and Intensification Analysis carried out by Watson are as follows:

- An increase in the residential intensification target is recommended at 60% within the existing urban boundary. In comparison, the current residential intensification target in the City's Official Plan is 40%. Intensification is defined as the development of a property or an area at a higher density than currently exists. This may be achieved through the re-use of brownfield sites, the development of vacant and/or underutilized lots within previously developed areas, infill development, and the expansion or conversion of existing buildings. Intensification emphasizes the optimization of existing urban land supply and focuses on making better use of the City's existing infrastructure and public service facilities.
- The city will require a range of housing options, including at-grade low- and medium-density and high-density housing choices to accommodate broad demographic groups.
- Almost all new low-density housing and most of the new medium-density housing will be accommodated in the greenfield areas, while most of the new high-density housing will be accommodated within the existing built-up area through residential intensification.
- Despite the increased residential intensification target of 60%, the city will need to expand its urban boundary by at least 340 hectares of gross developable land area to accommodate the housing forecast and the associated Community Area lands needs including commercial, institutional lands and supportive uses and associated infrastructure, such as stormwater management features, parks, roads, sidewalks, etc., excluding lands with environmental features that are protected from development. Watson notes that this is a minimum requirement that may be higher to allow for flexibility in the planning for neighbourhoods and other site factors such as ownership and natural heritage features.

Watson's scope of work does not include providing recommendations on the location of the urban boundary expansion lands. The locations will be reviewed as part of the Official Plan project, taking into consideration the formal urban boundary expansion requests that the City anticipates receiving from private landowners through applications for an Official Plan Amendment. The proposed process to review these urban boundary expansion requests was presented to Council on May 7, 2024, in Report Number 24-072.

The purpose of this report is to seek Council's endorsement of the Community Area Land Needs and Intensification Analysis, which will inform the more detailed work regarding the future urban boundary expansion to be completed through the Official Plan project. This report is being presented directly to Council for consideration as it is background work to a major policy initiative that will have long-term implications for land use and infrastructure planning in the city.

Recommendation:

That Council endorse the City of Kingston Community Area Land Needs and Intensification Analysis, dated July 31, 2024, prepared by Watson & Associates Economists Ltd., attached as Exhibit A to Report Number 24-172; and

That the Community Area land needs requirement, as presented in Exhibit A to Report Number 24-172, inform the more detailed work to be completed as part of the Official Plan project, which will identify the location of future urban boundary expansion lands.

Authorizing Signatures:

ORIGINAL SIGNED BY COMMISSIONER

**Paige Agnew, Commissioner,
Growth & Development Services**

ORIGINAL SIGNED BY CHIEF

p.p. ADMINISTRATIVE OFFICER

**Lanie Hurdle, Chief
Administrative Officer**

Consultation with the following Members of the Corporate Management Team:

Jennifer Campbell, Commissioner, Community Services	Not required
Neil Carbone, Commissioner, Corporate Services	Not required
David Fell, President & CEO, Utilities Kingston	Not required
Peter Huigenbos, Commissioner, Major Projects & Strategic Initiatives	Not required
Brad Joyce, Commissioner, Infrastructure, Transportation & Emergency Services	Not required
Desirée Kennedy, Chief Financial Officer & City Treasurer	Not required

Options/Discussion:

Background

As part of the preparation for the Official Plan project, three key background studies have been initiated by Planning Services, including a Population, Housing and Employment Forecast, an Employment Land Review, and a Commercial Land Review. A team led by Watson & Associates Economists Ltd. (Watson) was retained to undertake these studies. The analysis, conclusions and recommendations resulting from the studies will inform the residential, industrial, and commercial land use policies in the City's new Official Plan.

The Population, Housing and Employment Forecast is typically completed every five years and provides a foundation for the City's long-range land use, transportation, infrastructure, and capital expenditure planning. This helps ensure the efficient use of land, infrastructure, and public services. At the December 5, 2023, Council Meeting, Council endorsed the Medium Population, Housing and Employment Growth Scenario for the 2021-2051 time period. Based on this growth scenario, Kingston is projected to grow from 154,100 people in 2021 to a total permanent and student population of 220,900 by 2051, representing 66,800 new residents, 29,300 new housing units and 33,400 new jobs. This forecast will form the basis of the more detailed work to be completed as part of the Official Plan project, as well as other municipal studies and plans, including but not limited to, the Integrated Mobility Plan and the Water and Wastewater Master Plan.

Following Council's endorsement of the growth forecast, Watson undertook a Community Area Land Needs and Intensification Analysis (Exhibit A) to determine if there is sufficient land in the urban boundary to accommodate the housing forecast to the year 2051. This analysis focuses on the "Community Area" land needs which includes all land needed for residential, institutional and commercial uses and the infrastructure necessary to support those uses. This work does not identify the location of any potential urban boundary expansions. Employment land requirements for the city are also being reviewed, and that assessment will be provided in a separate report to Council.

The Community Area Land Needs and Intensification Analysis is intended to be a foundational background study for the new Official Plan, providing direction on the amount of land that needs to be added to the urban boundary to accommodate the housing forecast to the year 2051. The analysis has confirmed that the city has a shortfall of land within the urban area to accommodate all housing types, and in particular low- and medium-density housing. It is estimated that the city will need at least 340 hectares of additional lands within the urban boundary to accommodate projected future housing growth. Watson has noted that the actual land area of the expansion may be larger than 340 hectares to allow for flexibility in planning for new neighbourhoods and other site factors such as creating neighbourhoods that follow logical boundaries for urban development. The actual extent of the gross developable land area of the urban expansion areas will be further explored as part of the Official Plan project based on a series of planning considerations and may differ from the outcome identified in the Community Area Land Needs and Intensification Analysis. Watson acknowledges that the land needs

identified are considered a conceptual starting point, recognizing that further work will be carried out by City staff to determine the location of the urban boundary expansion lands.

Community Area Land Needs and Intensification Analysis

The following is a summary of the methodology used by Watson for the Community Area Land Needs and Intensification Analysis. The methodology is based on A Place to Grow: Growth Plan for the Greater Golden Horseshoe Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Watson notes that while this methodology is intended to be used by municipalities within the Greater Golden Horseshoe, it is the standard and most commonly used approach to assessing urban land needs broadly across large urban centres in Ontario. Furthermore, with the Provincial government's proposed consolidation of A Place to Grow: Growth Plan for the Greater Golden Horseshoe and the Provincial Policy Statement, 2020 into one brand new Province-wide Provincial Planning Statement, the terminology and direction provided in this guide is appropriate based on the current draft Provincial Planning Statement, 2024.

City Structure

For the purposes of the land needs assessment, the analysis categorizes the City's land area as urban and rural. Within the urban area, the land is further categorized as the Community Area and the Employment Area. Community Areas include residential and commercial areas, as well as institutional and open space lands within the urban area. Employment Areas are where most employment in industrial-type buildings is accommodated. Community Areas are further divided into the Built-Up Area and Designated Greenfield Area. For this analysis, Built-Up Areas are defined as lands that were developed within the City's urban area as of 2006, while urban lands that were undeveloped as of 2006 are considered the Designated Greenfield Area. The year 2006 was chosen to roughly correspond with the beginning of the development of the City's more recent secondary plans on large tracts of greenfield land, i.e., the Cataraqui West, the Cataraqui North, and the Rideau Community Secondary Plans.

The Built-Up Area further includes the "Strategic Growth Areas", which are areas identified for intensification. These include the City's proposed Protected Major Transit Station Areas (PMTSA) and the corridor connecting them. As noted in Report Number 24-072, the draft Provincial Planning Statement identifies 29 "large and fast-growing municipalities" in Ontario, which includes the City of Kingston. The draft policies would require the City to establish and meet minimum density targets for strategic growth areas and to delineate major transit station areas as an area within a 500 to 800 metre radius of a transit station. The *Planning Act* defines higher order transit as transit that operates in whole or in part in a dedicated right-of-way, including heavy rail, light rail and buses. Official Plans are allowed to identify an area surrounding an existing or planned higher order transit station or stop as a PMTSA and delineate its boundaries. The new Official Plan and the Integrated Mobility Plan work plans have been developed to identify and delineate PMTSAs in the city.

The remainder of the Built-up Area includes most of the city's existing neighbourhoods. Residential land needs were considered by accounting for the projected residential growth though residential intensification focused in the Built-Up Area, and additional residential growth which is mainly anticipated to be accommodated in the Designated Greenfield Areas.

Methodology

- **Step 1 – Housing Forecast:** As noted previously, 29,300 new housing units are anticipated in the city between 2021 and 2051. These include permanent as well as student households, with the permanent households being 24,600. The student households are anticipated to be accommodated within the Built-Up Area, and, as a result, would not require additional land to be brought into the urban area. Therefore, the land needs analysis focuses on the permanent household forecast. Over the 2021 to 2051 period, the City is forecast to average 900 units annually. Of these 900 units, 54% are projected to be high-density housing units (486 housing units), followed by medium-density housing units at 26% (234 housing units) and low-density housing units at 20% (180 housing units) annually. In addition to this, a further 180 high-density units are annually required over the 2021 to 2051 period to accommodate student households not captured in Census and existing household structural deficit.

- **Step 2 – Growth Allocation Rural and Urban Areas to 2051:** As per provincial planning direction, most of the City's housing growth is to be accommodated within the urban area. Watson estimates that approximately 98% of the City's housing growth (approximately 24,200 housing units) is anticipated to be accommodated within the City's urban area, and the remainder in the rural area.

- **Step 3 – Intensification Analysis:** To accommodate various demographic groups, the City will require a range of housing options including high density, medium density and grade-related low density housing options. This is in line with provincial policies that require the provision of a diversity of housing types. Over the 2006 to 2023 period, approximately 55% of the City's housing growth has been accommodated through intensification. An intensification analysis was undertaken by Watson which anticipates that the City can accommodate 60% of its housing growth to 2051 through intensification in the Built-Up Area. As a result, approximately 14,600 housing units in the City over the 2024 to 2051 period are anticipated to be accommodated through intensification.

- **Step 4 – Designated Greenfield Area Housing Demand to 2051:** Upon identifying the appropriate amount of housing growth to be accommodated through intensification within the Built-Up Area, and within the Rural Area, the remaining housing growth of 9,560 units is identified as the Designated Greenfield Areas housing unit demand.

  A summary of the permanent housing forecast by planning area is shown in Table 1.

Table 1: Housing Forecast by Planning Area

Planning Area	Permanent Households	Share of Housing Units (percentage)
Urban Area – Built-up Area	14,640	60%
Urban Area – Designated Greenfield Area	9,560	39%
Rural Area	370	2%
Total City of Kingston	24,570	100%

Note: Figures have been rounded and as such do not add precisely.

- **Step 5 – Designated Greenfield Area Housing Supply in Active Applications on Vacant Lands:** Watson reviewed the active planning application information within the Designated Greenfield Area and estimated that the City has the potential to accommodate approximately 2,040 housing units on vacant residentially designated lands in the Designated Greenfield Area. Watson estimates the following housing unit supply potential on currently designated residential lands, based on housing units by structure type:
  - Low Density: 825
  - Medium Density: 390
  - High Density: 825
  - Total Housing Units: 2,040

- **Step 6 – Designated Greenfield Area Housing Unit Supply versus Demand:** The housing unit supply was compared to the housing forecast by housing unit structure type. Based on a comparison of active application housing supply versus the housing forecast within the Designated Greenfield Area, Watson estimates that the City has a shortfall of approximately 7,520 housing units to 2051 (supply of 2,040 units minus demand of 9,560 units = 7,520 units). The housing unit shortfall is summarized below by housing unit structure type:
  - Low Density: -3,550
  - Medium Density: -3,140
  - High Density: -830
  - Total Housing Units: -7,520

- **Step 7 – Designated Greenfield Area Housing Units Per Hectare Assumption, Net Land Area:** In order to convert the shortfall of housing units to land area, Watson reviewed historical housing density trends within the Designated Greenfield Area, along with density trends of approved and proposed developments to gather insights regarding anticipated changes in density over the short and medium terms. Watson also considered forecast unit per hectare assumptions generated in land needs assessments for comparable municipalities in Ontario, including the City of Guelph, the City of Hamilton, the City of Barrie, and the City of London. The housing shortfall identified in Step 5 was divided by the following housing unit per hectare assumptions to identify the net land area required:
    - Low Density: 27 units per hectare
        - 3,550 units divided by 27 units per hectare = 132 net hectares (approximately 326 net acres)
    - Medium Density: 46 units per hectare
        - 3,140 units divided by units per hectare = 68 net hectares (approximately 168 net acres)
    - High Density: 100 units per hectare
        - 830 units divided by 100 units per hectare = 8 net hectares (approximately 20 net acres)

    The units per hectare assumptions anticipate that over the planning horizon, housing developments in all housing structure types will increase in density. The total net land area shortfall was identified to be approximately 208 net hectares (approximately 514 net acres). This represents the additional land area needed to accommodate housing development but does not include associated infrastructure and facilities such as roads, stormwater ponds, parks/trails, and non-residential uses such as schools, community centres, and commercial uses.

- **Step 8 – Total Land Needs Upwardly Adjusted for Community Area Uses:** To account for infrastructure and facilities such as roads, stormwater ponds, parks/trails, and select non-residential uses (such as schools, and commercial and institutional uses), Watson upwardly adjusted the land area shortfall to account for additional lands to accommodate these uses. The land area is doubled to account for other Community Area uses required to support the function of residential uses. Watson notes that it is important to ensure that while residential lots are getting smaller on average, the City would need to accommodate an adequate amount of parkland and non-residential lands to support the development of complete communities, which is one of the seven critical public interests to be met through the new Official Plan project. This also considers the additional land required (approximately 15 hectares, or 37 acres) of commercial uses to support local residents based on the Commercial Land Review draft technical findings (prepared under a separate report cover and to be presented to Council at a later date). The gross land area (net of environmental features) required for additional Community Area land is approximately 416 hectares of gross developable land (208 net hectares multiplied by 2 = 416 hectares (or approximately 1,028 acres)).

- **Step 9 – Land Needs Adjusted for Vacant Lands within the Designated Greenfield Area with No Application:** There are currently 73 hectares (180 acres) of gross developable land area that are designated for residential uses in the urban area, but with no active planning applications. As such, the shortfall of Community Area land identified in Step 8 was reduced by 73 hectares. The adjusted land area shortfall is at least 340 hectares (416 hectares minus 73 hectares = 340 hectares) of gross developable land area. As a result, the City will need to expand the urban boundary by at least 340 hectares (840 acres) of gross developable land area to accommodate the housing growth forecast to 2051. This excludes lands with environmental features.

   Staff note that this calculation is based on the existing Official Plan designations and that, as a result of other changes that may occur within the urban boundary through the drafting of the new Official Plan, these figures may need to be adjusted.

Urban Boundary Expansion

The current Provincial Policy Statement (PPS), 2020 allows for the expansion of settlement area boundaries, also known as the urban boundary, only through a comprehensive review process (unless it is an adjustment of the urban boundary that meets the criteria in the PPS allowing it outside of a comprehensive review). At present, under the current PPS, property owners have the right to submit an application for an Official Plan Amendment (OPA) with a request for an urban boundary expansion in conjunction with a comprehensive review.

The proposed Provincial Planning Statement, 2024 removes the concept of a comprehensive review, and instead, allows for the same OPA to be considered at any time by a municipality on an ad-hoc basis. If the proposed PPS is approved as drafted, any property owner will have the right to submit an OPA at any time requesting an urban boundary expansion (not just during a comprehensive review process).

Recognizing that the proposed new ability to submit urban boundary OPAs on an ad-hoc basis and the introduction of appeal rights connected to decisions or non-decisions of such requests (as detailed in Report Number 24-142) introduces uncertainty about the prioritization of comprehensive review processes versus ad-hoc requests for an urban boundary expansion, on May 7, 2024 Council directed Staff to review all urban boundary OPAs in a coordinated manner in conjunction with the Official Plan project, rather than on an ad-hoc basis, to ensure there is no impact on the timing, cost and scope of the new Official Plan project so that the requests can be reviewed in the most efficient and effective way possible.

Stemming from the growth forecast work, staff began receiving interest from private landowners for their properties to be considered for an urban boundary expansion through the new Official Plan project. As more requests were anticipated, and to be able to review such requests in a coordinated, transparent, and comprehensive manner, and with the endorsement of Council at the December 5, 2023 Council meeting, staff initiated a process for the review of urban boundary expansion requests.

As outlined in Report Number 24-016, in order to create a coordinated and transparent process for property owners to submit an OPA requesting an urban boundary expansion (urban boundary OPA), staff reached out to the community requesting private landowners to submit a "Notice of Intent" to request an expansion to the urban boundary if they were so contemplating. Staff published a notice in the Kingston Whig-Standard and on the City's website and sent an emailed notice on December 12, 2023 to the Official Plan project and the Growth Forecast study email list requesting that any property owner who is contemplating an urban boundary OPA to submit an expression of interest through a "Notice of Intent" to the City by January 31, 2024. The Notice of Intent submission was required to include the following: address/location of property; proposed density; proposed height; proposed number of units; and proposed housing form. No technical studies were required at this step. The Notice of Intent process is intended as the pre-application step for an OPA.

The City received Notices of Intent from 21 property owners identifying their interest in submitting an urban boundary OPA in conjunction with the Official Plan Project. A map is included with this report (Exhibit B - Urban Boundary Expansion Notice of Intent Mapping) showing the location of the properties that have been identified through these Notices of Intent and the proposed uses for each property.

Staff have now had pre-application meetings with these property owners to discuss the expansion requests and identify required submission materials that are to be completed by the property owner for a complete urban boundary OPA. The next step will be for the property owners to submit a complete application for an urban boundary OPA requesting an expansion to the urban boundary for their respective properties. October 15, 2024 has been set as a deadline for the submission of a formal application for an urban boundary OPA. Council and, ultimately, the Minister of Municipal Affairs and Housing, will be the decision makers on the Official Plan project and on any urban boundary OPAs. Staff's intent is to bring a recommendation on these OPAs at the same time as the new Official Plan document.

Property owners have been advised that the submission of an urban boundary OPA does not guarantee their request will be approved. Staff have identified that some of the requests for an expansion would not result in a positive recommendation due to factors such as significant natural heritage features on the property, feasibility of extending municipal servicing infrastructure within the planning horizon of 2051, or the lack of contiguity to the existing urban boundary and/or other urban boundary expansion requests. Staff have communicated this to the property owners, as appropriate, and have suggested alterative approaches to submitting an informal request through the OP project to enable development of those that would be more appropriate in a rural context. Should they still wish to submit an urban boundary OPA, it will be reviewed in conjunction with all other urban boundary OPAs.

Based on the urban boundary expansion notices of intent received so far for proposed residential development, staff see approximately 219 hectares as potentially being supportable for inclusion in the urban boundary if the technical analysis of the completed studies through the Official Plan project, in coordination with the Integrated Mobility Plan project and the Water and Wastewater Master Plan support the proposed expansion. Table 2 provides a summary of

staff's initial assessment of the notices of intent. Depending on the outcome of the technical review process associated with the urban boundary expansion OPAs, there are also a number of intervening properties surrounding the NOI properties that may also be reviewed by staff for their appropriateness as a potential expansion area for the urban boundary based on the same considerations that are being applied to the urban boundary expansion OPAs.

Table 2: Initial Assessment of Notices of Intent to Expand the Urban Boundary

Urban Boundary Expansion Notices of Intent (Residential)	Total Hectares (Approximate)
Potential to be supported for inclusion in the urban boundary if the technical analysis through the Official Plan project is positive and feasible	219
Unclear at this time due to technical challenges related to transportation and servicing infrastructure	78.5
Not supportable for inclusion in the urban boundary expansion due to distance from current urban boundary, but could support rural residential uses	63.1
Not supportable for inclusion in the urban boundary expansion due to constraints associated with natural heritage features and flooding hazards, with limited potential for future development	210.6

As noted by Watson in the Community Area Land Needs and Intensification Analysis, the Community Area land needs identified are considered a conceptual starting point, recognizing that further work will be carried out by staff to determine the location of the urban boundary expansion lands through the Official Plan project. Staff will be reviewing all urban boundary OPAs along with any intervening lands for which an urban boundary expansion request has not been received to ensure a logical progression of future development and to ensure that there are sufficient lands included within the urban boundary to accommodate future housing needs to 2051. Properties for potential urban boundary expansion identified through the NOI process are not the only mechanism the City has for identifying future residential land and through the Official Plan process staff will ensure that the ultimate recommendations that are brought forward to Council address the minimum residential land supply identified in the Watson Land Needs Analysis.

The actual development of any urban boundary expansion lands will depend on the outcomes of the Integrated Mobility Plan and the Water and Wastewater Master Plan and it is likely that these lands will not be developed for a number of years until they can be supported by the necessary infrastructure, including hydro and gas. Where lands are recommended to be brought into the urban boundary through the Official Plan project, appropriate phasing policies will be established to align with the infrastructure considerations.

As noted in Report Number 24-072, with the City's potential supply of more than 14,000 pending and committed housing units over the next several years, any potential urban boundary expansions (if approved by Council and the Ministry of Municipal Affairs and Housing through the Official Plan project) are not needed in the immediate term.

Staff will be bringing a separate report that addresses the supply of employment lands required to meet 2051 demand. As previously communicated to Council, there is more urgency in increasing the supply of the available employment lands that are readily available and easy to service.

Public Engagement

A meeting was held with the Kingston Home Builders Association (KHBA) on April 5, 2024 to present the draft Community Area land needs assessment. Additionally, on April 17, 2024, a public information session was held to discuss the draft Community Area and employment lands needs (Exhibit C). The session was held at INVISTA centre, and was attended by 29 members of the public. The session included a presentation by Watson followed by a question and answer session. A summary of the feedback received at the public information session along with responses from the project team is included in Exhibit D.

Next Steps

Following endorsement of the Community Area Land Needs and Intensification Analysis, Watson will be continuing to work on the Commercial Land Review, and Employment Land Review and the Growth Forecast study. These will be presented to Council in separate reports in the coming months.

Existing Policy/By-Law:

This report considers the existing Provincial Planning Statement 2020, and the proposed Planning Policy Statement, 2024, as well as the current City of Kingston Official Plan.

Notice Provisions:

None

Financial Considerations:

None

Contacts:

Sukriti Agarwal, Manager, Policy Planning, Planning Services, 613-546-4291 extension 3217

Chris Wicke, Senior Planner, Planning Services, 613-546-4291 extension 3242

Other City of Kingston Staff Consulted:

Laura Flaherty, Project Manager, Planning Services

Exhibits Attached:

Exhibit A – Community Area Land Needs and Intensification Analysis Report, Watson and Associates Economists Limited

Exhibit B – Urban Boundary Expansion Notice of Intent Mapping

Exhibit C – City of Kingston Draft Residential, Commercial and Employment Area Land Needs Presentation – Public information Session 2 – April 17, 2024

Exhibit D – Public Information Session 2 – April 17, 2024 – What We Heard Summary

Community Area Land Needs and Intensification Analysis

City of Kingston

Draft Report

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List of Acronyms and Abbreviations

A.R.U.	Additional Residential Unit
B.U.A.	Built-up Area
D.G.A.	Designated Greenfield Area
M.T.S.A.	Major Transit Station Area
O.P.	Official Plan
P.P.S., 2020	Provincial Policy Statement, 2020
P.P.S., 2024	Provincial Planning Statement, 2024
U.P.H.	Units per Hectare

Glossary

Additional Residential Unit (A.R.U.): as defined by the *Planning Act*, refers to a second and a third residential unit in addition to a primary residential unit on a residential lot containing a single detached housing unit, semi-detached housing unit, or townhouse unit. A.R.U.s are also referred to as second units, secondary suites, accessory dwelling units, accessory houses, basement apartments, coach houses, laneway houses, garden suites, tiny homes, granny flats, in-law apartments, or nanny suites.

Built-up Area (B.U.A.): refers to the area where most of the residential, commercial, and institutional lands within the City are developed. This area is where intensification, including redevelopment and infill, is expected to occur. The B.U.A. also offers vacant land sites; however, compared to the Designated Greenfield Area (D.G.A.), the vacant sites are smaller (sites measuring less than 20 hectares (49 acres) in land area) and are more likely to accommodate higher-density developments, such as townhouses, apartments and mixed-use developments. The City's intensification rate is applied to the B.U.A.; any housing development within this area is considered intensification, regardless of housing structure type.

Climate Change Mitigation: refers to reducing and avoiding emissions of greenhouse gases into the atmosphere to limit the magnitude of future climate impacts.

Climate Change Resilience: refers to effectively adapting with and managing the impacts of climate change while preventing those impacts from getting worse. A climate resilient City plans from a climate change lens and is equipped to deal with the realities of an increasingly warmer world.

Committed Housing Units in the Planning Process: is a category used by the City of Kingston staff to monitor anticipated housing activity in the planning application process and includes housing potential from one of the following: an approved draft plan of subdivision; a registered plan of subdivision (but only those units for which building permits have not been issued); an approved Official Plan/zoning by-law amendment or minor variance, but no Site Plan Control application submitted yet; a Site Plan Control

Glossary (Cont'd)

application under review with approved zoning; and an approved Site Plan Control application but no building permits issued yet.

Community Area: refers to the area within the City's Urban Area that is planned to accommodate housing and most of the population-related employment and office jobs. This area also includes the City's parkland and recreational lands. Community Areas are further divided based on two geographic areas: Designated Greenfield Areas (D.G.A.) and the Built-up Area (B.U.A.). The Community Area excludes industrial uses found in Employment Areas.

Community Area Land Needs Assessment: is a calculation to determine the amount of urban land required to meet the future needs of the City's residential, commercial, and institutional land requirements. Prior to a land needs assessment, a housing and commercial intensification analysis is carried out to determine growth that can be accommodated within the City's B.U.A. Housing and commercial floorspace growth not anticipated to be accommodated through intensification is inputted into the land needs assessment. In a land needs assessment, when the demand for D.G.A. land is greater than the available land supply, additional lands are required through an urban boundary expansion to accommodate growth. A commercial floorspace intensification analysis and commercial land requirements are discussed in further detail in the Commercial Land Review Report.

Community Area Expansion: refers to the expansion of the City's urban boundary to accommodate more lands (from the Rural Area) for Community Area uses on municipally serviced lands (i.e., water and wastewater servicing). Provincial planning policy refers to this as a form of a settlement area boundary expansion.

Complete Communities: is where communities meet the needs of residents for daily living throughout an entire lifetime by providing an appropriate mix of jobs, local services, a full range of housing, and community infrastructure, including affordable housing, schools, recreation, and open space for their residents within a short walking distance. A key objective of complete communities is to ensure that residents are offered a range of transportation options to accommodate the daily needs of residents. Providing diverse transportation options makes communities more inclusive by accommodating the mobility of people of all ages, abilities, and income levels.

Designated Greenfield Area (D.G.A.): refers to newly established, developing and vacant lands that are designated for residential and other Community Area uses that are generally on the periphery of Kingston's Urban Area. The D.G.A. has accommodated most of the City's new at-grade housing over the past decade. The D.G.A. includes the following Secondary Plan Areas in the City: the Cataraqui West Secondary Plan Area, the Cataraqui North Secondary Plan Area, and the northern

Glossary (Cont'd)

portion of the Rideau Community Secondary Plan Area. In addition, it includes large vacant sites or recently developed neighbourhoods measuring at least 20 hectares (49 acres) in size. D.G.A. lands will also include any lands that are brought into the Urban Area through a Community Area Expansion.

Employment Areas: refers to lands designated for industrial-type development. These lands are protected from sensitive uses such as residential, large-scale institutional uses (e.g., hospitals, nursing homes, and schools) due to land use compatibility issues. Additionally, Employment Areas are protected from major retail uses due to the traffic these uses generate.

Green Standard Community Improvement Plan: provide incentives to builders and owners who design and construct more efficient buildings that move towards achieving the City's goal of net zero greenhouse gas emissions.

Gross Developable Land Area: refers to lands that can be built on for the development of housing, commercial, and institutional uses, as well as infrastructure uses (stormwater ponds, parks/trails and roads). Gross developable land area excludes environmental features and other lands that cannot be built on.

Household Structural Deficit: refers to the City's current housing supply that does not meet the needs of the current population from a household affordability, suitability (e.g., major repairs required or not enough bedrooms for the size and make-up of households) and market choice lens. The household structural deficit identifies a need for existing residents in the City of Kingston, while the housing shortfall identified in the Community Area Land Needs Assessment identifies a shortfall to address the housing needs of future residents (i.e., population growth).

Intensification Rate: refers to the percentage of the City's historical and forecast housing growth accommodated within the B.U.A. The intensification rate is measured based on geographic area.

Major Transit Station Area (M.T.S.A.): are areas that typically encompass lands within a 500- to 800-metre radius (about a 10- or 15-minute walk) of a transit station or stop and tend to be primarily located along existing or planned transit corridors. Within Kingston, three M.T.S.A.s are identified in this report, including the Downtown, Kingston Centre, and Cataraqui Centre. Higher population and employment densities are anticipated within these areas to leverage and support the City's public transit.

Missing Middle Housing: refers to the range of housing types between traditional single detached houses and high-rise apartments that have gone "missing" from many large cities in Ontario. Missing Middle housing is typically defined to include a range of

Glossary (Cont'd)

house-scale buildings with multiple units – compatible in scale and form with detached single-family homes – located in a walkable neighbourhood.

Net Residential Land Area: refers to the portion of the developable land area to accommodate lots for housing, exclusive of all other land uses, such as roads, stormwater ponds, parks/trails, and commercial and institutional sites.

Net-to-Gross Ratio: refers to an upward adjustment to the net residential land area to estimate the gross developable land area that accounts for other Community Area land uses, such as roads, stormwater ponds, parks/trails, and commercial and institutional sites. In this report, the net-to-gross ratio is 50%, meaning that an additional 50% of the land is considered for other uses to support residential uses. This is a conceptual average and may vary by development area depending on the land area, housing types, built-form, range of non-residential land-uses, infrastructure requirements, and the surrounding land use context.

Non-Permanent Residents: includes residents that have been authorized to enter Canada for temporary residence purposes, such as work or study permit holders or those who have claimed refugee status. Furthermore, students temporarily living in the City of Kingston not captured in the Statistics Canda Census are also included as non-permanent residents. It is important to note that this segment of the population is largely concentrated in the City's B.U.A.

Pending Housing Units in the Planning Process: is a category used by the City of Kingston staff to monitor anticipated housing activity in the planning application process and includes housing potential from one of the following: a plan of subdivision that has yet to receive draft plan approval; an Official Plan/zoning by-law amendment that has yet to receive approval; and applications appealed to the Ontario Land Tribunal and pending a decision from the Ontario Land Tribunal.

Permanent Residents: refers to Canadian citizens and the population that have been granted the right to reside in Canada permanently by immigration authorities. Furthermore, it excludes students not captured in the Statistics Canada Census.

Remaining Built-up Area (B.U.A.): refers to lands within the B.U.A. that are not within a Strategic Growth Area. Other than a few redevelopment opportunities within the remaining B.U.A., the remaining B.U.A. largely comprises established residential neighbourhoods.

Residents and Jobs per Hectare: an estimate of the population and jobs divided by the gross developable land area.

Glossary (Cont'd)

Rural Area: refers to lands identified in the City of Kingston Official Plan outside the delineated urban boundary which includes prime agricultural lands, rural lands, rural settlement areas (hamlets), mineral aggregate resources, rural commercial, and rural industrial areas.

Settlement Area Boundary Expansion: is a term used in provincial planning policy that refers to the adjustment of the urban boundary to include additional land within the Urban Area. The settlement area boundary expansion may include providing additional lands for Community Area or Employment Area uses.

Strategic Growth Areas: are the areas where the City will focus intensification efforts and direct most of the intensification housing growth. The Strategic Growth Areas in Kingston comprise three M.T.S.A.s, a corridor connecting the M.T.S.A.s, and other selected sites in the B.U.A.

Units Per Hectare (U.P.H.): is measured based on the number of housing units by housing structure type divided by the net residential land area (i.e., residential lots).

Urban Area: refers to municipally serviced (water/wastewater) lands identified in the City of Kingston Official Plan with a delineated urban boundary. In accordance with provincial planning policies, the City's Urban Area will accommodate most of the City's growth, with a limited amount of growth allocated to the Rural Area. This approach prioritizes the protection of the City's prime agricultural lands, while providing some growth opportunities to contribute to the rural economy.

Vacant Lands with No Applications: refers to vacant designated residential lands that currently have no active planning applications as of December 31, 2023.

Executive Summary

Executive Summary

Terms of Reference

The City of Kingston retained Watson & Associates Economists Ltd. (Watson), in association with Dillon Consulting Limited and urbanMetrics inc. (together referred to as the "Consultant Team"), in January 2023 to prepare a Growth Analysis and Urban Land Needs assessment study to support the City's new Official Plan (O.P.) project. This study is being prepared in two phases: Phase 1 – Technical Analysis, and Phase 2 – Strategic Directions.

This study will form a foundational document for the City's long-range planning and will include an update of the City's population, housing, and employment forecasts, as well as a corresponding assessment of the City's land needs for residential, commercial, and Employment Area lands to the year 2051. This report, titled, "Community Area Land Needs and Intensification Analysis," summarizes the technical findings on the City's capacity to accommodate residential intensification, as well as housing growth and related Community Area land uses on designated greenfield lands through to 2051. Furthermore, this report also includes strategic policy direction regarding the planning and management of growth within the City's Community Areas, which includes residential areas, Major Transit Station Areas (M.T.S.A.s), and other Strategic Growth Areas.

The assessment of the City's non-residential land needs, including the long-term outlook and strategic policy recommendations, will be provided under separate report covers and will include the Commercial Land Review Report and the Employment Land Review Report.

Study Process

On December 5, 2023, City of Kingston Council endorsed the Medium Population, Housing, and Employment Growth Scenario to 2051, prepared and presented by Watson. The Medium Population, Housing, and Employment Growth Scenario forecasts a permanent and student population base of 220,900 and an employment base of

113,900 by 2051.[1] Leading to the endorsement of the growth forecast scenario by City of Kingston Council, there was an in-person Public Information Centre in June 2023 and the project team engaged with various City departments and external stakeholders over the course of the project. Additionally, the project team also consulted with representatives of Queen's University, St. Lawrence College, and the Royal Military College of Canada in the development of the post-secondary student forecast. More recently, on April 17, 2024, a second Public Information Centre was held, in person, to present and discuss the land needs and intensification findings contained in this report, as well as the preliminary technical results of the Commercial Land Review and the Employment Lands Review.

Following the review by City of Kingston Council in August 2024, additional reports will be provided, including the Population, Housing and Employment Growth Report, Commercial Lands Review and the Employment Lands Review. It is anticipated that these Reports will be provided in the fall of 2024.

Provincial Planning Policy Context

As previously discussed, the City of Kingston is about to begin the new O.P. project. This document, along with a series of other documents, are key background documents supporting the creation of brand-new policies through the O.P. project.

The City's new O.P. will be required to be consistent with provincial policy and legislation. In order to assess the City's land needs over the long-term horizon, the City is required to follow a provincial policy framework. The Provincial Policy Statement, 2020 (P.P.S., 2020) is the current in-effect policy document that provides a framework for managing growth. The P.P.S., 2020 provides guidance on directing growth with a focus on urban serviced lands (i.e., with municipal water and wastewater servicing) and prioritizing growth through intensification. Over the past few years, there has been a number of provincial policy and legislative changes that influence the planning and management of growth. At the time of writing this report, the Province has released a brand-new draft Provincial Planning Statement, 2024 (P.P.S., 2024) that is intended to replace the current P.P.S., 2020. It is expected that, by the time the City is ready to

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[1] City of Kingston Staff Report to Council, Population, Housing and Employment Growth Forecast Update to 2051, Report Number 24-016, December 5, 2023. Exhibit A attachment dated November 23, 2023, prepared by Watson & Associates Economists Ltd.

make final recommendations on the new O.P. project, the P.P.S., 2024, or some version of it, will be in effect. The P.P.S., 2024 recognizes that the approach to delivering housing and accommodating demand in Employment Areas will vary by municipality and, as such, it moves away from a prescriptive guideline-based approach. While this report was prepared under the purview of the P.P.S., 2020, it generally aligns with the proposed changes in the P.P.S., 2024 recognizing the anticipated 24-month timeline on the O.P. project and the likelihood that the new P.P.S., 2024 will be in effect by its completion. The 30-day comment period for the proposed P.P.S., 2024 ended on May 12, 2024.

Urban Structure

In order to assess land needs requirements and intensification potential, the City's existing and planned urban structure was assessed. An urban structure provides the foundation for how the municipality will direct and manage residential and non-residential growth across its built-up area (B.U.A.), designated greenfield area (D.G.A.), and Rural Area. Each component of the municipality's urban structure has a distinct role in accommodating growth and is guided by different provincial and local policies with respect to planning for growth. As such, in this report the urban structure components are referred to as "planning policy areas."

The City of Kingston has a delineated urban boundary. Lands within the urban boundary are considered urban and have full municipal servicing (i.e., water and wastewater servicing) or the potential to be developed in the future on full municipal services. Outside the urban boundary is the Rural Area, which includes prime agricultural lands, rural lands, rural settlement areas (hamlets), mineral aggregate resources, and rural commercial and rural industrial areas. The land needs assessment contained in this report is focused on accommodating growth on urban serviced land. In accordance with provincial planning policies, the City's Urban Area will accommodate most of the City's growth, with a limited amount of growth allocated to the Rural Area. This approach prioritizes the protection of the City's prime agricultural lands in accordance with provincial policy, while providing some growth opportunities to contribute to the rural economy.

Provided in Figure ES-1 are the key components of the City's urban structure, while Figure ES-2 provides a map of the City's urban structure. Following the figures is a brief

description of the City's urban structure components. Refer to the glossary for information on the terms discussed below.
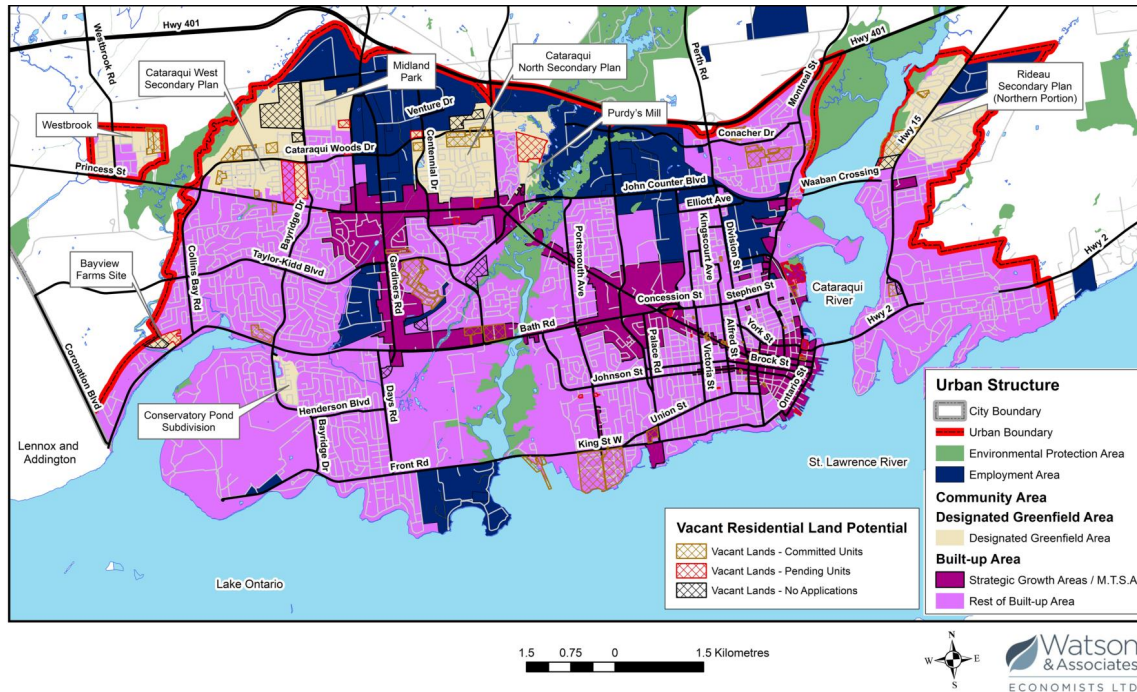
Figure ES-1
City of Kingston
Draft Urban Structure – Key Growth Areas Assessed
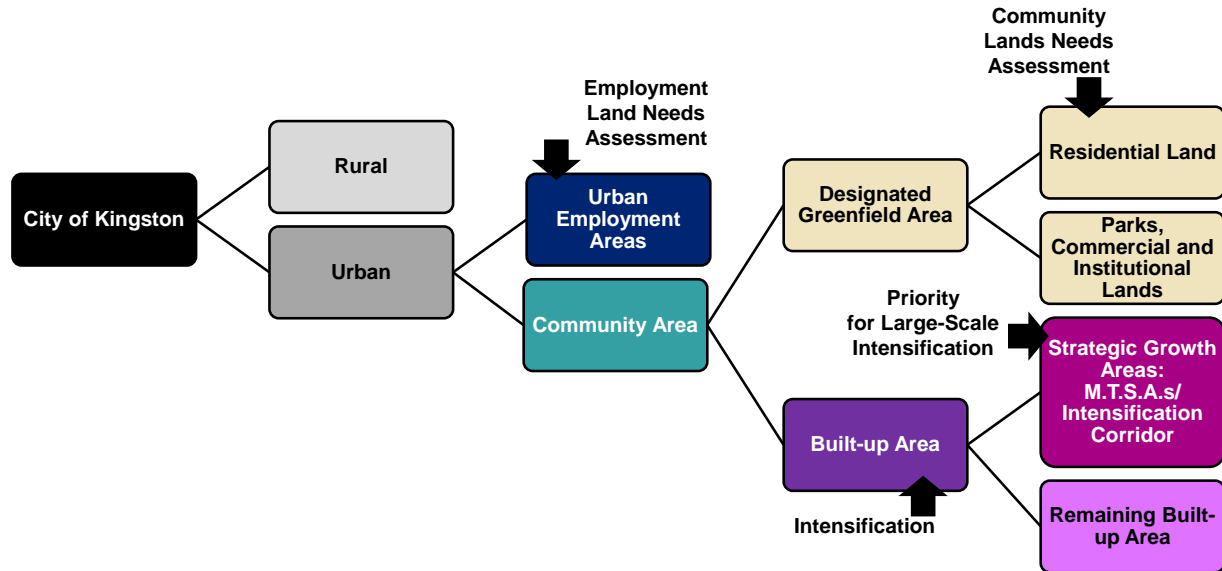
Notes: M.T.S.A. = Major Transit Station Area
Refer to glossary for definition of terminology displayed in figure.
Source: Watson & Associates Economists Ltd.

Figure ES-2
City of Kingston
Draft Urban Structure – Key Growth Areas Assessed

- **Community Area**
  - This report assesses the City's Community Area, which comprises residential land within the Urban Area, and commercial and institutional lands to support the residential uses. The Community Area is the City's Urban Area excluding Employment Areas (industrial-type uses).
  - Within the Community Area, the designated land is further divided into the D.G.A. and the B.U.A. The division of lands classified as B.U.A. and D.G.A. was based on the development status of the City's urban lands as of 2006. The year 2006 was chosen to roughly correspond with the beginning of the development of the City's more recent Secondary Plans on large tracts of greenfield land, namely the Cataraqui West Secondary Plan Area, the Cataraqui North Secondary Plan Area, and the northern part of the Rideau Community Secondary Plan Area. Furthermore, this time frame provides a rich dataset to observe housing trends in density and housing mix.

- o Community Area lands that were developed as of 2006 are considered the B.U.A., while urban lands that were undeveloped as of 2006 are considered the D.G.A.

- **Designated Greenfield Area**
  - o The D.G.A. represents all designated lands in the Urban Area that are not within the B.U.A. or within Employment Areas. Compared to the B.U.A., these areas are large tracts (sites measuring at least 20 hectares or 49 acres) of residential areas primarily planned for low-rise residential housing and are undergoing development, nearing completion, or have been developed less than 20 years ago. The D.G.A. also comprises other Community Area lands (e.g., parkland, commercial, and institutional uses).
  - o The land needs assessment only includes the vacant lands within the D.G.A. Developed lands within the D.G.A. are assessed only to understand trends in density and housing mix, and to inform key inputs into the land needs assessment.

- **Built-Up Area**
  - o The B.U.A. is the area where most of the residential, commercial, and institutional lands within the City are developed. This area is where intensification, including redevelopment and infill, is expected to occur. The B.U.A. also offers vacant land sites; however, compared to the D.G.A., the vacant sites are smaller (sites measuring less than 20 hectares (49 acres) in land area) and are more likely to accommodate higher-density developments such as townhouses and apartments.
  - o As set out in this report, the City's intensification rate applies to development within the geographic extent of the B.U.A. Over the past five years, development within the B.U.A. has primarily comprised high-density housing developments. It should be noted that the City's O.P. does not delineate a B.U.A. Watson has delineated a B.U.A. based on standard practices across Ontario and in accordance with provincial policy direction. The P.P.S., 2020 requires that municipalities "establish and implement minimum targets for intensification and redevelopment within built-up areas, based on local conditions."[2] The proposed P.P.S., 2024 encourages but does not require municipalities to delineate a B.U.A. and

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[2] P.P.S., 2020, policy 1.1.3.5, p. 9.

set minimum targets for intensification.[3] Going forward, the B.U.A. can be used by the City to monitor and review the City's intensification rate. The delineation will provide a clear parameter where intensification can be measured.

- **Strategic Growth Areas**
  - A further division within the B.U.A. is provided. The City's Strategic Growth Areas are the areas where the City will focus intensification efforts and direct most of the intensification housing growth. The Strategic Growth Areas in Kingston comprise three M.T.S.A.s, a corridor connecting the M.T.S.A.s, and other selected sites in the B.U.A.
- **Remaining Built-Up Area**
  - Other than a few redevelopment opportunities within the remaining B.U.A., the remaining B.U.A. largely comprises established residential neighbourhoods.

Methodology of Community Area Land Needs

The following lists the key steps in conducting the Community Area land needs assessment. It is important to note that the following methodology is based on standard practices in Ontario in calculating the Community Area land needs. Chapters 2 through 6 provide further details on the inputs utilized in the land needs assessment, including a review of trends, as follows:

- City of Kingston Housing Forecast to 2051;
- Growth Allocation Rural and Urban Areas to 2051;
- Intensification Analysis;
- D.G.A. Housing Demand to 2051;
- D.G.A. Housing Supply on Vacant Lands;
- D.G.A. Housing Unit Supply Versus Demand;
- D.G.A. Housing Units per Hectare Assumption, Net Land Area; and
- Community Area Land Needs Including Other Community Uses (e.g., parks/trails, stormwater ponds, local roads, and non-residential uses).

Prior to assessing the Community Area land requirements within the Urban Area, an intensification housing analysis was carried out by the Consultant Team. This

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[3] Proposed P.P.S., 2024, policy 2.3.4, p. 8.

"intensification first" approach prioritizes accommodating the City's housing growth through intensification.

City of Kingston Population and Housing Growth Forecast to 2051

The City of Kingston's permanent population is forecast to grow at an annual rate of approximately 1.2% under the Medium Growth Scenario. As previously discussed, the Medium Growth Scenario is the growth scenario endorsed by City of Kingston Council on December 5, 2023.[4] Under that growth scenario, the City's population is expected to reach 220,900 permanent residents and students by 2051, representing an increase of approximately 66,800 from 2021 to 2051. In developing the City's long-term population forecast, consideration was given to the long-term population, housing, and employment growth outlook for the surrounding market area, as well as national immigration trends and local and regional demographic trends.

In addition to the housing forecast to accommodate future permanent residents, there is a need to accommodate approximately 180 high-density housing units annually for students and to address the housing structural deficit for existing residents in the City.[5]

City of Kingston Population and Housing Growth by Planning Policy Area

The population growth in the City is anticipated to be driven by a broader range of demographic groups, including young adults and students, families with children, empty nesters, and seniors. To accommodate these broad demographic groups, the City will require a range of housing options, including at-grade low- and medium-density and high-density housing choices. Almost all new low-density housing and most of the new medium-density housing will be accommodated in the D.G.A., while most of the new high-density housing will be accommodated within the B.U.A., specifically as

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[4] City of Kingston Staff Report to Council, Population, Housing and Employment Growth Forecast Update to 2051, Report Number 24-016, December 5, 2023. Exhibit A attachment dated November 23, 2023, prepared by Watson & Associates Economists Ltd.

[5] Household structural deficit refers to the City's current housing supply that does not meet the needs of the current population from a household affordability, suitability (e.g., major repairs required or not enough bedrooms for the size and make-up of households), and market choice lens. The household structural deficit identifies a need for existing residents in the City of Kingston.

intensification within the Strategic Growth Areas where growth will benefit from access to public transportation.

It is forecast that 60% of the City's housing growth is planned for the B.U.A., primarily comprising high-density housing units. As previously discussed, housing growth within the B.U.A., regardless of housing structure type, is considered intensification. Based on an intensification rate of 60%, the City is anticipated to achieve a higher intensification rate than the current intensification target rate of 40% identified in the City of Kingston O.P.[6] This high rate of housing growth recognizes the intensification levels the City of Kingston has experienced over the past 20 years. Over the 2006 to 2023 period, approximately 55% of the City's housing growth was accommodated through intensification.[7] Achieving an intensification rate beyond 60% would require an adjustment to the City's housing forecast by structure type, as the B.U.A. has limited opportunities to accommodate at-grade housing (i.e., low-density and medium-density housing). Any adjustment to the housing forecast to include additional high-density housing growth would not align well with the diverse housing needs of a broader range of demographics the City is anticipated to accommodate through net migration.

Within the D.G.A., over the 2024 to 2051 period, approximately 80% of the housing units are anticipated to comprise at-grade housing units, including low-density (i.e., single detached and semi-detached housing units) (45%) and medium-density housing units (i.e., row houses) (35%). High-density housing units (i.e., apartments and stacked townhouse units) are anticipated to represent 20% of housing growth within the D.G.A. The D.G.A. has experienced a shift towards a wider range of housing options, especially in terms of accommodating more medium-density housing units (i.e., row houses), largely due to pressures for more affordable at-grade housing units.

Provided in Figure ES-3 is a summary of the housing growth forecast over the 2024 to 2051 period by planning policy area. The housing growth increment in the D.G.A. is utilized in the Community Area land needs assessment and is compared against the vacant land supply within the D.G.A. As summarized in Figure ES-3, approximately 60%

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[6] City of Kingston Official Plan, Consolidated as of December 1, 2022, Policy 2.4.5 (a), p. 56.
[7] The City's intensification rate has been measured based on City of Kingston residential building activity from 2006 to 2023 in accordance with the delineation of the B.U.A. by Watson.

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of the housing growth is anticipated to be accommodated in the B.U.A.; this is referred to as the intensification rate.

Figure ES-3
City of Kingston
Housing Forecast by Planning Policy Area, 2024 to 2051

Planning Policy Area	Total Housing Units Occupied by Permanent Residents	Share of Housing Units (%)
Built-up Area	14,640	60%
Designated Greenfield Area	9,560	39%
Rural Area	370	2%
City of Kingston	24,570	100%

Note: Figures has been rounded.
Source: Watson & Associates Economists Ltd.

Residential Intensification Analysis

Priority areas for intensification within Kingston were identified in consultation with City staff based on previous work undertaken to date. While intensification is encouraged throughout the B.U.A., the Strategic Growth Areas are the key priority areas for intensification. These align with the City's express transit routes and largely include arterial corridors along Gardiners Road and Bath Road between Cataraqui Centre and Kingston Centre, and Princess Street between Kingston Centre and the Downtown. These Strategic Growth Areas are anchored by the Downtown, Kingston Centre, and Cataraqui Centre M.T.S.A.s.

M.T.S.A.s typically encompass lands within a 500- to 800-metre radius (about a 10- or 15-minute walk) of a transit station or stop and tend to be primarily located along existing or planned higher-order transit corridors. The approach to delineating the M.T.S.A. boundaries involved the consideration of a number of factors discussed in the report, including barriers and constraints, surrounding land uses, and connectivity. The Strategic Growth Areas also include an area of older industrial and other under-utilized parcels along Montreal Street within the North King's Town Secondary Plan area, which is under review.

The residential intensification analysis prepared by the Consultant Team identified that the City has the potential for 47,300 housing units within the Strategic Growth Areas of the B.U.A., which is more than sufficient to accommodate demand for approximately 14,640 housing units within the B.U.A. The intensification housing potential was assessed based on screening out key constraints and categorizing based on opportunities, in addition to feedback from City of Kingston planning staff.

Community Area Lands Assessment Results

Despite a significant increase to the City's residential intensification target within the B.U.A., the City will need to expand its urban boundary by at least 340 hectares (840 acres) of gross developable land area to accommodate the housing forecast within the D.G.A. and the associated Community Area lands. It is important to note that the land requirements are considered to be gross developable land area requirements such as stormwater management features, parks, roads, sidewalks, and other facilities and supportive uses, but exclude all lands with environmental features that are protected from development. It is important to recognize that this represents a minimum land need; additional land area may be required to allow for flexibility in planning for new neighbourhoods and other site factors, such as creating neighbourhoods that follow logical boundaries for urban development. Furthermore, the actual extent of the gross developable land area of the urban expansion areas will be further explored as part of the City of Kingston O.P. project and may differ from the outcome identified in this report, based on a series of planning considerations. The land needs identified in this report are considered to be a conceptual starting point, recognizing that further work will be carried out by City of Kingston staff to determine the location of Community Area expansion lands.

Strategic Directions and Policy Recommendations

A series of strategic directions and policy recommendations are provided in regard to planning for the City's Community Area. These recommendations are discussed based on the following topics:

- Long-term population, housing, and employment forecasts;
- Residential phasing and supply of urban land;
- Residential intensification target;
- Planning for Community Area expansion lands;

- Planning for higher density on Community Area lands;
- Planning for employment in Strategic Growth Areas and M.T.S.A.s;
- Planning for mixed-use development and complete communities;
- Climate mitigation, adaption, and resilience principles; and
- Plan monitoring.

Next Steps

Following the review by City of Kingston Council in August 2024, additional reports will be provided, including the Population, Housing and Employment Growth Report, Commercial Lands Review and the Employment Lands Review. It is anticipated that these Reports will be provided in the fall of 2024.

Report

1. Introduction

1.1 Terms of Reference

The City of Kingston retained Watson & Associates Economists Ltd. (Watson), in association with Dillon Consulting Limited and urbanMetrics inc. (together referred to as the "Consultant Team"), in January 2023 to prepare a Growth Analysis and Urban Land Needs Assessment study to support the City's Official Plan (O.P.) Review. This study is being prepared in two phases: Phase 1 – Technical Analysis, and Phase 2 – Strategic Directions.

This study forms a foundational document for the City and is intended to be accompanied by a series of other reports which are being prepared concurrently by the Consultant Team as part of this broader study process to support the City's new O.P. Project. This includes an update of the City's population, housing, and employment forecasts, and a corresponding assessment of the City's future needs for Employment Area and commercial lands to the year 2051.[8]

This report, titled "Community Area Land Needs and Intensification Analysis," summarizes the technical findings regarding the City's capacity to accommodate residential intensification, as well as housing growth and related Community Area land uses on designated greenfield lands through to 2051. Furthermore, this report also includes strategic policy direction regarding the planning and management of growth within the City's Community Areas, which includes residential areas, Major Transit Station Areas (M.T.S.A.s), and other Strategic Growth Areas.

1.2 Study Process

On December 5, 2023, City of Kingston Council endorsed the Medium Population, Housing, and Employment Growth Scenario to 2051, prepared and presented by Watson. The Medium Population, Housing, and Employment Growth Scenario forecasts a permanent and student population base of 220,900 and an employment base of

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[8] City of Kingston Population, Housing and Employment Growth Analysis Study, September August; City of Kingston Community Area Land Needs and Residential Intensification Analysis Report, July 2024; and City of Kingston Commercial Land Needs Study, August 2024.

113,900 by 2051.[9] Leading to the endorsement of the growth forecast scenario by City of Kingston Council, an in-person Public Information Centre was held in June 2023. The Consultant Team and the City Planning Services Department also engaged with various City departments and external stakeholders over the course of the project. Additionally, the Consultant Team and the City Planning Services Department consulted with representatives of Queen's University, St. Lawrence College, and the Royal Military College of Canada in the development of the post-secondary student forecast.

More recently, on April 17, 2024, a second Public Information Centre was held in-person to present and discuss the land needs and intensification findings contained in this report, and the preliminary technical results of the Commercial Land Review and the Employment Lands Review. Following the review by City of Kingston Council in August 2024, additional reports will be provided, including the Population, Housing and Employment Growth Report, Commercial Lands Review and the Employment Lands Review. It is anticipated that these Reports will be provided in the fall of 2024.

1.3   Provincial Planning Policy Context

On April 7, 2023, the Province of Ontario released a new draft Provincial Planning Statement (P.P.S., 2023) for public consultation in concert with introducing Bill 97: *Helping Homebuyers, Protecting Tenants Act, 2023*. Bill 97 received Royal Assent on June 23, 2023, and amended seven provincial statutes, including the *Planning Act*. The draft P.P.S., 2023 was released for public consultation with the intent of simplifying and consolidating existing provincial policies (A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, and the Provincial Policy Statement, 2020 (P.P.S., 2020)) in one Province-wide policy, while providing municipalities and the Province with greater flexibility to deliver on housing objectives.

On April 10, 2024, the Province introduced *Bill 185: Cutting Red Tape to Build More Homes Act, 2024* and, at the same time, an updated draft of the Provincial Planning Statement (P.P.S., 2024) was released. The 30-day comment period for the proposed P.P.S., 2024 ended on May 12, 2024. A key focus of the proposed P.P.S., 2024 is that it

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[9] City of Kingston Staff Report to Council, Population, Housing and Employment Growth Forecast Update to 2051, Report Number 24-016, December 5, 2023. Exhibit A attachment dated November 23, 2023, prepared by Watson & Associates Economists Ltd.

recognizes that the approach to delivering housing and accommodating demand in Employment Areas will vary by municipality and, as such, it moves away from a prescriptive guideline-based approach. The following summarizes key highlights of the proposed P.P.S., 2024:

- Compared to the P.P.S., 2020, the proposed P.P.S., 2024 provides a more flexible horizon for planning for growth by providing a planning horizon with a minimum of 20 years and a maximum of 30 years. If approved, under the P.P.S., 2024 municipalities are to designate land to accommodate growth over a 20- to 30-year period, with the opportunity to designate additional land beyond the 30-year time horizon for Employment Areas.
- The proposed P.P.S., 2024 requires municipalities to consider population and employment growth forecasts prepared using the Ministry of Finance's 25-year projections and allows municipalities to modify them as appropriate.[10] It is important to note that the Ministry of Finance population forecasts are provided at the Census division[11] level only, which typically represents upper-tier municipalities, including separated municipalities (e.g., the City of Kingston and the County of Frontenac are included with the Frontenac Census Division) and large urban single-tier municipalities. It is our interpretation that the use of the Ministry of Finance forecasts is not meant to replace long-term forecasting by municipalities, but the forecasts are to be used as a starting place in establishing forecasts and testing the reasonableness of alternative regional forecasts and area municipal growth allocations, an approach that was carried out for this study.
- According to the proposed P.P.S., 2024, Minister's Zoning Orders are to be treated as "in addition to projected needs" over the planning horizon. In planning for Minister's Zoning Order lands, the proposed P.P.S., 2024 states these lands must be incorporated into the O.P. and related infrastructure plans.[12]
- Generally unchanged from the P.P.S., 2020, the proposed P.P.S., 2024 still requires planning authorities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands that are designated

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[10] Proposed P.P.S., 2024, policy 2.1.1, p. 6
[11] Census division is a term used by Statistics Canada that refers to a large geographic area encompassing neighbouring municipalities that may share some common services (such as police or ambulance services).
[12] Proposed P.P.S., 2024, policy 2.1.1, p. 6.

and available for residential development. It is noted, however, that the emphasis on intensification and redevelopment in this regard has been removed. Planning authorities are also required to maintain at all times, where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units, available through lands suitably zoned, including units in draft approved or registered plans.

- According to the proposed P.P.S., 2024, settlement area boundary expansion is allowed at any time and without the requirement of a Comprehensive Review, provided that all P.P.S. policies under subsection 2.3.4 are considered. Furthermore, the policies allow for a simplified and flexible approach for municipalities to undertake a settlement area boundary expansion which would require a demonstrated need for urban expansion.

- The proposed P.P.S., 2024 includes an updated definition of Employment Area based on the amendment of the *Planning Act* on June 8, 2023. The *Planning Act* was amended under subsection 1 (1) to include a new definition of "area of employment." This definition of Employment Area has been scoped to include only industrial-type employment as a primary use. The amendment to the *Planning Act* received Royal Assent as part of Bill 97 on June 8, 2023. The definition change in the *Planning Act* would require proclamation before it comes into effect.

- The proposed P.P.S., 2024 requires that municipalities unlock more opportunities for housing, stating that municipalities should support redevelopment of commercially designated retail lands (e.g., underutilized shopping malls and plazas) to support mixed-use residential.[13] Furthermore, the proposed P.P.S., 2024 notes that Employment Areas that do not meet the definition of Employment Area, referred to as "employment outside of Employment Areas" should support a diverse mix of land uses, including residential uses.[14] These lands generally would include office business parks, commercial and institutional lands, and employment lands that do not meet the definition of Employment Area.

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[13] Proposed P.P.S., 2024, policy 2.4.1.3, p. 9.
[14] Ibid., policy 2.8.1.3, p. 13.

- The proposed P.P.S., 2024 identifies that development within Rural Areas needs to be assessed within the rural context in terms of the scale of servicing and character.[15]

This report was prepared under the purview of the P.P.S., 2020; however, it is noted that the suggested changes in the proposed P.P.S., 2024 have been extensively reviewed and addressed. As such, the Community Area land needs methodology provided herein aligns with the proposed P.P.S., 2024.

2. Approach

2.1 Urban Structure

In order to assess land needs requirements and intensification potential, the City was divided into urban structure components. An urban structure provides the foundation of how the municipality will direct and manage growth. Each component of the municipality's urban structure has a distinct role in accommodating growth and is guided by different provincial and local policies with respect to planning for growth. As such, in this report the urban structure components are referred to as "planning policy areas." Figure 1 illustrates the City's urban structure components, while Figure 2 provides a map of the urban structure components within the Urban Area.

Provided below is a breakdown of the urban structure components within the City.

Urban and Rural Areas

Figure 2 provides a map of the urban structure components within the Urban Area, including the delineation of the current boundary as shown by a red line. Outside the urban boundary is the Rural Area, which includes prime agricultural lands, rural lands, rural settlement areas (hamlets), mineral aggregate resources, rural commercial, rural industrial and environmental protection areas. It is important to note that the land needs assessment contained in this report is focused on accommodating growth on urban serviced land. In accordance with provincial planning policies, the City's Urban Area will accommodate most of the City's growth, with a limited amount of growth allocated to the

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[15] Ibid., policy 2.5.2, p. 10.

Rural Area. This approach prioritizes the protection of the City's prime agricultural lands, while providing some growth opportunities to contribute to the rural economy.

Employment Area

Employment Areas are lands designated for industrial type uses. A comprehensive land needs assessment for these lands will be provided under a separate report. Employment Area uses are protected from conversions to non-Employment Area uses and require separation from major retail uses and sensitive uses such as residential and large institutional uses (e.g., nursing homes, schools, and hospitals) due to land use compatibility issues. The location of these lands is identified in dark blue on Figure 2.

Community Area

This report assesses the City's Community Area, which comprises residential land within the Urban Area, as well as commercial, institutional, and recreational/parkland lands to support the residential uses. The Community Area is the City's Urban Area, excluding Employment Areas. These lands are identified in Figure 2 with the colours of beige, mauve, and light purple, reflecting the various sub-components of the City's Community Area.

Delineation of the Built-up Area and the Designated Greenfield Area

Within the Community Area, designated land is further divided into the Designated Greenfield Area (D.G.A.) and the Built-up Area (B.U.A.). The division of lands classified as B.U.A. and D.G.A. was based on the development status of the City's urban lands as of 2006. The year 2006 was chosen to roughly correspond with the beginning of the development of the City's more recent Secondary Plans on large tracts of greenfield land, namely the Cataraqui West Secondary Plan Area, the Cataraqui North Secondary Plan Area, and the northern part of the Rideau Community Secondary Plan Area.

Urban lands that were developed as of 2006 are considered B.U.A., while urban lands that were undeveloped as of 2006 are considered D.G.A. This time frame provides a rich dataset to observe housing trends in density and housing mix. Designated lands developed within the D.G.A. today primarily comprise low-density housing developments (i.e., single detached/semi-detached housing units) and, to a lesser extent, medium-density housing units (i.e., row housing units). Over the past 18 years, most of the City's at-grade housing activity (e.g., single detached, semi-detached, and

row housing units) has been concentrated within the D.G.A. High-density housing activity (i.e., apartment units and stacked townhouses) has been primarily concentrated in the City's B.U.A., with only a few high-density buildings constructed within the D.G.A. over the past few years.

Designated Greenfield Area

The D.G.A. represents all designated lands within the Urban Area not within the B.U.A. and outside of Employment Areas. The location of these lands is identified in a beige colour on Figure 2. D.G.A. lands are represented by large tracts of residential areas (of at least 20 hectares, or 49 acres) primarily planned for at-grade housing (low-density and medium-density housing) that are undergoing development, nearing completion, or were developed less than 20 years ago. As previously discussed, the D.G.A. was largely undeveloped as of 2006. The D.G.A. includes the following Secondary Plan Areas that are nearing completion: the Cataraqui West Secondary Plan Area, the Cataraqui North Secondary Plan Area, and the northern portion of the Rideau Community Secondary Plan Area. These Secondary Plan Areas have been the location of most of the housing growth within the D.G.A. over the past decade. Recent development in the D.G.A. has primarily comprised low-density (single and semi-detached housing units) and medium-density (row housing units) housing developments. The D.G.A. also comprises other Community Area lands, such as commercial, institutional (e.g., schools, nursing homes, and community centres), and recreational/parkland uses.

Municipalities across Ontario use the term D.G.A. or "greenfield area" to categorize newly established or developing areas. For example, municipalities in the Greater Golden Horseshoe[16] and other municipalities such as the City of London, the City of Ottawa, the City of Sarnia, the Municipality of Chatham-Kent, the County of Essex, and the City of Stratford use this approach to categorize intensification areas apart from greenfield areas.

As part of its new O.P., the City of Kingston may elect to use a different term to refer to the urban designated lands outside of the B.U.A. and Employment Areas. The P.P.S., 2020 and the proposed P.P.S., 2024 do not require the use of a standard term. It should

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[16] Municipalities where the provincial planning document, A Place to Grow: Growth Plan for the Greater Golden Horseshoe applies.

be noted that the P.P.S., 2020 uses the term "designated growth areas," while the proposed P.P.S., 2024 uses the term "growth areas" to refer to this type of area.

As discussed in Chapter 6, it is important to note that the land needs assessment only includes vacant lands within the D.G.A. As shown in Figure 2, many of the lands within the D.G.A. are developed as of 2024. Developed lands within the D.G.A. are assessed only to understand trends in density and housing mix and inform key inputs into the land needs assessment.

Built-Up Area

As set out in this report, the City's intensification rate applies to development within the geographic extent of the B.U.A. Over the past five years, development within the B.U.A. has primarily comprised high-density housing developments. It should be noted that the City's O.P. does not delineate a B.U.A. Intensification is not defined in the City's O.P. based on a geographic area, but rather it is based on intensifying and redeveloping underutilized sites with a focus in directing intensification to centres and corridors. Furthermore, the City of Kingston O.P. identifies strategic intensification sites within the Central Area of the City in Schedule CK-1.

According to the City of Kingston O.P., intensification is defined as:

> The development of a property, site or area at a higher density than currently exists through:
>
> a. the re-use of brownfield sites;
> b. the development of vacant and/or underutilized lots within previously developed areas;
> c. infill development; and,
> d. the expansion or conversion of existing buildings.[17]

Watson has delineated a B.U.A. based on standard practices across Ontario and in accordance with provincial policy direction. The P.P.S., 2020 requires that municipalities "establish and implement minimum targets for intensification and redevelopment within built-up areas, based on local conditions."[18] The proposed P.P.S., 2024 encourages

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[17] City of Kingston Official Plan, Consolidated as of December 1, 2022, Definitions, p. 22.
[18] P.P.S., 2020, policy 1.1.3.5, p. 9.

but does not require municipalities to delineate a B.U.A. and set minimum targets for intensification.[19] Going forward, the B.U.A. can be used by the City to monitor and review the City's intensification rate. The delineation will provide a clear parameter where intensification can be measured.

Strategic Growth Areas

A further division within the B.U.A. is provided, as summarized in Figure 1. The location of these lands is identified in a mauve colour on Figure 2. The City's Strategic Growth Areas are the areas where the City will focus intensification efforts and direct most of the intensification housing growth. The delineation of the Strategic Growth Areas in this report has been carried out in accordance with the proposed P.P.S., 2024. The Strategic Growth Areas in Kingston comprise three M.T.S.A.s and a corridor connecting the M.T.S.A.s. Additional Strategic Growth Areas may be identified by the City through the creation of the new O.P. In addition, the Strategic Growth Areas include selected strategic sites in the Central Area of the City. Chapter 5 provides further details on the location of the Strategic Growth Areas.

M.T.S.A.s are not defined in the P.P.S., 2020; however, they are defined in the *Planning Act* and the proposed P.P.S., 2024. These are areas that are generally planned and protected for a high intensity of residential and mixed-use development around transit station areas. The City of Kingston currently does not have M.T.S.A.s delineated in the O.P. As part of the City's O.P. Review, the City plans to identify M.T.S.A.s. This report provides a draft delineation of the M.T.S.A.s. as discussed in Chapter 5. According to the *Planning Act,* in regard to delineating M.T.S.A.s:

> The official plan of a single-tier municipality may include policies that identify the area surrounding and including an existing or planned higher order transit station or stop as a protected major transit station area and that delineate the area's boundaries, and if the official plan includes such policies it must also contain policies that,
>
> > (a) identify the minimum number of residents and jobs, collectively, per hectare that are planned to be accommodated within the area;
> >
> > (b) identify the authorized uses of land in the major transit station area and of buildings or structures on lands in the area; and

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[19] Proposed P.P.S., 2024, policy 2.3.4, p. 8.

(c) identify the minimum densities that are authorized with respect to buildings and structures on lands in the area. 2017, c. 23, Sched. 3, s. 5 (2).[20]

Remaining Built-Up Area

Other than a few redevelopment opportunities within the remaining B.U.A., the remaining B.U.A. largely comprises existing established neighbourhoods with opportunities for gentle intensification, including accommodating Additional Residential Units (A.R.U.s). The locations of the remaining B.U.A. lands are shown in a light purple colour on Figure 2 and include the largest portion of the Urban Area within the City of Kingston.

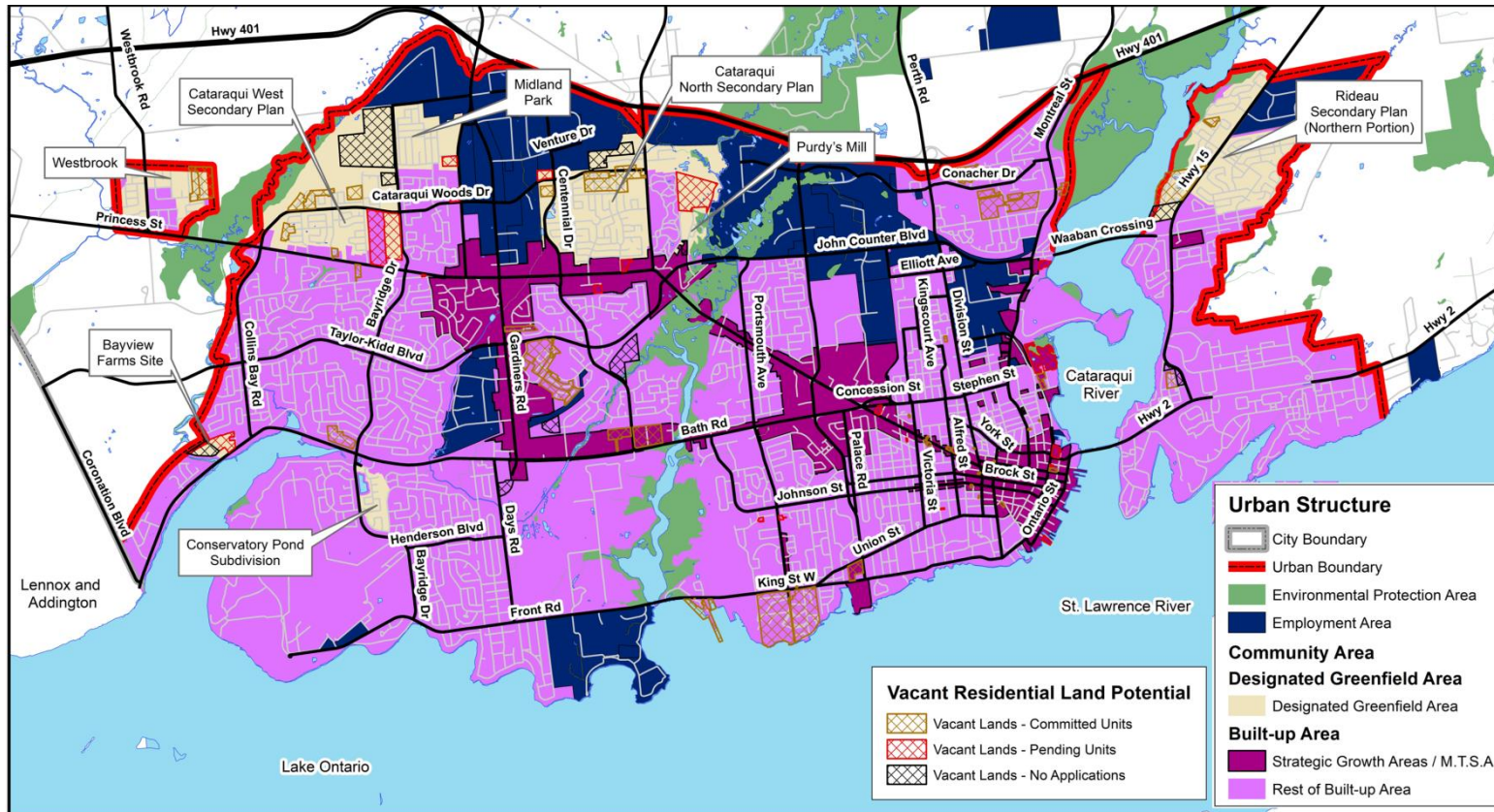[20] *Planning Act*, section 16 (15).

Figure 1
City of Kingston
Draft Urban Structure – Key Growth Areas Assessed
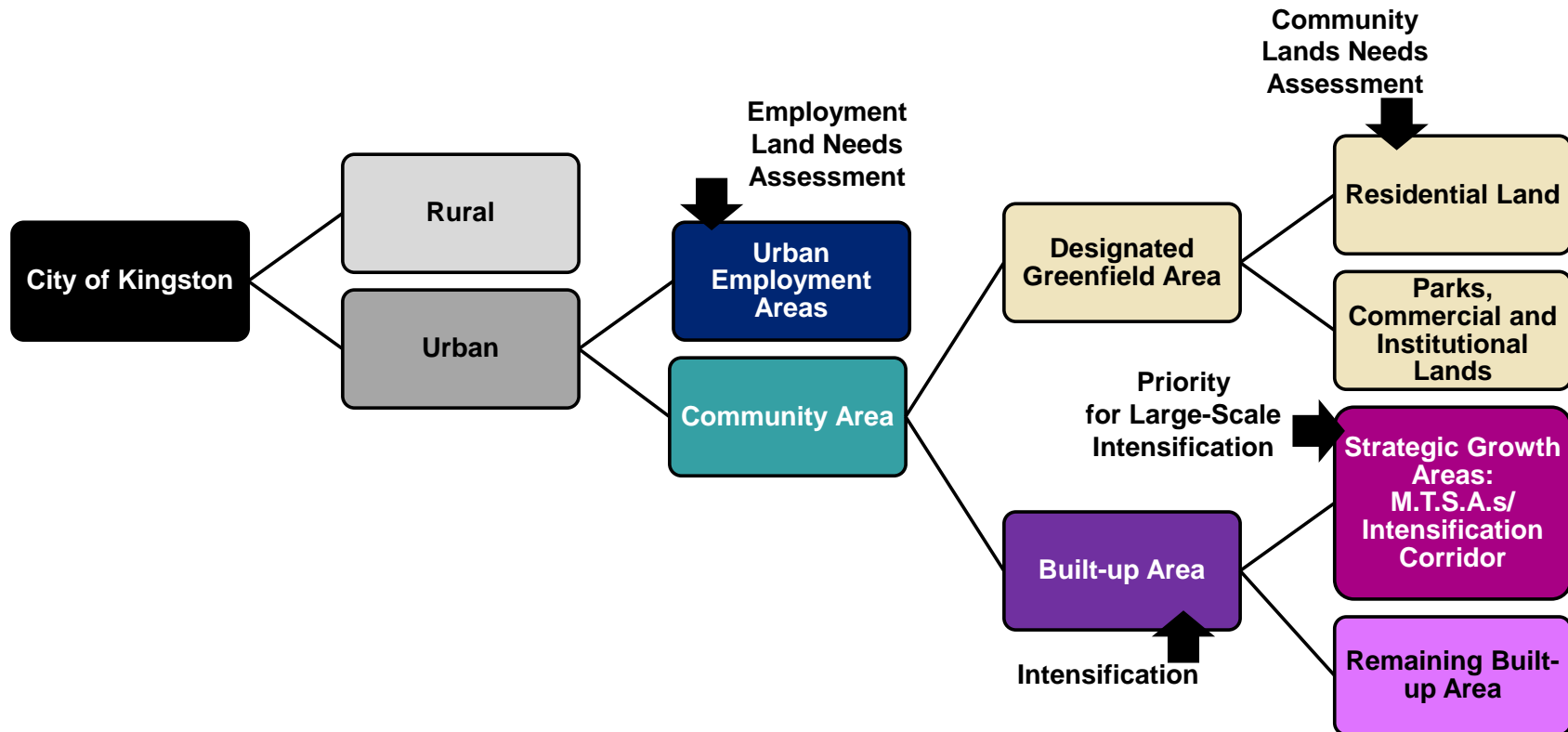
Notes: M.T.S.A. = Major Transit Station Area.
Refer to glossary for definition of terminology displayed in figure.
Source: Watson & Associates Economists Ltd.

Figure 2
City of Kingston
Draft Urban Structure – Key Growth Areas Assessed

Note: Refer to glossary for definition of terms displayed on map.

2.2 Methodology of Community Area Land Needs Assessment

The following discusses the methodology in conducting the Community Area land needs assessment and a summary of the key inputs into the analysis. The rest of this report will discuss the land needs assessment in further detail. It is important to note that the following methodology is based on standard practices in Ontario in calculating the Community Area land needs.

Housing in this report is categorized by the following housing structure types:

- **Low-Density Housing:** includes single detached and semi-detached units;
- **Medium-Density Housing:** includes row housing units, including back-to-back townhouses and duplexes; and
- **High Density Housing:** includes apartments and stacked townhouses.

The following is an overview of the steps involved in the Community Land Needs Assessment; further details on the key inputs are provided in the subsequent chapters.

Step 1 – City of Kingston Housing Forecast to 2051

The Medium Population, Housing, and Employment Growth Scenario (Recommended Scenario) forecasts that the City will have a permanent and student population base of 220,900 residents accommodated in approximately 92,200 households by 2051. The Medium Population, Housing, and Employment Growth Scenario was endorsed by City of Kingston Council on December 5, 2023. Further details on the population, housing, and employment forecast can be found in Chapter 3 and within the City of Kingston Growth Forecast Update, Summary of Draft Findings Memorandum, prepared by Watson and dated November 23, 2023.[21]

Over the 2024 to 2051 planning period, the City will require approximately 24,600 additional housing units to accommodate the permanent population forecast. In

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[21] City of Kingston Staff Report to Council, Population, Housing and Employment Growth Forecast Update to 2051, Report Number 24-016, December 5, 2023. Exhibit A attachment dated November 23, 2023, prepared by Watson & Associates Economists Ltd.

addition, as discussed in Chapter 3, there is a need to accommodate approximately 180 high-density housing units annually for students and to address a housing structural deficit for existing residents.[22] This housing segment would largely be accommodated within the B.U.A. and, as a result, would not require additional land to be brought into the Urban Area.

Step 2 – Growth Allocation Rural and Urban Areas to 2051

In accordance with provincial planning direction, as per the P.P.S., 2020 and the proposed P.P.S., 2024, most of the City's housing growth is to be accommodated within the Urban Area, which offers the potential for full municipal servicing (i.e., water/ wastewater servicing). More specifically, approximately 98% of the City's permanent housing growth (24,200 housing units) is anticipated to be accommodated within the City's Urban Area. In contrast, it is forecast that less than 2% of the City's housing growth is anticipated to be accommodated within the Rural Area. Further details of growth in the Rural Area are provided in section 4.1.

Step 3 – Intensification Analysis

Prior to assessing the Community Area land requirements within the Urban Area, an intensification housing analysis was carried out by the Consultant Team. This "intensification first" approach prioritizes accommodating the City's housing growth through intensification. Based on the intensification analysis, it is anticipated that the City can accommodate 60% of its City-wide housing growth to 2051 through intensification. As a result, approximately 14,600 housing units in the City over the 2024 to 2051 period will be accommodated within the existing Urban Area through intensification. It should be noted that the City is anticipated to achieve a higher intensification rate than the current intensification target rate of 40% identified in the City of Kingston O.P.[23] As a comparison, over the 2006 and 2023 period, approximately 55% of the City's housing growth has been accommodated through intensification which

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[22] Household structural deficit refers to the City's current housing supply that does not meet the needs of the current population from a household affordability, suitability (e.g., major repairs required or not enough bedrooms for the size and make-up of households), and market choice lens. The household structural deficit identifies a need for existing residents in the City of Kingston.

[23] City of Kingston Official Plan, Consolidated as of December 1, 2022, Policy 2.4.5 (a), p. 56.

supports an increase in the intensification rate established in the O.P.[24] Further details regarding trends within the B.U.A. can be founded in section 4.1, while Chapter 5 provides further details on the residential intensification supply analysis.

As previously discussed, intensification is measured based on housing growth within the B.U.A. The intensification analysis considers the City's housing forecast by structure type and its ability to accommodate an appropriate housing mix within the B.U.A. Generally, growth through intensification will largely be in the form of high-density housing (i.e., stacked townhouses and apartment units) and, to a lesser extent, medium-density housing (i.e., row housing units). Limited infill opportunities are identified for low-density housing (i.e., single detached and semi-detached units) through intensification. Further details of growth regarding the housing forecast for the B.U.A. can be founded in section 3.4.

The intensification analysis also considers the opportunity to accommodate A.R.U.s. A.R.U.s, for the purposes of this report, are considered high-density housing units due to the similar occupancy levels (i.e., average persons per unit) that they generate when compared with apartment housing units. Since 2020, the City of Kingston averaged 79 A.R.U.s annually.[25] The vast majority of A.R.U.s were established in the B.U.A. Going forward, it is anticipated that A.R.U.s will continue to remain strong given the recent policy changes by the City and the Province to allow for more A.R.U. opportunities. Provincial policy changes include allowing for up to three A.R.U.s per property on a residential lot containing a single detached housing unit, semi-detached housing unit, or townhouse unit.

Step 4 – Designated Greenfield Area Housing Demand to 2051

Upon identifying the appropriate amount of housing growth to be accommodated through intensification (i.e., within the B.U.A.) and within the Rural Area, the remaining housing growth is identified as D.G.A. housing unit demand. The D.G.A. housing unit

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[24] The City's intensification rate has been measured based on the City of Kingston's residential building permit activity from 2006 to 2023 in accordance with the delineation of the B.U.A., by Watson & Associates Economists Ltd.
[25] Based on the City of Kingston's residential building permit activity, 2020 to 2023.

demand is approximately 9,600 housing units over the 2024 to 2051 period and is based on the following housing units by structure type:

- Low Density: 4,380
- Medium Density: 3,530
- High Density: 1,650
- Total Housing Units: 9,560

Further details of growth regarding housing forecast for the D.G.A. can be founded in section 4.1.

Step 5 – Designated Greenfield Area Housing Supply in Active Applications on Vacant Lands

The D.G.A. housing unit demand to 2051 has been compared to the housing unit potential on vacant land in active applications within the D.G.A. It is estimated that the City has the potential to accommodate approximately 2,040 housing units on vacant lands in the D.G.A. based on active applications. The housing unit supply potential on currently designated residential lands comprises the following, based on housing units by structure type:

- Low Density: 825
- Medium Density: 390
- High Density: 825
- Total Housing Units: 2,040

Further details on the residential housing supply in active applications on vacant lands can be founded in subsection 6.2.

Step 6 – Designated Greenfield Area Housing Unit Supply versus Demand

The housing unit supply is compared to the housing forecast by housing unit structure type. Based on a comparison of active application housing supply versus the housing forecast within the D.G.A., it is estimated that the City has a shortfall of approximately 7,520 housing units to 2051 (supply of 2,040 units minus demand of 9,560 units = 7,520

units (note: numbers do not add precisely due to rounding)). The housing unit shortfall is summarized below by housing unit structure type:

- Low Density: -3,550
- Medium Density: -3,140
- High Density: -830
- Total Housing Units: -7,520

Further details on the Community Area land needs analysis can be found in Chapter 6.

Step 7 – Designated Greenfield Area Housing Units Per Hectare Assumption, Net Land Area

In order to convert the shortfall of housing units to land area, Watson reviewed historical housing density trends within the D.G.A. Additionally, Watson considered density trends of approved and proposed developments to gather insights regarding anticipated changes in density over the short and medium terms. Moreover, Watson considered forecast unit per hectare (U.P.H.) assumptions generated in land needs assessments for comparable municipalities across Ontario, including the City of Guelph, the City of Hamilton, the City of Barrie, and the City of London. These cities are also aspiring to accommodate a more compact, transit-supportive urban form. The housing shortfall identified in Step 5 was ultimately divided by the following housing U.P.H. assumptions to identify the net land area required:

- Low Density: 27 U.P.H.
    - 3,550 units divided by 27 U.P.H. = 132 net hectares (approximately 326 net acres)
- Medium Density: 46 U.P.H.
    - 3,140 units divided by 46 U.P.H. = 68 net hectares (approximately 168 net acres)
- High Density: 100 U.P.H.
    - 830 units divided by 100 U.P.H. = 8 net hectares (approximately 20 net acres)

Note: numbers may not add precisely due to rounding.

The U.P.H. assumptions provided herein anticipate that, over the planning horizon, housing developments in all housing structure types will increase in density. Local and provincial residential development trends suggest a strong upward trend in the average U.P.H. in the medium-density housing category with an increasing focus on more compact row housing developments. Further details on the U.P.H. assumptions can be found in section 6.3.

The total net land area shortfall is approximately 208 net hectares (approximately 514 net acres). This represents the additional land area needed to accommodate housing development (i.e., the lot area of each new housing unit); however, this land area excludes roads, stormwater ponds, parks/trails, and non-residential uses such as schools, community centres, and commercial uses. When planning for an outward expansion of the urban boundary, it is important to factor in the additional uses required to support housing growth and the development of complete communities.

Step 8 – Total Land Needs Upwardly Adjusted for Community Area Uses

Recognizing that planning for residential uses includes the need for infrastructure such as local roads, stormwater ponds, parks, trails, and select non-residential uses (e.g., schools, and commercial and institutional uses), the Consultant Team has upwardly adjusted the land area shortfall to account for additional lands to accommodate these uses. Additional land is provided to account for other Community Area uses required to support the function of residential uses. This upward adjustment is referred to as a "net to gross ratio factor." The net to gross ratio factor is 50%. It is important to ensure that while housing development lots are getting smaller on average, the City accommodates an adequate amount of parkland and non-residential lands to support the development of complete communities, which is one of the six critical public interests to be met through the new O.P. project. The net to gross ratio also considers the additional land required (approximately 15 hectares, or 37 acres) of commercial uses to support local residents based on the Commercial Land Review draft technical findings (prepared under a separate report cover).

The gross land area (net of environmental features) required for additional Community Area land is approximately 416 hectares of gross developable land (208 net hectares multiplied by 2 = 416 hectares (or approximately 1,028 acres)).

Step 9 – Land Needs Adjusted for Vacant Lands within the Designated Greenfield Area with No Application

Vacant lands within the D.G.A. with no active planning applications comprise five sites that total approximately 73 hectares (180 acres) of gross developable land area based on data from the City of Kingston's planning department staff. Since there are no applications for these sites, the housing unit yield of these lands is unknown. The shortfall of Community Area land identified in Step 8 was reduced by 73 hectares. Further details on vacant lands with no applications on D.G.A. lands with no applications can be found in subsection 6.2.3.

The adjusted land area **shortfall is at least 340 hectares** (416 hectares minus 73 hectares = 340 hectares) of gross developable land area. As a result, the City will need to expand the urban boundary by at least 340 hectares (840 acres) of gross developable land area to accommodate the housing growth forecast to 2051. This excludes lands with environmental features. It is important to recognize that this represents a minimum land need and additional land area may be required to allow for flexibility in planning for new neighbourhoods and other site factors, such as creating neighbourhoods that follow logical boundaries for urban development. Furthermore, the actual extent of the gross developable land area of the urban expansion areas will be further explored as part of the City of Kingston O.P. project and may differ from the outcome identified in this report, based on a series of planning considerations. The land needs identified in this report are considered a conceptual starting point, recognizing that further work will be carried out by City of Kingston staff to determine the location of Community Area expansion lands.

3.   City of Kingston Population and Housing Forecast to 2051

3.1   Population and Housing Forecast to 2051

The City of Kingston's permanent population is forecast to grow at an annual rate of approximately 1.2% under the Medium Growth Scenario. As previously discussed, the Medium Growth Scenario is the growth scenario endorsed by City of Kingston Council

on December 5, 2023.[26] Under that growth scenario, the City's permanent population is expected to reach 197,000 by 2051, representing an increase of approximately 60,000 people from 2021 to 2051. The City's permanent population, including the student and non-permanent population is anticipated to reach a population of 220,900 by 2051, an increase of 66,800 population over the 2021 to 2051 period. Total households, including student housing units are forecast to increase by 29,200 over that same period, or 1.3% annually, reaching a total of just over 92,000 households by 2051.

In developing the City's long-term population forecast, consideration was given to the long-term population, housing, and employment growth outlook for the surrounding market area, as well as national immigration trends and local and regional demographic trends. Further details on the population and housing forecast can be found within the City of Kingston Growth Forecast Update, Summary of Draft Findings Memorandum dated November 23, 2023, and presented to City of Kingston Council on December 5, 2023.[27] It should be noted that some of the figures discussed below have been prepared in accordance with Census periods to align with historical demographic figures on migration and population by age structure that is only available for these periods.

3.2   Housing Forecast by Housing Unit Structure Type to 2051

Over the 2006 and 2021 period, the City averaged 600 housing units annually.[28] As summarized in Figure 3, over the 2021 and 2051 period, the City is forecast to average 900 units annually, representing a 50% increase compared to the 15-year historical average. Of the 900 units forecast annually over the 2021 and 2051 period, 54% are projected to be high-density housing units (486 housing units), followed by medium-density housing units at 26% (234 housing units) and low-density housing units at 20%

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[26] City of Kingston Staff Report to Council, Population, Housing and Employment Growth Forecast Update to 2051, Report Number 24-016, December 5, 2023. Exhibit A attachment dated November 23, 2023, prepared by Watson & Associates Economists Ltd.
[27] City of Kingston Staff Report to Council, Population, Housing and Employment Growth Forecast Update to 2051, Report Number 24-016, December 5, 2023. Exhibit A attachment dated November 23, 2023, prepared by Watson & Associates Economists Ltd.
[28] Based on Statistics Canada, 2006 to 2021 Census.

(180 housing units). As a result, the City is forecast to double the average annual amount of high-density housing units and more than double the average annual amount of medium-density housing units, compared with the historical 15-year average observed. Furthermore, housing preferences by structure type are anticipated to gradually shift towards medium- and high-density housing forms over the long-term due largely to the aging of the population and the continued upward pressure on housing prices.

Figure 3
City of Kingston
Annual Permanent Housing by Structure Type, 2021 to 2051
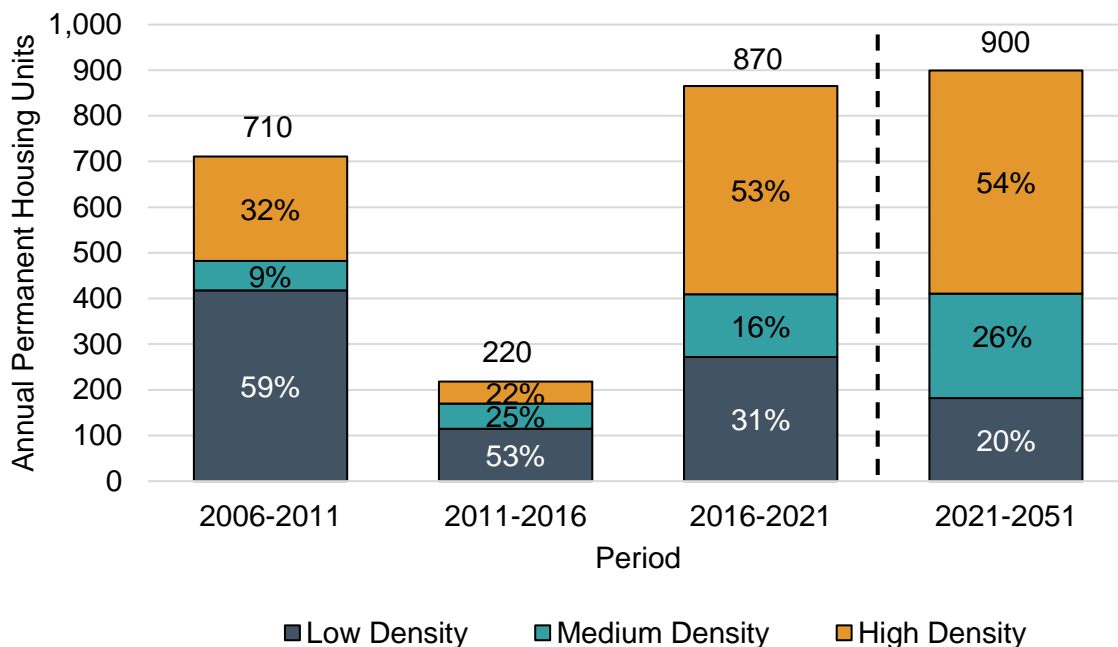
Note: Low density includes single detached and semi-detached units; medium density includes row housing units; and high density includes apartments and stacked townhouse units.
Source: 2006 to 2021 derived from Statistics Canada Census data; 2021 to 2051 forecast by Watson & Associates Economists Ltd.

It is important to note that the permanent housing forecast excludes student housing needs not captured in the Statistics Canada Census. The City of Kingston has a very large student population with three post-secondary institutions. As previously discussed, the Consultant Team conferred with representatives of Queen's University, St. Lawrence College, and the Royal Military College of Canada in the development of the

post-secondary student forecast and to understand the unique housing needs of its students. These housing needs are generally in the form of high-density housing (refer to Figure 4).

Additional housing needs have also been identified in the near term to address existing housing deficiencies in the rental housing market and current non-market housing needs. As a result, it is forecast that the City will require an additional 180 high-density units annually from 2021 to 2051 for the following:

- Student households (not considered permanent population); and
- Existing household structural deficit.

The City's existing household structural deficit is estimated at 3,200 housing units. This includes an approximate shortfall of 500 rental market units, roughly 400 non-market rental housing units to address the households that are currently homeless and not captured in the Census data, and the approximately 2,300 households that are in severe core need, as identified through the 2021 Census data.[29]

When considering forecast demand for high-density housing associated with both permanent residents and students, and the additional high-density housing needs associated with existing shortfalls in the City's housing market, the total forecast demand for high-density housing types is anticipated to average approximately 670 housing units per year. Comparably, this represents a 45% increase relative to recent annual housing demand experienced between 2016 and 2021 (refer to Figure 4).

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[29] City of Kingston Housing Needs Assessment prepared by Watson & Associates Economists Ltd., July 31, 2023.

Figure 4
City of Kingston
Annual High-Density Forecast, 2021 to 2051
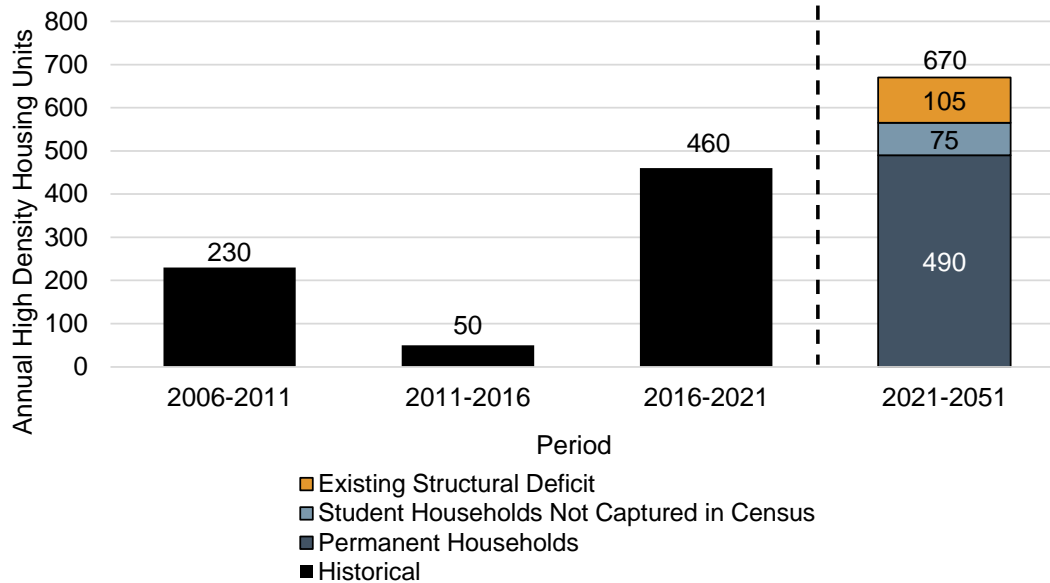
Source: 2006 to 2021 derived from Statistics Canada Census data; 2021 to 2051 forecast by Watson & Associates Economists Ltd.

Taking into account the City's total housing needs, including student housing needs not captured in the Census, the City's 10-year annual housing forecast is just over 1,400 units per year, or 14,000 total housing units. Comparatively, the total 10-year housing forecast exceeds the 10-year housing target of 8,000 housing units, as set out in the Bill 23 Municipal Housing Pledge by the Province for the City of Kingston.[30] It is important to note that this additional housing need does not have a direct impact on Community Area land requirements, as most of these additional units are expected to be accommodated within the B.U.A.

3.3   Net Migration Trends by Age Group

The City's population base is getting older, largely driven by the aging of the Baby Boom population (people born between 1946 and 1964). These demographic factors have generated a steady decline, and now negative trend, in the City's population

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[30] City of Kingston Staff Report to Council, 2031 Housing Pledge, Report Number 23-063, February 21, 2023.

growth from natural increase (i.e., births less deaths). From 2006 to 2021, the City of Kingston experienced average net migration of 5,100 people annually. Net immigration is anticipated to be the primary source of population growth for the City over the next 25 years.

Net migration impacts the population age structure. As the existing population ages, the City of Kingston will become increasingly dependent on net-migration to maintain its existing share of younger age groups. The population age structure is forecast to remain relatively younger (compared to previous forecasts) due to higher net-migration levels associated with working-age residents and their families. As summarized in Figure 5, it is anticipated that the City will accommodate an increase in the primary family age group (20 to 54 years of age), from 37% historically (over the 2006 to 2021 period) to 66% through net migration from 2021 to 2051.

Figure 5
City of Kingston
Net Migration Forecast, 2021 to 2051

Age Group	Annual Average 2006 to 2021	Annual Average 2021 to 2051	Share 2006 to 2021	Share 2021 to 2051
0-19	420	480	40%	22%
20-34	420	1,010	40%	47%
35-44	-40	320	-4%	15%
45-54	10	80	1%	4%
55-64	30	60	3%	3%
65-74	110	120	11%	6%
75+	80	100	8%	5%
Total	1,040	2,170	100%	100%

Source: Historical derived from Statistics Canada Demography Division data, 2006 to 2021; 2021 to 2051 forecast by Watson & Associates Economists Ltd.

3.4 Population and Housing Forecast Allocation by Planning Policy Area to 2051

As previously discussed, population growth in the City is anticipated to be driven by a broader range of demographic groups, including young adults and students, families with children, empty nesters, and seniors. To accommodate these broad demographic groups, the City will require a range of housing options, including at-grade low- and

medium-density and high-density housing options. Almost all new low-density housing and most of the new medium-density housing will be accommodated in the D.G.A., while most of the new high-density housing will be accommodated within the B.U.A., specifically within the Strategic Growth Areas where growth will benefit from access to public transportation.

Figure 6 provides a summary of the housing forecast by planning policy area, including the B.U.A., the D.G.A., and the Rural Area. As summarized, 60% of the City's housing growth is planned for the B.U.A., primarily comprising high-density housing units (approximately 78% of the total units in the B.U.A.). Targeting an intensification rate of 60%, the City is anticipated to achieve a higher intensification rate than the current intensification target rate of 40% identified in the City of Kingston O.P.[31] This high rate of housing growth recognizes the intensification levels the City of Kingston has experienced over the past 18 years. Over the 2006 and 2023 period, approximately 55% of the City's housing growth has been accommodated through intensification.[32] Achieving an intensification rate beyond 60% would require an adjustment to the City's housing forecast by structure type, as the B.U.A. has limited opportunities to accommodate at-grade housing (i.e., low-density and medium-density housing). Any adjustment to the housing forecast to include additional high-density housing growth would not align well with the diverse housing needs of the broader range of demographics the City is anticipated to accommodate through forecast net migration.

It is important to note that the annual housing intensification forecast over the 2024 to 2051 period is anticipated to average 540 housing units. As a comparison, over the 2006 to 2051 period, the City averaged just over 370 housing units annually through intensification. Comparatively, annual housing units accommodated through intensification over the next 27 years is anticipated to be 46% higher than historical levels. Furthermore, it is important to stress that the intensification forecast will provide a significant amount of growth to meet the City's objectives in developing transit-supportive communities, including the development of the M.T.S.A.s.

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[31] City of Kingston Official Plan, Consolidated as of December 1, 2022, Policy 2.4.5 (a), p. 56.
[32] The City's intensification rate has been measured based on City of Kingston residential building activity from 2006 to 2023 in accordance with the delineation of the B.U.A., by Watson & Associates Economists Ltd.

Within the D.G.A., approximately 80% of the housing units are anticipated to comprise at-grade housing units, including low-density (45%) and medium-density housing units (35%), as summarized in Figure 6. High-density housing units are anticipated to represent 20% of the housing growth within the D.G.A. As discussed in Chapter 4, the D.G.A. has experienced a shift towards a wider range of housing options, particularly more medium-density housing units (i.e., row houses), largely due to pressures for more affordable at-grade housing units.

Also summarized in Figure 6, the Rural Area is anticipated to accommodate 2% of the City's housing unit growth (450 housing units in total) which will consist of low-density housing units (i.e., primarily single detached housing units).
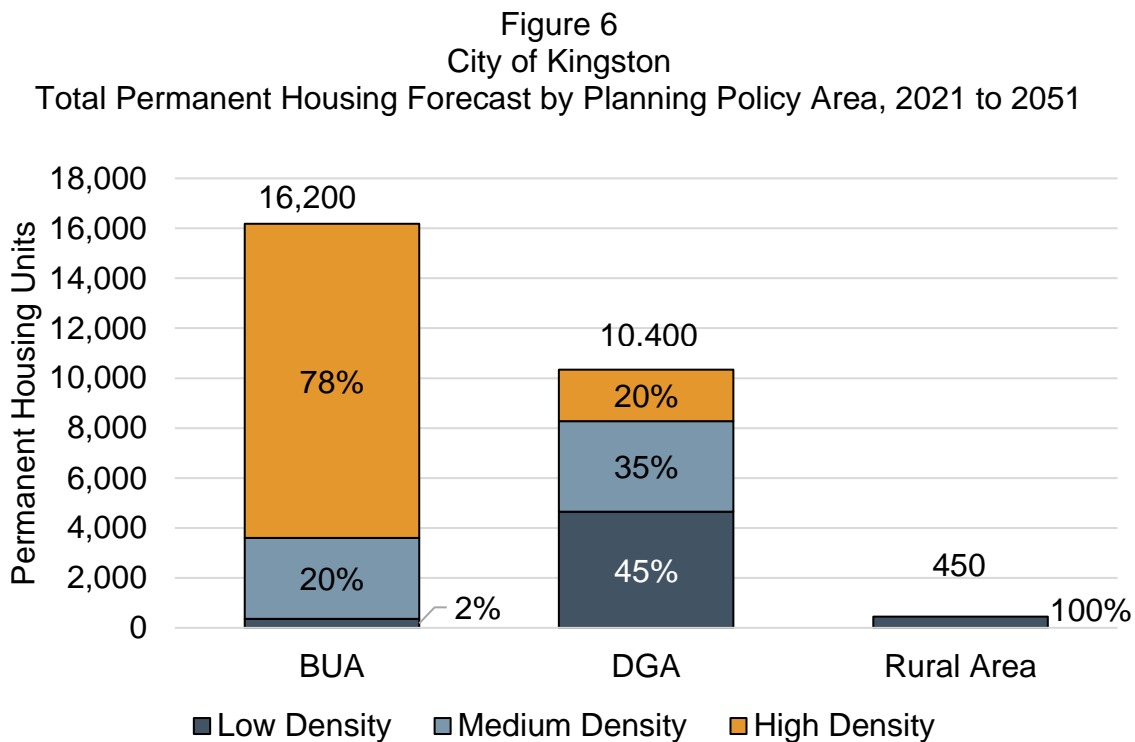
Figure 6
City of Kingston
Total Permanent Housing Forecast by Planning Policy Area, 2021 to 2051

Note: Low density includes single detached and semi-detached units; medium density includes row housing units; and high density includes apartments and stacked townhouse units.
D.G.A. = designated greenfield area; B.U.A. = built-up area
Source: Watson & Associates Economists Ltd.

For the purposes of the land needs assessment provided herein, the housing growth increment has been updated for the 2024 to 2051 period. Figure 7 provides a summary of the housing forecast over the 2024 to 2051 period by planning policy area. The

forecast has been provided for the 2024 to 2051 period for the purposes of the land needs assessment. It should be noted that the previous figures discussed have been prepared in accordance with Census periods due to demographic data availability.

Figure 7
City of Kingston
Housing Forecast (Occupied by Permanent Residents)
by Planning Policy Area, 2024 to 2051

Planning Policy Area	Low Density Units	Medium Density Units	High Density Units	Total Housing Units	Share of Housing Units (%)
Built-up Area	290	3,170	11,190	14,640	60%
Designated Greenfield Area	4,380	3,530	1,650	9,560	39%
Rural Area	370	-	-	370	2%
City of Kingston	**5,040**	**6,700**	**12,840**	**24,570**	**100%**

Note: Figures have been rounded and may not add up precisely.
Source: Watson & Associates Economists Ltd.

4.   Housing Trends by Planning Policy Area

## 4.1 Annual Housing Growth by Planning Policy Area, 2006 to 2023

Figure 8 summarizes historical trends in annual housing units by planning policy area over three historical time periods, including 2006 to 2010; 2011 to 2015; and 2016 to 2023. As summarized, annual housing growth in the City increased significantly over the 2006 to 2023 period, rising from an average of 630 units annually over the 2006 to 2010 period to an average of 830 units over the 2016 to 2023 period. This represents an increase of 24% in annual housing units (or 200 additional housing units annually).

The increase in annual housing unit activity over the most recent period, 2016 to 2023, was driven largely by the housing activity within the Strategic Growth Areas. Housing activity within the Strategic Growth Areas increased from an annual average of 106

housing units from 2006 to 2010 to 307 housing units over the 2016 to 2023 period. Furthermore, total residential intensification activity (Strategic Growth Areas and the remaining B.U.A.) averaged 492 housing units annually over the 2016 to 2023 period compared to an annual average of 291 housing units over the 2006 to 2010 period. Over the 2006 to 2010 period, housing activity within the City's D.G.A. averaged 312 units annually, similar to the annual average of 319 units over the 2016 to 2023 period.

Figure 8
City of Kingston
Average Annual Housing Units by Area
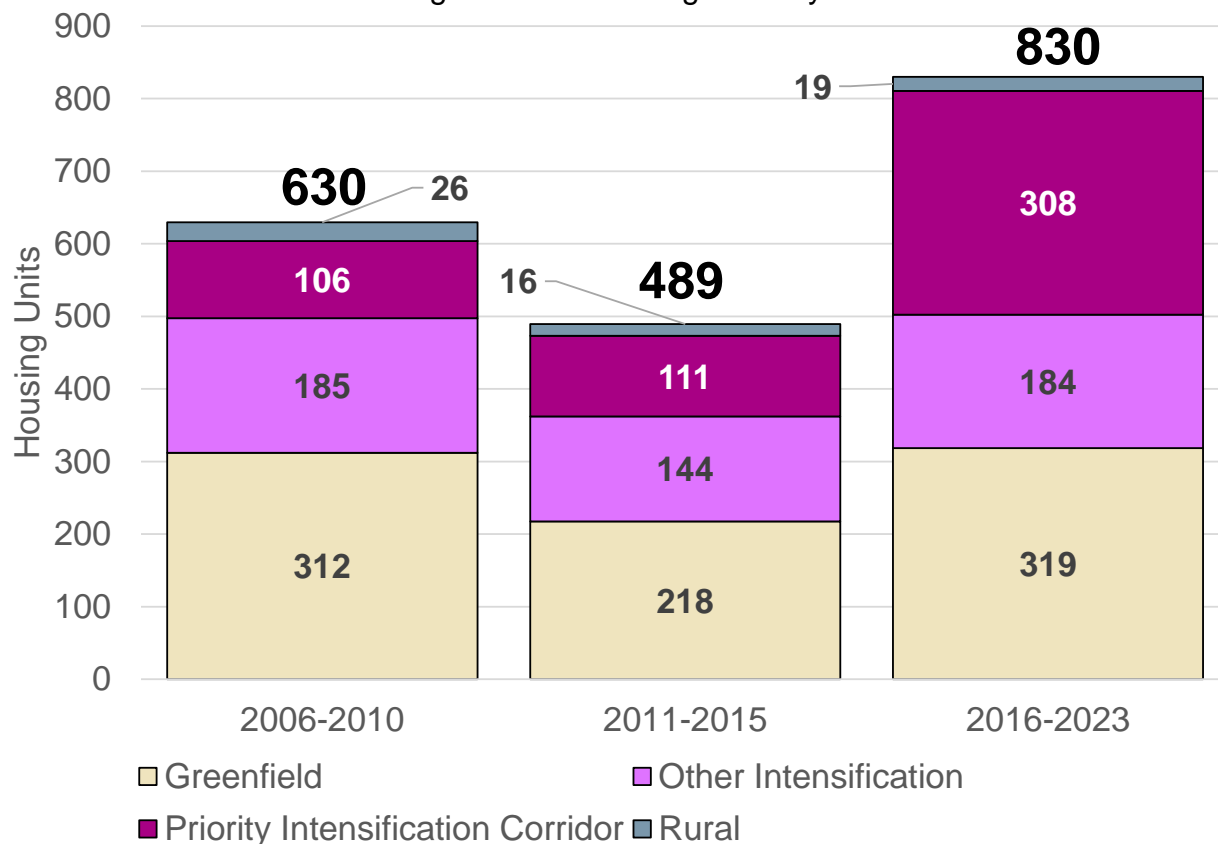
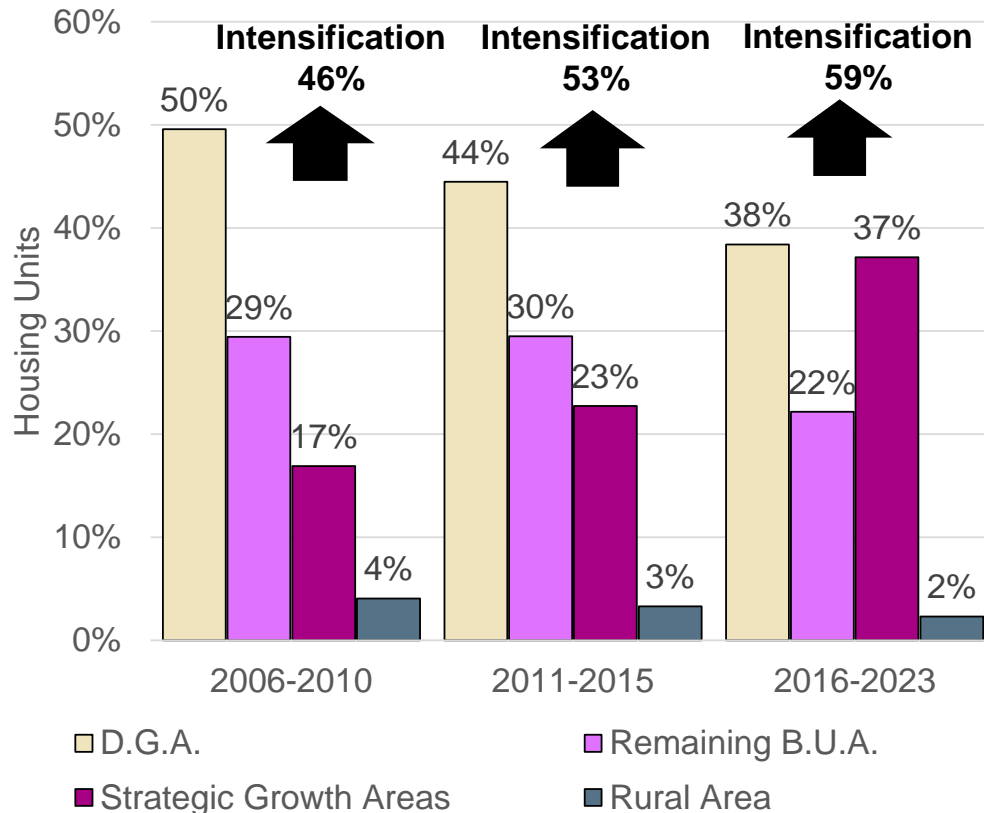Note: D.G.A. = designated greenfield area; B.U.A. = built-up area
Source: Derived from the City of Kingston's residential building permit activity by Watson & Associates Economists Ltd.

Figure 9 summarizes the share of housing unit activity by planning policy area between 2006 and 2023. As summarized, the City's intensification rate progressively increased from 46% over the 2006 to 2010 period to 59% over the most recent period, 2016 to 2023. Conversely, the share of housing unit development dropped within the City's

D.G.A., decreasing from 50% over the 2006 to 2010 period to 38% over the 2016 to 2023 period. In addition, the share of housing unit activity in the City's Rural Area declined in terms of its share of the City's housing activity, as shown in the figure below.

Figure 9
City of Kingston
Housing Unit Share by Area, 2006 to 2023

Note: D.G.A. = designated greenfield area; B.U.A. = built-up area
Source: Derived from the City of Kingston's residential building permit activity by Watson & Associates Economists Ltd.

Figure 10 summarizes the housing unit mix within the B.U.A. over the 2006 to 2023 period, while Figure 11 summarizes the housing unit mix within the D.G.A. over the same period. As summarized, housing unit activity within the B.U.A. has been progressively more oriented towards high-density housing. Within the D.G.A., the housing unit mix included a more balanced distribution of low-, medium- and high-density housing units over the most recent period (2016 to 2023) compared to the 2006 to 2010 period.

Figure 10
City of Kingston
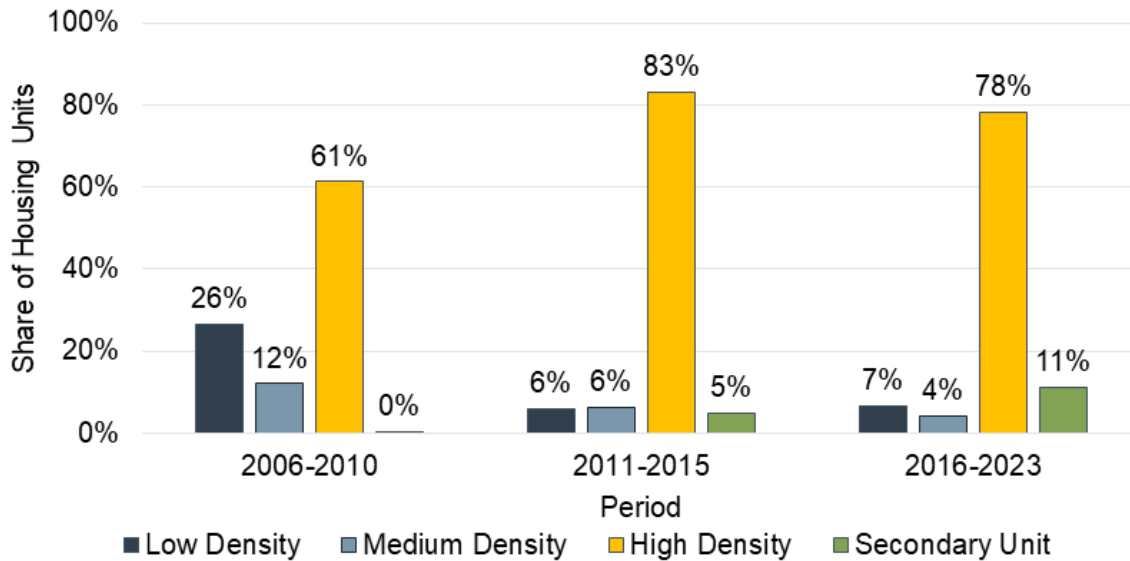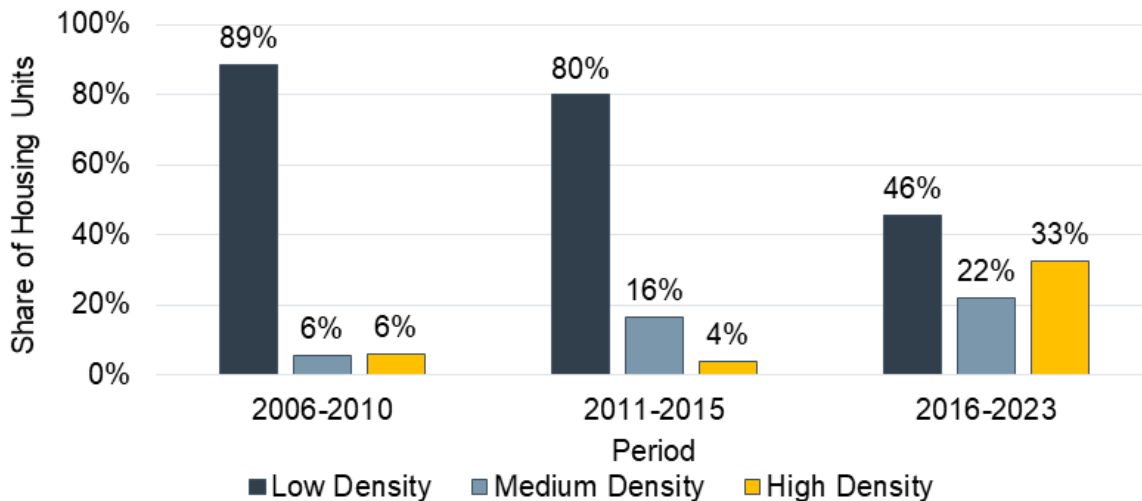Housing Unit Mix by Structure Type in the Built-up Area, 2006 to 2023

Figure 11
City of Kingston
Housing Unit Mix by Structure Type in the Designated Greenfield Area,
2006 to 2023

Note: Low density includes single detached and semi-detached units; medium density includes row housing units; and high density includes apartments and stacked townhouse units.
Source: Derived from the City of Kingston's residential building permit activity by Watson & Associates Economists Ltd.

5.   Residential Intensification Supply Analysis

5.1   Overview

The purpose of this chapter is to describe the approach and methodology used to identify the priority intensification areas, including M.T.S.A.s, and to estimate the potential housing unit yields over the period to 2051. The key finding of this analysis is that there is a more than sufficient supply of housing to accommodate forecast demand for residential intensification throughout the long-term planning horizon. Preliminary M.T.S.A. density targets and other policy directions to be considered in the next phase of the study process are also briefly discussed.

5.2   Approach

Priority areas for intensification within Kingston were identified in consultation with City staff based on previous work undertaken to date. While intensification is encouraged throughout the B.U.A., the priority Strategic Growth Areas are the key arterial corridors along Gardiners and Bath Road between Cataraqui Centre and Kingston Centre, and Princess Street between Cataraqui Centre and the Downtown, anchored by the Downtown, Kingston Centre, and Cataraqui Centre transit stations. The Strategic Growth Areas also include an area of older industrial and other under-utilized parcels along Montreal Street within the North King's Town Secondary Plan area, which is under review.

Currently, the priority areas for intensification do not include any surplus federal lands within the community. These lands are not currently owned by the City or by private landowners so they are not considered vacant, designated, and available to receive development applications within the meaning of provincial guidance considering standard practices for urban land needs assessment in Ontario.[33] The federal government has recently announced an intention to provide lands for housing, including

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[33] A Place to Grow: Growth Plan for the Greater Golden Horseshoe Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). While intended to be used by municipalities within the Greater Golden Horseshoe, the 2020 methodology is the standards and most commonly used approach to assessing urban land needs broadly across large urban centres in Ontario.

surplus lands in Kingston.[34] It is our experience that the disposition of federal lands occurs through the transfer of custodianship from the active department (e.g., Correctional Services Canada) to Canada Lands Company, being the agency responsible for the re-planning/re-development of federal landholdings. In other situations, lands are transacted by Public Services and Procurement Canada for outright divestiture. A change in custodianship has not occurred to Canada Lands Company or Public Services and Procurement Canada based on our research, and the timing for any change in custodianship is unknown, therefore the timing of the lands turning over is also unknown. Due to this uncertainty, the surplus federal lands are not included in the land supply for redevelopment at this stage of work.

Notwithstanding this, some intensification is likely to occur in other areas throughout the community, especially by way of "gentle densification" within existing residential communities, including attached, interior, and stand-alone accessory units (sometimes referred to as "laneway houses" or "garden suites") and other forms of "Missing Middle" housing.[35] Some higher-density units are also allocated to the new greenfield areas, in accordance with the forecast demand by housing unit type within these areas and to recognize that a diversity of housing types is supportive of City goals regarding complete communities across the municipality. Otherwise, from a residential intensification perspective, most of the future growth is envisioned to occur in the Strategic Growth Areas, as illustrated in Figure 12.

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[34] Kingstonist news article – *Feds Announce Ambitious Plan to Build 250k Homes on Public Lands,* April 24, 2024, retrieved online: https://www.kingstonist.com/news/feds-announce-ambitious-plan-to-build-250k-homes-on-public-lands/

[35] The "Missing Middle" refers to the range of housing types between traditional single detached homes and high-rise apartments that have gone "missing" from many large cities in Ontario. Missing Middle housing is typically defined to include a range of house-scale buildings with multiple units – compatible in scale and form with detached single-family homes – located in a walkable neighbourhood.

Figure 12
City of Kingston
Strategic Growth Areas
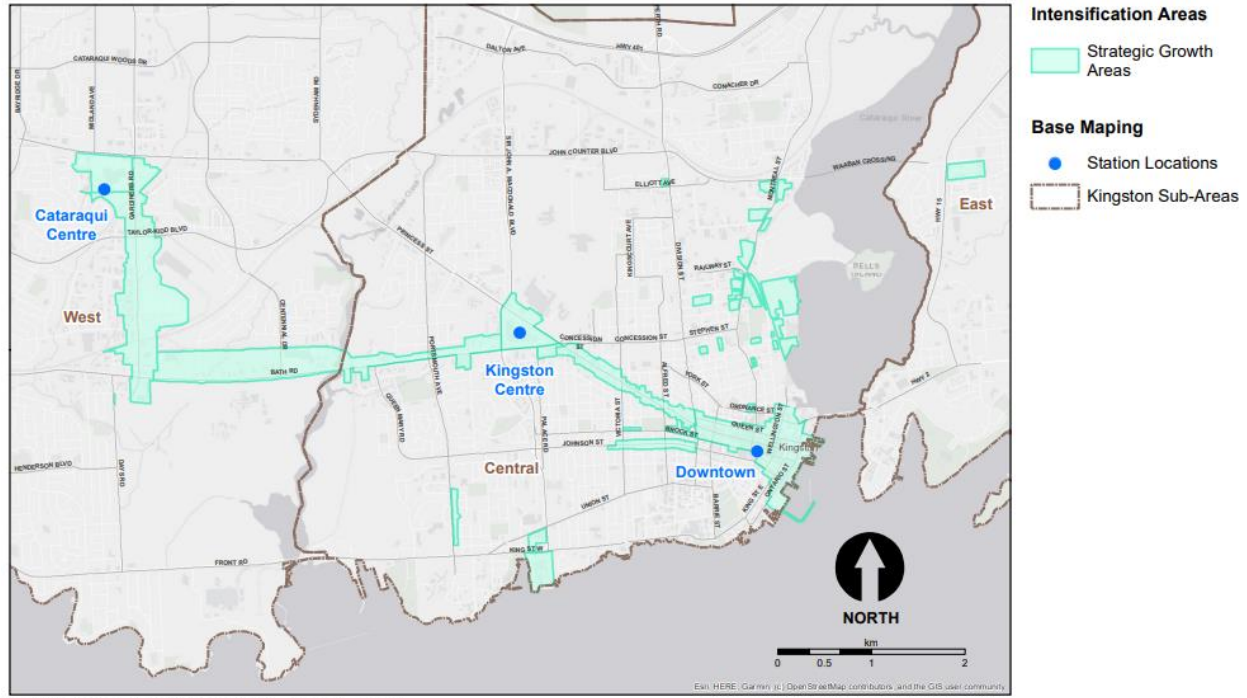
Source: Dillon Consulting Limited.

5.3   Delineation of Major Transit Station Areas

Within the Strategic Growth Areas are three M.T.S.A. locations, which have previously been identified conceptually in the Downtown, Kingston Centre, and Cataraqui Centre. M.T.S.A.s typically encompass lands within a 500- to 800-metre radius (about a 10- or 15-minute walk) of a transit station or stop and tend to be primarily located along existing or planned transit corridors.

Planning for M.T.S.A.s is important to support increased intensification around rapid transit infrastructure to ensure new residents can live and travel to their places of work, recreational activities, and educational institutions, and have access to nearby shopping and entertainment. The approach to delineating the M.T.S.A. boundaries is summarized below.

1. Initial Boundary Review

The initial M.T.S.A. boundaries were delineated through a two-step approach using a geographic information system framework to map and quantify the results.

1. **Buffer Creation:** An initial boundary was created by generating 500- and 800-metre radius buffers around each higher-order transit station within Kingston. As noted above, the three key transit nodes include:

    a) Cataraqui Centre Terminal;
    b) Kingston Centre Terminal; and
    c) Downtown Terminal.

2. **Parcel Fabric Overlay:** The initial radius buffers were then overlaid with existing City datasets to inform subsequent refinement of the M.T.S.A. boundaries. These datasets included:

    a) Transit Bus Stops and Routes;
    b) Official Plan Land Use including Natural Heritage Systems;
    c) Secondary Plan Land Use;
    d) Zoning By-law;
    e) Active Development Applications;
    f) Property Parcels; and
    g) Road Network.

The result of this approach was to create a draft or "working version" of the M.T.S.A. boundaries, for review, that takes into account a general expectation of size (the 500- to 800-metre radius) and local property conditions, including the current pattern of development, land use planning permissions, and key infrastructure, especially transportation.

2. Boundary Refinement

The initial boundaries were then refined based on a parcel-by-parcel review of each M.T.S.A. and the surrounding context. A range of criteria were used to ensure the M.T.S.A. boundaries were logical from a development perspective, are well-suited for pedestrian access, minimize impacts on key natural and infrastructure features, and

maximize opportunities for development, including any existing or future major trip generators.

Key considerations include:

1. **Connectivity:** Boundaries were adjusted to generally prioritize whole blocks and utilize existing sidewalks and accessible pedestrian pathways whenever possible. Major roads, highways, and rail corridors were used as edges where appropriate, while areas with limited pedestrian access were excluded.

2. **Barriers/Constraints:** All lands within the 500-metre radius were generally included. No major barriers or constraints to pedestrian access such as natural features (e.g., water bodies) or significant infrastructure barriers (e.g., highways with limited pedestrian crossings or major arterial roads) were identified within the core M.T.S.A. footprint.

3. **Growth Opportunities:**

   a) Lands within the 800-metre radius with potential for intensification were included. These included vacant lands, brownfield sites, underutilized parking lots, and sites with active development applications for higher-density development.

   b) Existing high-density developments were recognized and incorporated where they aligned with the overall M.T.S.A. objectives.

   c) Any major trip generators, such as the location of future major office, institutional, and sports or event spaces were also taken into account.

The results are shown on Figure 13 outlining the draft M.T.S.A. boundaries, which may continue to be refined.

Figure 13
City of Kingston Major Transit Station Areas
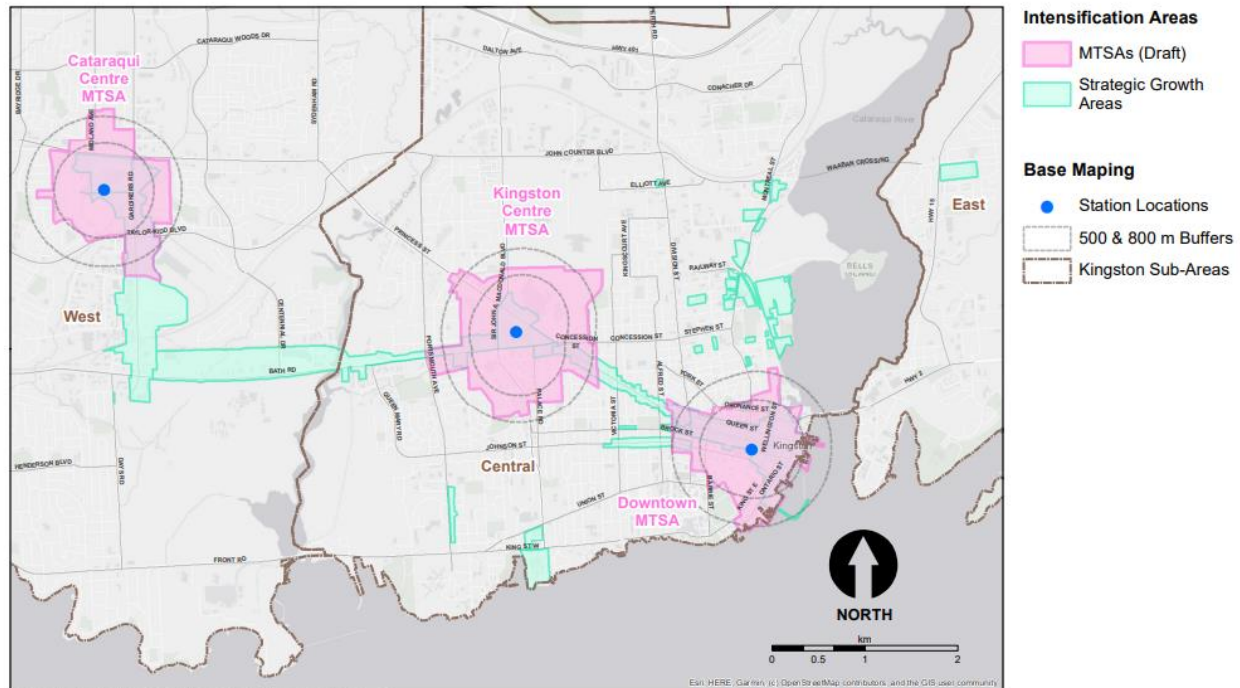
Source: Dillon Consulting Limited.

5.4 Identification of Development Opportunities and Constraints

A process similar to the identification of the priority intensification areas was undertaken to identify key development opportunities and constraints, whereby preliminary results were prepared for review with City staff and refined based on feedback received. The Consultant Team assessed intensification opportunities within the corridor and the M.T.S.A.s based on a range of data sources, including Google Street View, O.P. and Secondary Plan designations, information on active development applications, and other property information. As noted, City staff provided valuable feedback and insights throughout the process, as described below.

5.4.1 Screening Out Key Constraints

The first step to estimating overall intensification and redevelopment potential is to identify and initially "screen out" major development constraints, which are the

properties not considered suitable or likely to be feasible for intensification to the plan horizon. Generally, properties that are not assumed for intensification fall into the following categories:

1. **Environmental Protection Areas:** Natural heritage features designated for environmental protection, as well as parks and open spaces, are excluded to preserve ecological functions and public access to open space.

2. **Existing Development:** Properties with existing developments of three storeys or greater, or existing townhouses and other new developments that are unlikely to be redeveloped are excluded from consideration.

3. **Institutional Uses:** Lands occupied by active institutional uses such as fire stations, schools, churches, and museums were generally not considered suitable for intensification; as such, the entire parcel was initially excluded from consideration. Based on feedback from City staff, however, this approach was felt to underestimate ultimate redevelopment potential. As a result, certain portions of occupied institutional parcels were reincorporated into the estimate, including some parts of large surface parking lots, unused yard spaces, and/or landscaped areas that may have potential for intensification as surplus lands. A similar approach was taken for large commercial centres as described below in more detail in subsection 5.4.3.

4. **Infrastructure:** Properties within infrastructure rights-of-way, such as roads and railway corridors, are not suitable for development and are excluded.

5. **Recent Redevelopment:** Properties that have undergone redevelopment within the past five years are excluded, as they are considered to have a remaining lifespan that would be beyond the plan horizon.

6. **Heritage Sites:** All properties identified by the City as heritage sites were initially excluded to preserve their historic and cultural significance. Similar to institutional and commercial uses, however, and upon further review, some of these lands were later included under certain circumstances, as discussed below.

5.4.2 Categorizing Properties with Redevelopment Potential

For the remaining lands, development potential and opportunities were identified through an analysis of specific sites and locational criteria to determine their suitability to accommodate intensification. Properties assumed to potentially redevelop include:

1. **Active Development Applications:** Includes units currently under construction or approved projects anticipated to begin construction soon within the M.T.S.A.

2. **Approved Projects:** Lands with approved projects expected to contribute to future residential intensification within the M.T.S.A.

3. **Vacant and Underutilized Parcels:** Areas that offer opportunities for redevelopment due to their lack of current use or potential for higher-density development.

4. **Aging or Deteriorating Buildings:** Buildings in poor condition suggest potential for redevelopment or rehabilitation to increase residential capacity.

5. **Underutilized Retail Properties:** Small plazas and malls with vacancies or excess parking suitable for conversion into mixed-use developments with residential units.

6. **Proximity to Development:** Parcels adjacent to existing or planned developments that, over time, would likely become more attractive for redevelopment due to potential synergies.

7. **Long-Term Intensification Potential:** Lands identified for potential future development based on factors such as location and the age of existing development.

5.4.3 City Review and Feedback

The preliminary results of the analysis were assessed in consultation with City staff through an iterative process of review and feedback, with the goal of reaching consensus on the overall results. As a result, three key changes were made:

1. **Further Site-Specific Assessment:** As noted, initially some larger occupied parcels with relatively new development and large areas of surface parking or

landscaped areas were excluded entirely from the estimates. Upon further review, and based on feedback from the City, it was felt that this approach somewhat understated the potential for intensification and a more detailed evaluation was warranted. This work included a particular focus on identifying potential "surplus lands" that had been previously excluded from having intensification potential.

2. **Institutional and Commercial Parcels:** Of particular note was the potential for surplus lands within major institutional and commercial areas, given recent trends towards the redevelopment of major large-format retail development (i.e., malls) in major Urban Areas with a broader range of uses, including residential. It was felt that some older institutional and commercial centres within the community may have this type of potential, which was identified at a high-level and re-incorporated into the estimates. Examples of the type of additional intensification potential involved include portions of existing surface parking lots at the Kingston Penitentiary, Kingston Centre, and Cataraqui Centre, as well as surplus yard space and landscaped areas located at the Katarokwi Learning Centre and Kingston Seventh-Day Adventist Church.

3. **Heritage Site Re-evaluation:** Initially, all heritage site properties were excluded from the estimate. Upon further review, this approach was considered to be too conservative. As such, the potential for heritage sites was re-evaluated. Properties listed and designated under Part V of the *Ontario Heritage Act* were reclassified as potential development opportunities and were evaluated on a site-by-site basis, while properties designated under Part IV remained classified as constraints.

The updated results are shown on Figure 14, incorporating the review and feedback from City staff. It is important to clarify that the estimate of intensification potential does not provide a forecast of future demand. Forecast demand for intensification is determined through the intensification target, that is, a policy objective relating to the share of new housing units that are allocated within the existing B.U.A., within the context of City-wide housing demand over the next three decades, as discussed in Chapter 3. The overall supply potential for intensification, therefore, is not an input to the forecast but rather an estimate to verify that there are no significant supply constraints to achieving the policy target and, ultimately, to provide a context and

framework for determining the appropriate density targets for the M.T.S.A.s in the next phase of the study.

Figure 14
City of Kingston
Intensification Potential
Opportunities and Constraints
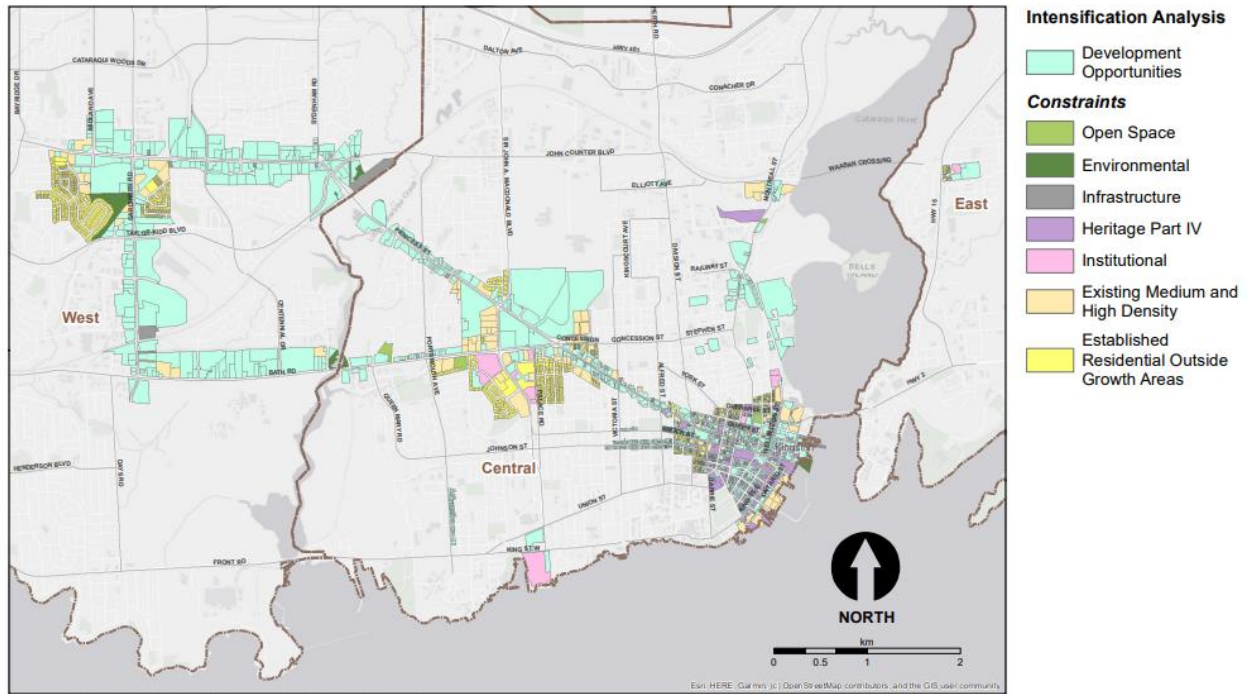
Source: Dillon Consulting Limited.

5.5 Estimated Housing, Population, and Employment Yields

Based on the development opportunities previously discussed, the associated housing unit, population, and employment yields were estimated. The key steps in the analysis are outlined below, which indicates that Kingston is very well positioned from a supply perspective – a total of nearly 50,000 housing units have been identified within the areas labeled as development opportunities on Figure 14. Notwithstanding this, intensification can be a complicated process with the combined requirements of site acquisition, financing, planning approvals, and multi-year construction periods affecting both the timing and location of units in the market. This variability makes it difficult to identify all

potential supply opportunities with accuracy and is especially challenging over an extended planning horizon to 2051.

5.5.1 *Higher-Density Forms Expected*

For most urban intensification scenarios, the economics of redevelopment almost always lead to higher-density residential forms such as apartments and row house units and, in some cases, commercial as part of larger mixed-use developments. That is to say, on a site-by-site basis in most large Urban Areas in Canada, the redevelopment of older central city parcels almost always takes the form of higher-density apartments with associated retail because these are the uses that are required to achieve the necessary financial returns to the developer to make projects feasible.

For this reason, the redevelopment of older Urban Areas for significant new industrial uses or the addition of significant new single detached units within the context of residential intensification projects is rare. On a related policy note, the potential financial returns (and hence incentives) from the developer's perspective to redevelop older urban parcels (often designated for industrial-type use) with residential mixed-use forms is one of the key factors driving the pressure for conversion of employment lands, because the return on investment is faster and higher. The issue of employment land conversion is introduced briefly in the final section of this chapter and is being addressed in more detail in the next phase of work.

Accordingly, for the purposes of the analysis of intensification potential within the Strategic Growth Areas, a broad distribution of 80% apartments and 20% row housing is anticipated for all parcels. This approach translates into an approximately 60%/40% split on the associated land area occupied by apartments and row, respectively. The distribution of units by type is different than the resulting land areas occupied because apartments are generally developed at higher densities than row house forms, as summarized in Figure 15, below.

Figure 15
City of Kingston
Intensification Housing Unit Potential

Housing Type	Land Area Allocation	Housing Unit Allocation	Density: Units Per Hectare
Apartment Units	60%	80%	145
Row Housing Units	40%	20%	50

Figure has been rounded.
Source: Dillon Consulting Limited.

Minimal new single detached housing units are anticipated as part of future intensification, other than potential through active applications. This type of development is likely to be accommodated within the D.G.A., as addressed in Chapter 3 of this report.

5.5.2 Density Factor Applied to Estimate Unit Yields

Housing unit yields are generated by applying a density factor of 145 U.P.H. for apartments and 50 U.P.H. for row houses. These densities reflect a typical apartment and street or block row house form consistent with the type of new buildings currently being developed in central Kingston and other comparable communities in Southern Ontario. See section 6.3 – Housing Units Per Net Hectare Density Trends, 2006 to 2023 – for further analysis on how these densities were reached.

It should also be noted that the apartment density applied to the intensification estimate is somewhat higher than in greenfield areas due to a more compact urban form enabled by the provision of underground parking as opposed to surface parking. Row house density is also slightly higher to reflect a more urban form compared to greenfield areas. Other urban row house forms such as "back-to-back" and "stacked" townhouses can have much higher densities, in some cases approaching those of mid-rise apartment buildings.

5.5.3 Employment Generation

A high-level estimate of employment associated with the development of higher-density residential space has been made, mainly in the form of ground-floor retail in new

apartment buildings. An average apartment unit size of approximately 100 square metres (approximately 1,080 square feet) is used to estimate overall residential space generation, which comprises a net area of 70 square metres (approximately 750 square feet) for the actual apartment unit plus 25 square metres (approximately 270 square feet) to account for the additional space required for common areas, loading, and elevators (where applicable).

Ground-floor retail space is estimated at 10% of total gross residential space, consistent with the experience of other comparable communities. Again, these estimates are not a forecast of commercial space, but rather provided for high-level illustration purposes to ensure there are no significant supply constraints associated with future intensification. No estimates have been made in regard to the potential for major commercial or office developments, which would be in addition to any at-grade retail space added over time. This component of future development within the community will be examined as part of the Commercial Land Needs assessment along with the M.T.S.A. density targets following this report.

Figure 16
City of Kingston
Employment Density Assumptions

Overall Total	Floor Area, Square Metres
Commercial Allocation	0.1
Apartment Unit Size	100
Commercial Square Metres per Job	42

Source: Dillon Consulting Limited.

5.5.4 Population Estimates

Population is estimated through the application of persons per unit factors by unit type, adjusted upwards to account for the Census net under-coverage (the "undercount") at a rate of approximately 4% based on Statistics Canada information. The average estimated persons per unit factor is 1.675 for apartments and 2.303 for row houses, which is applied to the estimated housing units within the identified intensification areas. The resulting household population total is adjusted upwards by approximately 4% to

estimate total population. The non-household population is not explicitly incorporated into the intensification estimate, as it is expected to be minimal and captured in the existing base of collective dwellings like nursing homes, seniors' residences, and other dwellings of a communal nature.

5.5.5 Results

As shown below in Figure 17, the residential intensification analysis discussed herein results in an estimated total potential for 47,300 units, which is more than sufficient to accommodate demand for approximately 14,600 housing units within the B.U.A., as discussed in Chapter 3.

Figure 17
City of Kingston
Intensification Analysis
Population, Housing, and Employment Potential

Housing Potential by Timing	Land Area, Hectares	Apartment Housing Units	Row Housing Units	Total Housing Units	Total Population	Total Jobs
Short Term	196	18,230	2,770	21,000	38,500	5,000
Medium Term	89	6,930	1,770	8,700	16,300	1,800
Long Term	185	14,500	3,700	18,200	34,200	3,800
Total	**470**	**39,660**	**8,240**	**47,900**	**89,000**	**10,600**

Note: Figures have been rounded.
Source: Dillon Consulting Limited.

It is important to reiterate that the estimate of intensification potential is not an input to the forecast of housing demand within the B.U.A., but rather a high level "check" to verify that no significant supply limitations exist from a development perspective. As noted previously, the amount of residential intensification that is planned to occur over the period to 2051 will be set by the intensification target that is ultimately endorsed by Council, not by the overall housing supply potential. In conjunction with this, it is important to reiterate that while there is significant potential, not all residential development will be accommodated through intensification due to the need to plan for a full range and mix of housing options.

The amount of potential intensification sites for most mid-sized to large urban communities is typically very large. The amount of intensification that **actually occurs** over the planning period, however, is driven by a range of other factors relating to the community's ability to attract investment within the broader marketplace, as well as local conditions such as planning policy, existing or planned services (especially transportation), the property owners (who must have an interest in redevelopment), and the physical characteristics of sites, which must allow for viable redevelopment. Site size, configuration, access, and the surrounding land uses must be able to support intensification and not impede economic viability. As a result, an ample supply of potential residential intensification is typically available for most communities comparable with the City of Kingston (as well as larger urban communities) to maximize the likelihood of success in capturing future intensification opportunities.

6.   Community Area Land Needs Analysis

6.1 Overview

The purpose of this chapter is to identify the Community Area land requirements to 2051 based on the previously discussed key inputs, including growth allocation to the D.G.A. Further details are provided in this chapter on key inputs to the land needs assessment, including land supply and density. The findings of the Community Area land needs assessment suggest that the City will require additional Community Area lands to accommodate housing growth even after factoring a large portion of the City's growth to be accommodated through intensification. The methodology and approach of the Community Area land needs assessment was previously summarized in Chapter 2, section 2.2. A detailed table of the Community Area land needs assessment is provided at the end of this chapter.

6.2 Housing Unit Supply Potential in Urban Area

6.2.1 Location of Vacant Land Supply in the Urban Area

Figure 18 identifies the location of vacant land supply opportunities within the Urban Area, under the categories created by the City, including "Committed" (largely approved applications by the City); "Pending" (largely proposed applications received by City);

and "Currently Vacant" (lands with no active applications).[36] Vacant residential land supply that falls within the D.G.A. is included in the urban land needs assessment, while residential land supply that falls within the B.U.A. forms part of the City's intensification potential. The data on the City's housing supply is derived from the City of Kingston's most recent pending and committed residential supply as of December 31, 2023. It should be noted that the City maintains an active inventory of development applications through the City's DASH webpage.[37] The data contained in this report is based on information as of December 31, 2023, and includes development activity on lands that are currently designated for residential uses.

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[36] Refer to the glossary for a full definition of the City's land supply terminology.
[37] City of Kingston DASH webpage: https://www.cityofkingston.ca/business/dash

Figure 18
City of Kingston
Vacant Lands and Housing Supply
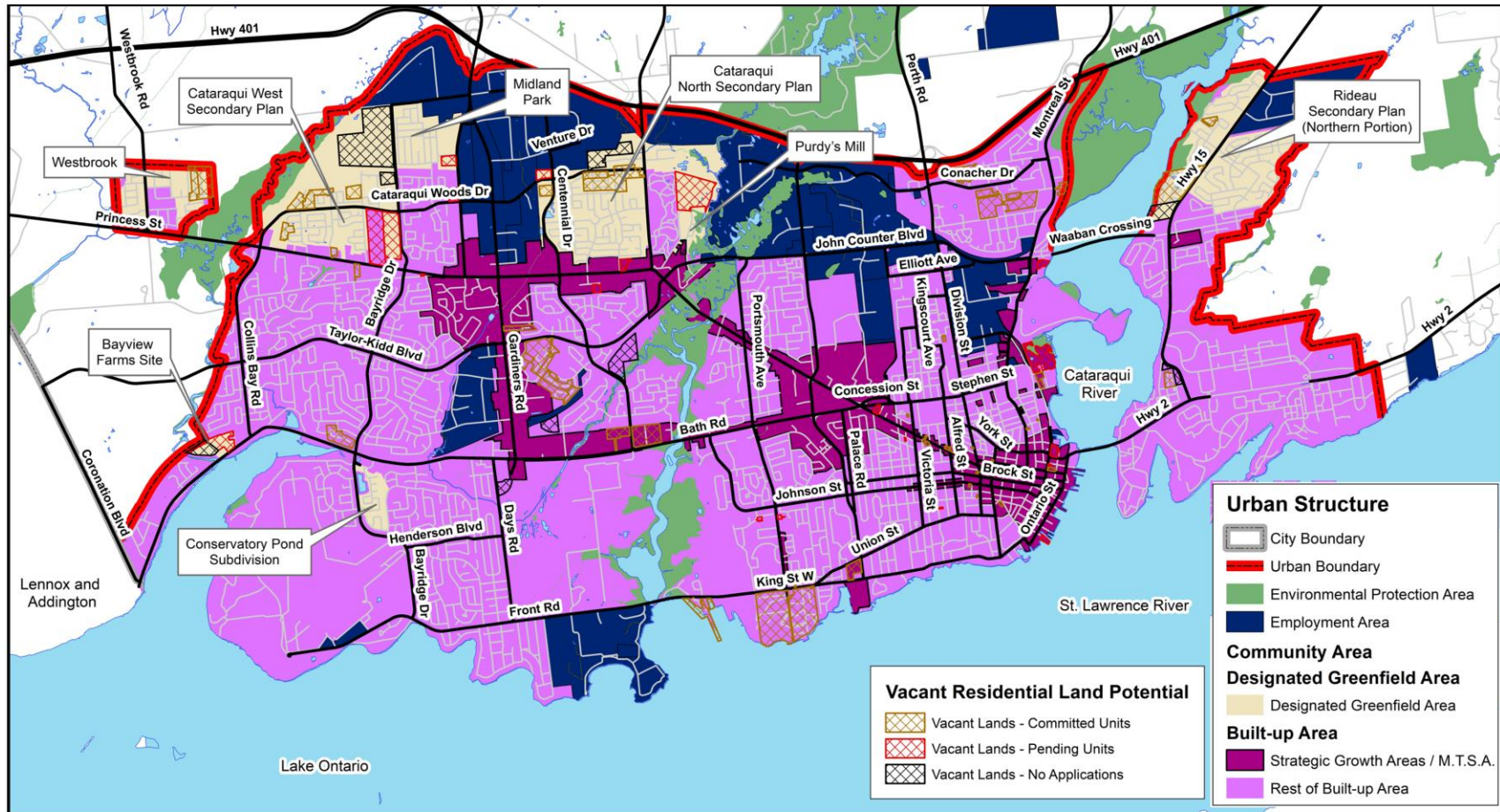
### 6.2.2 *Housing Unit Supply Potential in Active Planning Approvals*

Figure 19 summarizes the housing unit supply potential in City planning approvals (approved and proposed planning applications) by D.G.A. and B.U.A. It is estimated that as of December 31, 2023, the City of Kingston has approximately 14,140 housing units in planning approvals. Most of the housing unit supply potential is within the B.U.A., representing 9,890 housing units or approximately 70% of the housing unit supply potential. The housing unit potential in the B.U.A. largely comprises high-density housing units. Applications within the D.G.A. represent approximately 2,040 housing units. The housing unit potential in the D.G.A. comprises a mix of low-, medium- and high-density housing units. The Community Area land needs assessment utilizes the housing unit potential in the D.G.A. and includes the following housing unit supply potential as of December 31, 2023, on lands that are currently designated for residential use:

- Low Density: 825
- Medium Density: 390
- High Density: 825
- Total Housing Units: 2,040

The housing unit potential in the B.U.A. within active development applications will provide a source in accommodating the City's intensification potential. Based on the housing unit supply potential in the B.U.A., active planning applications have the potential to accommodate up to 68% of the intensification housing forecast to 2051. It is anticipated that the remaining intensification demand will be accommodated through redevelopment and infill within the City's Strategic Growth Areas and A.R.U.s across the City.

Figure 19
City of Kingston
Housing Unit Supply Potential in Planning Approvals
Applications on Designated Residential Lands as of December 2023
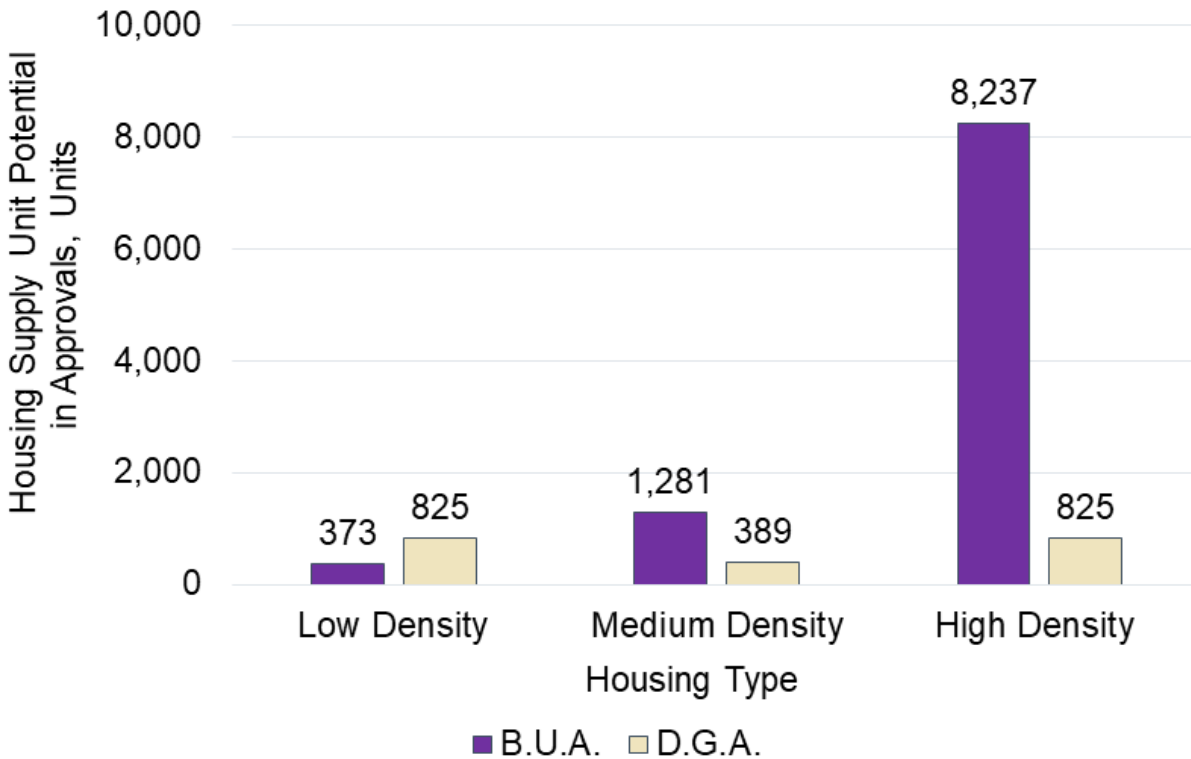
Notes: Low density includes single detached and semi-detached units; medium density includes row housing units; and high density includes apartments and stacked townhouse units.
The figure does not include housing units within the B.U.A. that require an Official Plan Amendment to allow residential use.
D.G.A. = designated greenfield area; B.U.A. = built-up area.
Source: Derived from City of Kingston Land Inventory Report of Pending and Committed Units as of year-end December 2023, provided to Watson & Associates Economists Ltd.

6.2.3 Vacant Lands with No Applications

The City of Kingston's planning staff has identified 12 sites that are vacant across the City, totalling approximately 93 hectares (approximately 230 acres) of gross developable land area. Within the B.U.A., there are seven sites which total approximately 20 hectares (approximately 49 acres). Within the D.G.A., there are five sites, totalling 73 hectares (approximately 180 acres). The largest site within the D.G.A. measures approximately 41 hectares (101 acres) and is situated within the Cataraqui

West Secondary Plan on Creekford Road. The Community Area land needs assessment utilizes the 73 hectares in the D.G.A. along with the previously discussed active planning applications within the D.G.A.

## 6.3 Housing Units Per Net Hectare Density Trends, 2006 to 2023

A key input in the Community Area land needs assessment is the U.P.H. assumption, a density input. Average U.P.H. assumptions are used to translate the housing forecast in the D.G.A. into an associated land area. Average U.P.H.s are calculated by dividing the number of housing units over the total land area of the building lot. Figure 20 summarizes the average U.P.H. by housing structure type in the City's D.G.A. over three time periods: 2006 to 2010; 2013 to 2017; and 2018 to 2023. Summarizing the average U.P.H. over three periods provides an opportunity to observe historical trends in density. Provided below are key highlights of Figure 20:

- The average U.P.H. increased significantly for row housing units within the City of Kingston, from 30 U.P.H. in 2006 to 2012, to 42 U.P.H. from 2018 to 2022. This is consistent with urban housing trends observed across the Province, as row housing developments have become more compact over the past 15 years. Over the forecast horizon, it is anticipated that the City will experience an increase in more compact row housing units, including back-to-back townhouse developments that will upwardly impact the average U.P.H. Back-to-back townhouses share the back wall with another unit, eliminating the provision of a backyard, which significantly increases the yield of housing units on a development site.
- Within the low-density housing category, the average U.P.H. increased slightly, largely due to an increase in the share of semi-detached housing units. It is noted that the average U.P.H. of single detached housing units within the City largely remained stable over the 2006 to 2023 period at an average of 23 U.P.H. Over the forecast horizon, it is anticipated that semi-detached housing will represent a larger share of the low-density housing category. A larger share of semi-detached housing units will have a slight upward impact on the average U.P.H. in the low-density housing category.
- Over the 2018 and 2023 period, high-density housing units averaged 82 U.P.H. Given the limited activity of high-density housing units within the D.G.A., the

sample size was insufficient for other periods. Within the D.G.A., high-density developments are typically three- to six-storey buildings with surface parking. In comparable municipalities, the average U.P.H. tends to be between 100 and 120 U.P.H. Over the forecast period, it is expected that larger-scale, high-density developments will primarily be accommodated within the B.U.A., specifically within the Strategic Growth Areas. It is important to note that high-density housing developments include stacked townhouses, which typically tend to average less than 100 U.P.H.

Figure 20
City of Kingston
Designated Greenfield Area Units Per Hectare Density Trends, 2006 to 2023
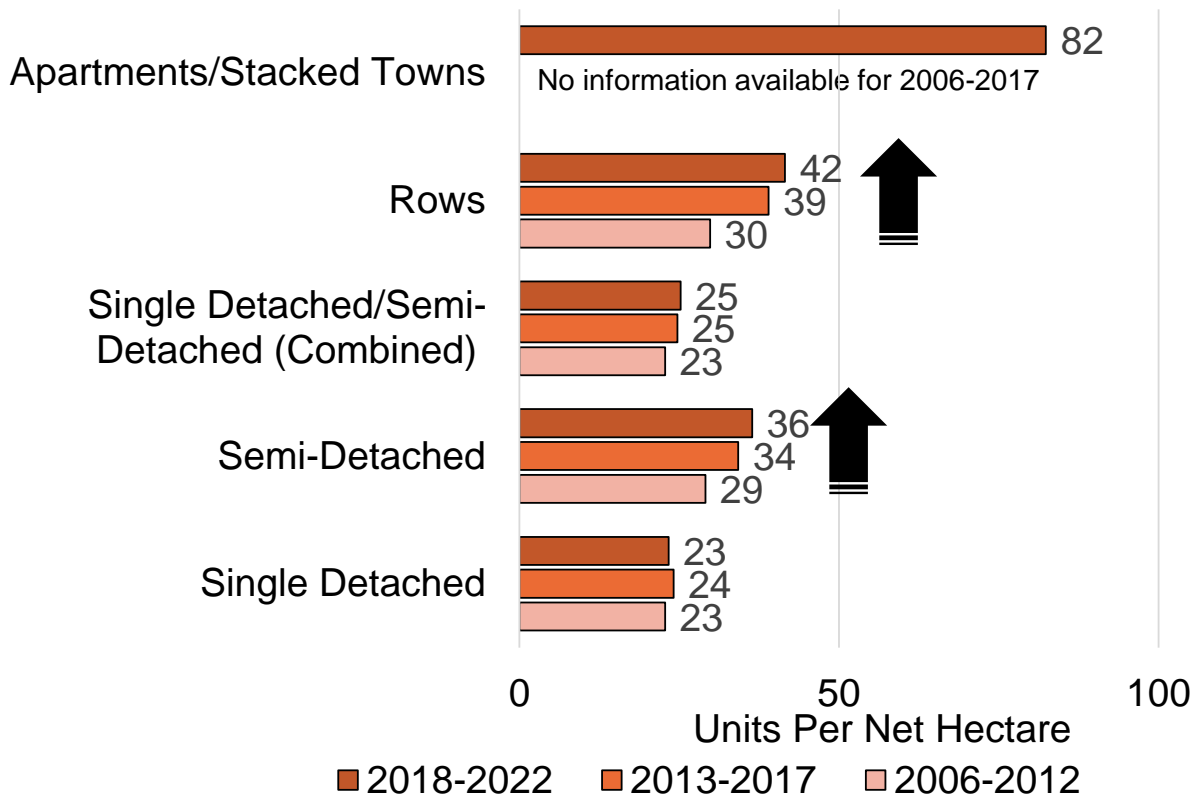
Source: Watson & Associates Economists Ltd., based on the City of Kingston's residential building permit activity and City of Kingston geographic information systems MPAC parcel fabric data.

Based on the previously discussed trends and outlook on U.P.H., the following assumptions are utilized in the Community Area land needs assessment, as summarized in Figure 27.

Figure 21
City of Kingston
Designated Greenfield Area Units Per Hectare Density Assumptions
Compared to Historical Trends

Housing Type	Historical Units per Hectare, 2018 to 2023	Forecast Units per Hectare, 2024 to 2051	Increase in Average Units per Hectare
Low Density (single detached/semi-detached)	25	**27**	8%
Medium Density (row housing)	42	**45**	7%
High Density (apartments and stacked townhouses)	82	**100**	22%

Source: Watson & Associates Economists Ltd.

Figure 22 provides a comparison of the average U.P.H. density assumptions utilized in the D.G.A. compared to the B.U.A. The U.P.H. density assumptions in the B.U.A. were discussed previously in Chapter 5. As summarized in Figure 22, the average U.P.H. of medium-density housing units in the D.G.A. is anticipated to be lower in the D.G.A. at 45 U.P.H. compared to 50 U.PH. in the B.U.A. A lower density is assumed for the D.G.A. compared to the B.U.A., given that medium-density housing units in the D.G.A. are anticipated to require a greater provision of land for driveways and lot areas. The average U.P.H. for high-density housing is also anticipated to be higher in the B.U.A. given that high-density buildings in the B.U.A. are anticipated to have a greater number of storeys, as well as opportunities for underground parking or a lower provision for land required for parking.

Figure 22
City of Kingston
Designated Greenfield Area and Built-up Area
Units Per Hectare Density Assumptions to 2051

Housing Type	Built-up Area Units per Hectare Assumptions	Designated Greenfield Area Units per Hectare Assumptions
Low Density (single detached/semi-detached)	n/a	**27**
Medium Density (row housing)	50	**45**
High Density (apartments and stacked townhouses)	145	**100**

Note: Units per hectare assumptions are based on net land area (i.e., lot area of housing unit) and do not include the average after including parks/trails, local roads, stormwater ponds, and non-residential uses that tend to require a greater provision of land within the designated greenfield area compared to the built-up area.
Source: Watson & Associates Economists Ltd.

Figure 23 provides recent visuals of density by housing structure within the City. Except for the apartment example at 127 U.P.H., all examples are within the D.G.A. Figure 23 provides an example of a single detached housing unit at an average of 24 U.P.H. which represents the higher-end range of U.P.H. for single detached housing units built in the City on D.G.A. lands. As previously discussed, single detached housing units have averaged 23 U.P.H. since 2018. The semi-detached example in Figure 23 at 36 U.P.H. is reflective of the average of semi-detached housing units in the City since 2018. This represents the densest form of low-density housing. Single detached housing units have represented a large component of the low-density housing units and have averaged 24 U.P.H. since 2018. The examples provide a means of comparison with the previously discussed U.P.H. averages. As shown in Figure 23, high-density housing, for example, can range from 80 U.P.H. in a stacked housing development to 127 U.P.H. in a five-storey apartment building.

Figure 23
City of Kingston
Recent Visual Density Examples

24 units
per
hectare

Single Detached
(Low Density)
Tulip Drive

36 units
per
hectare

Semi-Detached
(Low Density)
Brookedayle Avenue

45 units
per
hectare

Row Housing
(Medium Density)
Tentley Drive

80 units
per
hectare

Stacked Towns
(High Density)
Terra Verde Way

127 units
per
hectare

5-Storey Apartment
(High Density)
Princess St./Sydenham Rd.

Note: Density estimates by Watson & Associates Economists Ltd.
Source: Images are from Google Earth and Realtor.ca.

6.4 Community Area Land Needs

Figure 24 provides a detailed table of the Community Area land needs to 2051. As summarized in Line A, the D.G.A. housing unit demand forecast is approximately 9,600 housing units over the 2024 to 2051 period and is based on the following housing units by structure type:

- Low Density: 4,380 (46%)
- Medium Density: 3,530 (37%)
- High Density: 1,650 (17%)
- Total Housing Units: 9,560 (100%)

Line C of Figure 24 identifies the housing unit potential on vacant land in active applications within the D.G.A. As previously noted, it is estimated that the City has the potential to accommodate approximately 2,040 housing units on vacant lands in the D.G.A. based on active applications on lands that are designated for residential use.

The City's D.G.A. housing unit supply[38] is then compared to the housing forecast by housing unit structure type in Line D. Adjusting for the remaining housing potential in active development applications in the D.G.A., it is estimated that the City has a shortfall of approximately 7,520 housing units to 2051 (demand of 9,557 units minus supply of 2,039 units = 7,518 units). As identified in Line D, the City has a D.G.A. land shortfall across all housing types.

To convert the housing shortfall to a net land area, Watson has applied a U.P.H. assumption to the housing shortfall by structure type, as identified in Line E. The total net residential land area shortfall is approximately 208 net hectares (approximately 514 net acres), as identified in Line F. This represents the additional land area needed to accommodate housing development (i.e., the lot area of each new housing unit); however, this land area excludes roads, stormwater ponds, parks/trails, and non-residential uses such as schools, community centres, and commercial uses which is referred to as the gross developable land area. As previously discussed in Chapter 2, when planning for an outward expansion of the urban boundary, it is important to factor

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[38] Based on housing supply in planning applications that are identified by the City of Kingston staff as of December 31, 2023, that is "Committed" and "Pending," excluding applications that are proposed to be re-designated for residential use. Refer to the glossary of terms for further information.

in the additional lands required for complete communities to support the housing growth. Providing an adequate amount of parkland and non-residential lands to support the development of complete communities is one of the six critical public interests to be met through the new O.P. project.

Recognizing that planning for residential uses includes the need for infrastructure such as local roads, stormwater ponds, parkland/open space, and select non-residential uses, Watson has upwardly adjusted the land area shortfall to account for additional lands to accommodate these use, as illustrated in Line G. This upward adjustment is referred to as the "net to gross ratio factor" and the net to gross factor is 50%. As previously discussed, the net to gross ratio considers the additional land required (approximately 15 net hectares or 37 net acres) of commercial uses to support local residents based on the Commercial Land Review draft technical findings. As illustrated in Line G, the gross developable land area (net of environmental features) required for additional Community Area land is approximately 416 hectares (208 net hectares multiplied by 2 = 416 hectares (or approximately 1,028 acres)).

Vacant lands within the D.G.A. with no application comprise five sites that total approximately 73 hectares (180 acres) of gross developable land area, as summarized in Line H. Since there are no active applications for these sites, the potential housing unit yield on these lands is currently unknown. The shortfall of the Community Area land need identified in Line G was deducted by 73 hectares of gross developable land area. As a result, the adjusted land area **shortfall is at least 340 hectares** (416 hectares minus 73 hectares = 340 hectares) of gross developable land area to accommodate forecast Community Area population and employment growth within the City to the year 2051.

It is important to recognize that the required 340 gross developable land area (approximately 840 acres) for Community Area uses is a minimum land need and additional land area may be required to allow for flexibility in planning for new neighbourhoods and other site factors, such as creating neighbourhoods that follow logical boundaries for urban development. Furthermore, the actual extent of the gross developable land area of the urban expansion areas will be further explored as part of the City of Kingston O.P. project and may differ from the outcome identified in this report, based on a series of planning considerations. The land needs identified in this report are considered a conceptual starting point, recognizing that further work will be carried out by the City of Kingston staff to determine the location of Community Area expansion lands.

Figure 24
City of Kingston
Community Area Land Needs Assessment, 2024 to 2051

Land Needs	Calculation	Low-Density Units	Medium-Density Units	High-Density Units	Total Households
Designated Greenfield Area Housing Unit Forecast, 2024-2051	A	4,376	3,530	1,651	9,557
Housing Unit Mix (%)	B	46%	37%	17%	100%
Housing Unit Potential in Approvals (Approved/Proposed)[1]	C	825	389	825	2,039
Housing Unit (Shortfall)/Surplus	D = C - A	(3,551)	(3,141)	(826)	(7,518)
Units Per Hectare (U.P.H.), net hectares assumption	E	27	46	100	-
Net Residential Land Required, hectares	F = U.P.H. ÷ D	(132)	(68)	(8)	(208)
Net to Gross Ratio Factor for Other Community Area Lands (local roads, parks, trails, stormwater ponds, and non-residential uses) – Additional 50%	G = F × 2	-	-	-	(416)
Vacant Land Supply with no Approved or Proposed Applications, hectares (deduct from deficit)[2]	H	-	-	-	73
Total Land Needs, gross hectares (rounded)	**I = G - H**	**-**	**-**	**-**	**(340)**

[1] Based on active applications within the designated greenfield area provided by the City of Kingston's planning staff.
[2] Based on vacant lands identified by the City of Kingston's planning staff that currently have no applications; includes five sites within the designated greenfield area.
Total land needs in Line I has been rounded.
Source: Watson & Associates Economists Ltd.

7.   Strategic Directions and Policy Recommendations

This report has highlighted key themes related to growth and change agents that have implications for the future of land use planning and the phasing of hard and soft infrastructure for the City of Kingston over the next three decades. A number of broader strategic recommendations are provided below which relate to the long-term management of growth and development within the City of Kingston. These recommendations are intended to inform the City's new O.P. project and on-going efforts with respect to growth monitoring and growth management. These strategic recommendations are provided within the context of an evolving provincial and local planning policy framework.

7.1   Long-term Population, Housing, and Employment Forecasts

The City is projected to experience strong population and housing growth over the long-term planning horizon. The in-effect O.P. establishes specific policy direction regarding housing projections by structure type over the long-term planning horizon. The current in-force P.P.S., 2020 and the proposed P.P.S., 2024 require planning authorities to provide for an appropriate range and mix of housing options to meet projected housing needs, including affordable housing needs.

Recommendations:

- Update the growth management policies in the City of Kingston O.P. that establish the City's goals with respect to population, employment, and housing growth to the year 2051 to be consistent with the recommended growth projections as established through the study. More specifically, it is recommended that the City plan for a permanent and student population base of 220,900 and an employment base of 113,900 by 2051. Over the 2024 to 2051 planning period, the City will require approximately 29,300 additional housing units to accommodate the permanent and student population forecast.
- Develop a refined policy framework to provide continued direction that encourages a range of housing types and densities by tenure (i.e., ownership and rental) in consideration of the updated housing projections to the year 2051.

7.2   Residential Phasing and Supply of Urban Land

A significant amount of growth is expected in the City of Kingston and not all of it can or will happen at the same time from a practical perspective, primarily because of the time it will take to extend infrastructure in a logical and efficient manner. As a result, a key deliverable of this study is the identification of priority growth areas that are best suited to proceed earlier versus later over the next three decades. In doing so, the City of Kingston can achieve numerous policy objectives that best support the development of complete communities.

Kingston's Strategic Growth Areas, including M.T.S.A.s and other developed lands, provide a supply opportunity for intensification within the City; however, capacity and market demand for intensification within these areas is not homogenous. Certain areas have the capacity to play a more significant role in accommodating growth and intensification. In accordance with anticipated market demand, key investment decisions should prioritize the achievement of intensification and higher densities within the areas identified under the intensification hierarchy. On the other hand, the City should consider planning policies and tools to stimulate development within identified areas that are considered slower growth areas. Furthermore, the City should identify infrastructure projects and investments that can unlock or remove barriers to achieve forecast growth potential in Strategic Growth Areas and other priority growth areas.

Recommendations:

- Add growth management policies in the new City of Kingston O.P. that establish the City's goals with the phasing and supply of urban land from 2021 to 2051 by policy area in accordance with the results of the growth forecast allocation.
- Ensure consistency with the applicable provincial policy regarding the minimum supply of land available for residential development. Consider establishing further principles and criteria to inform recommendations on where development should be prioritized in designated growth areas.
- Update policies that support investment to enable growth, specifically recognizing the important roles of M.T.S.A.s and Strategic Growth Areas, which will be key to accommodating growth, achieving intensification targets in the City, and encouraging compact built form. This will require refinements to policies that

inform and phase investment decisions to enable growth and development in these areas.

- Update the O.P. to include the geographic boundaries of the M.T.S.A. and other Strategic Growth Areas identified, as discussed in Chapter 5.

7.3   Residential Intensification Target

Residential intensification contributes to building complete communities, often makes more efficient use of existing infrastructure and public services and minimizes adverse impacts to the natural environment and agricultural land. The proposed P.P.S., 2024 establishes clear policy direction to encourage that sufficient land within settlement areas is made available through intensification and redevelopment. Based on an assessment of the intensification opportunities, the City has significant possibilities for utilizing intensification sites to meet a broad range of future housing needs within developed areas.

Recommendations:

- Based on the analysis of intensification drivers and present infill opportunities, aim for a **minimum** intensification target of 60% (i.e., 60% of housing growth to be accommodated in the B.U.A.) and continue to track development within the geographically defined B.U.A. as established in this report.
- Stress in the O.P. that the intensification target is a minimum with aspirations for the City to exceed the intensification target.
- Monitor residential intensification activity on an annual basis against the O.P. target.

7.4   Planning for Community Area Expansion Lands

As identified in this report, the City requires an estimated 340 hectares of gross developable lands (approximately 840 acres) to accommodate a shortfall of housing and support Community Area uses (e.g., parkland/recreational lands, local infrastructure, institutional, and commercial lands). In identifying Community Area expansion lands, the City will need to ensure that the lands added to the City support complete communities' principles.

Recommendations:

- Adjust the urban boundary to accommodate at least 340 hectares of gross developable Community Area land.
- Plan for a Community Area land expansion that considers opportunities to add additional Community Area lands that are a logical extension to the existing Urban Area and also offer the potential to leverage existing infrastructure, parkland/recreational lands, and public facilities (e.g., schools, recreational centres, etc.).
- Ensure that the Community Area expansion lands will provide future residents with adequate access to commercial and institutional uses.
- Continue to monitor residential land absorption on an annual basis to ensure that sufficient Community Area lands are provided over the long term.

7.5 Planning for Higher Density on Community Area Lands

Increasing the yield of housing units on designated residential lands provides the opportunity to build more compact communities that are transit-supportive and ensures a more efficient use of the land. This report has utilized U.P.H. assumptions by housing type on D.G.A. lands that are higher than historical trends and consider the outlook for more compact built forms. Over the long term, the City is anticipated to accommodate more dense and compact developments on D.G.A. lands compared to the developed D.G.A. lands today. The following U.P.H. averages are utilized in this report:

- Low Density (single detached/semi-detached): 27 U.P.H.
- Medium Density (row housing units): 46 U.P.H.
- High Density (apartments and stacked townhouses): 100 U.P.H.

The proposed P.P.S., 2024, encourages large and fast-growing municipalities (includes the City of Kingston) to plan for a target of 50 residents and jobs per gross developable hectare in designated growth areas.[39] A density of residents and jobs is based on the total population in housing units and employment accommodated in commercial and institutional uses, and is divided by the gross developable land area. Based on the housing mix, U.P.H. assumptions, and the net to gross ratio on Community Area expansion lands (as discussed in Chapter 6), the average density on Community Area

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[39] Proposed P.P.S., 2024, policy 2.3.5., p. 8.

lands is anticipated to average approximately 53 residents and jobs per gross developable hectare.[40]

Recommendations:

- Utilize the U.P.H. assumptions as a City-wide average guideline for D.G.A. and Community Area expansion lands on a net land area basis (i.e., parcel of housing development). The City should support developments that exceed the above U.P.H. where appropriate; however, provide flexibility for developments that may require a lower average due to other considerations (e.g., site configuration). It is important to recognize that the above U.P.H. assumptions represent averages, and opportunities to increase U.P.H. may vary on a site level basis.
- Provide an O.P. policy that sets a minimum density requirement that developments on Community Area expansion lands plan for a minimum of 50 residents and jobs per gross developable hectare.

7.6 Planning for Employment in Strategic Growth Areas and Major Transit Station Areas

Workers in knowledge-intensive industries are increasingly demanding accessible and dynamic work environments that promote interaction and innovation. This underscores placemaking as an increasingly recognized and important concept in creating diverse and vibrant workplaces which, in turn, can help attract local population and job growth provided that other necessary infrastructure requirements are met. This is particularly relevant in mixed-used environments which integrate retail, office commercial, residential, and other community uses with public open spaces.

Given the strong employment growth identified for the City of Kingston that is increasingly oriented towards knowledge-based sectors, Strategic Growth Areas and M.T.S.A.s offer strong market attributes to accommodate these growing employment sectors. Considering the near- and longer-term market outlook for office and mixed-use

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[40] Based on population estimate of housing unit shortfall and assumptions on employment. The total people and jobs estimate is 18,100 and land area is 340 gross developable hectares (18,100 divided by 340 = 53). Note, this is conceptual and may vary on a site-by-site basis.

development opportunities identified within the City's Strategic Growth Areas and M.T.S.A.s, the City of Kingston should continue to prioritize its efforts to encourage and promote office and mixed-use development where market demand potential is highest. The City should also work to identify potential gaps between planning policy objectives and market demand across each of the City's Strategic Growth Areas and M.T.S.A.s. This will help identify where the utilization of financial tools and planning incentives to facilitate development, where fiscally sustainable, may be required to support planning policies regarding intensification within these areas.

When planning for employment in Strategic Growth Areas and M.T.S.A.s, it is important to consider the following:

- **Not all forms of office development can be accommodated in Strategic Growth Areas and M.T.S.A.s** – The provincial and local planning policy framework directs larger office developments to M.T.S.A.s, or other Strategic Growth Areas where multi-modal transportation and existing or planned frequent transit service will be available to support live/work opportunities. Certain commercial and industrial facilities (e.g., manufacturing, assembly, and warehousing) with office uses, training facilities, and showcase rooms/ancillary retail are often integrated on-site. Operations such as these can be land intensive and have unique siting requirements that are typically not appropriate in mixed-use Strategic Growth Areas or M.T.S.A.s and should be directed to Employment Areas. Furthermore, Employment Areas provide opportunities to accommodate multi-use facilities, such as larger industrial operations adopting a campus-style setting which requires surface parking and future expansion potential.
- **Office development potential outweighs demand** – In planning for office development in Strategic Growth Areas/M.T.S.A.s, the City of Kingston should be realistic about the amount of office growth that might be attracted to these areas over the planning horizon. While O.P.s have provisions in place to encourage office development, the reality is that potential supply outweighs demand. In planning for new office developments within Strategic Growth Areas/M.T.S.A.s there needs to be corresponding consideration to prioritize development to also create transit-oriented, vibrant urban centres and minimize potential competition between these locations.
- **Provide the right long-term environment** – The future success of employment uses within the City of Kingston's Strategic Growth Areas/M.T.S.A.s is highly

dependent on their ability to provide places that offer access to both skilled and unskilled labour, vibrant spaces and places for employees, and synergies between businesses. This requires a more strategic approach to planning, one that integrates planning with the City's Economic Development Strategy. A place-based approach should allow for flexible planning frameworks, repurposing measures for older buildings and areas, investment for mixed-use, co-working, incubators/accelerator facilities for start-up businesses, and opportunities for shared spaces. With this in mind, the primary objective of planning policies should be to create high-quality, mixed-use urban environments that offer access to higher-order transit services, a walkable and cyclable public realm, services and amenities, including restaurants, cafes, shops, daycare facilities, arts and cultural activities, and indoor/outdoor recreational facilities. It should be recognized that such physical qualities are typically what drives successful office real estate markets over the long term.

- **Encourage proactive planning** – It is recognized that given the comprehensive nature of the O.P. review process and the considerable changes that have been made to the provincial policy framework over the past decade, Southern Ontario municipalities have traditionally been somewhat slow to adopt flexible land use frameworks to address the structural changes in the economy identified in this report. Recent economic trends and industry disruption, however, mandates that the City of Kingston O.P., Secondary Plans, and zoning allow for opportunities, where appropriate, to encourage transformative change over the long term within Strategic Growth Areas/M.T.S.A.s. This will ensure that businesses are able to effectively respond to the changing environment, new ways of working, and innovation capabilities. Recent trends show that employment spaces and facilities are increasingly demanding the ability to integrate different functions. For example, innovation parks and mixed-use spaces integrate research, institutions, start-ups and labs, office, co-working, and production space with recreational amenities and services.

Recommendations:

- Direct major office development to Strategic Growth Areas/M.T.S.A.s that are served with existing or planned higher-order transit.
- Ensure that M.T.S.A.s retain a commercial function in supporting the needs of local residents and employees in the area by encouraging developments to

incorporate local serving retail uses, such as restaurants, food stores, drug stores, health care, and personal services. Based on the Commercial Land Review report, a significant portion of the City's commercial gross leasable area (floorspace) demand is anticipated to be accommodated in the B.U.A., specifically within the M.T.S.A.s. Applications that contemplate a major decrease in the amount of commercial floorspace in the M.T.S.A. should be reviewed within the context of the surrounding area.

- Target an appropriate level of major office development to complement residential development and other population-related functions to create complete communities.

- Accelerate infrastructure investment and capacity to facilitate development/ redevelopment efforts across Strategic Growth Areas/M.T.S.A.s with the strongest identified real estate market opportunities.

- Monitor the uptake of new O.P. policies and, where deemed necessary, prepare planning and market studies, including proformas, to assess development feasibility opportunities and challenges for office development across Strategic Growth Areas/M.T.S.A.s and the potential use of municipal financial incentives and other planning tools to help facilitate development.

- Monitor development activity and the corresponding population and employment growth within Strategic Growth Areas/M.T.S.A.s on a regular basis.

7.7 Planning for Mixed-Use Development and Building Complete Communities

The City already has supportive policies in the O.P. on active transportation, which is a foundational element to achieving a complete community where residents have easy access to amenities such as grocery stores, services, and community facilities. As the City continues to transform, there is an opportunity to look at various neighbourhoods and promote investment that strengthens and enhances the amenities offered, which in turn fosters a more equitable city.

Recommendations:

- New spatial analysis tools such as the Walk Score Toolkit are making it easier for cities to help identify these needs in their community. Incorporate policy that also

encourages complete neighbourhoods where residents, through active transportation, can have good access to a range of amenities.

- Incorporate policy that acknowledges the existence of potentially underutilized commercial sites (e.g., plazas and malls) that may be experiencing decline, and incorporate policy encouraging their revitalization through the addition of appropriately scaled and sited residential buildings on these sites.

7.8   Climate Mitigation, Adaption, and Resilience Principles

The City of Kingston has undertaken a number of initiatives to facilitate and promote sustainable development, including the City's Climate Leadership Plan.[41] The City's Strategic Plan includes a number of Strategic Priorities, including lead environmental stewardship and climate action.

Recommendations:

- Through its O.P. policies, continue to guide and encourage energy efficient and climate resilient development.[42]
- Continue to encourage sustainable design principles, use of low-impact materials, and maximize energy efficiency in development.
- Support the City's existing Green Standard Community Improvement Plan,[43] which incentivizes low carbon new buildings, the Savings by Design and Commercial Custom New Construction programs both offered by Enbridge Gas, as well as third party distributed generation systems.

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[41] City of Kingston Climate Leadership Plan dated December 13, 2021. The Climate Leadership Plan measures the impact of programs and actions taken by the City to reduce greenhouse gases. It also outlines steps that need to be taken to achieve the City's goal of being carbon neutral by 2040.

[42] Climate Change Resilience refers to effectively adapting with and managing the impacts of climate change while preventing those impacts from getting worse. A climate resilient City plans from a climate change lens and is equipped to deal with the realities of an increasingly warmer world.

[43] The City's Green Standard Community Improvement Plan provide incentives to builders and owners who design and construct more efficient buildings that move towards achieving the City's goal of net zero greenhouse gas emissions.

- Enhance design policies for mid-rise and tall buildings to improve building efficiency, promote multimodal lifestyles not dependent on personal automobiles, and increase overall livability.
- Develop O.P. policies and by-laws that focus new residential growth in dense, walkable locations that are well connected to transit.
- Continue to explore intensification opportunities that support enhancing public transit.

7.9 Plan Monitoring

Throughout the City's O.P., direction is provided with respect to systematic monitoring, review, and amendment of the O.P. In this regard, the study provides critical input to long-range planning by identifying any future growth, land supply, and land demand which ultimately informs a comprehensive policy framework to manage change over the planning horizon. Policies providing direction on plan monitoring and evaluation should be considered in the City's O.P. Policies establishing direction for regular plan monitoring and evaluation may include a robust framework that enables the City to modify growth objectives based on actual supply and demand data, while contemplating a range of planning policy, demographic, and economic factors that influence growth and change over the long-term planning horizon.

Recommendations:

- Incorporate a framework to monitor housing supply and intensification targets at regular intervals in coordination with the provision of hard services and servicing allocation.
- Consider various tools for monitoring housing growth, including comprehensive and interactive web-based growth tracking models to monitor population, housing, and employment growth, as well as performance measures and benchmarking at the planning policy area and neighbourhood level, on an annual basis.

8.   Conclusions and Next Steps

8.1   Conclusions

As previously discussed, population growth in the City is anticipated to be driven by a broader range of demographic groups, including young adults and students, families with children, empty nesters, and seniors. To accommodate these broad demographic groups, the City will require a range of housing options, including both at-grade housing and high-density housing forms. Almost all new low-density housing and most of the new medium-density housing in the City over the next three decades will be accommodated in the D.G.A. On the other hand, most of the new high-density housing will be accommodated within the B.U.A., specifically within the Strategic Growth Areas where growth will benefit from access to public transportation.

It is recommended that 60% of the City's housing growth is planned within the B.U.A., primarily comprising high-density housing units (approximately 78% of the total units in the B.U.A.). Based on an intensification rate of 60%, the City is anticipated to achieve a higher intensification rate than the current intensification target rate of 40% identified in the City of Kingston O.P.[44] This high rate of housing growth recognizes the intensification levels the City of Kingston has experienced over the past two decades. A 60% housing intensification forecast will provide a significant amount of growth to meet the City's objectives in developing transit-supportive communities, including the development of the M.T.S.A.s, as previously discussed in Chapter 5.

Achieving an intensification rate beyond 60% would require an adjustment to the City's housing forecast by structure type, as the B.U.A. has limited opportunities to accommodate at-grade housing (i.e., low-density and medium-density housing). Any adjustment to the housing forecast to include additional high-density housing growth would not align well with the diverse housing needs of the broader range of demographics the City is anticipated to accommodate through net migration, or the demand from existing residents.

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[44] City of Kingston Official Plan, Consolidated as of December 1, 2022, Policy 2.4.5 (a), p. 56.

Despite a significant increase to Kingston's residential intensification target, the City will need to expand its urban boundary by at least 340 hectares (840 acres) of gross developable land area to accommodate the housing forecast and associated Community Area lands. It is important to recognize that this represents a minimum land need; additional land area may be required to allow for flexibility in planning for new neighbourhoods and other site factors. Other site factors include creating neighbourhoods that follow logical boundaries for urban development, planning around environmental features, and the development of servicing. Furthermore, the actual extent of the gross developable land area of the urban expansion areas will be further explored as part of the City of Kingston O.P. project and may differ from the outcome identified in this report based on a series of planning considerations. The land needs identified in this report are considered a conceptual starting point, recognizing that further work will be carried out by City of Kingston staff to determine the location of Community Area expansion lands.

8.2   Next Steps

Following the review by City of Kingston Council in August 2024, additional reports will be provided, including the Population, Housing and Employment Growth Report, Commercial Lands Review and the Employment Lands Review. It is anticipated that these Reports will be provided in the fall of 2024.

City of Kingston Growth Analysis and Urban Land Needs Study – Phase 1 Draft Findings

Public Information Centre #2
April 17, 2024

Introduction
City of Kingston Growth Study

Phase 1: Technical Components

- Population, housing, and employment forecast to 2051 has been finalized – the medium growth scenario has been selected as the preferred growth scenario.

- Draft urban land needs analysis has been completed for residential and Employment Areas.

We are here

- Urban land needs analysis to be finalized after further consultation with staff, the public and City Council..

Phase 2: Strategic Directions

- The next phase of work will include policy considerations.

Schedule
City of Kingston Growth Study

Legend
- In-Person
- Stakeholder Meetings
- Reports

PIC #1 · City Council

Growth Analysis, Scenarios, and Allocations

PIC #2 · City Council

Land Needs and Intensification Analysis

Policy Recommendations

City Council

Feb. to Nov. 2023

Jan. to June 2024

July/Aug. 2024

Feb. 2023

Fall 2024

Phase 1: Technical Analysis

Phase 2: Strategic Directions

Reporting:
1: Population and Employment Growth Analysis

Reporting:
2: Residential Intensification and Land Needs
3: Commercial Land Review
4. Employment Land Review

PIC = Public Information Centre

2

Employment Area Land Needs

Introduction – Employment Lands
Employment Lands Review Land Needs Assessment

- The Employment Area Technical Analysis includes a comprehensive Employment Area supply and demand analysis (needs assessment).

- The assessment has been prepared in accordance with the Provincial Policy Statement, 2020, which requires that municipalities have sufficient urban land supply to meet projected needs for a planning horizon of 25 years.

- The assessment also considers implications of potential conversions of select sites to non-employment uses on Employment Area land needs.

Kingston Employment Outlook
Employment Forecast, 2023 to 2051

- Over the 2023 to 2051 period, Kingston's employment base is expected to expand from 80,500 to 113,900.

- Of the incremental growth of 30,400 jobs over the period, 31% (10,300 jobs) are ELE (employment lands employment)

Employment Growth by Land Use, 2023 to 2051

Major Office
2,600
8%

Rural
600
2%

ELE
10,300
31%

PRE
19,900
59%
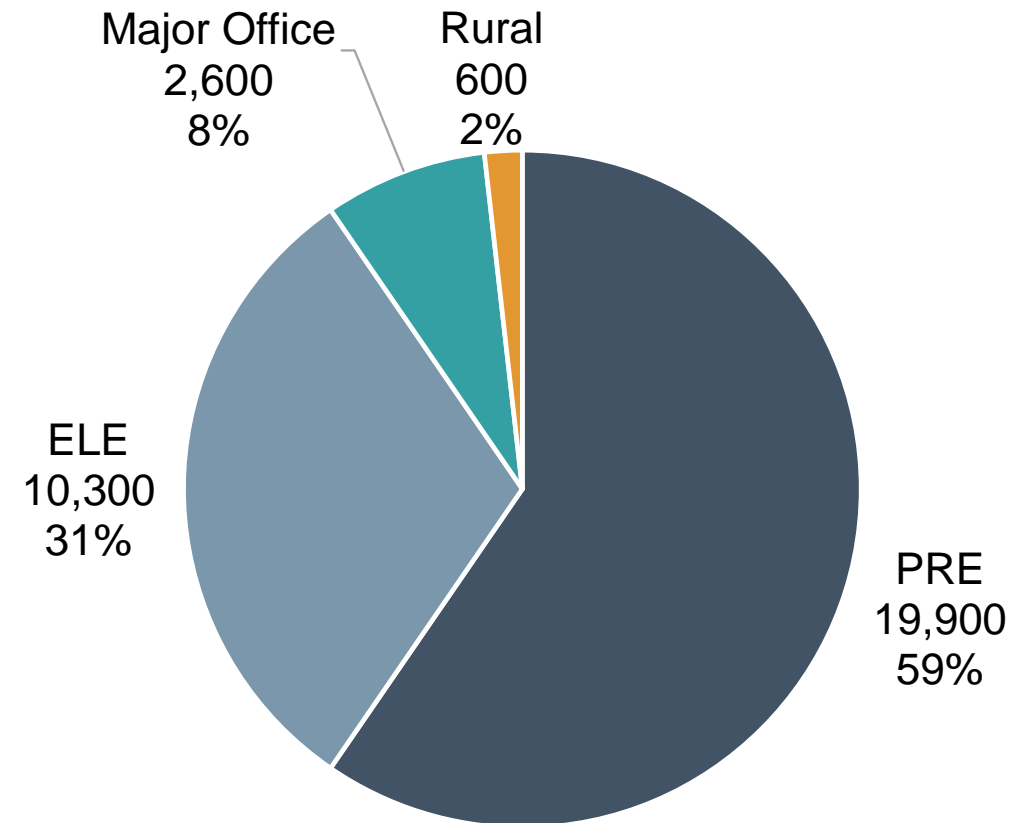
PRE = Population-Related Employment

Kingston's Employment Areas
Vacant Designated Employment Lands Supply

- Kingston has approximately 240 net ha (593 net acres) of vacant designated employment land supply.

City of Kingston Designated Employment Lands
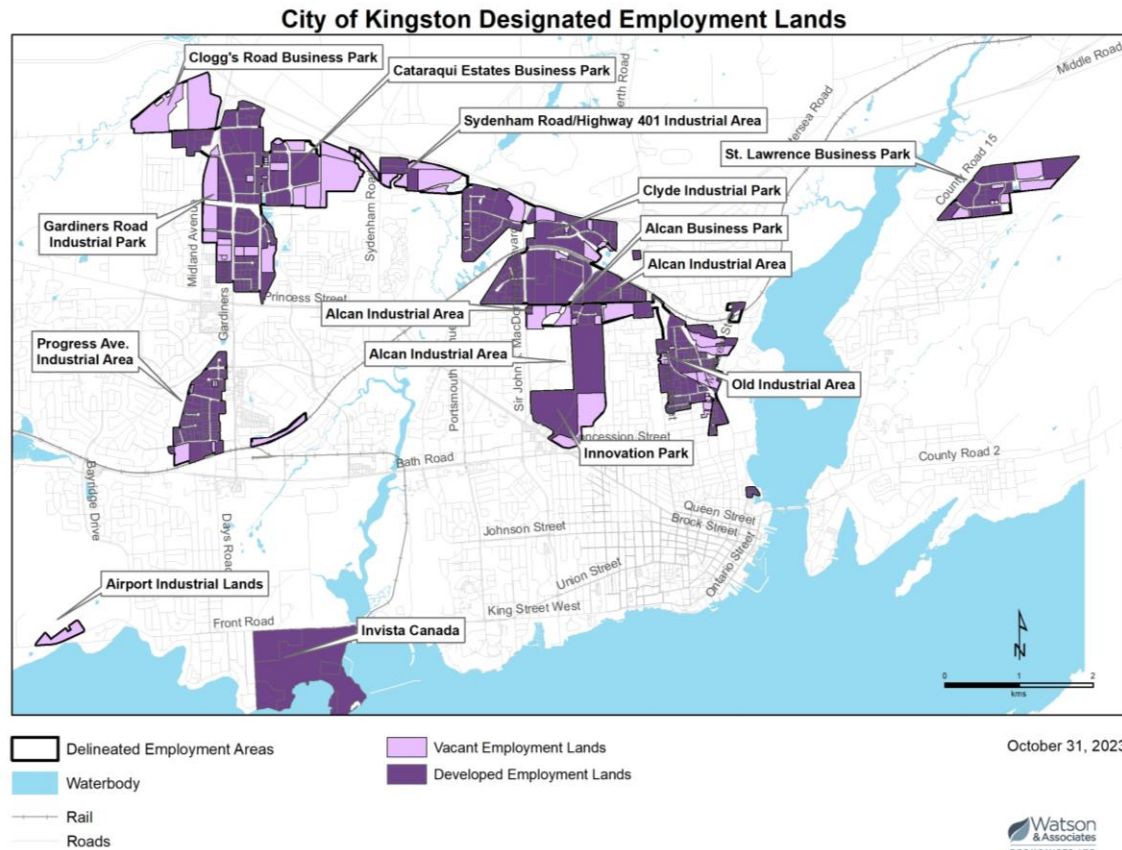
Kingston's Vacant Designated Employment Lands Supply

6
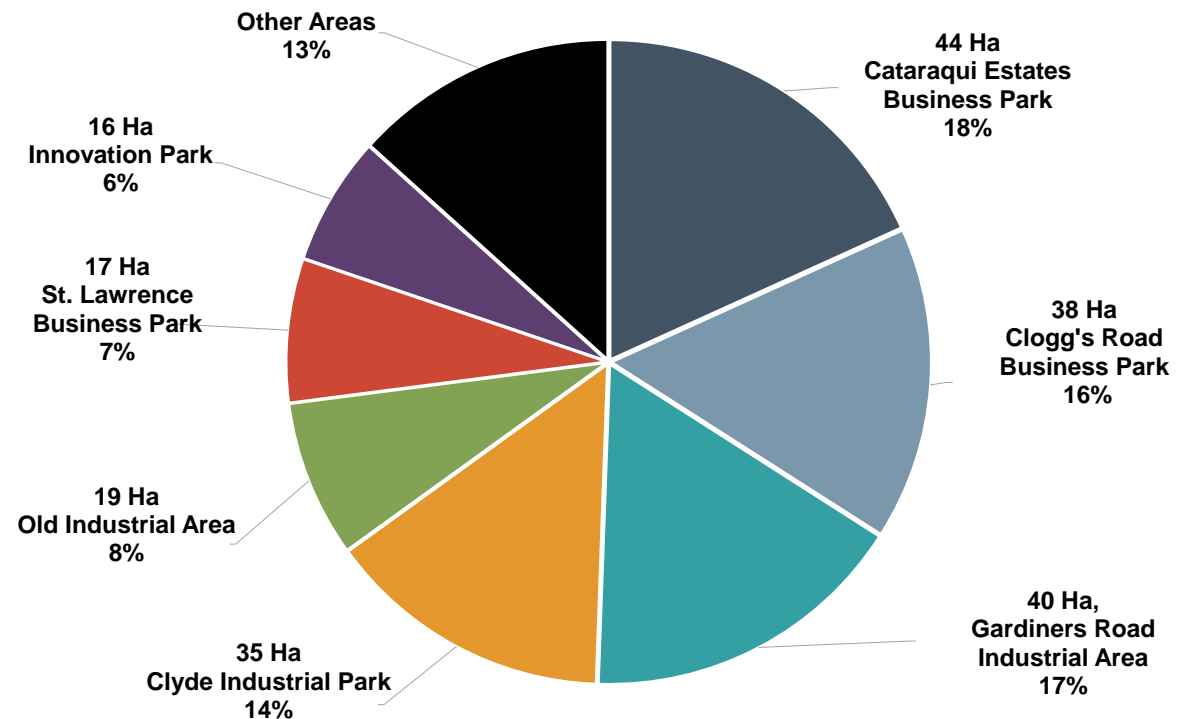
Employment Area Land Needs to 2051

- Over the 2024 to 2051 period, Kingston Employment Area land demand is anticipated to total 440 net ha, accommodating employment growth of 9,700 jobs.

- Kingston's overall designated supply of vacant Employment Area lands totals approximately 200 net ha,* adjusted for vacancy factor.

- Kingston has a shortfall of designated employment land to accommodate long-term growth to 2051.

- The City will need to explore urban boundary expansion options to accommodate future Employment Area lands growth.
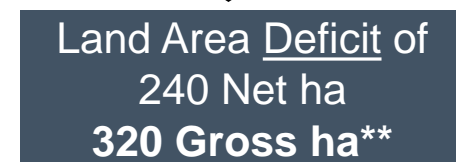
* Excludes potential Employment Area conversions which may reduce designated employment land supply beyond what is presented here.

**320 gross hectares includes additional gross-up for roads, stormwater and local infrastructure.

Employment Area Land Demand: **440 Net ha**

Current Employment Area Land Supply: **200 Net ha***

Land Area <u>Deficit</u> of 240 Net ha **320 Gross ha****

7

Residential Land Needs
and Intensification Review

City Urban Structure

Overview

City of Kingston Draft Urban Structure
Overview

Residential Lands Needs Assessment

Employment Land Needs Assessment

City of Kingston

Rural

Urban

Urban Employment Areas

Community Area

Designated Greenfield Area

Residential Lands

Other Community Area Lands

Priority for large-scale intensification

Strategic Growth Areas: P.M.T.S.A.s/ Intensification Corridor

Built-up Area

Intensification

Remaining Built-up Area

Note: P.M.T.S.A. = Protected Major Transit Station Areas
Source: Watson & Associates Economists Ltd.

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City of Kingston Draft Urban Structure
Key Growth Components Assessed
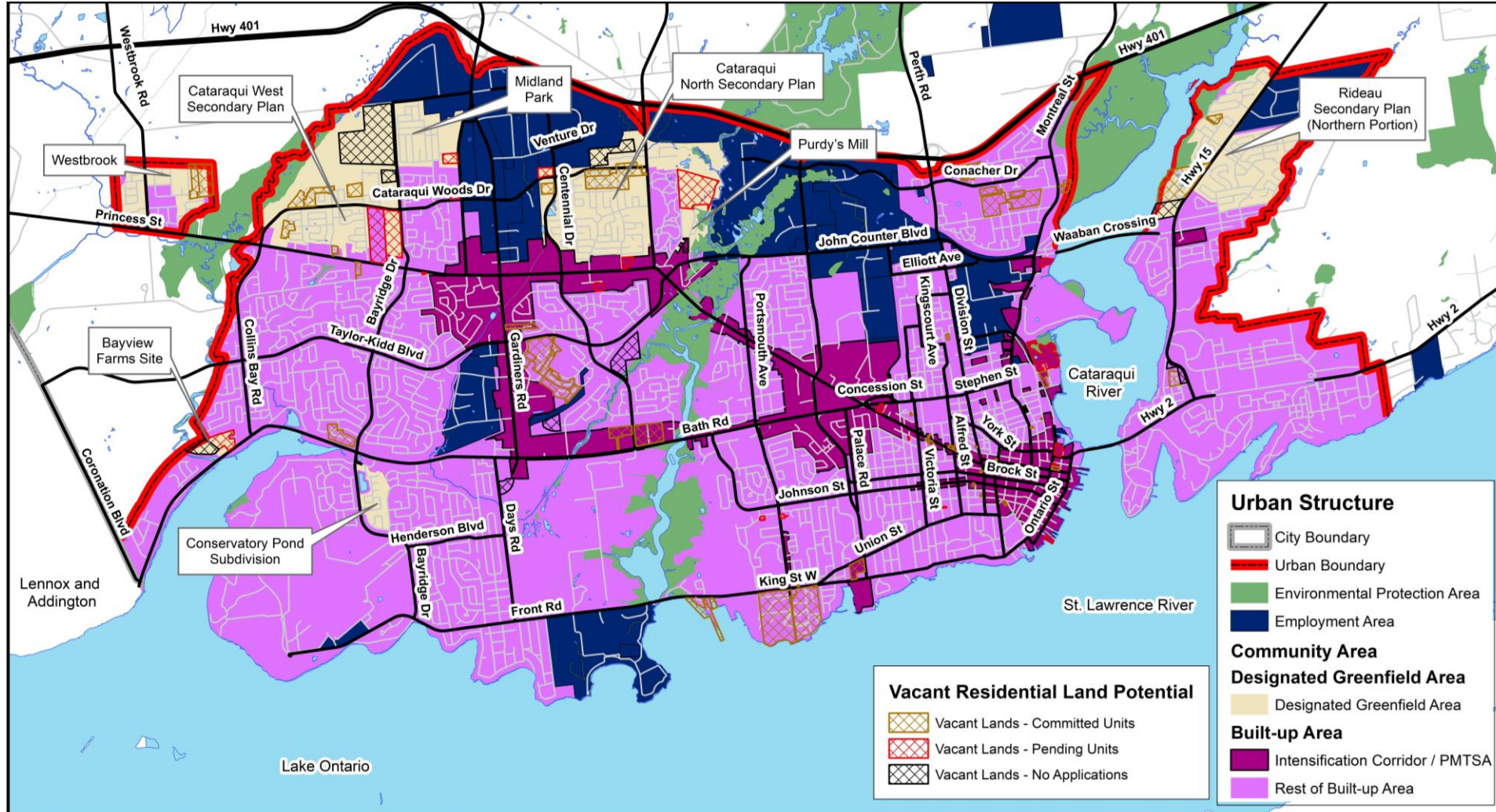
Greenfield Includes:

Key Secondary Plans:
- Cataraqui West
- Cataraqui North
- Rideau (northern portion)

Large and Urban Edge Development Sites:
- Midland Park
- Westbrook
- Purdy's Mill
- Conservatory Pond
- Bayview Farms Site

Notes: The above map is draft and is subject to change.
Vacant land supply potential as of December 2023.

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Strategic Growth Area: PMTSAs and Corridor

Intensification Areas

- Planning Growth Areas
- PMTSAs (Draft)

Base Mapping
- ● Station Locations
- 500 & 800 m Buffers
- Kingston Sub-Areas
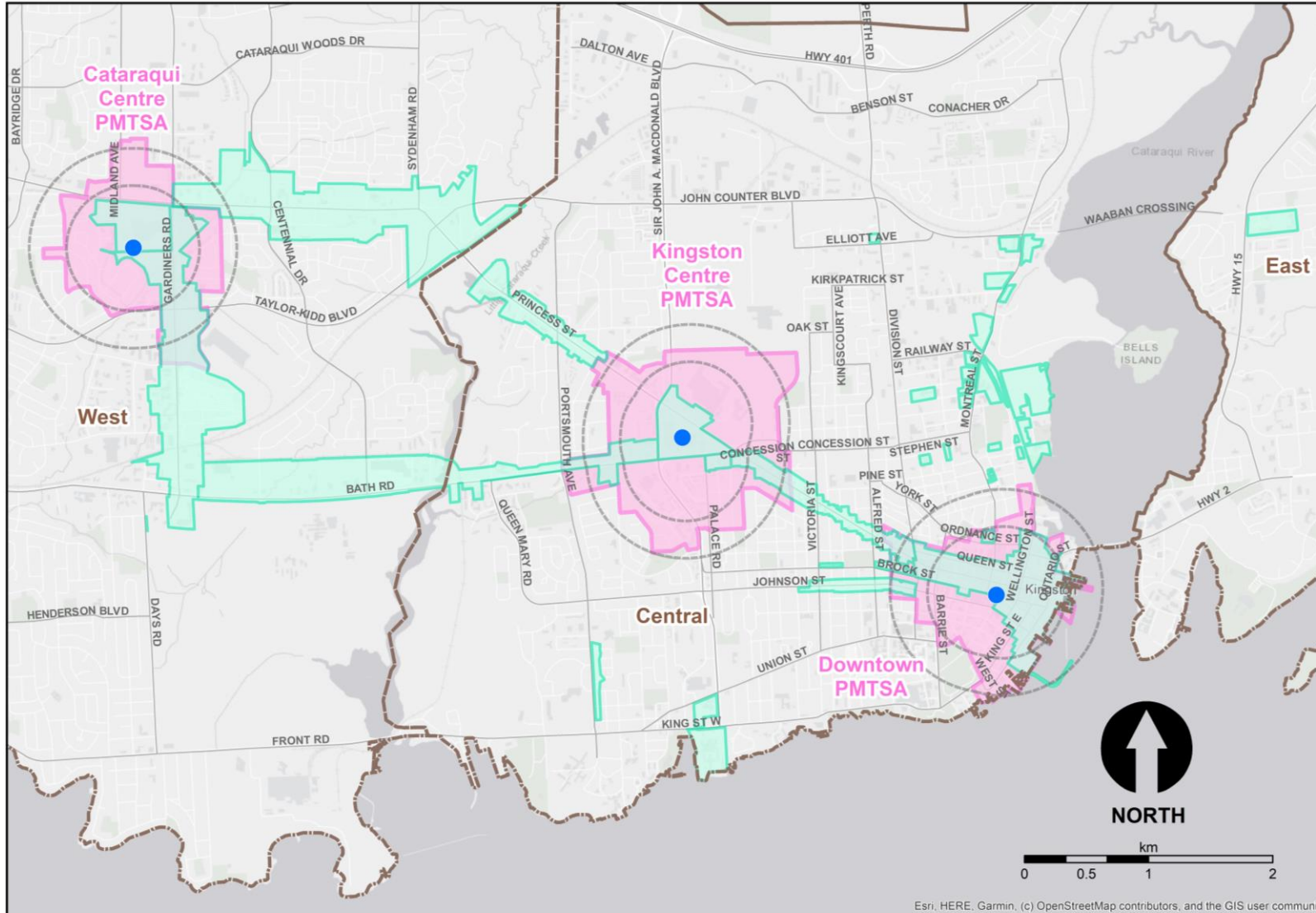
Total Housing Unit Potential through Intensification: 47,900

PMTSA = Protected Major Transit Station Area

Notes: The above map is draft and is subject to change.
Source: Dillon Consulting Limited

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Housing Trends by B.U.A. and D.G.A.

Overview

B.U.A. = Built-up Area; D.G.A. = Designated Greenfield Area

City of Kingston Historical Housing Trends by Area
2006 to 2023

Average Annual Housing Units by Area
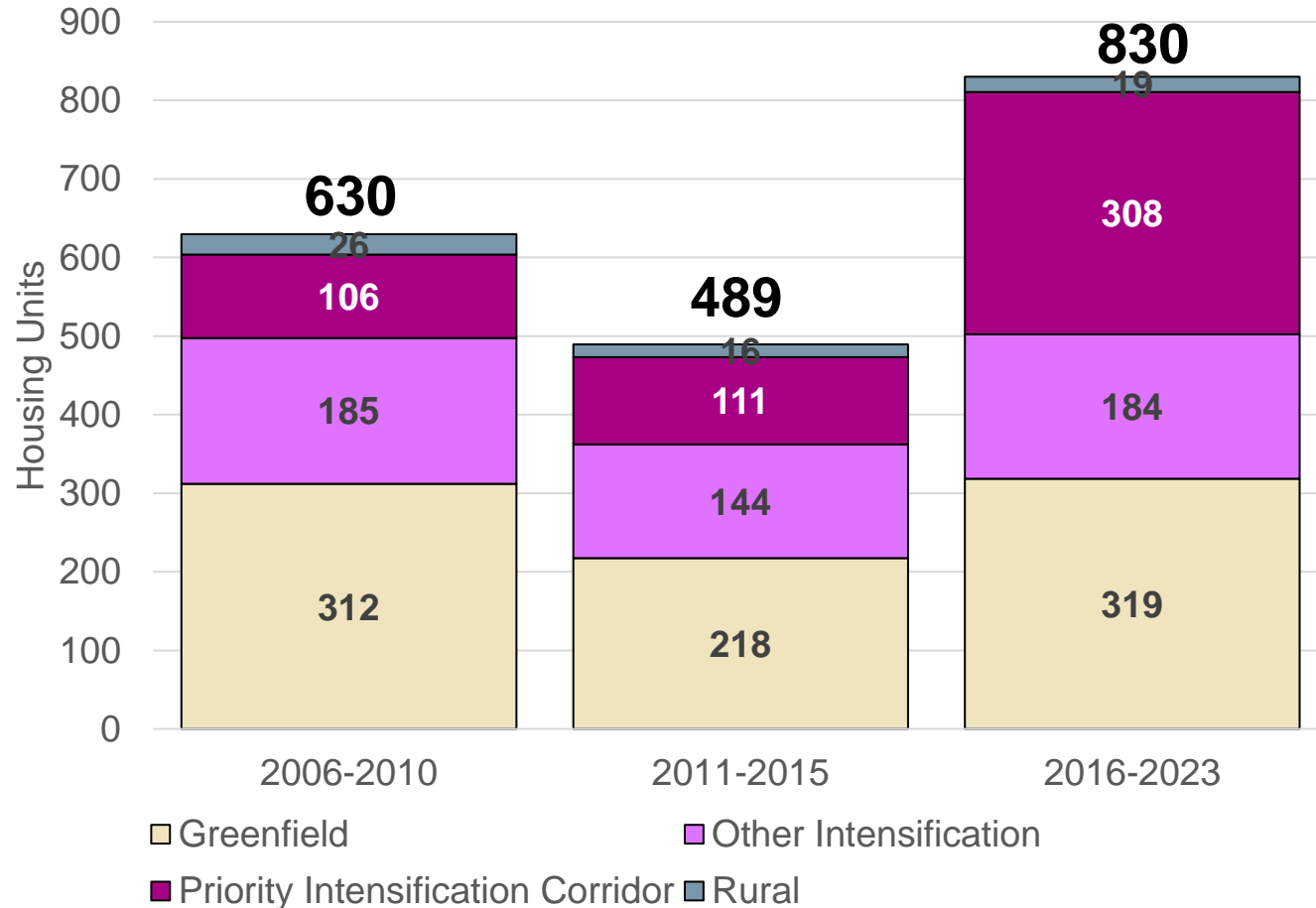
Housing Shares by Area
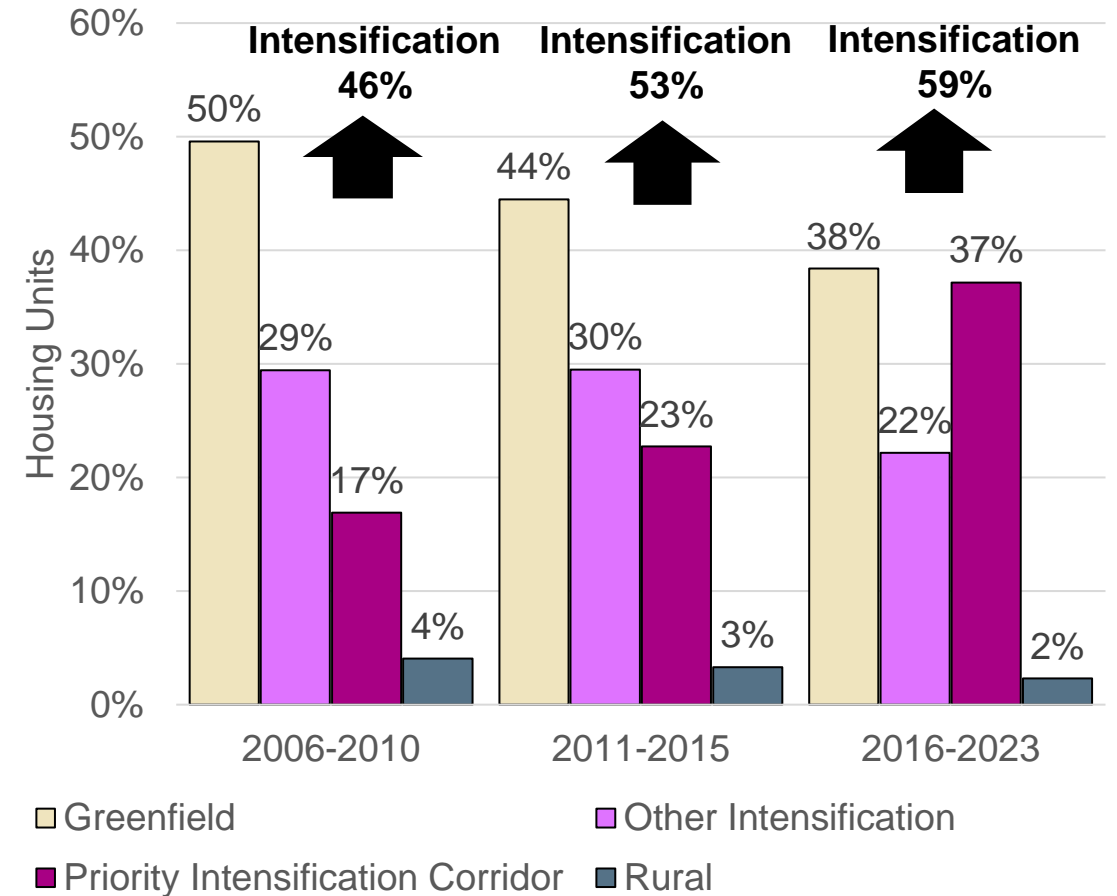
Source: Derived from City of Kingston Residential Building Permit Activity by Watson & Associates Economists Ltd.

City of Kingston Housing Unit Mix in the B.U.A. and D.G.A.
2006 to 2023

Built-Up Area
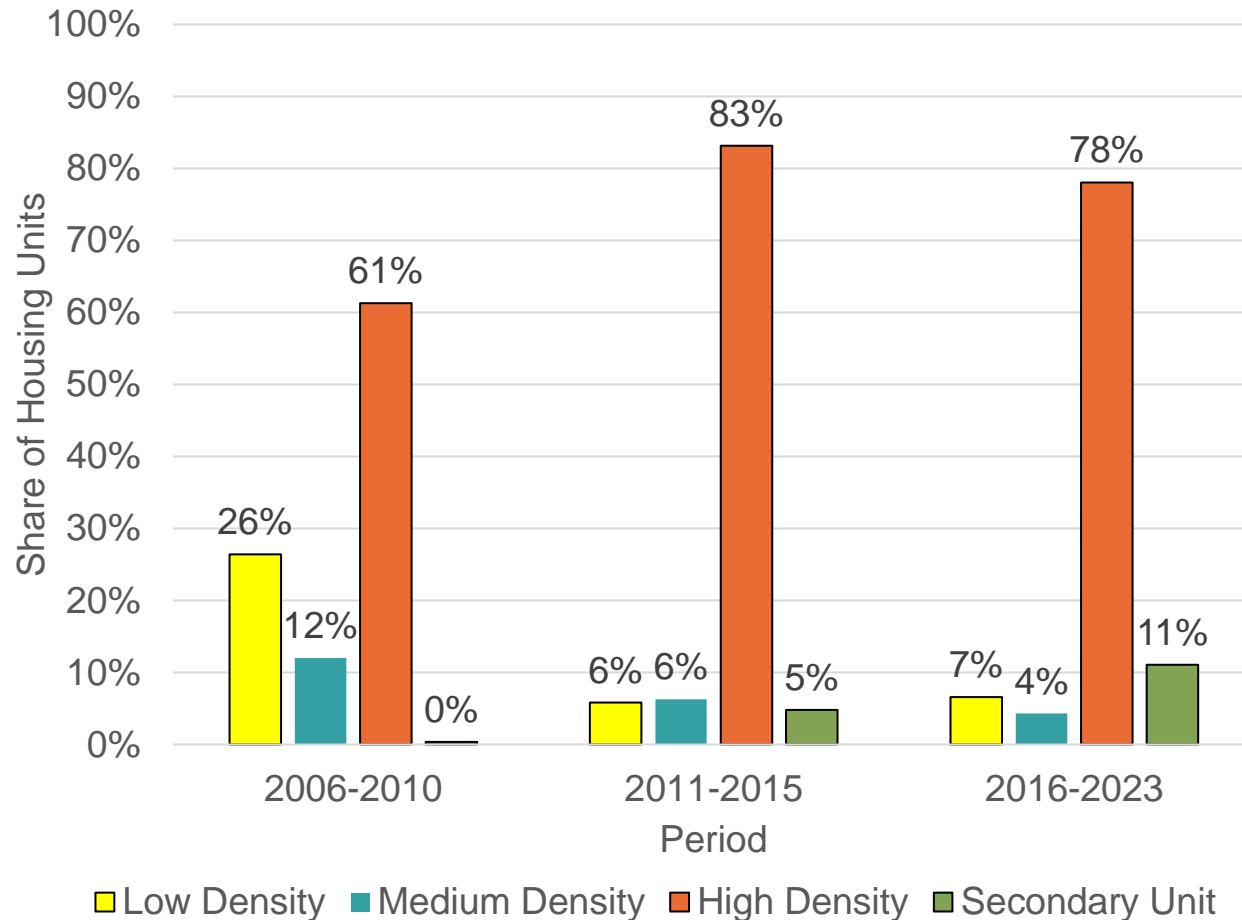
Designated Greenfield Area
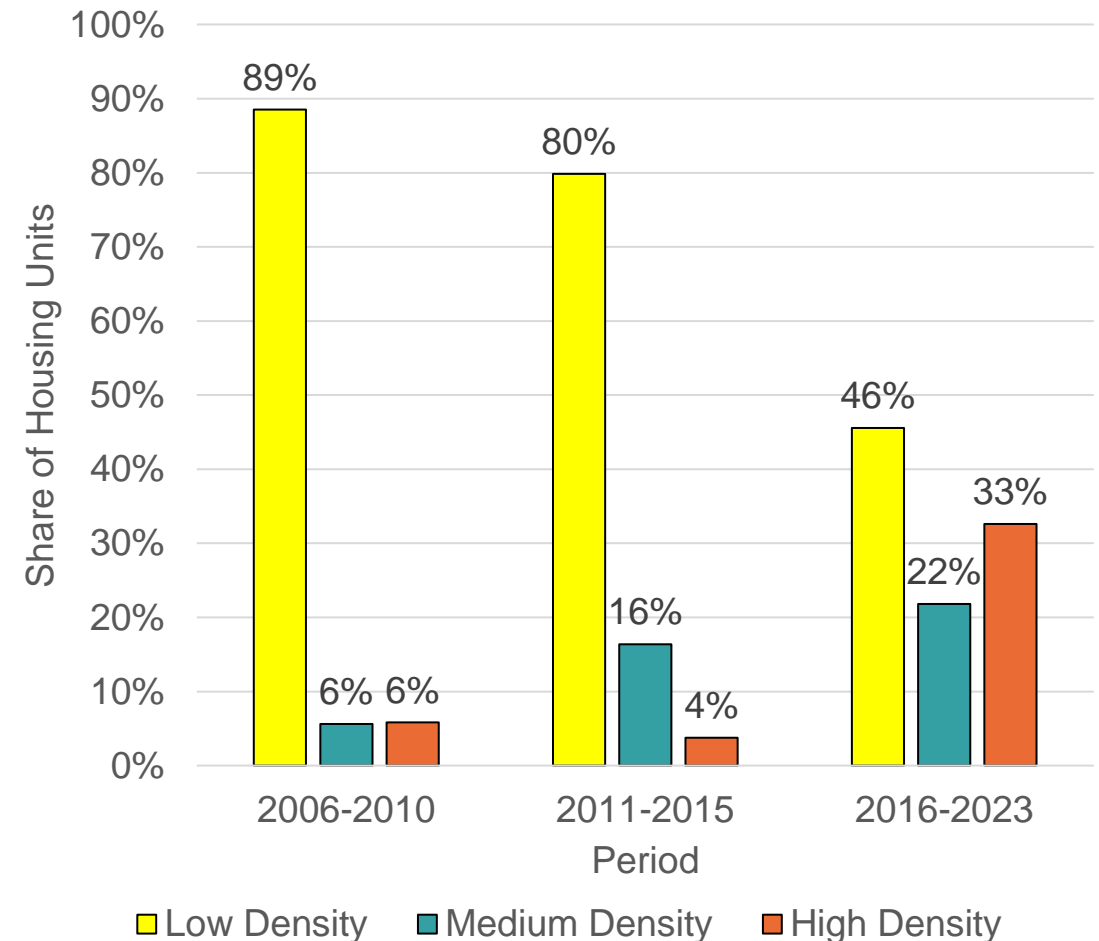
BUA = Built-up Area; DGA = Designated Greenfield Area

Note: Low density includes single detached and semi-detached units; medium density includes row housing; high density includes apartments and stacked townhouses.
Source: Derived from City of Kingston Residential Building Permit Activity by Watson & Associates Economists Ltd.

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Housing Growth Allocations

Overview

Housing Forecast by Planning Policy Area, 2021 to 2051

City of Kingston
Total Permanent Housing Forecast by Planning Policy Area, 2021 to 2051
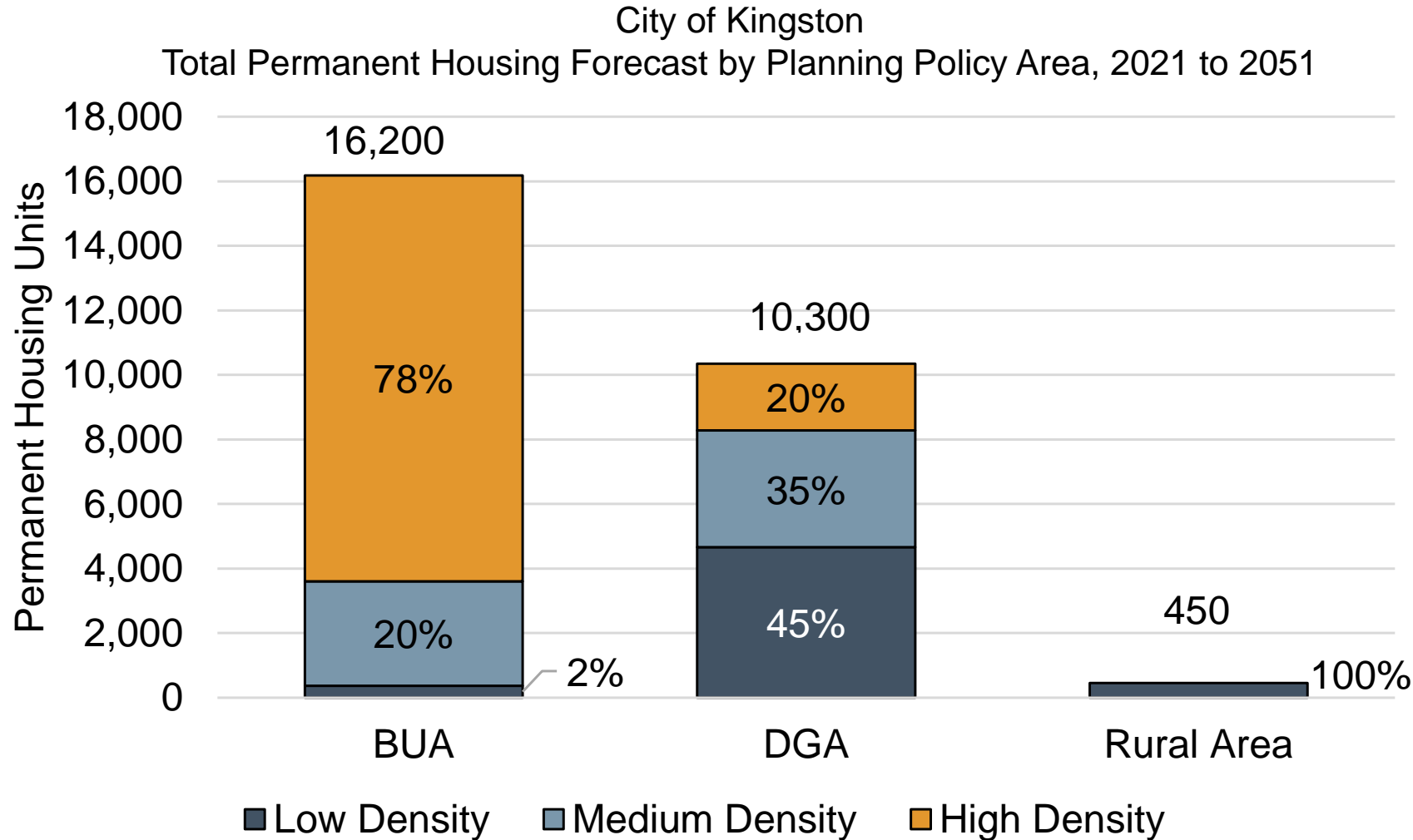
60% Intensification

2021 to 2051
Housing Forecast:

Low Density: **5,500 (20%)**
Medium Density: **6,900 (26%)**
High Density: **14,700 (54%)**
Total: **27,000**

■ Low Density ■ Medium Density ■ High Density

B.U.A. = Built-up Area; D.G.A. = Designated Greenfield Area

Note: Low density includes single detached and semi-detached units; medium density includes row housing; high density includes apartments and stacked townhouses.
Source: Watson & Associates Economists Ltd.

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Housing Forecast by Structure Type

- From 2006 to 2021, the City averaged 600 Census units annually.

- The 2021 to 2051 permanent housing forecast is 900 units annually, a 50% increase over the historical average.

  - 2.6x increase in medium-density units; and

  - 2x increase in high-density units over the historical 15-year average.

- The Central Area is taking on more growth now, with an increased focus on intensification.

- Additional 180 annual units identified outside the permanent housing forecast.
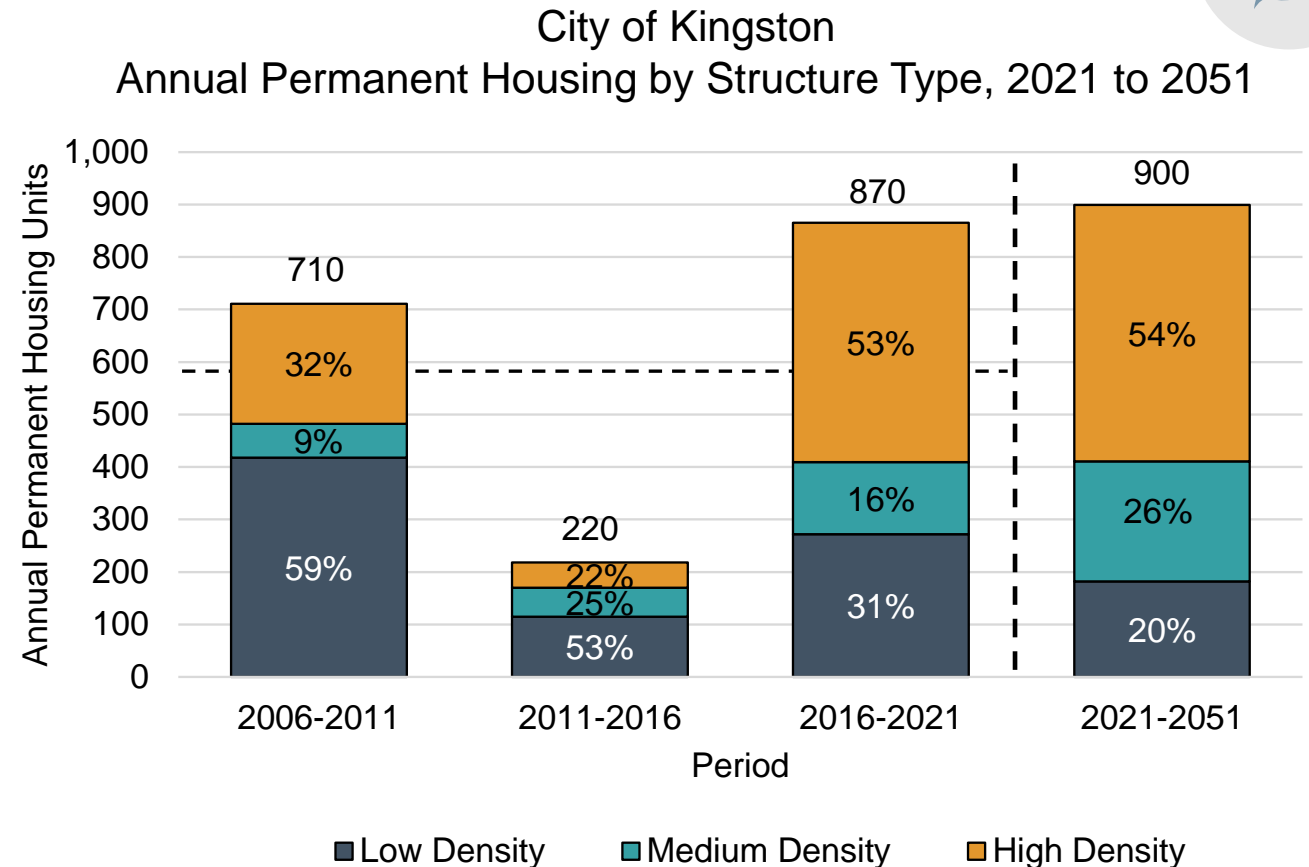
City of Kingston
Annual Permanent Housing by Structure Type, 2021 to 2051

Note: Low density includes single detached and semi-detached units; medium density includes row housing; high density includes apartments and stacked townhouses.
Source: 2006 to 2021 derived from Statistics Canada Census data; 2021 to 2051 forecast by Watson & Associates Economists Ltd.

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Total High-Density Forecast

- Additional 180 high-density units identified from 2021 to 2051 for:

  - Student households not captured in Census; and

  - Existing household structural deficit.

- 670 annual high-density units in total.

- Majority of these additional units are located in the B.U.A.
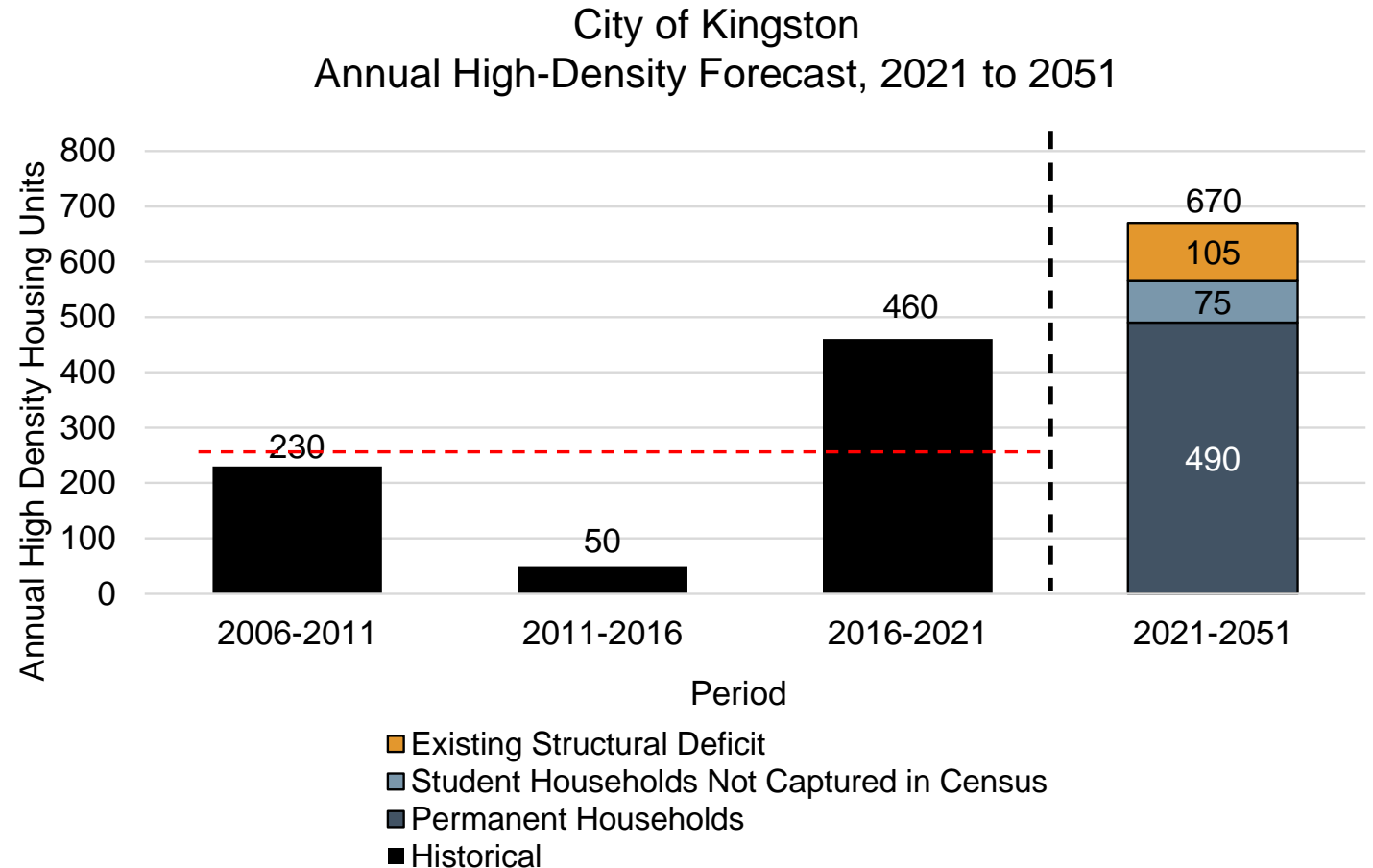
City of Kingston
Annual High-Density Forecast, 2021 to 2051

Source: 2006 to 2021 derived from Statistics Canada Census data; 2021 to 2051 forecast by Watson & Associates Economists Ltd.

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Net Migration Trends by Age Group

- Additional growth in forecast is achieved through increased migration.

- All age groups are forecast to have higher amounts of migration.

- Strong increase in the primary family age group (20 to 54), from 37% historically to 66% from 2021 to 2051.

- Anticipating to see demand for grade-related housing to accommodate more families; however, grade-related housing forecast is increasing 11% relative to 2006 to 2021, and high density is doubling.

City of Kingston
Net Migration Forecast, 2021 to 2051

Age Group	Annual Average		Share	
	2006-2021	2021-2051	2006-2021	2021-2051
0-19	420	480	40%	22%
20-34	420	1,010	40%	47%
35-44	-40	320	-4%	15%
45-54	10	80	1%	4%
55-64	30	60	3%	3%
65-74	110	120	11%	6%
75+	80	100	8%	5%
Total	**1,040**	**2,170**	**100%**	**100%**

Source: Historical derived from Statistics Canada Demography Division data, 2006 to 2021; 2021 to 2051 forecast by Watson & Associates Economists Ltd.

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Residential Land Needs

Overview

Housing Unit Supply Potential in Planning Approvals
Applications on Designated Residential Lands as of December 2023
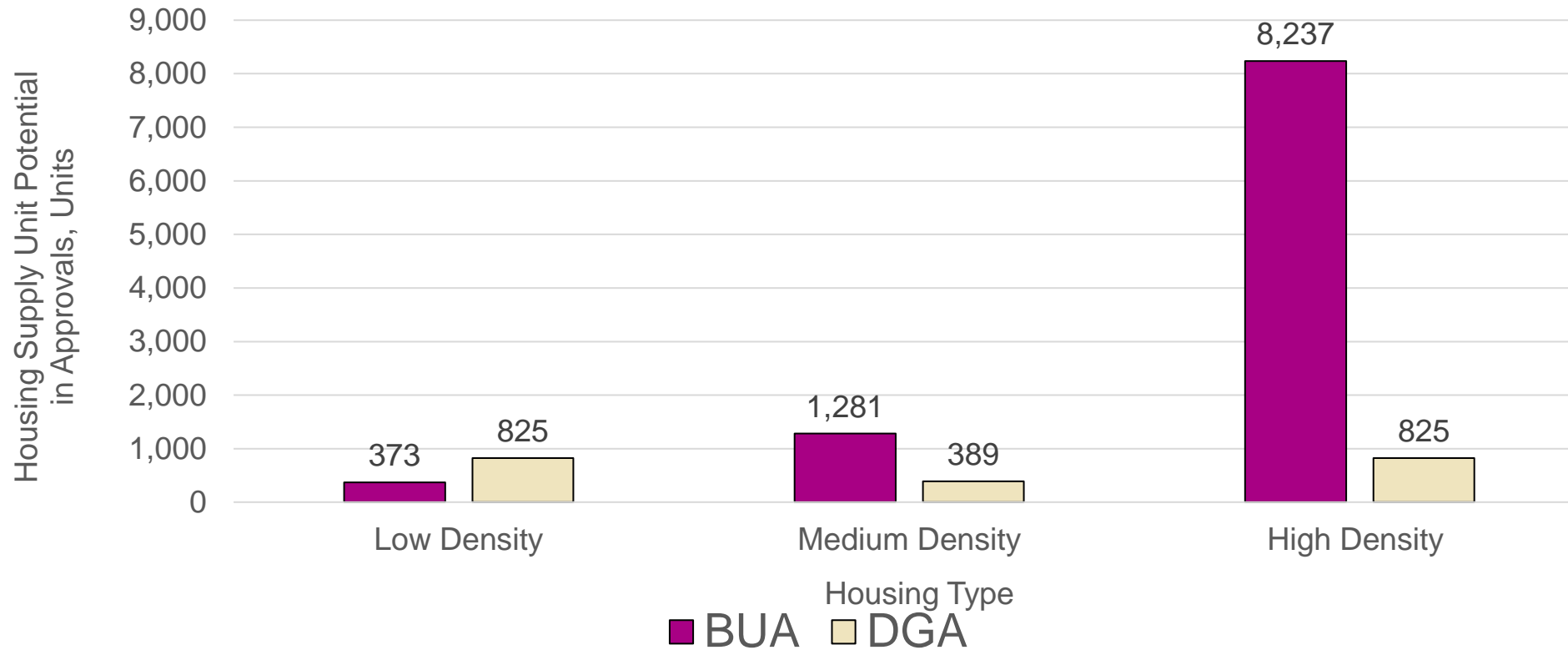
B.U.A.: 9,890 Units*

D.G.A.: 2,040 Units*

Total: 14,140 Units*

B.U.A. = Built-up Area; D.G.A. = Designated Greenfield Area

Notes: Low density includes single detached and semi-detached units; medium density includes row housing; high density includes apartments and stacked townhouses. Figure does not include units that require an Official Plan Amendment to permit residential use which includes approximately 2,430 proposed units that have been identified by the City.
Source: Derived from City of Kingston Land Inventory Report of Pending and Committed Units as of year-end December 2023, provided to Watson & Associates Economists Ltd. Subject to change.

Figure is rounded.

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DGA Housing Units Per Hectare Density Trends

2006 to 2022

Density Examples

Chart: Units Per Net Hectare

- **Apartments/Stacked Towns**
  - 82 (2018-2022)
  - No information available for 2006-2017
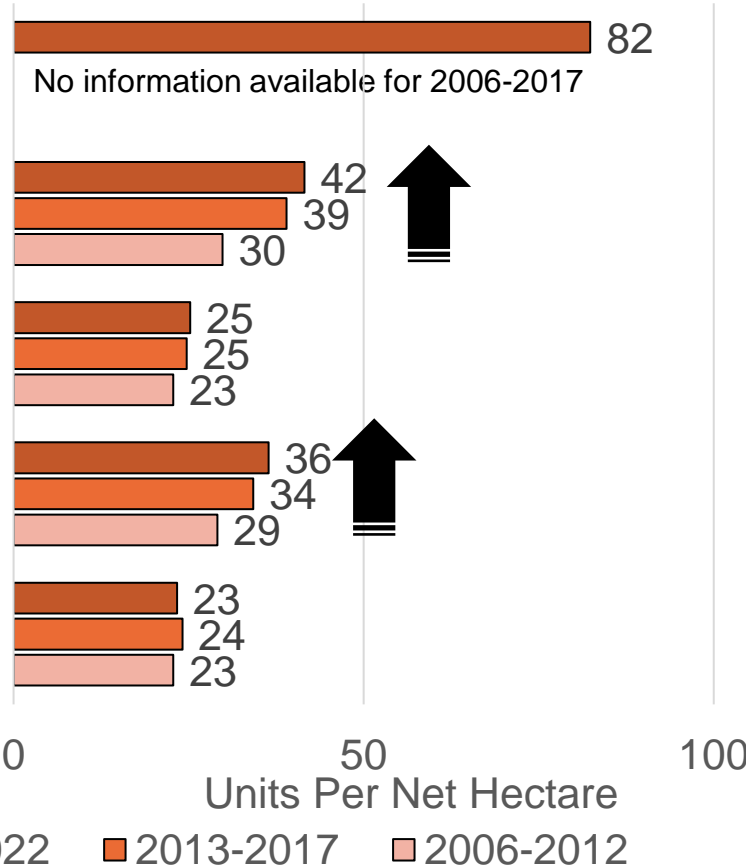
- **Rows**
  - 42 (2018-2022)
  - 39 (2013-2017)
  - 30 (2006-2012)

- **Single Detached/Semi-Detached (Combined)**
  - 25 (2018-2022)
  - 25 (2013-2017)
  - 23 (2006-2012)

- **Semi-Detached**
  - 36 (2018-2022)
  - 34 (2013-2017)
  - 29 (2006-2012)

- **Single Detached**
  - 23 (2018-2022)
  - 24 (2013-2017)
  - 23 (2006-2012)

X-axis: 0 — 50 — 100
Units Per Net Hectare

Legend: ■ 2018-2022 ■ 2013-2017 ■ 2006-2012

Source: Watson & Associates Economists Ltd.

Greenfield Assumptions to 2051:
- Single/Semi-Detached: 27 units per hectare
- Rows: 46 units per hectare
- Apartments: 100 units per hectare

36 units per hectare

Semi-Detached (Low Density) Brookedayle Avenue

45 units per hectare

Row Housing (Medium Density) Tentley Drive

80 units per hectare

Stacked Towns (High Density) Terra Verde Way

127 units per hectare

5-Storey Apartment (High Density) Princess St./Sydenham Rd.

Source: Images are from Google Earth and Realtor.ca.
Density estimates by Watson & Associates Economists Ltd.

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Residential Land Needs to 2051
Summary

- Land needs assessment included a review of all vacant lands with active applications, as well as remaining vacant lands.

- The City has a shortfall of greenfield land to accommodate all housing types, in particular low- and medium-density housing.

- The land needs assessment utilized a gross-up factor to account for parks/trails, local roads and a provision for local serving non-residential uses (e.g., institutional and commercial).

- It is forecast that the City will require at least 340 hectares of residential lands. The actual land area of the expansion may be larger than 340 hectares to allow for flexibility in planning for neighbourhoods and other site factors.

Land Need: 340 hectares

Commercial Review

Commercial Trends in Urban Areas

Transition and Innovation
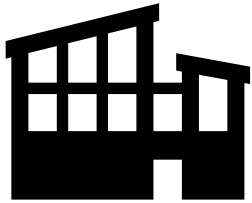
Gradual retail transition towards higher-density formats and mixed-use buildings.

Fluctuations in the use of commercial space due to:
- Public health measures.
- Repositioning anchor tenants.
- Community and temporary uses in shopping centres.

E-retailing:
- Some categories reducing physical space.
- Increased need for distribution and warehousing.
- Need to accommodate delivery traffic.
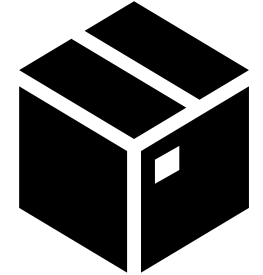
Competition for curb and sidewalk space from a widening user group.

Key Commercial Trends in Kingston

Building Up and Out
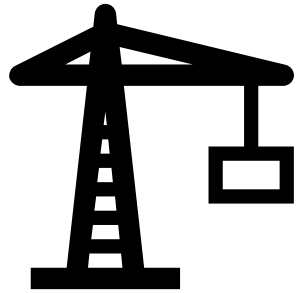
Transition of commercial properties along Princess St. into mixed-use residential buildings with ground-floor retail space.

Conversion and redevelopment opportunities on aging commercial sites

Ongoing separation of functions between Downtown and shopping centres/plazas

Source: urbanMetrics inc.

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Commercial Review – Key Facts

2.3 million sq.ft.

Population growth will drive demand for approximately 2.3 million sq.ft. (213,677 sq.m) of new commercial space by 2051.
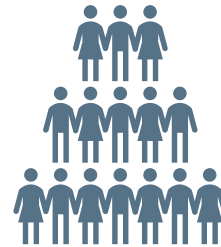
+30%   **+45%**

This represents an approximately 30% increase in commercial space compared to a 45% forecast increase in population growth.

70 hectares

Based on typical building types, the City requires approximately 70 additional hectares of land to accommodate commercial space.

Source: urbanMetrics inc.

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Commercial Review – Key Considerations

- Commercial space will be required:

    - To serve existing greenfield areas.

    - To serve greenfield expansion areas.

    - To serve intensification areas.

    - To provide for City-wide needs.

    - To provide for "heavy" commercial uses (e.g., automobile repair, home improvement, equipment rental, etc.).

    - To provide for land expansive commercial uses (e.g., car dealerships, hotels, motels, public storage, etc.)

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Conclusions

Summary of Land Needs

Overview

Summary of Key Findings

* Commercial land needs represents 10 to 15 hectares.
** Represents a minimum; may be higher based to allow for flexibility in planning for neighbourhoods and other site factors.

Next Steps

Overview

Next Steps

- Presentation of Draft Phase 1 Findings to Council – June 2024.

- Phase 2 – Strategic Directions/Planning Policy Considerations – May/June 2024.

- Draft and Final Reporting – June to August 2024.

- Final Presentation to Council – Fall 2024.

Questions?
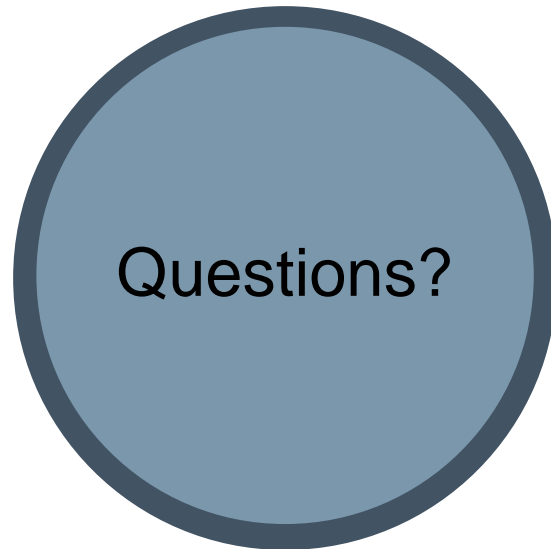
Supplementary Residential and Employment Area Land Needs Analysis

Residential Land Needs to 2051

Land Needs	Calculation	Low Density	Medium Density	High Density	Total Households
Greenfield Area Forecast, 2024-2051	A	4,376	3,530	1,651	9,557
Housing Mix (%)	B	*46%*	*37%*	*17%*	*100%*
Housing Unit Potential in Approvals (Approved/Proposed)[1]	C	825	389	825	2,039
Housing Unit (Shortfall)/Surplus	D = C - A	(3,551)	(3,141)	(826)	-
Units Per Ha (UPH), Net ha Assumption	E	27	46	100	-
Net Residential Land Required, ha	F = UPH / D	(132)	(68)	(8)	(208)
Net to Gross Ratio Factor for Other Community Area Lands (local roads, parks, trails, stormwater ponds and non-residential uses) - Additional 50%	G = F x 2	-	-	-	(416)
Vacant Land Supply with no Approved or Proposed Applications, ha (deduct from deficit)[2]	H	-	-	-	73
Total Land Needs, gross ha (rounded)	I = G - H				(340)

[1]Excludes applications on lands that require an Official Plan Amendment.

[2]Lands identified by the City that are vacant, do not have active applications and are within the DGA as identified by Watson.

Source: Watson & Associates Economists Ltd.

Land Needed: 340 ha

ha = Hectares

Kingston's Employment Area Land Needs
Based on Current Designated Employment Lands Supply

- Kingston has a shortfall of designated employment land to accommodate long-term growth to 2051 – a deficit of a minimum of 320 gross ha.

Employment Area Land Demand	
Total Employment Growth within Employment Area Lands to 2051	9,700
Intensification %	10%
Total Employment Growth Adjusted for Intensification	8,700
Net Density (jobs per net ha)	20
Net Land Requirements (net ha)	440
Employment Area Land Supply	
Employment Land Supply (net ha) - with 15% Vacancy Adjustment	200
Employment Area Land Needs	
Land Area Surplus/Deficit (net ha)	(240)
Gross Land Area Surplus/Deficit - 75% Net to Gross Ratio (gross ha)	(320)

Source: Watson & Associates Economists Ltd., 2024.

ha = Hectares

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What We Heard – Urban Land Needs Public Information Centre #2 - April 17, 2024, INVISTA Centre

Thank you for your interest in the growth analysis review being undertaken by the City of Kingston. As part of this project, a public open house was held on April 17, 2024 at the INVISTA Centre. The following is a summary of the comments received at the session, along with comments received shortly thereafter.

- **Comment:** Please clarify if the land needs assessment considers lands beyond the urban boundary.
  Response: As per draft land needs assessment, the 660 hectares of additional land – 340 for community lands (residential and commercial) and 320 for employment lands, are what is required beyond the existing urban area.

- **Comment:** Is the City only moving westward with no eastward expansion?
  Response: At this time, only the quantity of required additional lands to be included in the urban boundary has been provided. Identification of the location of future urban boundary expansion lands will be reviewed by City as part of the Official Plan project.

- **Comment**: What are considerations regarding the effect of climate change and artificial intelligence (AI) on planning in the next 25 years?
  Response: Climate change will be better examined as part of the Phase 2 work program and policy recommendations. We need to find the right balance between growing up and out. It is anticipated that artificial intelligence will continue to be a social disruptor, similar to industrial automation and work from home / hybrid working. The potential impacts on productivity and demand are being studied, and there will be both disruption and an uplift on productivity. Human labour is a key element to how we grow and function; AI will enhance this and will drive productivity. Changes will be monitored as we figure out how to accommodate new industry. In terms of impact on this growth review, this is a long-term projection, and periodic updates will be made.

- **Comment:** Why is low density development being emphasized instead of high intensity?
  Response: Low density residential growth is a part of the future housing requirements. We need to accommodate a lot of growth – both overall higher rates of development and also more high-density growth. A proportionally lower amount of low-density housing is anticipated, but there will still be a significant amount of low-density growth, and not all of it can be accommodated in the built-up area.

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- **Comment:** Why are both net and gross hectares being used for land needs projections?
  Response: Net land area calculations apply recent development densities and include only the parcel of land that accommodates the actual buildings. Gross land area calculations use net land areas as a basis and then also include land for road and stormwater infrastructure, easements, and, in a community area, parks, schools, and other non-residential uses like retail. In this way, both net and gross estimates are needed to determine future land needs. In addition, natural heritage features and parcel boundaries will also be considered but aren't accounted for yet in this land needs summary as they will ultimately be specific to the areas being reviewed.

- **Comment:** Regarding Kingston's employment lands, is a 20- to 30-year supply of serviced land being accounted for?
  Response: The 320 hectares projected for employment lands takes the City to 2051, but it doesn't incorporate a further surplus beyond that period. The available land will be reviewed at regular intervals as we approach 2051 to ensure that the land supply continues to extend to a 20-30 year horizon. If there's a change in the trajectory of growth, this can be revisited.

- **Comment:** The federal land around Collins Bay Penitentiary is our largest portion of undeveloped land within the urban area, with servicing on all four sides. Development should be considered here instead of outside the urban boundary. In addition, the federal and provincial governments also own many acres of developed land within the urban boundary. Can they be used?
  Response: Federal and provincial lands could be made surplus, but this is not a City decision. The land needs assessment has considered lands within the urban boundary, including the potential for intensification. While federal and provincial sites have potential for future development, the land is not divested easily, and there are competing interests for their use. There may be federal or provincial housing initiatives whereby some or all of the land becomes available to contribute lands for growth, but the lands are not available for residential uses presently..

- **Comment:** Employment job density related to industrial land depends on the use: there are far fewer jobs in a fully automated warehouse or at a trucking facility. Also, a lot of uses could operate outside the serviced area (e.g. McAdoo's Lane), with very low amounts of water consumption. Is this considered?
  Response: Employment densities by type have been considered in the land needs assessment. Provincial direction is vague regarding rural employment areas; the focus is on existing rural businesses and their expansion, not to develop new areas. We need to accommodate a range of uses, some of which will be appropriate for a

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rural area, but there are also challenges such as fire protection for which a significant source of water is required even for industrial developments in rural areas with few employees.

- **Comment:** While there is pressure to expand the urban area, it could be useful to look at all the assets to find solutions within the urban boundary instead of pushing outward which provides servicing and transit challenges and ultimately comes at cost to taxpayer.
  Response: The phasing of land over time is to be determined, and a pragmatic approach is required to accommodate growth over the next 25 years. A distinct urban structure has been identified with priority areas. Significant levels of growth are projected, and intensification may not serve to accommodate all forms of anticipated development, which includes ground-oriented residential as well as medium and high density forms of residential

- **Comment:** Look to brownfields and lands like the Alcan site and consider incentives to get them developed.
  Response: The Alcan lands are currently not included in the City's Brownfield Community Improvement Plan (CIP) project area; however, if a future sensitive use, (e.g. residential development), were proposed in this area, they could apply for an amendment to the Brownfield CIP for inclusion as a project area to be eligible for financial incentives.

- **Comment:** Protect the employment that we have here – employers like Corrections, CFB Kingston, government institutions - that employ many people. Also, look at the zoning and the Official Plan and how they affect the growth in the city. While there's been more attention recently, it's still restrictive.
  Response: The comment regarding the current employers is acknowledged. The new Kingston Zoning By-law has been a step forward in terms of making regulations clear and consistent. The Official Plan will be reviewed through the upcoming Official Plan project.

- **Comment:** Ensure an indigenous perspective is considered. Pay particular attention to climate change and preservation of natural heritage and wildlife corridors.
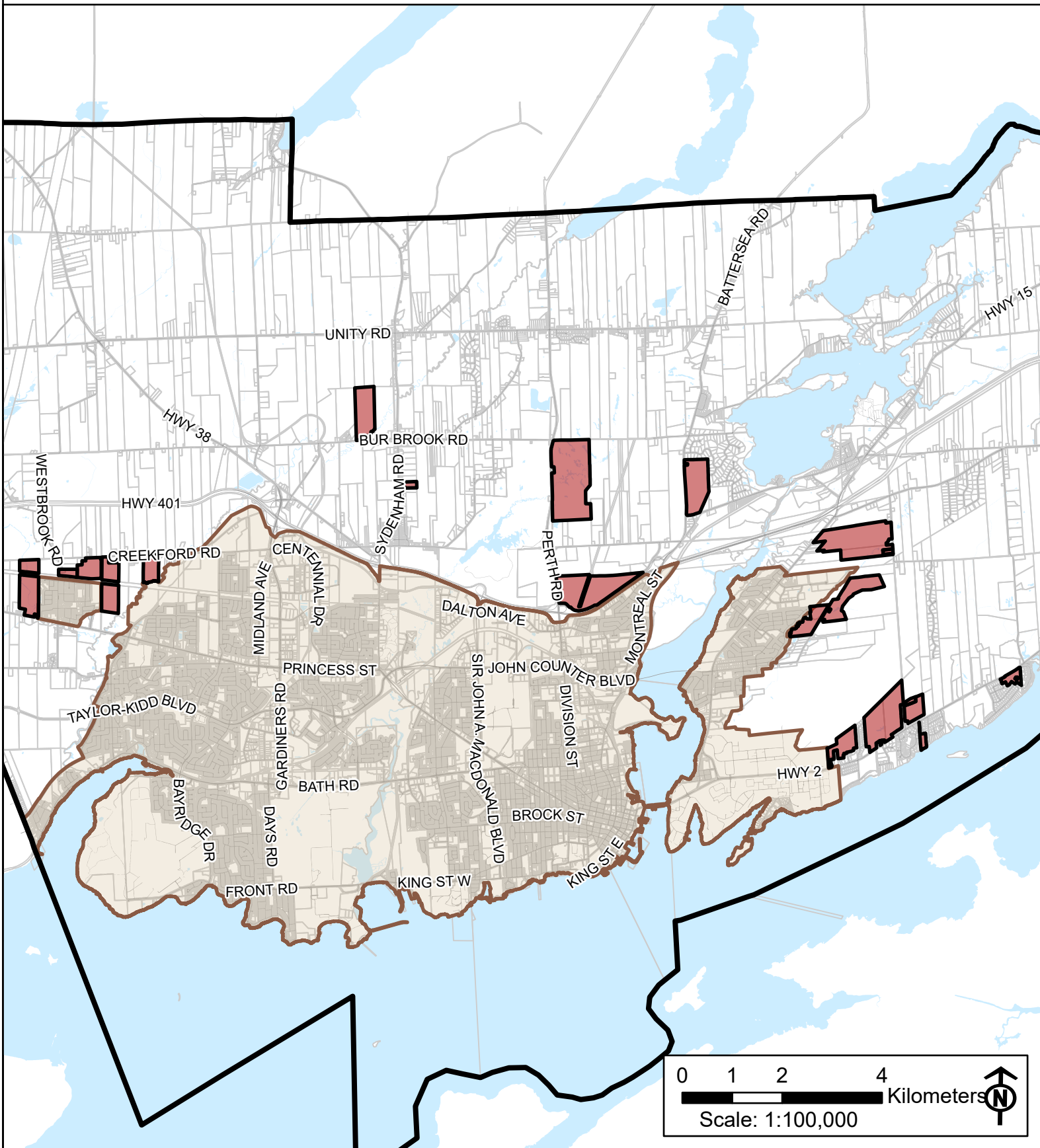 **Response:** Indigenous consultation will be undertaken as part of the Official Plan project. Natural heritage features will continue to be protected as per provincial policies and the City's Official Plan. They are taken into account as separate and above land areas that are considered for inclusion into an expanded urban boundary.

Urban Boundary Expansion Requests

Key Map

KINGSTON
Planning Services

Legend:
- Urban Boundary Expansion Requests
- Existing Urban Boundary
- Property Boundaries
- City of Kingston Boundary
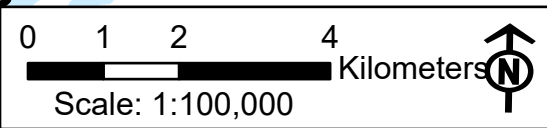
BATTERSEA RD
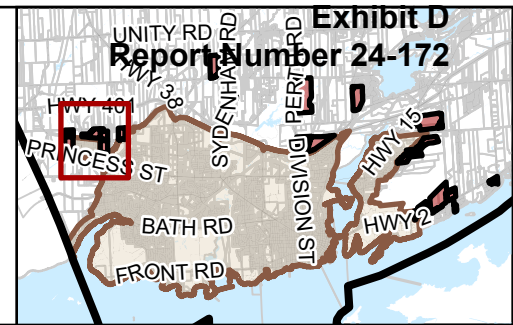
HWY 15

UNITY RD

HWY 38

BUR BROOK RD

WESTBROOK RD

HWY 401

CREEKFORD RD

CENTENNIAL DR

SYDENHAM RD

PERTH RD

MONTREAL ST

TAYLOR-KIDD BLVD

MIDLAND AVE

GARDINERS RD

PRINCESS ST

DALTON AVE

SIR JOHN A. MACDONALD BLVD

JOHN COUNTER BLVD

DIVISION ST

HWY 2

BATH RD

BAYRIDGE DR

DAYS RD

BROCK ST

FRONT RD

KING ST W

KING ST E

0 1 2 4 Kilometers

Scale: 1:100,000

N

Urban Boundary
Expansion Requests

Map 1

Exhibit D
Report Number 24-172

Kingston
Planning
Services

Existing Urban Boundary
Proposed Uses
Residential
Residential and Open Space

HWY 401
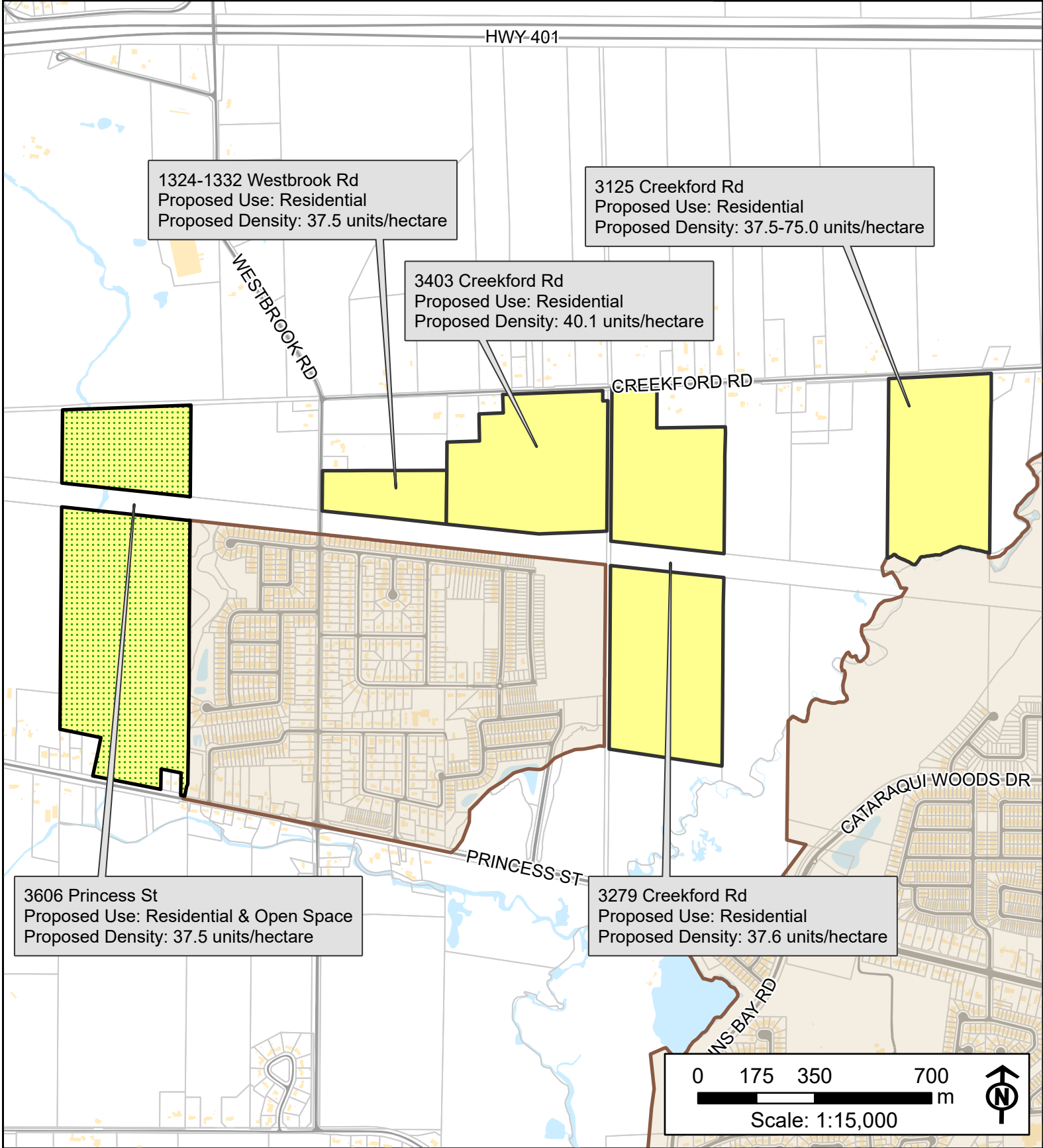
1324-1332 Westbrook Rd
Proposed Use: Residential
Proposed Density: 37.5 units/hectare

3125 Creekford Rd
Proposed Use: Residential
Proposed Density: 37.5-75.0 units/hectare

3403 Creekford Rd
Proposed Use: Residential
Proposed Density: 40.1 units/hectare

WESTBROOK RD

CREEKFORD RD

CATARAQUI WOODS DR

3606 Princess St
Proposed Use: Residential & Open Space
Proposed Density: 37.5 units/hectare

PRINCESS ST

3279 Creekford Rd
Proposed Use: Residential
Proposed Density: 37.6 units/hectare

COLLINS BAY RD

0   175   350   700
                              m
Scale: 1:15,000

N

Urban Boundary Expansion Requests
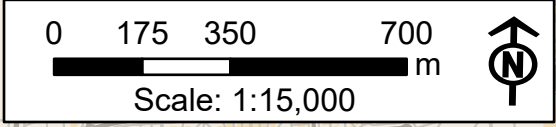
Map 2

Kingston Planning Services

Exhibit D
Report Number 24-172

Existing Urban Boundary

Proposed Uses
- Business Park Industrial
- Residential and Commercial
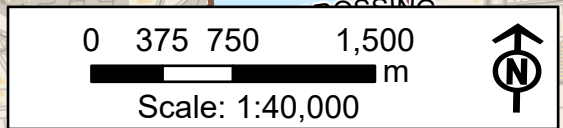- Residential and Open Space
- Rural Industrial
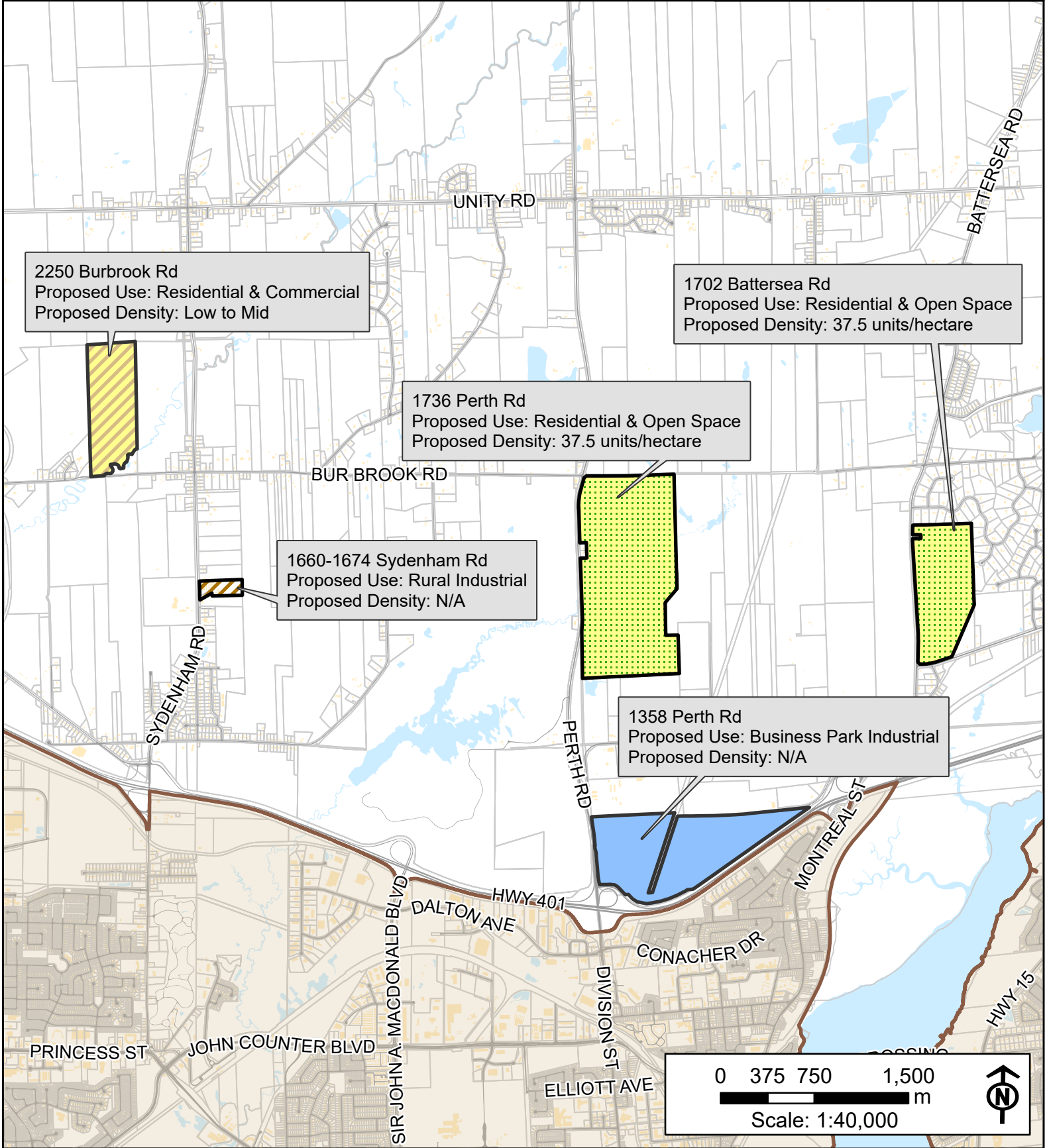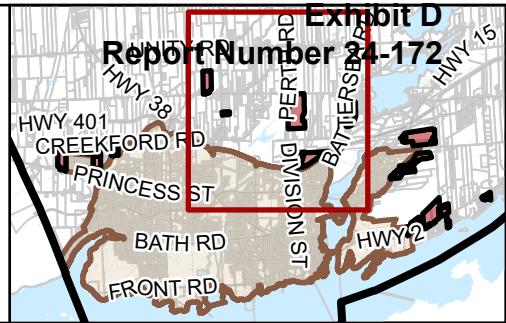
2250 Burbrook Rd
Proposed Use: Residential & Commercial
Proposed Density: Low to Mid

1702 Battersea Rd
Proposed Use: Residential & Open Space
Proposed Density: 37.5 units/hectare

1736 Perth Rd
Proposed Use: Residential & Open Space
Proposed Density: 37.5 units/hectare

1660-1674 Sydenham Rd
Proposed Use: Rural Industrial
Proposed Density: N/A

1358 Perth Rd
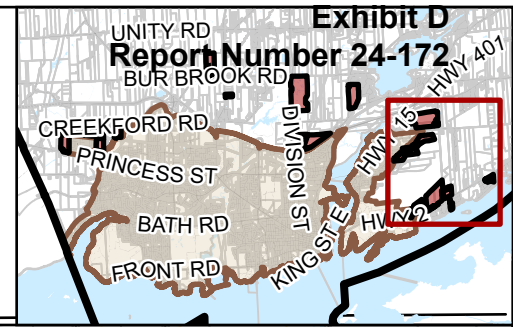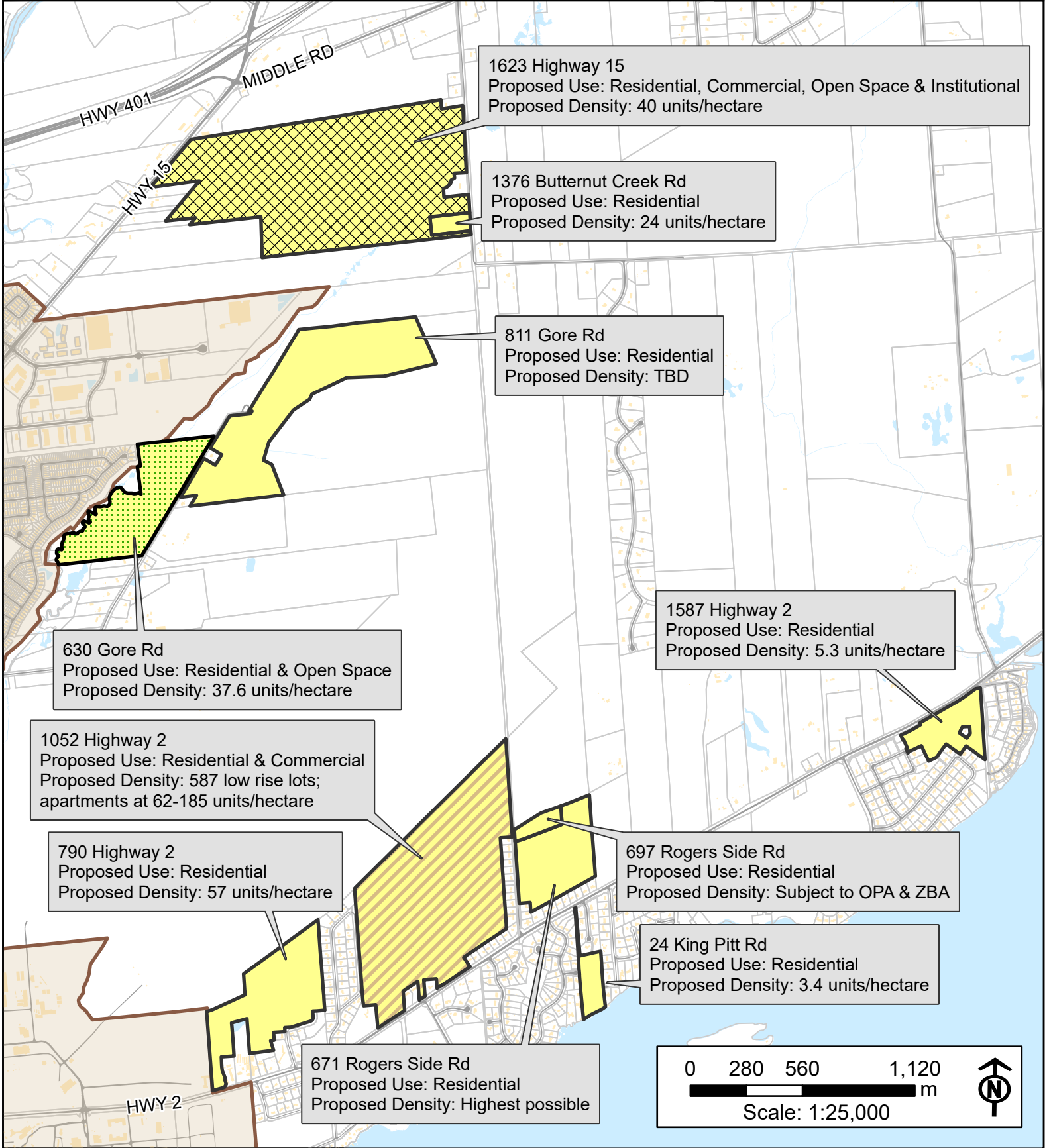Proposed Use: Business Park Industrial
Proposed Density: N/A

Scale: 1:40,000

0 375 750 1,500 m

Urban Boundary Expansion Requests

Map 3

Exhibit D
Report Number 24-172

Kingston Planning Services

Legend:
- Existing Urban Boundary

Proposed Uses
- Residential
- Residential and Commercial
- Residential and Commercial, Open Space and School
- Residential and Open Space

1623 Highway 15
Proposed Use: Residential, Commercial, Open Space & Institutional
Proposed Density: 40 units/hectare

1376 Butternut Creek Rd
Proposed Use: Residential
Proposed Density: 24 units/hectare

811 Gore Rd
Proposed Use: Residential
Proposed Density: TBD

1587 Highway 2
Proposed Use: Residential
Proposed Density: 5.3 units/hectare

630 Gore Rd
Proposed Use: Residential & Open Space
Proposed Density: 37.6 units/hectare

1052 Highway 2
Proposed Use: Residential & Commercial
Proposed Density: 587 low rise lots; apartments at 62-185 units/hectare

790 Highway 2
Proposed Use: Residential
Proposed Density: 57 units/hectare

697 Rogers Side Rd
Proposed Use: Residential
Proposed Density: Subject to OPA & ZBA

24 King Pitt Rd
Proposed Use: Residential
Proposed Density: 3.4 units/hectare

671 Rogers Side Rd
Proposed Use: Residential
Proposed Density: Highest possible

Scale: 1:25,000

0   280   560   1,120 m