

Municipal Benchmarking Study

LONDON



OVERALL RANKING

London places fourth in the rankings across the three categories of study. London has the shortest average approval period in Ontario. The average approval period was 10 months.

	Rank	Planning Features (1=best)	Approvals Timelines (1=best)	Government Charges (1=lowest)	Score (Avg. Rank)
1	Edmonton	1	6	6	4.5
2	Charlottetown	19	1	1	6.4
3	Calgary	6	5	10	6.8
4	London	3	8	9	6.8
5	Regina	13	3	7	7.2
6	Winnipeg	15	4	5	7.6
7	Saskatoon	12	2	11	7.7
8	Halifax	5	16	4	9.1
9	St. John's	20	7	3	9.7
10	Ottawa	10	9	12	10.2
11	Moncton	21	10	2	10.9
12	Vancouver	8	10	17	11.5
13	Surrey	9	11	15	11.6
14	Oakville	4	13	18	11.8
15	Hamilton	7	18	13	13.2
16	Brampton	11	12	19	13.8
17	Burnaby	16	17	8	14.0
18	Toronto	2	20	21	14.9
19	Pickering	17	14	16	15.5
20	BWG	18	15	14	15.6
21	Markham	14	19	20	17.8

The study assessed municipalities on features, approvals and government charges, drawing out best practices. All cities can learn from each others' experiences, continually improving policies and operations to increase housing supply and affordability.



Population
change in the last decade



House Prices
change from 2006-2021

+149%



National Average

+188%



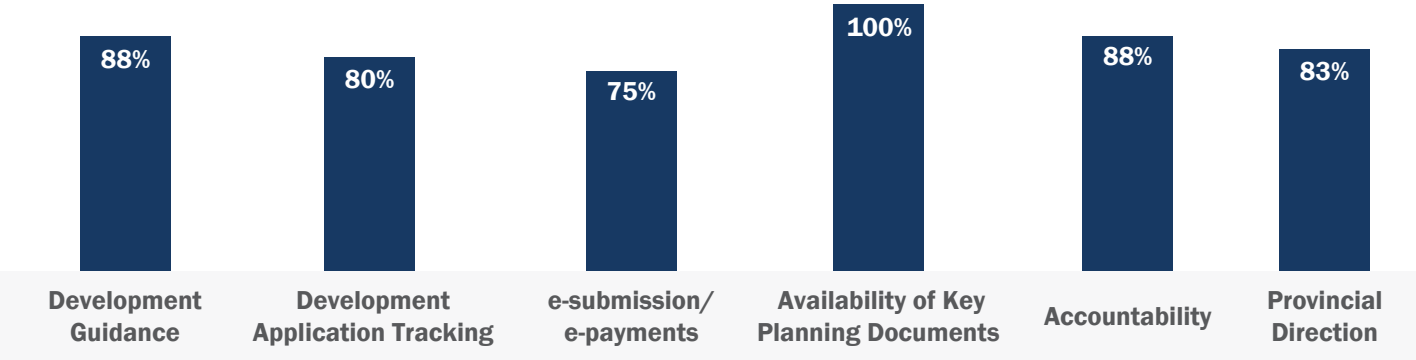
London

RANKINGS

Each participating municipality has been assigned a score that combines their performance on planning features, approvals timelines and government charges. This ranking provides a snapshot to show which municipal governments are leading in which of the three areas at the moment, as well as an overall ranking. This ranking does not assess anything beyond what was analyzed and is not reflective necessarily of the engagement and cooperation between industry and local governments. Whether at the top or the bottom of the list, each city can learn from best practices of others and continue to improve.

Planning Features

Each municipality is scored on whether they have features that can support an efficient planning approvals system, and increase transparency for developers, the public, or other interested parties. They were scored based on six overall themes.



Approvals Timelines

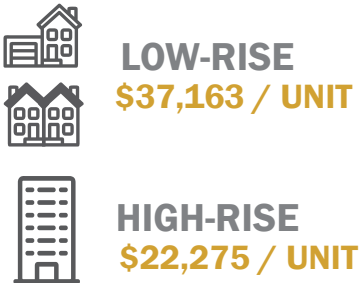


We estimate typical approval timelines for development applications – from complete application to planning approval. The nature of the ‘planning approval’ can take many forms.

Delays in approvals impact housing affordability. Months of delays add tens of thousands of dollars to the cost of a home.

Municipal Charges

The report provides a high-level overview of government charges levied by municipal governments and attempts to quantify the costs these charges and fees generate for developers, home builders, and ultimately, home buyers. To model and estimate the charges and fees imposed by the municipalities two development scenarios were analyzed.



SUCCESSES AND CHALLENGES

To achieve a fourth-place ranking, London has several elements working well, and a few others requiring improvement.

WORKING WELL



Highly Ranked Planning Features

London ranked 3rd in the planning features category, behind only Edmonton and Toronto.



Short Average Approval Times

London has the shortest average approval period in Ontario. The average approval period was 10 months.



Strong Population Growth

The City of London is one of five study municipalities to see average annual population growth rates increase in each of the last three Census periods (+0.77% from 2006-2011, +0.95% from 2011-2016 and +1.93% from 2016-2021).



Planning Features

London placed third in our ranking of planning features with a score of 86%, and scored over 80% in five theme areas, one of just two municipalities to do so (Halifax being the other).

NEEDS IMPROVEMENT



Application Status Updates

Although the City provides planning application details such as type of application, development statistics, staff member assigned, but the status of applications is not updated.



More Details Needed on Studies

London's development application forms show studies that may be required but do not appear to provide a definitive list of studies that are required - more clarity could be provided regarding required studies versus potential studies. The City's application forms do not include any reference to specific terms of reference, and in some cases, only refer to some studies as being "potential" information needs.

About the

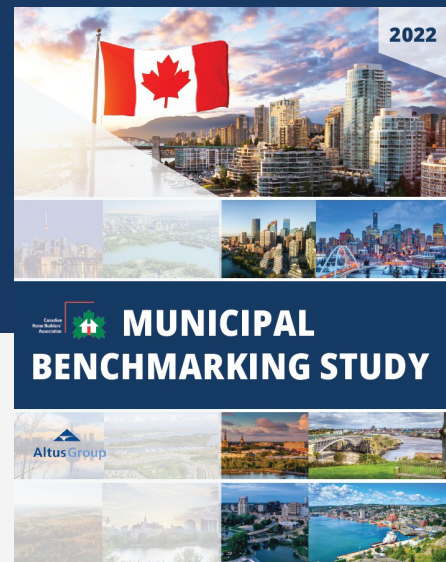
CHBA Municipal Benchmarking Study

www.chba.ca/municipal-benchmarking

The Municipal Benchmarking Study was commissioned by the Canadian Home Builders' Association (CHBA) and delivered by Altus Group. The study compares 23 Canadian municipalities, examining how their processes, approvals timelines, and charges and fees contribute to housing affordability and supply issues in major housing markets across Canada. The report reads as a report card to show which municipal governments are leading in which of the three pillars of the study—planning system features, approval timelines and government charges.

“This report is intended to support the important conversation with all orders of government on major challenges to housing affordability and the efficient delivery of much needed new housing supply. We’ve undertaken this work to showcase where municipal governments have the policies and systems in place to support supply and affordability, and provide a path forward for improvements where things aren’t working as well.”

— Kevin Lee, CEO, CHBA



Notes

The research for the study was completed prior to March 16, and therefore prior to the COVID related public health measures.

The rankings only reflect what was studied, and the results are based on readily available or public information. Planning systems vary between provinces, and implementation of provincial planning systems can vary between municipalities. The results examine things that are comparable across the country but may not reflect the full processes, approvals, or charges in this community.

The results are independent of the quality of the relationship between the municipal government and the residential construction industry.

LOCAL INSIGHTS

This Local Insights page allows constituent local/provincial associations of CHBA to bring out more local context, including any successes, priorities and challenges from the report or since the original data was collected.



LONDON HOME BUILDERS'
ASSOCIATION

Economic/Market Conditions

London has been growing at record pace over the last five years, with the population rising by 10% between 2016-2021 led by an influx of residents leaving the GTA for more affordable homes in London. Recent census data shows the London CMA is the fastest growing region in Ontario and the fourth-fastest growing nation-wide only behind Kelowna, Chilliwack, and Kamloops.



While average home prices have risen in London, the city and region are still considered to be very affordable in comparison to other urban-centers in Canada making it an attractive place to call home. While there has been a slowdown in the market due to interest rate hikes, there is significant growth on the horizon for London and region. A recent Watson and Associates report prepared for the City of London looked at a 30-year growth horizon for the City. It found that London should average 1.3% growth annually over the next three decades with a rate of growth of 2% annually for the upcoming five years.

Current Development Issues

The City of London is currently undertaking the process of preparing a new comprehensive zoning by-law, the last one being established in 1993. This will look to align with the recently adopted official plan, The London Plan. The aim and hope of the new zoning by-law will be to simplify and make zoning more nimble in the City to allow for more streamlined processes and less delays in the development process.

In addition to the new zoning by-law the City of London has begun investigating whether or not an expansion of the Urban Growth Boundary is necessary with the significant growth recently experienced and the expected growth to come for the City.



The City of London has experienced tremendous growth recently which is a significant shift from fairly slow growth for many years. Growth and evolution is looking to become the new normal for London though with hundreds of thousands of new residents expected to call London home over the next 30 years. Political leadership in London aims to have a plan to meet and exceed the target of 47,000 new homes set by the Province over the next ten years and the London Home Builders' Association will be working hard with the City to help reach it.



— Jared Zaifman, CEO
London Home Builders' Association