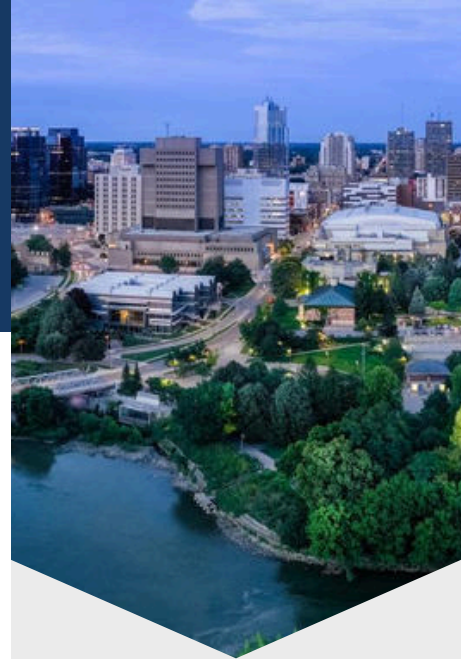


Municipal Benchmarking Study

LONDON



OVERALL RANKING

Coming in at the #3 spot in the rankings, London was the only Ontario municipality studied that was in the top half of the results.

Rank	Municipality	Planning features (1=Best)	Approvals timelines (1=Best)	Government charges Low-Rise (1=Lowest)	Government charges High-Rise (1=Lowest)
1	Edmonton	6	4	8	9
2	Halifax	1	13	6	2
3	London	5	7	9	15
4	Regina	14	3	5	8
5	Calgary	7	6	13	10
6	Moncton	18	2	1	1
7	Charlottetown	22	5	2	3
8	Kelowna	15	8	11	5
9	Kamloops	21	10	7	6
10	Surrey	11	9	14	13
11	Saskatoon	16	1	18	7
12	St. John's	20	12	3	4
13	Ottawa	8	17	10	16
14	Winnipeg	23	14	4	11
15	Oakville	4	15	21	21
16	Burnaby	17	18	16	14
17	Vancouver	12	11	17	12
18	Brampton	9	16	20	20
19	Hamilton	10	23	12	17
20	Pickering	13	19	19	18
21	Toronto	3	22	23	23
22	Markham	2	20	22	22
23	Bradford West Gwillimbury	19	21	15	19

This study compares 23 Canadian municipalities, examining how their processes, approvals timelines, and government charges and fees contribute to housing affordability and supply issues in major housing markets across Canada.

Whether at the top or the bottom of the list, each city can learn from best practices of others and continue to improve.



RANKINGS

The ranking reads as a report card to show which municipal governments are currently leading in which of the three pillars of the study (planning features, approvals timelines, and government charges), and provides 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.

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. This edition of the study makes some modifications to the review of features from the previous study. After an internal review and feedback of the scoring process from the previous study, the number of themes that include features within them has been reduced from five (5) to three (3). The total number of features being reviewed has been reduced from 16 to 13.



OVERALL SCORE FOR PLANNING FEATURES

Theme	Feature	Score
APPLICATION PREPARATION	(1) Application Support Materials (2) Zoning By-law in Interactive Map (3) Zoning By-law in Machine Readable Format (4) Staff Contact Information	75%
APPLICATION SUBMISSION	(1) Planning Application Submission Options (2) Planning Application Payment Options (3) Building Permit Submission Options (4) Building Permit Payment Options	88%
APPLICATION TRACKING	(1) Active Application Information Website (2) Status Indicator for Applications (3) Historical Planning Data Availability (4) Interactive Map of Planning Applications (5) Availability of Application Submission Documents	90%

MUNICIPAL CHARGES

The report provides a high-level overview of a blended rate 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.

LOW-RISE



\$59,400 / UNIT

HIGH-RISE



\$58,100 / UNIT



4.6
MONTHS

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 can add tens of thousands of dollars to the cost of a home.

INDIRECT COSTS DUE TO DELAYS

There are indirect costs that accumulate on a development as its application goes through the application process including: property taxes, financing costs, and cost escalation of construction materials and labour due to inflation.

LOW-RISE



\$3,799 / UNIT / MONTH

HIGH-RISE



\$2,317 / UNIT / MONTH

SUCCESSSES AND CHALLENGES

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

WORKING WELL



UNDERTAKING THE "RETHINK ZONING" PROJECT

This is expected to deliver a new comprehensive zoning by-law that will implement The London Plan and replace the current Zoning By-law.



OTHER ZONING REFORMS

Introduced regulation and policy changes to permit 4 units per property as-of-right city-wide.



TIMELINE IMPROVEMENTS

In the 2022 study, it took an average of 10 months for timeline approval. The 2024 study saw that improve to an average of 4.6 months.

NEEDS IMPROVEMENT



ROOM FOR IMPROVEMENT IN MUNICIPAL FEES

While London ranks at #3 for overall score, it is in 9th place for municipal fees (per unit) of development.

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 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.

The 2024 edition of the study provides further detail on how a municipality's performance on approval timelines, municipal fees, and planning features influence housing outcomes, including affordability and availability of housing for young families, and the total cost implications of these municipal processes and policies. There was also greater direct participation from most municipalities to help support the research.

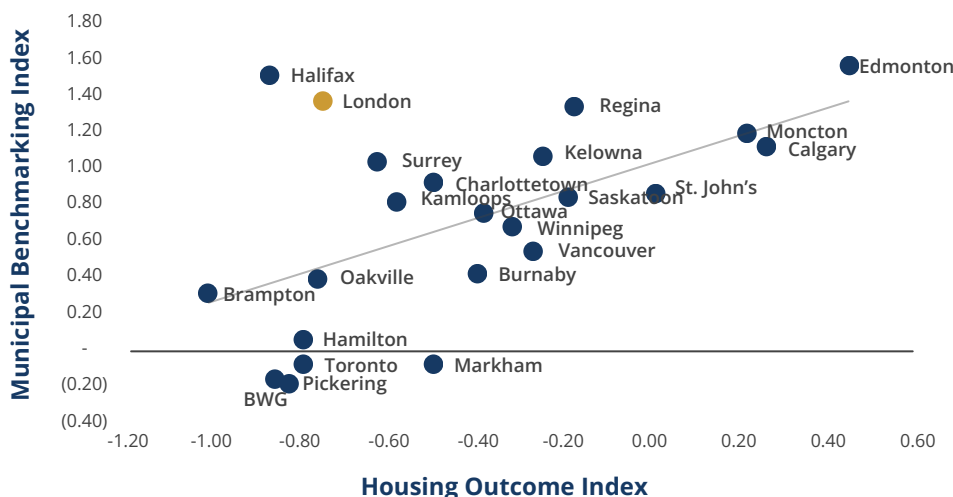
This edition also includes two additional areas of scoring: indirect costs of the residential development application process, and a housing outcome measure. The chart below shows that in general, **municipalities that score low on the municipal benchmarking index have worse housing outcomes**. Higher Municipal Benchmark Index scores are positively related to a blended measure of improved housing affordability, lower suppressed household formation rates, a balanced vacancy rate, and net positive municipal migration. Poor Benchmark scores create a high likelihood that a municipality experiences relatively poor housing outcomes—the opposite of the four blended measures. Outlier cities like Halifax and London illustrate how housing policy changes for new supply need time before measurable housing outcomes improve.

"This study is intended to facilitate conversations among all levels of government, especially municipal governments, on how land-use planning-related factors can be improved to encourage more housing supply, and help improve affordability for Canadians across the country. Municipalities often face similar challenges, and learning from each other can help improve housing outcomes for all."



**-Kevin Lee
CEO, CHBA**

Housing Outcomes Index VS. Municipal Benchmarking Index, 2024



NOTES

The research started with data from June 2022 onwards (to avoid overlap with the previous study). The study does not include any potential impacts on housing as a result of the changes a municipality may have made as a result of receiving money from the federal Housing Accelerator Fund.

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