

**Spillover gentrification? Mid-sized cities within commuter sheds
of global cities**

by

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Author's declaration

This thesis consists of material all of which I authored or co-authored: see Statement of Contributions included in the thesis. This is a true copy of the thesis, including any required final revisions, as accepted by my examiners.

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Statement of contributions

This thesis follows the manuscript option for Master's students in the School of Planning at the University of Waterloo. It comprises two separate manuscripts submitted to peer-reviewed journals. One manuscript has been submitted and the other has been accepted and published (April 2021). The manuscripts appear verbatim in the thesis, only deviating from their submitted and published versions in formatting.

I (Justin van der Merwe) am the primary author of the first manuscript as presented in the thesis, titled: "Class advancement or displacement? Spillover gentrification in the middle class migration from Toronto to Hamilton". This manuscript was submitted to *Urban Studies* in August 2021. The original research idea stemmed from a project on gentrification in Hamilton led by Dr Brian Doucet and which he presented to me as a research project. Dr Doucet and I co-developed the research method and sampling technique; I did all the data collection, thematic coding and analytical development independently. The results were written up and embedded in the existing literature based on supervisor guidance. I wrote approximately 75% of the manuscript's content with Dr Doucet writing the remaining 25%.

I am also the primary author of the second manuscript as presented in the thesis, titled: "Housing challenges, mid-sized cities and the COVID-19 pandemic: Critical reflections from Waterloo Region". This manuscript was loosely based on a policy report submitted to the Region of Waterloo on the impact of COVID-19 on housing¹. I designed the research method for the manuscript based on independent research and supervisor guidance. I conducted all data collection and analyzed the data independently. Once the policy report was submitted, Dr. Doucet and I then adapted the report into the manuscript as it is presented: we both contributed

¹ Doucet, B., and Van der Merwe, J. (2020). COVID-19 and housing implications in the Region of Waterloo: Amplified challenges and proactive planning. https://uwaterloo.ca/environment/sites/ca.environment/files/uploads/files/densityhousing_3_housing_douc_etvandermerve.pdf

to framing the work within the existing literature, and to addressing reviewer comments after the article had been accepted. The article was submitted to *Canadian Planning and Policy Journal* in February 2021, accepted with revisions in April 2021, and re-submitted and published in the same month. As it is presented in this thesis, I contributed 60% of the written content and Dr. Doucet contributed the remaining 40%.

Throughout the writing of both manuscripts, Dr. Doucet provided guidance and support in the conceptualization of research questions and in the identification of analytical approaches.

Abstract

Commuter sheds have long comprised several mid-sized cities surrounding a large metropolis. The smaller cities typically feed into the economic and commuter orbit of the larger city. These 'bedroom communities' of the bigger city have housing markets that need to accommodate long-term in-migration, which is something for which they are sometimes ill-prepared. As a result, sustained and sudden increases in migration to these smaller communities can cause distortions in their housing markets, not least for affordable housing. This dynamic displaces those who are struggling, forcing them further down the urban hierarchy.

Analyzing the wider region around Toronto, and the role of two prominent mid-sized cities within this system (Hamilton and the Region of Waterloo), this study investigates how gentrification spreads between large and mid-sized cities within a regional commuter shed, and whether the COVID-19 pandemic accelerated a type of tiered and cascading gentrification throughout city regions. The first case examines how gentrification spills over from Toronto into Hamilton's Lower City neighbourhoods, resulting in the (re)production of neighbourhoods based on a Torontonians middle class identity. The second case examines the established pattern of migration from the Greater Toronto Area into Waterloo Region, and the extent to which the COVID-19 pandemic accelerated this flow while amplifying affordable housing challenges.

Considered together, the empirical chapters suggest that planners need to pay particular attention to the systemic pressures accruing between various 'nodes' within the urban hierarchy of commuter sheds, as spillover gentrification exerts a discernable pressure down the urban system of these commuter sheds. This thesis therefore makes a call for a wider systemic understanding of the scales of gentrifying capital. Planners in the Greater Toronto and Hamilton Area, as well as in commuter sheds more generally, should focus on the systemic downward pressure caused by the ebb-and-flow of capital throughout their regions, as it valorizes and devalorizes neighbourhoods and suburbs around global cities. To properly 'unscramble' spillover gentrification around global cities, we need a refocusing of planning debates, and

directing of future research to the neighbourhood and suburb scale instead of a metropolitan one.

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List of abbreviations

ABTC – A Better Tent City

CA – Census Agglomeration

CMA – Census Metropolitan Area

CSD – Census Sub-division

GTA – Greater Toronto Area

GTHA – Greater Toronto and Hamilton Area

OECD – Organization for Economic Co-operation and Development

REIT – Real Estate Investment Trust

Chapter 1: Introduction

Background and introduction

Homeownership is a particularly coveted prize for most middle class families. Yet the housing landscape in big cities has changed to such an extent that the chances of homeownership are increasingly unrealistic for most middle class families (Aalbers, 2009; Jones and Chanoff, 2012; Liukku and Mandias, 2016; Harrap, 2018). This is especially the case in global cities such as New York and London where homeownership remains particularly elusive. The net result has been a steady movement of people out of these cities into the surrounding and peri-urban areas where they can own a house and still commute into the big city for various reasons, not least work. Typical examples are San Francisco to Oakland, New York to Newark and Berlin to Leipzig (Harrap, 2018).

The situation is no better if not worse in Canada's big cities. Ranked number one and two in North America as the least affordable cities, Toronto and Vancouver have fallen into the very same situation (Mitchell, 2021). It is no surprise then that places like Hamilton and the Region of Waterloo, situated 80 and 100 kilometres to the southwest and west of Toronto, respectively, are good examples of alternate cities for big city dwellers in need of greater affordability and potentially a slower pace of life (Harris, 2020; Harris et al., 2015; Moffat, 2021).

Known as one of Canada's fastest growing urban areas (Davis, 2020a), the Region of Waterloo is an attractive destination for big city residents because of its robust economy and quasi-rural setting. It is based beyond the sprawling suburbs around Toronto but can still be considered part of the big city's wider, informal commuter shed thanks to adequate highway and public transit coverage. Although housing costs have recently risen substantially in Waterloo Region (Davis, 2020b), by comparison, it is generally considered much more affordable than

Toronto: in early 2021, the cost of an average detached home in the Region was around \$400,000 cheaper than in Toronto.

Unique because of its post-industrial character and pre-World War II housing stock, until recently, Hamilton was considered the last bastion of affordable housing around Toronto (Mitchell, 2021). Its 'gritty' urban aesthetic and walkable neighbourhoods are highly sought after by some Torontonians, mostly because it reminds them of the inner city of Toronto, and it is well serviced by commuter options connecting it to its neighbour (Weaver, 2012).

Yet the movement of people into the wider commuter shed causes other problems: driving up prices in surrounding communities and pushing out locals in these mid-sized cities. The increased interest from buyers originating from big cities and their regions has the effect of aggressively driving up housing demand in nearby mid-sized ones, which causes problems at the lower end of the housing spectrum through displacement of low-income residents (Moffat, 2021). Similar patterns have been observed in Rotterdam, Oakland and Leipzig, which are all experiencing gentrification pressures due to their proximity to Amsterdam, San Francisco and Berlin, respectively (Jones and Chanoff, 2012; Liukku and Mandias, 2016; Harrap, 2018).

What made the situation worse recently was that since the outbreak of the COVID-19 pandemic, housing pressures in these mid-sized cities increased because of new pandemic-related nuances in housing needs and preferences (Nanda et al., 2021; Rogers and Power, 2020). Media articles suggested that telecommuting had caused a sudden influx of residents into mid-sized cities, as people were fleeing big cities in search of greater and affordable indoor and outdoor space to assist them in self-isolating and working from home (Haag, 2020; Marsh, 2020; Sheehan and Sheehy, 2020).

But there are also more enduring patterns to intercity migration that warrant attention. Regardless of recent pandemic-related changes, out-migration from big cities to neighbouring mid-sized ones has been a feature of the Canadian urban landscape for decades (Frey; 2002; Hou and Bourne, 2006; Ley, 2007). This is especially true when you consider the sustained

boom in Canada's large property markets over the past ten years or so which, albeit amplified by the pandemic, also long preceded it (Markusoff, 2017).

Introduction to case study cities

In order to analyze the movement of people and the effects on housing within a commuter shed of a global city, this study focuses on the wider Toronto region. This will be achieved through a case study approach focusing on Hamilton and the Region of Waterloo in relation to Toronto. The choice of case study cities is not meant to be fully representative of the Toronto region. Rather, they were chosen because of the contrasts they provide. Although located geographically further away from Toronto than Hamilton, the Region of Waterloo can be said to have an accommodationist approach to Toronto and is connected to the city through an innovation, services and financial corridor (McKinsey and Company, 2016; Waterloo EDC, 2020). The Waterloo Region Economic Development Strategy (2014, p. 5) noted that:

“Waterloo region has unique cultural attributes that enable it to benefit from its proximity to the Toronto regional economy without being overwhelmed by its urban neighbours to the east. Its proximity to Toronto provides important economic and transportation linkages and an easy access to potential markets beyond Canada”.

This is contrasted by the more independent approach adopted by Hamilton. One of Canada's oldest cities, Hamilton was an important regional economic centre in its own right; as manufacturing hub, port city and railroad distribution point (Weaver, 2012). Geographically, given its location on the southern side of the far western tip of Lake Ontario, and its proximity to Detroit and Buffalo, it has often looked south rather than north/northeast for economic opportunities. However, today there are deep, intergenerational familial and worker ties between the two cities. Its economy has also changed a great deal from its roots in the steel industry: manufacturing has declined and today the dominant sectors are health services, education, finance and tech (Harris, 2020; Trapunski, 2017; Weaver, 2012). The city's more competitive

approach to Toronto is also a direct consequence of it being constantly defined relationally to the bigger city, or as living within Toronto's 'shadow', e.g., the Brooklyn of Toronto (Trapunski, 2017).

Thesis purpose

Push factors relating to affordability stemming from the core of regional commuter sheds radiate outwards (Frey, 2002; Hou and Bourne, 2006; Ley, 2007) creating downstream affordability problems in nearby mid-sized cities (Jones and Chanoff, 2012; Liukku and Mandias, 2016; Harrap, 2018; Harris, 2020; Harris et al., 2015; Moffat, 2021). Fully understanding this phenomenon relates to understanding both the reasons why people were pushed out of the big city in the first place (i.e., what triggered their move and their onwards aspirations), as well as the impact that their moving has on these mid-sized cities, especially for housing affordability.

The purpose of this thesis is to analyze movers' motivations for leaving global cities and the (real or imagined) impact of increased in-migration on housing affordability within surrounding mid-sized cities. Chapters 2 and 3 investigate different aspects of this: the first, movers' motivations for leaving the big city; the second, challenges for affordable housing in nearby mid-sized cities.

The second chapter is a systematic study of the moving motivations of middle class Torontonians who moved to Hamilton since 2015. The purpose of the study is to examine how Toronto-led gentrification in Hamilton operates and spreads.

The third chapter is a systematic study of the pressures placed on Waterloo Region's housing because of *apparent* increased in-migration resulting from the COVID-19 pandemic. The purpose of this study is to assess the challenges for affordable housing.

Context: Gentrification across cities - Displacement down the urban hierarchy?

Gentrification and displacement: Definitions and debates

This section briefly defines gentrification and introduces the major delineation in gentrification debates: the split between capital (economic) and demand (cultural) levels of analysis.

Prominent contributions to the conceptualization of displacement are also covered.

Foregrounding this literature highlights the role of gentrification in perpetuating housing inequality.

Gentrification was first defined by Glass in the 1960s. Glass (1964, p. xvii) stated:

One by one, many of the working-class quarters of London have been invaded by the middle-class – upper and lower... Once this process of 'gentrification' starts in a district it goes on rapidly until all or most of the original working-class occupiers are displaced and the social character of the district is changed.

Put simply, gentrification is the process whereby the class character of a neighbourhood changes, leading to the direct or indirect displacement of typically low-income residents. Some of the most prominent literature on gentrification points to it being a deliberate process promoting the interests of the middle class and profit-seeking at the expense of lower classes (Slater, 2009; Marcuse, 1985), involves some state intervention (Smith, 1979; Hackworth and Smith, 2001), and has increased after the advent of financialization and neoliberalism (August and Walks, 2018; Fields, 2017). The theoretical and methodological debates on gentrification are robust - especially as they relate to its root causes and outcomes.

Smith defined gentrification as occurring when there is a rent gap: "The rent gap is the disparity between the potential ground rent level and the actual ground rent capitalized under the present land use" (1979, p. 545). Smith's rent gap theory suggests that gentrification is a structural product of the land and housing markets. Capital will go where the rate of profits are

highest, and the movement of capital to the suburbs and the corresponding depreciation of land in the inner cities, effectively results in gentrification (1979, p. 546). Smith argued that the cause of gentrification can be placed into two categories: cultural and economic. The cultural explanation, according to Winter (1978) and (Ley 1978), suggests that gentrification is a process inspired by changes in lifestyles, fashions, needs, and the preferences of new occupants, and this inevitably leads to inner city resurgence and changes in consumption patterns. The economic approach suggests that as the cost of housing in the suburbs grow, inner city properties that are structurally sound start to appear attractive again and can be rehabilitated for less cost than moving into large homes in the suburbs. This places owners near work and other attractions in the city centre. It can also lead to reduced travelling times. The two explanations are not mutually exclusive, and often occur together (Smith, 1979, p. 545).

Smith, who is considered the main protagonist of the economic explanation of gentrification, argues that the process is initiated not by the individual consumer preferences (an effect which can be socially created) but rather, by “some form of collective action” at the neighbourhood level (the root cause) (1979, p. 545). He adds:

The state, for example, initiated most if not all of the early schemes, and though it plays a lesser role today, is still important. More commonly today, with private market gentrification, one or more financial institutions will reverse a long standing redlining policy and actively target a neighborhood as a potential market for construction loans and mortgages. All the consumer preference in the world will amount to nought unless this long absent source of funding reappears [the rent gap]; mortgage capital is a prerequisite (Smith, 1979, p. 545).

Regarding displacement due to gentrification, Marcuse's work has been highly influential. He stressed the need to carefully define displacement induced by gentrification to accurately identify and measure the phenomenon. Marcuse's definition is multifaceted. He defines displacement as direct, which has two types: displacement from a unit that is currently

occupied, such as when a landlord cuts off the hydro thereby forcing the occupants to move out; and, displacement that occurs when a landlord raises the rent beyond the occupant's ability to pay, thereby forcing them to move. The former is referred to as physical displacement and the latter as economic (1985, p. 205). For purposes of accurately measuring displacement, Marcuse suggests that there are several conceptually different ways to do so. One could focus on the number of housing units affected. This type of displacement, however, assumes that only the last resident in the unit was displaced. This type of displacement is called "last-resident displacement". However, displacement may have occurred in the same house previously when the property was at an earlier stage of decline or at an earlier stage when the rent was increased. This type of displacement is called "chain displacement" (1985, p. 206). Marcuse further added "exclusionary displacement" which:

"...occurs when any household is not permitted to move into a dwelling, by a change in conditions that affects the dwelling or its immediate surroundings, and that: 1) is beyond the household's reasonable ability to control or prevent; 2) occurs despite the household's being able to meet all previously imposed conditions of occupancy; 3) differs significantly and in a spatially concentrated fashion from changes in the housing market as a whole; and 4) makes occupancy by that household impossible, hazardous, or unaffordable" (1985, p. 207).

Finally, displacement affects those living in the same neighbourhood who are not directly displaced but may feel indirect pressure to leave. This could stem from no longer feeling a sense of belonging or shared identity with the neighbourhood because their friends and the businesses they frequent are leaving or closing and the new services and amenities that arise in their place do not suit them nor their lifestyles. Under such a situation, displacement pressure may be severe. Marcuse concludes that the full definition of displacement must include consideration of all forms of displacement (1985, p. 207-208).

More recently, Elliot-Cooper et al. (2020, p. 492) extended the definition of displacement owing to gentrification, stating that displacement should be understood as the process of “unhoming”, mostly because “it always ruptures the connection between place and people”. They develop Atkinson’s (2015) definition of displacement as a process of unhoming that cuts the link between residents and the communities to which they belong, and that can occur in a range of ways such as through financial, social, or familial means, amongst others. Elliot-Cooper et al. (2020, p. 498) also build on the work of Bricknell et al. (2017) who suggest that displacement needs to be considered as an affective and material rupture. They further describe displacement as a form of violence which disproportionately affects the lower classes. Its effects are always uneven across space and although displacement can occur through one single event, it normally occurs through several smaller events that may displace people and businesses over time (Elliot-Cooper et al., 2020, p. 498).

Although gentrification was initially understood as an essentially negative process, in more recent times, it has been cast in desirable terms or, in the least, that rising tides will raise all boats. In an influential article titled “The eviction of critical perspectives from gentrification research”, Slater (2009, p. 752) laments the uncritical nature of most contemporary analyses on gentrification, stating:

The term [gentrification] was coined with critical intent to describe the disturbing effects of the middle classes arriving in working-class neighbourhoods and was researched in that critical spirit for many years. It has since been appropriated by those intent on finding and recommending quick-fix ‘solutions’ to complex urban problems, and in extreme cases depoliticized and called something else”.

Slater believes that debates over gentrification have become focused on the causes at the expense of its outcomes; that displacement was no longer considered a defining feature; and the dominance of neoliberal policies hide the negative aspects of gentrification through illusions of a healthy “social mix”. Slater also believes that it is myopic to view the debate concerning

gentrification as neatly revolving around cultural (Ley) and economic (Smith) causes. He argues that Ley included economic explanations and that Smith discussed culture, especially in their later books. In other words, the divisions between the two competing arguments and their main protagonists, were effectively over emphasized (2009, p. 746).

Mid-sized cities, moving motivations and affordable housing within commuter sheds of global cities

Mid-sized cities can generally be classified as cities with a population of between 50,000 to 500,000 residents (Seasons, 2003), However, recent studies conducted as part of the EverGreen Mid-Sized Cities Research Series include cities above the 500,000 mark, such as Hamilton and the Region of Waterloo. Growth trajectories of Canadian mid-sized cities vary (Bourne and Simmons, 2003; Bunting et al., 2007; Donald and Hall, 2015; Gordon et al., 2019; Jamal, 2018), with the most significant determining factor to their growth being their proximity to a 'feeder' global city. This is because mid-sized cities grow due to in-migration from local regions, including from nearby big cities and their often equally dense city regions (Frey, 2002; Hou and Bourne, 2006; Ley, 2007). 'Big picture' quantitative data support these observations (Moffat, 2021), but the reasons for moving from a big to a second-tier city are also important. Here, qualitative research needs to probe movers' motivations.

Aside from pragmatic reasons for choosing a mid-sized city relatively close to a large city (such as continued access to work, friends and family, and greater variety of entertainment), moving motivations and neighbourhood choice are complex and speak directly to the geography of gentrification. Despite robust popular and academic interest in gentrification, not many analyses have sought to focus on the regional scale or intercity aspects to gentrification and how this might be considered distinct, despite the phenomenon clearly having a wider regional and provincial overtone (Lees, 2000; 2012). Analyzing the factors considered when making moving decisions (i.e., the behaviour and habits of gentrifiers) gives one insights into how

gentrification spreads, not only within cities but also between cities. There are two schools of thought on the spread of gentrification between cities: one approach suggests that it ‘cascades’ down the urban hierarchy from global cities (Bridge, 2003; Dutton, 2003, 2005; Lees, 2006; Lees et al., 2008), while the other points to it happening concurrently across urban hierarchies (Lees, 2006).

Exploring the intercity nature of gentrification brings the desired end result of the move into greater focus, as it highlights the strategic placement and deliberateness of otherwise external capital moving into new communities. This focuses debates on what these movers were hoping to ‘achieve’ through their move and the implicit lifestyle and class aspirations, i.e., how these aspirations manifest through taste preferences linked to a suburban life versus inner-city living (see Ley, 1996; 2003; Bridge, 2006; Boterman and Bridge, 2015). These insights shed new light on how gentrification frontiers are established within cities. From a middle-class perspective, such a ‘downgrade’ in the urban hierarchy could translate into increased access to green and public spaces; reduced density and greater freedom of movement; and greater options and affordability in terms of housing availability and cost-of-living (Less, 2006).

But the increased in-migration into mid-sized cities also plays a role in influencing house prices and rents, general availability, and the overall affordability of housing within these communities (i.e., typical demand and supply forces). The housing markets of mid-sized cities relatively close to a big city are normally robust enough to accommodate fluctuations in demand (Charbonneau et al., 2006; Texeria, 2009). However, the sustained and even accelerated migration of regional middle class residents permanently moving from a large to a mid-sized city is less studied (Frey, 2002; Langley, 2007; Ley, 2007), and may have various unintended consequences for these smaller housing markets (Alini, 2021; Bozikovic et al., 2019; Haigh, 2021).

Elevated prices due to heightened competition in mid-sized cities is known to cause shocks to local residents resulting in swelling demand at the already pressured lower end of the

affordability housing spectrum (Harrap, 2018; Jones and Chanoff, 2012; Liukku and Mandias, 2016; Moffat, 2021). Those who would have upgraded housing, are pressured to downgrade, pushing out and further narrowing the options of those who are struggling more than they are. These pressures are more severe at times when affordable housing challenges are already amplified because of economic downturns (Alini, 2021; Haigh, 2021). Global and regional recessions do not spare cities, and doing more with public resources is expected everywhere. The spatial limits to growth within these smaller cities also get tested. As the need for housing expansion to keep up with population growth increases, so does the pressure to avoid its negative aspects such as further sprawl into farming hinterlands (Bozicovic et al., 2019).

Placed within the context of the COVID-19 pandemic, smaller cities need to be particularly cognizant of a potential influx into their communities. If media articles were to be believed, people were leaving big cities for smaller and even rural ones in droves (Haag, 2020; Marsh, 2020; Sheehan and Sheehy, 2020). This narrative was supported by the growing body of literature in the matter supporting the claim that the COVID-19 pandemic was exacerbating the push factors in big cities, while simultaneously enhancing the allure of mid-sized ones. Factors often associated with big cities and which were believed to be driving this included: overcrowding; higher densities; fewer quality green and public spaces; and smaller properties for more money, which are not conducive to self-isolation and working from home (Almagro, 2020; Chen and Kriegler, 2020; Florida, 2020; Florida, and Ozimek, 2021; Nanda, 2021; Power et al., 2020).

However, to date, there have been few empirical studies on whether or not people are actually moving away from larger cities because of the pandemic (Ellis, 2020; Kolko et al., 2021), with analysis of the 2021 Census data round only likely to be available late in 2022. Even though local governments are more stretched than normal, they are still required to stay within the ambit of sustainability and social equity.

Research questions

Census data are considered the gold standard when measuring the movement of people between cities and within regions (Frey; 2002; Hou and Bourne, 2006; Ley, 2007). However, these data do not tell the whole 'story' of why people moved (push and pull factors). Nor do they elaborate on the resultant pressures on the receiving geographies, such as those placed on housing demand and subsequent affordability, especially in smaller communities (Alini, 2021; Haigh, 2021; Harrap, 2018; Jones and Chanoff, 2012; Liukku and Mandias, 2016; Moffat, 2021).

In order to assess this, qualitative research probing the stories 'behind the numbers' is required. This provides an understanding of why people leave big cities in favour of trading down the regional urban hierarchy, and the downstream challenges this poses to housing at the intermediary 'node' or 'hierarchical position' of a mid-sized city within a wider commuter shed of a big city (Lees, 2000, 2006). Put simply, such research would need to investigate movers' motivations for leaving the big city, and the impacts on housing demand and affordability within receiving mid-sized cities.

Out-migration from big cities and in-migration into surrounding mid-sized ones, highlight relational aspects between cities at varying 'nodes' within the urban system. These migration patterns also foreground the systemic affordability pressures radiating from the big city outwards to those smaller ones within its commuter shed. On the one hand, relational analysis between nodes within the urban hierarchy, raises questions in respect of how gentrification spreads from big to mid-sized cities (Bridge, 2003, 2006; Lees, 2000; 2006; 2012; Lees et al., 2018; Dutton 2003, 2005). On the other hand, systemic affordability challenges that radiate throughout the urban system, relate to housing challenges that smaller cities experience as a result of being in the commuter orbit of a big city (Alini, 2021; Haigh, 2021; Harrap, 2018; Jones and Chanoff, 2012; Liukku and Mandias, 2016; Moffat, 2021).

At the same time, it must be remembered that housing affordability challenges were further complicated by COVID-19 and remote work which supposedly increased the flow of

people out of big cities into mid-sized ones, thereby creating a further expectation within these mid-sized cities of a sudden influx of residents (Florida, 2020; Florida and Ozimek, 2021; Haag, 2020; Marsh, 2020; Sheehan and Sheehy, 2020). The matters mentioned above speak directly to how gentrification pressures are spilling over from big cities into nearby mid-sized ones.

Based on the above assumptions, the two overarching questions this thesis seeks to address are:

- How does gentrification spread between large and mid-sized cities within wider, regional commuter sheds?
- Is COVID-19 playing a particular role in accelerating a type of tiered and cascading gentrification throughout city regions?

Chapter 2 addresses the first question and Chapter 3 the second.

Thesis summary and methodology

This thesis employs qualitative research methods. Qualitative methods are well suited to developing an understanding of the social world and phenomena resulting from human behaviour (Cresswell, 2014). My research methods were designed to identify and analyze trends in moving motivations and housing through discourse analysis. Potter (1996, cited in Silverman, 2006) defines discourse analysis as:

“[A]n analytic commitment to studying discourse as texts and talk in social practices...the focus is on language as...the medium for interaction; analysis of discourse becomes, then, analysis of what people do. One theme that is particularly emphasized here is the rhetorical or argumentative organization of talk and texts; claims and versions are constructed to undermine alternatives”.

From this perspective, discourse (text, talk and practice) is important in understanding how planners, local government officials and the general public assign meaning to and make sense of urban environments and the social world.

My methods therefore reflect the constructivist perspective which is primarily concerned with understanding a phenomenon. Constructivists believe that reality is constructed from multiple perspectives, and is also historically and socially constructed (Coghlan and Brydon-Miller, 2014; Creswell, 2014; Gergen and Gergen, 2008; Guba and Lincoln, 1994). Reality viewed from a constructivist perspective, is also considered to be relative and derived from local and specific realities. Guba and Lincoln (1994, p. 110) note on the ontology behind constructivism:

“Realities are apprehendable in the form of multiple, intangible mental constructions, socially and experientially based, local and specific in nature (although elements are often shared among many individuals and even across cultures), and dependent for their form and content on the individual persons or groups holding the constructions. Constructions are not more or less “true,” in any absolute sense, but simply more or less informed and/or sophisticated.”

The epistemology most closely aligned with constructivism suggests that reality is subjective and transactional, relying on created findings. Guba and Lincoln (1994, p. 111) observe that, “The investigator and object of investigation are assumed to be interactively linked so that the ‘findings’ are literally created as the investigation proceeds”. Accordingly, the researcher should also attempt to lessen the distance between them and the object of their study (Creswell, 2014).

Second chapter: Spillover gentrification between Toronto and Hamilton

The second chapter in this thesis is called “Class advancement or displacement? Spillover gentrification in the middle class migration from Toronto to Hamilton.” This chapter is centred on the first research question: How does gentrification spread between large and mid-sized cities within wider, regional commuter sheds? The chapter specifically aims to:

- 1) Analyze the push and pull factors in GTA to Hamilton migration;

- 2) Assess how ex-GTA middle class members facilitate class transition of Hamiltonian neighbourhoods.

Spillover gentrification exerts pressure down the urban hierarchy throughout city regions. The displacement pressures are all the more greater when the mid-sized city in proximity to the big city is a traditionally working class, post-industrial one (Risager, 2021). However, the middle class members making the move occupy a curious position in the urban hierarchy, as they themselves are often victims of displacement in the big city and its immediate area but enter the mid-sized one as likely gentrifiers. This chapter investigates the moving motivations of middle class members moving from the GTA to Hamilton in the past five years. Focusing primarily on Hamilton's Lower City as a perceptible frontier of gentrification (Harris, 2020), the chapter contributes to the debates on mid-sized cities and the geography of gentrification, as well as the production of gentrified space, i.e., how middle class residents actively seek to (re)produce a gentrified landscape in a different city.

In order to assess this, moving motivations expressed in interviews by those who had made the move were analyzed using discourse analysis. As highlighted, Hamilton was chosen because it represents a unique, post-industrial mid-sized city within commuting distance to Toronto. As gentrification is widely understood to be the transformation of neighbourhoods from working class to middle class (Glass, 1964; Lees, et al., 2008), 'class' motivations relating to economic outcomes and a middle class identity were regarded as the primary drivers behind gentrification. The interview data were therefore analysed for patterns of group behaviour to deduce class interests and preferences, and through that, an understanding of how Toronto-led gentrification in Hamilton operates and reproduces was developed.

Details of the interview process are provided in the chapter. The primary aim in this section is to focus on aspects that are not included in the chapter. One of the main techniques of qualitative data collection is the interview method (Holloway, 1997; Kvale, 2007; Marshall and

Rossman, 2011). The methods employed in this chapter also entailed the collection and analyzing of supporting material, such as media sources and literature. Primary data were acquired through 42 semi-structured interviews conducted over Zoom. On average, interviews lasted about one hour and were recorded. Prior to the interviews commencing, the study received ethical approval from the University of Waterloo's ethics committee. The interview process itself began with respondents receiving the consent form before the interview. However, the researcher would also read the consent form out loud to respondents at the beginning of the interview, followed by their response. The consent form described the nature of the study; what the data will be used for; how the data will be used; that the identities of respondents will remain confidential (the names used in the chapter are pseudonyms); and that respondents could withdraw from the study at any time without negative repercussions. The interview schedule comprised four parts as well as a section on demographic information. Each part was centred on a particular theme or aspect of their move to Hamilton. Data presented in the chapter draw primarily from "Part 1: your move to Hamilton", although for deeper embedding within group behaviour and matters relating to class, data from other parts of the interview schedule were also used. The main questions pertaining to the chapter were: "What were the reasons you moved to Hamilton?" and "What attracted you to the house/neighbourhood you are in?"

Recruitment of research participants was achieved through a series of media articles, interviews and posts on social media. Based on this, respondents volunteered via email to be interviewed. Snowballing techniques were also used. Qualifying criteria were that they had moved from Toronto to Hamilton since 2015. Interviews were professionally transcribed and then coded thematically. In order to develop a full analysis of the results, all data were coded before writing up began despite the heavy reliance on Part 1. Coding entailed developing themes based on repetition of a particular response, with a new response category being created every time a new theme was introduced. Once immersed in understanding the data, patterns emerged which gave rise to cross-cutting themes and discourses.

The results suggest that class transformation is occurring in Hamilton's Lower City neighbourhoods through Toronto-led gentrification, and that this gentrification spreads through a dialectic discourse between capital and demand. This discourse manifests itself through displacement forces exerting pressure down the urban hierarchy, choosing neighbourhoods based on a Torontonion middle class identity, and is ably supported by the 'we're moving to Hamilton' push in social and familial circles as well as online.

Third chapter: Housing challenges in mid-sized cities during the pandemic

The third chapter in this thesis is called "Housing challenges, mid-sized cities and the COVID-19 pandemic: Critical Reflections from Waterloo Region." This chapter was guided by the second research question: Is COVID-19 playing a particular role in accelerating a type of tiered and cascading gentrification throughout city regions? The chapter specifically seeks to:

1. Understand to what extent the housing challenges of the pandemic constitute new issues for mid-sized cities.
2. Enhance planning and policy debates by articulating key insights, lessons, and considerations for how to deal with housing challenges during a pandemic.

Despite a lack of consolidated quantitative evidence, one of the major observable urban trends associated with the COVID-19 pandemic has been the sudden movement of people out of large cities in favour of mid-sized ones. This phenomenon has been widely noted in the early media coverage of the pandemic (Haag, 2020; Marsh, 2020; Sheehan and Sheehy, 2020), but without due consideration for the affordability impacts on these smaller housing markets and their residents (Alini, 2021; Haigh, 2021). This chapter interrogates these assertions to assess whether they are accurate and how planners in these mid-sized cities should respond.

The chapter employed a critical content review of media articles drawn from Waterloo Region's primary media sources (and others), although research and policy reports, particularly during the first wave of the pandemic were also consulted (March-August 2020) (see Parsell et

al., 2020; Rogers and Powers, 2020; Vilenica et al., 2020). The assertions and claims within media and reports regarding an apparent influx of people into mid-sized cities were tested and critically analyzed. The chapter is loosely based on a policy report submitted to the Region of Waterloo government on the impact that the COVID-19 pandemic is likely to have on housing in the Region (Doucet and Van der Merwe, 2020). As highlighted, the Region of Waterloo is a relevant case study as it possesses several features that make a mid-sized city attractive to big city residents, such as a vibrant economy and its location on the urban fringe of the wider Toronto region.

The systematic media search and analysis are described in detail in the chapter itself, but a brief overview is provided here. The media search was divided into four steps involving: identified keyword searches of local Waterloo Region media; creating a thick narrative account of events as they unfolded in the Region; supplementing the Region's media with articles obtained from further focused searches; and extending the narrative accounts where necessary based on the material obtained from the wider searches.

The chapter concludes that the expected increase in the number of people entering mid-sized cities in commuter sheds of large cities, should be interpreted carefully and that without up-to-date quantitative data, it is generally too early to predict with certainty that this is the case. However, if there is an influx due to COVID-19, it will likely come from the GTA and Toronto as these are the established patterns of in-migration into the Waterloo Region anyway (Frey; 2002; Hou and Bourne, 2006; Ley, 2007). The chapter also concludes that the COVID-19 pandemic is likely to increase the need for affordable housing across the housing spectrum. In this sense, the chapter stresses the need for continuity in planning interventions in meeting housing challenges in mid-sized communities.

Thesis organization

This thesis adopts the manuscript option for master students in the School of Planning at the University of Waterloo. It comprises two independent manuscripts that collectively examine spillover gentrification from global cities onto mid-sized cities within commuter sheds. The two chapters were reformatted for presentation in this thesis. The final chapter synthesizes and presents key findings from both manuscripts, demonstrates the relationship between the findings, assesses the relevance of these findings for planners and policy-makers, and suggests directions for future research.

Chapter 2: Class advancement or displacement? Spillover gentrification and the middle class migration from Toronto to Hamilton

Abstract

The spillover effects from global to mid-sized cities is an under-studied aspect of the geography of gentrification. With growing unaffordability in large cities, some households who wish to maintain an urban lifestyle, are moving to urban neighbourhoods in mid-sized cities rather than suburbs in search of more affordable housing. The migration from the Toronto to Hamilton, 80km away, is one such example. However to date, there is little empirical research about these flows, and debates are largely based around media stories and anecdotes. We interviewed more than forty households who moved from the Greater Toronto Area (GTA) to Hamilton within the past five years. In this article, we focus on those who have settled in older parts of Hamilton, primarily its Lower City, which contain many walkable, mixed use areas with similar aesthetics to gentrified Toronto. We find complex experiences of both being displaced from one city, while gentrifying another. The gritty urbanity, arts scene, historic aesthetics and walkable urban form in Hamilton's Lower City mean it is possible to replicate similar lifestyles that are now too expensive in Toronto. This migration therefore helps maintain an urban middle-class social reproduction, while a 'we're moving to Hamilton' credo actively encourages middle-class Torontonians to do the same.

Introduction

Leaving large global cities in search of more affordable housing options is nothing new; North America's largest cities tend to lose more people to their province/state than they gain (Hou and Bourne, 2007; Frey, 2002; Ley, 2007). Much of this outmigration is bound for suburbs that are predominantly based around the automobile. At the same time, inner city gentrification within global

cities has resulted in very few older, mixed-use and walkable neighbourhoods being affordable, even to middle-class, professional households. For those who want an urban, rather than suburban lifestyle, but are priced out of core neighbourhoods in cities such as Toronto, New York or London, this poses a dilemma: move to the suburbs where housing is (marginally cheaper) but there is more space, or remain in crowded and overpriced urban neighbourhoods.

In recent years, however, there has been growing media attention paid towards another option: relocate to an older, industrial, or mid-sized city one or two hours away. There are many examples: San Francisco to Oakland, New York to Newark, Berlin to Leipzig and Toronto to Hamilton (Harrap, 2018). The latter is the focus of this article. While there are media anecdotes about those who have moved to Hamilton, there has been very little empirical work on the impact this has.

This article is part of a wider research project exploring the spillover effects of gentrification in Toronto and the role it plays in shaping neighbourhood change in Hamilton. In this article, we are specifically focused on the motivations and experiences of those who have made this move, with an emphasis on urban, rather than suburban flows. Therefore, the aim of our article is to shed new light on this geography of gentrification and the potential spillover effects that major global cities play on gentrification in adjacent mid-sized ones. Two objectives guide this research:

1. Analyze the push and pull factors in GTA to Hamilton migration
2. Assess how ex-GTA middle class members facilitate class transition of Hamilton's Lower City neighbourhoods

Hamilton makes for an insightful case study to explore this geography of gentrification. Long regarded as the last bastion of affordable housing around Toronto, Hamilton has recently risen to being the third least affordable housing market in North America, just behind Vancouver and Toronto, and worse than New York and San Francisco (Mitchell, 2021). The average price of a house in Hamilton had risen by 31% year-on-year in May 2021 (Housing Market Report, 2021). A city with a long industrial history, it is also known for its resistance to gentrification (Ellis-Young,

2020; Weinberg, 2021). Hamilton is one of Canada's oldest cities and remained its fifth largest until 1961. That means there are many neighbourhoods constructed before World War II, that share similar land use, density and morphology characteristics to inner city Toronto.

Our analysis is based on the relational aspects between Hamilton to Toronto, and the spillover gentrifying pressures exerted on the former by the latter, which is in no way unique (Jones and Chaoff, 2012; Luikku and Mandias, 2016; Harrap, 2018). Hamilton is increasingly part of Toronto's economic and commuting orbit. Additionally, we emphasise how gentrification revolves around the aesthetics and lifestyle of older urban neighbourhoods, that form part of one's middle-class identity. We demonstrate neighbourhoods, even if they are found within different cities, are essential to middle-class social reproduction and how this revolves around a particular urban aesthetic, rather than a particular city. To analyse this, we draw on 42, in-depth interviews conducted via Zoom between October 2020 and April 2021.

The article seeks to make three contributions. First, we highlight how gentrification spreads and reproduces in Hamilton's Lower City neighbourhoods through a dialectic discourse between capital and demand, relating this to literature on the geography of gentrification. Second, we argue that this discourse facilitates class transformation in Hamilton through displacement processes, neighbourhood choice, and via forceful 'wooing' of other GTA residents to undertake the same move. Lastly, we reflect on the significance of these processes in placing distance between ex-GTA members and established Hamiltonians.

Gentrification, its spread and gentrifiers' motivations

Gentrification is the production of space for more affluent users (Hackworth, 2002) that leads to class transformations and the displacement of lower-income populations as the entire social character of a neighbourhood changes (Glass, 1964). Much of the research into how gentrification spreads examines patterns within a city, focusing on the role of uneven capital and rent gaps (Smith, 1979), the desires among certain middle class households for an urban

lifestyle (Ley, 1996; 2003; Bridge, 2006; Boterman and Bridge, 2015) and the role of urban policy in promoting and fostering gentrification (Smith, 2002; Hackworth, 2007; Hyra, 2012). Some studies examine factors that inhibit the spread of gentrification, such as industry, ethnic enclaves or public housing (Walks and August, 2008; Ley and Dobson, 2008).

Another aspect of the geography of gentrification is how it spreads between cities (Lees, 2012; 2000). Globally, Lees et al (2018) argues that this relationship is far more complex than a one-way north-south, or west-east diffusion. Within countries, the dominant view is that gentrification 'cascades' down the urban hierarchy from global cities (see Bridge, 2003; Lees et al., 2008), through economic, cultural or policy diffusion (Lees, 2006). However, very few studies have empirically examined this relationship; Dutton's (2003; 2005) studies of Leeds showed that gentrification there was partially driven by households 'cashing out' of the London property market. However, Lees' (2006) findings in Portland, Maine, suggests that gentrification did not 'lag behind' cities such as New York or Boston, but rather existed contemporaneously, albeit unnoticed by researchers.

Although gentrification is often a 'top-down', policy-driven process, analytically, there are two main approaches advanced to answer this question: a capital approach (Smith, 1987) and shifts in demand (Ley, 1996). Stretching over several decades, the capital-demand nexus lies at the heart of gentrification debates (Slater, 2006). The literature on capital is important as price, access to finance, housing supply, and gentrification are the main factors taken into consideration when moving. On the other hand, shifts in demand and consumption, such as changing demographics, culture or aesthetic tastes are also important. Jager (1986) noted the aesthetic value in old housing, as part of building middle-class identity in gentrifying neighbourhoods. Slums became 'Victoriana.' Viewed as a process, gentrification arguments relating to capital and demand are sometimes presented as rather circular, 'chicken and egg', or as different phases of the same process. This is because economic reasons normally provide

the trigger for the move but, by the same token, not all moves are made out of necessity as culture and fashion can also play a significant role (Slater, 2006, p. 746).

One important approach to understanding the geography of gentrification would be to examine the motives of gentrifiers moving into new frontiers of gentrification. The literature suggests that households decide between moving to an inner-city neighbourhood, or moving to the suburbs. Bridge (2006) found that those who wished to move to another neighbourhood weigh up considerations of desirable inner city living (based on aesthetics and lifestyle) with good schools (traditionally important middle class values), with the latter normally being prioritized in an aesthetics/education trade-off. Good schools, however, are normally based away from the inner-city and found in middle-class or affluent suburbs. According to Bridge (2006), the act of moving into desirable school catchment areas in the suburbs, becomes a means of maintaining class status and privilege through education, with the 'correct' move being a key component of suburban middle class reproduction. For those wishing to remain in the inner city, Boterman (2020; 2013) outlined different strategies employed by middle-class parents in gentrifying neighbourhoods that ranged from self-selection, sending their children to school outside the neighbourhood or trying to reform a school from within. He notes the conflict that exists between gentrifiers who initially celebrate the diversity of their neighbourhood, but, upon having school-aged children the "desire to display symbolic capital may conflict with the need to reproduce cultural capital through the educational system" (Boterman, 2013, p. 1130).

In Hamilton, the pull of inner-city neighbourhoods is based around their historic architecture, arts scene and gritty post-industrial image. While there is substantial literature that emphasises how a 'gritty' urban aesthetic has been idealized by some middle-class gentrifiers (Ley, 1996; 2003; Bridge, 2006; Boterman and Bridge, 2015), this sits in conflict with other goals of capital accumulation and middle-class reproduction. We will examine these aspirations, conflicts and tensions in the remainder of the article, first outlining the context of Hamilton and its place within the Toronto region.

Gentrification in Hamilton and migratory patterns

Hamilton's Lower City sits below (north) of the Niagara Escarpment (known as The Mountain) and was largely constructed before World War II. It contains some of Canada's poorest urban census tracts and has high instances of poverty and unemployment, low levels of education and poor health outcomes (Harris, 2020). Along the waterfront, there are still active factories and steel mills. Some parts of the Lower City contain middle class or upper class housing stock, particularly in the west and close to the escarpment. By and large, they share an urban form based around the streetcar, rather than the automobile (Doucet and Doucet, forthcoming).

There has been significant media attention paid towards the gentrification of parts of Lower Hamilton (Harrap, 2018; Booth and Barr, 2017), particularly around the Locke Street and James Street North commercial corridors. It is largely assumed that migration from Toronto is the driving force behind neighbourhood change in Hamilton (see Harrap, 2018; Risager, 2021). Intraprovincial migration numbers clearly indicate that the biggest source of population growth in Hamilton is migration from the GTA. Between 2011 – 2016, 28,700 people moved from the GTA to the city of Hamilton, up 39.4% from the 2001 – 2006 period. 51% of these migrants moved to Hamilton's outer suburbs, despite only constituting 39% of Hamilton's population. However, the biggest flows (77%) were from the suburbs of Toronto (referred to as 'The 905' because of its area code), rather than the city itself; 60% of those originating from The 905 moved to suburban parts of Hamilton that were amalgamated with the city of Hamilton in 2001. Out of the 28,700 people that moved to Hamilton from the GTA, only 6,730 people moved from the city of Toronto between 2011 – 2016. This constituted only a 5.7% increase over the 2001 – 2006 period. However, these migrants from the city of Toronto are far more likely to settle in the Lower City (Author, forthcoming).

In this article, our emphasis is on those who moved from the GTA to the Lower City. While some neighbourhoods within the Lower City are gentrifying, many more are experiencing processes of downgrading (Harris, 2020). Although not the only site of pushback to

gentrification, the Lower City has been home to significant resistance movements against gentrification. Focusing on a rent strike against a REIT (Real Estate Investment Trust) in 2017 as a key moment in working class formation and agency, Risager (2021) argues that the neighbourhood (as opposed to the factory), is the key site of the struggle between capital and labour. Ellis-Young (2019) focuses on how dominant perspectives which celebrate the city's revitalisation work to delegitimise opposition to gentrification.

We build on this work in two ways. First, in a Foucauldian sense, it is not only the working-classes that are subjected to displacement pressures and respond accordingly. Gentrification has long been seen as a working-class problem and a middle-class opportunity (Tolfo and Doucet, 2020). However, in recent years, even many middle-class households have been displaced from major global cities. As our interviews articulate, many of those who are moving from Toronto to downtown Hamilton have been directly or indirectly displaced from the increasingly unaffordable Toronto housing market. While moving enables access to legal-financial resources and unlocks avenues for capital accumulation in the Hamilton real estate market, this movement through space also render demand aspects of neighbourhood important, exposing subjective experiences of 'place' linked to class identity that directly or indirectly displace long-term residents of Hamilton.

Second, class agency's role in social reproduction (see Mohandesi, 2013; Mohandesi and Teitelman, 2017), surely works both ways as relative, class-different 'outsiders' may look to establish new ways of living, based on demand preferences formed elsewhere, usually in Toronto. Confirmation bias, exercised through neighbourhood choice, reinforces the in-movers' perceptions of their own class identity in relation to an objectified local 'other'. Agential power may also involve actively courting members from one's previous community through social, familial and online networks to build similar likeness in the new city.

Methodology and approach

This article is based on the first tranche of data collection of a larger longitudinal study on gentrification in Hamilton. We conducted 42 semi-structured interviews with people who had moved from the Greater Toronto Area (GTA) to Hamilton since 2015. Recruitment was done through a series of media articles and interviews that coincided with the launch of this project, as well as posts on social media. Snowballing techniques also led to the further recruitment of participants.

The interviews were structured according to themes: the reasons for leaving the GTA; what attracted respondents to Hamilton more broadly and their specific neighbourhood; the relational aspects between Hamilton and the GTA in terms of family, friends, work and social lives; their experiences and perceptions as ex-GTA residents in Hamilton; as well as the perceived role that COVID-19 played in recent relocations to Hamilton. On average, interviews lasted approximately one hour and were conducted over Zoom between October 2020 and April 2021. Interviews were recorded and professionally transcribed. They were then coded thematically. Themes emerged based on repetition giving rise to categorization (push-pull factors; house- and neighbourhood-driven responses). Meta-discourses centred on class and the capital-demand dialectic emerged through patterns of group behaviour and analysis of wider responses (analysis of data drawn throughout the questionnaire). Media and literature searches supplemented our interview data. Figure 1 situates Hamilton in relation to Toronto, while Figure 2 indicates the residential locations of the 33 participants who moved from the Toronto region to Lower Hamilton. The remaining 9 participants reside in other suburbs. As we noted earlier, this is not representative of the overall flows from the GTA to Hamilton, which is primarily oriented towards the suburbs. Our decision to focus on the Lower City was partially a practical one: the majority of respondents resided in Lower Hamilton, and part was based on the predominance of older neighbourhoods, which allows us to investigate the role that older urban aesthetics and lifestyles play. It should also be noted that the conflicts and tensions associated with gentrification in Hamilton have mostly been focused on the inner city, rather than the suburbs. However, we are careful to stress that our findings do not

represent all residents who have moved from Toronto to Hamilton, or all segments of the middle-class.

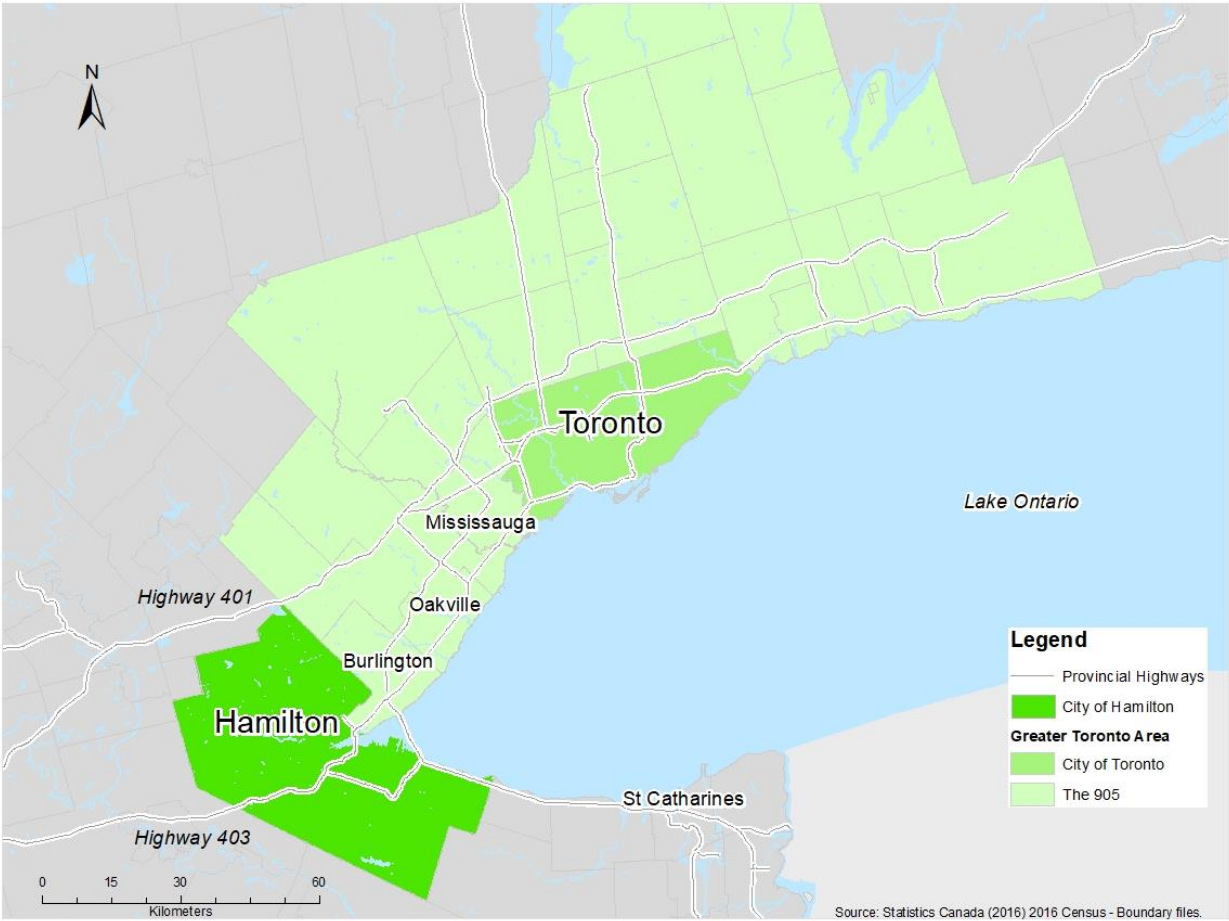


Figure 1: Toronto in relation to Hamilton

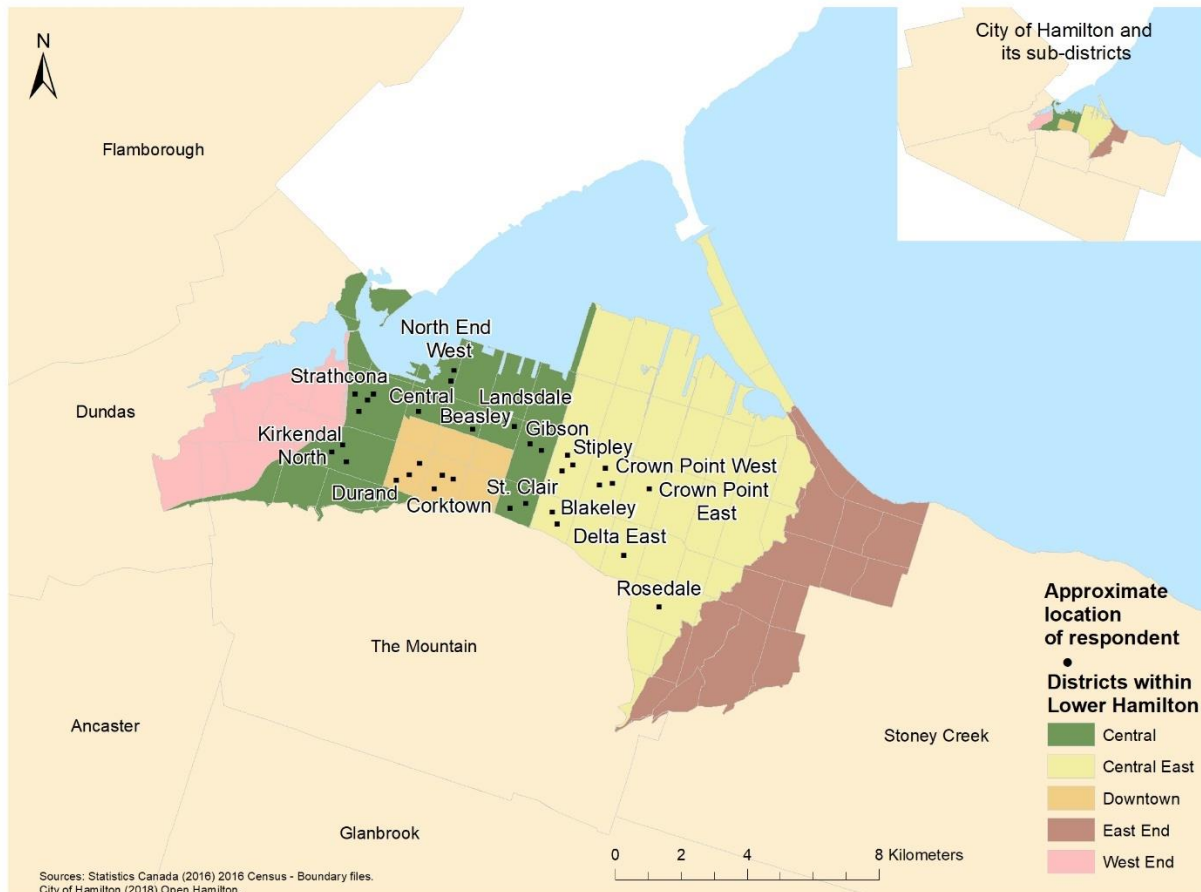


Figure 2: Residential locations of Lower Hamilton respondents

While Ley (2007) and Frey (2002) note that disproportionately large share of people migrating out of big cities have lower levels of education and middle- and lower-middle incomes, our respondents were largely professionals with university degrees. Respondents ranged in age: 17 were between 18-35 years old; 16 between 36-49; 6 between 50-65; and 3 were 65 and up. The median household income in Hamilton in 2015 was \$69,024 (Statistics Canada, 2017). Our participants generally had household incomes higher than this figure: 33% respondents earned above \$150,000; 33% between \$150,000 to \$100,000; 19% between \$100,000 to \$75,000; and only 14% below \$75,000. This means that in terms of income, most of our participants were part of the middle income class, which is between 75% and 200% of median income, as defined by the

Organisation for Economic Co-operation and Development (OECD) (OECD, 2019). In addition to this, the higher levels of education and professional employment are in line with other definitions of the middle-class (Ley, 1996, 2003; Walks and Maarannen, 2008).

Regarding the origin of our respondents, 81% came from the city of Toronto and the rest from The 905 region. In terms of housing, all but 10% were homeowners in Hamilton. 62% rented in the GTA, most of whom bought their first properties when moving to Hamilton. 38% sold a property in the GTA, thereby 'cashing out' of that area's property market before buying a home in Hamilton. However, it should be noted that some people who sold their homes in the GTA did so because they could not afford a larger property there. As we discuss below, this adds a complexity to binaries of 'gentrifier' and 'displaced'; in many cases, those leaving the GTA experienced indirect displacement, yet came to Hamilton as gentrifiers. Many are middle class professionals but their ability to maintain a middle class lifestyle is dependent on the city in which they live. Although class has obvious economic designations, we also refer to this as a social distinction that revolves around the neighbourhood (homes, amenities, mobilities, aesthetics). Bourdieu's (2005[1972], p. 174-175) *habitus*, or cultural identity, which can be defined as "a deep structure generative of all thought and behavior" helps to further structure our analysis. It is based on unconscious, collective and context-dependent cultural schema that shape perceptions of the social world and bodily dispositions.

However, the ways in which capital and demand operate over space as an expression of class interests are complex and often contradictory (Bridge, 2001). We rely on dialectical reasoning to articulate the geography of gentrification in Hamilton. Engaging both capital and demand levels of analysis, gentrification spreads through a dialectic drawing from states of relative development and underdevelopment based on Hamilton's socio-economic history. A dialectic regards opposite aspects as working in unity. Here, Lefebvre's ([1974] 1991) theory of spatial production is instructive. From this perspective, urban space is the material expression of the practice of a society. Space is socially produced and is a product of the struggles and contradictions within society.

Moving motivations and house/neighbourhood choice

Motivations for moving to Hamilton can be categorized into push and pull factors. The overwhelming push factor was the rising cost of living in the GTA¹. The following statement by Tom, a 44-year-old events planner who moved from High Park North in Toronto to Delta East in Hamilton, echoed the general response:

Purely financial. We have two kids and...between...mortgage and...daycare for both of them it was...killing us. Then we did the math and we figured [that] for what...we could get for the house and what property was going for in Hamilton it was a no brainer for [my wife] to quit her job, sell the house, move to Hamilton and then she would raise the kids.

This push factor was evident both for people who wanted to switch from renting to owning, and among people who owned a condo or small house in Toronto, but wanted more indoor and outdoor space for a growing family. A 32-year-old father who relocated his family from Mimico in Toronto to Strathcona in Hamilton stated:

We were starting to feel the space...closing in...even before the pandemic...and then [with] us all being home at the same time, we have a newborn and a 7-year-old...the walls just started coming in and...there's nowhere to go...which is fine for a while, but it started getting smaller and smaller.

Related to this, the dominant pull factor was the more affordable housing costs in Hamilton. Proximity by both car and transit to Toronto also played a role, with improving transit connections allowing people to stay connected to work, family and friends back in Toronto. A retired widow who moved from High Park area to Kirkendal North but wanted to remain close to her family remarked: "It's a GO Bus ride [away] that goes right to Union Station [in Toronto], under an hour [and Hamilton is] so much easier [for] people to drive here". Several families had at least one member who had better work opportunities or an easier commute because of existing involvement in a Hamilton growth area (creative industries, post-secondary institutions, medical research and hospitals). In

such cases, a history of living in Hamilton (studying, having grown up there) or having current family in the region was usually present.

However, it was not just the pragmatic or financial aspects that pushed people from the GTA and drew them to Hamilton. Part of the Lower City's appeal is its historic, walkable, mixed-use neighbourhoods. Neighbourhoods such as Kirkendall, Beasley, Corktown and Delta were compared to the "sprawl [surrounding] Toronto" comprising "pure suburbs" and myriad "big-box stores". Those who moved to the Lower City explicitly wanted pedestrian-friendly neighbourhoods with customized and independent shops five minutes' walk away. They did not want to be dependent on their automobiles, as is the case in suburban areas (Filion, 2018). Furthermore, respondents wanted to live in a city that was "its own entity" and not only a "commuter city" of Toronto. At the city scale, the sentiment behind this was that Hamilton felt like a *big-small* city, with similar variation and amenities to Toronto, just on smaller scale; our respondents regularly noted how "everything's 10 to 15 minutes away". Other parts of the GTA do not have this city *feeling* that is conducive to an "urban lifestyle" that respondents were accustomed to living in Toronto. A civil servant living in Beasley but who commutes into work in the GTA commented, "Of the places one can commute into Toronto, Hamilton is the only place that still feels like a city. It has the density, services, walkability and various ethnic communities". A student living in Rushdale who regrets not moving closer to downtown Hamilton stated, "It's not the size of Toronto, but it still feels like a city in itself, it doesn't feel like a suburb". A former resident of the once affordable Parkdale neighbourhood in Toronto, now living in downtown Hamilton mentioned, "You can live a life that is not too different from the life we were used to living in Toronto".

Other pull factors were Hamilton's vibrant arts, culture and political communities. However, many admitted to viewing the city only because a friend had invited them there or by chance, and recounted being "pleasantly surprised" that negative stereotypes were not true and found it a "vibrant place". Surprisingly, access to nature (Hamilton is known as the per capita waterfall capital

in Ontario) was mostly flagged later in the interview as a persuading factor and partially as a neighbourhood-specific consideration.

Houses themselves fit with both aesthetic desires and the goal of capital accumulation. 'Century homes' had "room to improve" with "good bones" and lots of indoor and outdoor space. Respondents expressed wanting to do their own renovations over time and "put their own style into it". John, a 38-year-old engineer who moved from downtown Toronto to Durand, commented:

So the house...had everything we wanted...it's a 120 year old house that had a lot of historical details as well as some updated furnishings, a nice backyard. It's in a central walkable neighbourhood close to a lot of green space.

Neighbourhoods in the Lower City also featured both a "walkability" and "neighbourhood feel" that emulated a Torontonians lifestyle. It was regularly noted that these qualities were not evident within automobile-oriented suburban areas in either the GTA or Hamilton. This meant being within walking distance to amenities, retail, restaurants, bakeries and farmers' markets (sourcing local produce). All these factors contributed to the feeling of neighbourhoods being self-contained, enclave communities, like those in Toronto. An ex-Torontonian hailing from Bloorcourt Village, known for its mix of cafes, bars and vintage shops, remarked: "And the thing that I knew about [the neighbourhood] was the proximity to [the trendy] James... and...Lock Street[s]. And I knew that I wanted to be walking distance to shops and restaurants and bars, just like in Toronto, but then also to green space". A former Bloor West Village resident, a popular shopping district in Toronto, stated: "So we get that...experience that we really like about Toronto, where we're able to walk places. We're able to...be a part of this urban community". A planner who moved from North York (one of the six administrative districts of Toronto) to Hamilton's Lower City commented, "I really wanted that old city walking around feel".

Words describing the human and built environment of neighbourhoods such as "diversity", "variation", "eclectic", "mix", etc., drew association with being trendy and hip, again like the *feel* of those in Toronto. Other prominent reasons for picking a neighbourhood were proximity to the

westside of the city because of highway accessibility to the GTA; access to public transit and a GO station; and proximity to a good school. Although affordability was the primary reason for the move at a city-scale, “price convenience” was only explicitly mentioned once at neighbourhood level, with the attributes of the neighbourhoods themselves being key aspects of the decision-making. It is also clear that most respondents felt that their desired home and neighbourhood was within reach, something that was not possible in Toronto.

The dialectic discourse of gentrification in Hamilton

Delving deeper into our interviews, there was evidence of both demand and capital related reasons for settling in Lower Hamilton. Respondents referred to targeted neighbourhoods as “emerging”, “up-and-coming”, “on the cusp” (see also Harris et al. 2015), undergoing “reinvestment” and so on, suggesting the opportunity for capital appreciation and accumulation. On the other hand, interviews suggested that demand and lifestyle acts as the substrate facilitating neighbourhood transformation through creation of the ‘other’ and entrenching class gains or privileges in the new neighbourhood based upon tastes, preferences, design, etc. These character-altering processes indirectly displace lower classes. Facebook groups, neighbourhood associations and others serve as civic and neighbourhood ‘gatekeepers’ as members spend much of their time blocking or assisting GTA residents negotiate this class transition. Schools further generate the insider/outsider dynamics between established Hamiltonians and newcomers.

The dialectic discourse involves both narratives of urban downgrading and revival. Gentrifiers rely on the discursive space created by these ‘mirror-image’ portrayals of the city playing off against each other. The two narrative strands are, however, not mutually exclusive as they serve to work together, favouring a rehabilitated rust belt city that is constantly approaching its prime. The fork-tongued nature of the discourse is apparent through the ‘schizophrenic’ approach to gentrification processes by middle class members, who both

eschew and support its driving forces. It is also evident in the codified (read class-defining) spatial markers of upper, lower, east, west, the mountain, etc. that middle class members use to denote desirable and undesirable areas of the city. In at least two cases, hand drawn (moving) maps were used to ascribe 'ghettoised' areas to be avoided.

The narrative of downgraded neighbourhoods that are undergoing revival is lucrative so long as it does not threaten new developments due to affordable housing pressures nor through fear over safety and security. This narrative supports the 'floating' of older neighbourhoods and their houses as coveted speculative investments for middle class families. The narrative is generally spread by Toronto-based and local real estate companies, some media (e.g., interviews suggested publications such as *Toronto Life* and *Macleans*, and to some extent *blogTO*) and through word-of-mouth between local ex-GTA residents and their family and social networks in the GTA.

Part of the urban downgrading narrative suggests that instead of trying to deny the grittiness of Hamilton, one should rather embrace it. The assumption is that this gives the city its authenticity and compared to the more sanitized GTA, demonstrates the realities of life, for better or worse. 'Authenticity' manifests itself in several ways: through modesty, friendliness, roughness, etc. Middle class members in support of this narrative chose to see this as a form of honesty which is part of what gives Hamilton its allure.

The cut-and-thrust of capital and demand in Hamilton occurs in both the established suburbs of Hamilton, such as Dundas and Ancaster, but is mainly focused in the rapidly changing Lower City neighbourhoods around Locke Street (Kirkendall neighbourhood), James Street (Beasley) and Gage Park (Delta, Crown Point). The arts and culture scene on Locke and James Streets is a useful way of marketing the inner city to those who are likely to be rebelling against the GTA's consumerism anyway, and is a good alternative to the uniformity and affluence of GTA area suburbs. As one ex-Torontonian stated: "Hamilton is a city for anti-capitalists who still want to live in a city". Although there is currently a generational mix in lower-

city neighbourhoods, those supporting such a lifestyle tend to be millennials working in design, marketing, IT, academia, the arts, the film industry and planning and are drawn to the inner city. Although favouring maintenance of neighbourhood character, these individuals wrestle with their middle class upbringings (usually around Toronto), displaying equally conflicting attitudes towards neighbourhood change. They are typically first-time home buyers and owning a single-detached home in Hamilton allows them to overcome the class dissonance young people may feel who cannot afford a house like ones they grew up in in the GTA. The dialectic discourse of capital and demand finds further resonance in the areas of displacement and neighbourhood choice, and is supported by the strong ‘we’re moving to Hamilton’ credo. Keeping both capital and demand levels of analysis engaged, we now explore these areas.

Displacement down the urban hierarchy

For some, gentrification represents opportunity, or emancipation (Caulfield, 1994; Glaeser, 2012), while for others, it represents conflict, loss of community and displacement (Kern, 2016; Paton, 2014; Slater, 2006). Displacement, while long thought to be a one-time process of out-migration (Grube Cavers and Patterson, 2015), is now more broadly conceived of in ways that capture spatial, non-spatial and exclusionary forms of displacement (Easton et al., 2019; Elliot Cooper et al., 2020; Marcuse, 1986).

As highlighted, middle class residents suggested that when confronted with sustained affordability pressures in the GTA, they had no choice but to move. Residents recounted how the rapidly changing character of their former neighbourhood was pushing them out. The mother of a family which had ‘cashed out’ of Oakville, a suburb between Toronto and Hamilton, but who had settled in Ancaster and not the Lower City of Hamilton, suggested:

“[O]ne of the...reasons..I was...more open to moving [to Hamilton] was because of...change in our neighbourhood. [M]y son is 18...[and] when he was in lower school, everybody...lived in a small bungalow [and] had the same socioeconomic status. But

over time, with my younger daughter, I found there was a huge divide between the bungalow dwellers and the monster home dwellers. [T]here was the haves and the have nots...And people were judged by the size of their house and my daughter was really struggling. She felt like there was a lot of...clique-ness in the class, in those groups and struggled with that...Whereas my son never had that experience. So I think that also made us realise that we're getting...pushed out."

A retired academic who rented an apartment near downtown Toronto for 22 years stated that:

"[T]he last few years I was there...everything started to change very rapidly. There was a lot of development and...by the end of the first decade of the 21st century...most of the houses on the street I was living on, were going for a couple of million dollars....And I just got to the point where I thought I don't want to live here anymore, what am I going to do?...Life in the building became unpleasant. They kept trying to go for above guideline rent increases and it cost more to just live around there. It was getting more crowded and... high-rise developments kept on going up. And I thought well, I don't think there's long term sustainability living here. And so that's how I got the idea for moving to Hamilton.

Affluent households therefore also succumbed to displacement pressures in the GTA, "even when your household income is over 150,000 [CAD] a year it's just not...possible anymore [to live in Toronto] if you have children", suggested a former resident of Bloor Village West. Displacement pressures were exacerbated by the COVID-19 pandemic providing further impetus for the move. The pandemic was described as being "a kick in the pants", having "really expedited our decision to move to Hamilton" or having caused middle class families to confront precarity should a breadwinner become sick².

As alluded to, those who were renting and hoping to buy also realized that home ownership in the GTA was beyond their means and likely to remain so. John exclaimed, "You know...in 2017, when housing was going through the roof...I realized we would never own a

house in Toronto and our current accommodation situation was poor". Others felt that to "maintain [their] quality of life" and based on the strong middle class ambition to own instead of rent, they "would be going backwards just to say we owned something. And so we started talking about Hamilton." Another stated, "we left because our hand was forced and our desire to own property outweighed our desire to stay in the city."

We were regularly told that, all things being equal, respondents would have preferred remaining in the GTA. But the reality of high housing costs, particularly when combined with growing families or evolving life circumstances (death of spouse, divorce, having to suddenly support adult children, etc.) left them in the position of needing to look beyond the GTA for adequate housing. Accordingly, respondents imagined gentrification as both a displacement-invoking process involving victimhood, which pushed them out of the GTA, but also a financial opportunity to acquire property that was pulling them to Hamilton. Respondents' awareness of their role as someone displacing others in Hamilton ranged from indifference to concern and even active participation in pro-affordable housing groups in Hamilton. Mostly the sentiment was one of helplessness and resignation towards the underlying capitalist forces causing displacement. Others advocated for a responsible and socially conscious form of gentrification, as a much-needed and positive force in Hamilton. When asked where the displacees might be going, places further away from Toronto and down the urban hierarchy to the west and east of Hamilton such as Brantford and St. Catharines were suggested, something that Moffatt (2021) has found in migration statistics.

Choosing neighbourhoods based on a Torontonion middle class identity

Buying in the 'right' neighbourhood was not just about aesthetics and amenities, but also about profit. The trick was to find neighbourhoods about to gentrify. Members of the well-known Facebook Group³ 'So you think you're about moving to Hamilton' stated that the most frequent

question received by GTA members (who constitute the majority of members), beside concerns mentioned above, is which neighbourhood is likely to quickly rise in value. Members suggested that although the Facebook group now plays a larger information-sharing role in moving to Hamilton, it was initially created as a real estate 'tool' aimed at GTA buyers. Its founder was a real estate agent at the time of creating the group in 2017, and it now has more than 4,000 members.

Much of what constituted a desirable neighbourhood for these movers was defined relationally to Toronto, which reinforces the notion that a move may not have happened had people not felt displaced in the GTA. Vanessa, a 40-year-old administrative secretary for the City of Hamilton who moved from Little Italy (College Street) in Toronto to St Clair, noted:

"[T]he neighbourhoods very much resembled the Toronto neighbourhoods and homes that we were used to. So that was definitely part of the appeal. We had heard that there were other people moving from Toronto, but at that time we didn't personally know of anybody. But that also appealed to us that we would end up in a city [in which] other people were going to be in a similar situation as us."

Many comparisons were drawn between Hamilton neighbourhoods and some of Toronto's most attractive and gentrified areas. Both the data analysis on intraprovincial migration to Hamilton (author, forthcoming) and our interviews have found evidence of Toronto 'enclaves' that have started forming within Lower Hamilton. An ex-GTA resident remarked on the Facebook group: "[It is] aimed at...young people from Toronto...[m]oving and trying to...copy what they had...trying to make Hamilton the same [as Toronto]".

Moving into a transplanted community filled with ex-GTA residents was seen as a way to integrate seamlessly by seeking out others in a similar situation and avoiding conflict with established Hamiltonian residents, which might occur if one was the only ex-GTA member on the block. One resident of the Stipley South neighbourhood stated that: "[I]n my block of..30 houses at least half of them have been renovated and sold...[to] Toronto buyers...and there's

some animosity between [longstanding] residents and...Torontonians that have moved in".

Locals were clearly weary of this type of active gentrifier. A Toronto expat described how he had to "undergo a test" before being accepted by their neighbours and another suggested that Torontonians "have to work harder to be accepted".

Unsurprisingly, Toronto-led gentrification spreads from west to east neighbourhoods in Hamilton because industry is in the east and the prevailing winds blow from west to east: "[T]here are parts of western Hamilton, like Kirkendall, which...feel...Toronto-ish in terms of the crowd, [and] there are parts of east Hamilton, which are much rougher and are much earlier on [in] the gentrification process". However, the geography of Toronto-led gentrification is gradually moving eastwards as relative rent gaps get exploited in these areas.

'We're moving to Hamilton'

Transplanting capital and relying on the transformative power of demand is further supported by the social reproduction of class. Once a decision to move based on economic reasons had been made, demand elements guided the choosing of a neighbourhood. However, for continued neighbourhood class transition, middle class members engaged in an enthusiastic recruitment of class-similar GTA residents willing to undertake the move. Hamilton's friendliness and charm, and phrases like 'you can do anything in Hamilton', 'diamond in the rough' and 'lots of opportunity in Hamilton', become the glib phrases that suggest a deeper motive. "So it's funny because as soon as you move to Hamilton, you start being the number one ambassador. So I was trying to get all my friends to move here when we first moved", remarked Vanessa, whose family had relocated from Toronto to Hamilton seven years prior.

Many people we spoke with eventually moved to Hamilton only because a friend or family member invited them there, and recounted being relieved that stereotypes of Hamilton were not true. Once living in Hamilton, ex-GTA residents instinctively understood what appeals to those from the Toronto region and were able to strategically mention all the 'right' things

when attempting to persuade others to move, i.e. a 'big-small' city feeling, reasonable proximity to Toronto, access to nature and a decent transit system. But several accounts suggested that even with a friend or family member living there, GTA residents needed significant persuasion and preferably a background in Hamilton to consider the move. Vanessa further explained:

"I've been trying to convince people to move here...And I talk to [my friend] all the time about how it's gentrifying. Because she also went to McMaster [University in Hamilton]...I've been trying to kind of educate her about how it's changing..they live in the same neighbourhood that we lived in in Oakville and they also wanted to kind of try to gain equity and financial stability."

Another ex-GTA resident suggested that he and his wife had been trying to convince a family member to move to Hamilton but "she's been very resistant to the idea. But I think we might be wearing her down."

Testimonials of having successfully moved to Hamilton also spread through word-of-mouth at work. An ex-GTA resident working in the film industry in Hamilton had 5 colleagues move after her: "A production designer, production manager, a grip, an electric and a camera guy". She initially planned to live in the property for a short period but "the more you talk about Hamilton [the more you encounter other people saying] oh, yeah, I just moved to Hamilton". Another suggested being the "initial snowball" in his office and "because a lot of people saw [his move to Hamilton] working [out]...5 out of [the] 40 [or] 50 people [in his office also] moved. "

Conclusion: The centrality of 'othering' in gentrification

Toronto-led gentrification in Hamilton spreads through a dialectic of capital and demand. The reasons for moving were overwhelmingly economic and it could even be argued that gentrifiers in Hamilton have been displaced from the GTA. In our study, which is limited by the fact that we focused on the Lower City, once the decision had been made to leave Toronto, the deciding factors for moving to Hamilton were based both around its relative affordability but, equally

important, demand aspects at the neighbourhood level that made it possible to replicate certain aesthetics, cultural values and lifestyles associated with urban Toronto. This migration spread partly through word of mouth and through the positive experiences of friends, family and co-workers who already made the move, through their active 'selling' of Hamilton to their peers. This social reproduction of class reinforced class identity based on a Torontonians middle class 'ideal'. In some ways, Lower Hamilton constitutes the GTA's gentrification frontier, especially as there are very few neighbourhoods left in the GTA where one can pick up an old fixer-upper with good bones at a reasonable price.

GTA residents' class conceit towards Hamilton's Lower City and the calculations involved in the move (economic, social, lifestyle, spatial and temporal) were demonstrated through the fact that the move to Hamilton related directly to being 'sold' on the financial optics and economic stability that it will bring their household, while having to 'accept' or 'come to terms with' the neighbours, downtown, and city over time. Although the initial trigger for moving to Hamilton was economic, demand-linked elements, such as access to nature, walkability and culture, the hope of a less car-dependent lifestyle, did genuinely contribute to the appeal over the long term but, were almost always aspects that middle class members needed persuading on. Moving to Hamilton's Lower City therefore became a matter of trying to convince oneself of the beauty of the city and its merits over time having already been forced to move there or while contemplating similar options.

Once moved, middle class members perceived a knock in status. They dealt with this through confirmation bias, either moving into neighbourhoods already dominated by ex-GTA residents and/or by recruiting class-similar GTA members. Additionally, interacting mainly with people who have recently experienced displacement in the GTA, is an easy way to perpetuate the perception of injustice and a 'righteous' sense of community upliftment. The alternative would generally be too uncomfortable and would entail an assessment of one's precarity and the class system that inflicted it. Having been on the receiving end of the capitalist class system,

the same behaviours are transplanted and replicated in Hamilton. Failing to properly integrate into the new community further allowed middle class members a certain amount of distance needed to enact violence towards those already living there. Tropes and stereotypes of Hamilton are a way of dehumanizing and justifying the worst elements of gentrification: the Hammer, Ontario's armpit, etc. The constant discussion of possibly going back to the GTA is a way in which members cope with having taken a blow to class status. 'Othering' in Hamilton is happening in the non-production and neighbourhood spheres; financial gains must be weighed against real and potential social and class 'losses', as members jostle for palatable 'outcomes'.

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Endnotes

¹ While the cost of housing in Toronto was by far the biggest push factor, other factors included: amplified affordability issues (breadwinners being furloughed or laid off) due to COVID-19, accelerating the move to a more affordable location and feeling no connection with Toronto.

² A separate article will specifically explore the role of the COVID-19 pandemic on moving to Hamilton. For more on mid-sized cities and COVID-19, see Doucet, B., & Van der Merwe, J. (2020). *COVID-19 and housing implications in the Region of Waterloo: Amplified challenges and proactive planning*. https://uwaterloo.ca/environment/sites/ca.environment/files/uploads/files/densityhousing_3_housing_doucetvandermerve.pdf

³ <https://www.facebook.com/groups/469546280077259/>.

Chapter 3: Housing challenges, mid-sized cities and the COVID-19 pandemic: Critical reflections from Waterloo Region

Abstract

This article examines key housing challenges in mid-sized cities during the COVID-19 pandemic. Two questions guide our critical reflection: understanding to what extent the pandemic represents new challenges and what planners can do to respond to them? We use the example of the Region of Waterloo, situated 100km west of Toronto and one of Canada's fastest growing urban areas. Waterloo has many similar characteristics to other mid-sized cities within commuting distance of large urban regions. In this article, we focus on two of the biggest (and inter-related) housing issues: inward migration from the Toronto Region and growing unaffordability. Both these challenges long-predate the COVID-19 pandemic, but there are early indicators that they are accelerating because of it. By rooting the challenges of the pandemic within longer trends and trajectories, our critical reflection suggests that many solutions that have long been understood to address housing inequalities are still important during the pandemic. Rather than devising new solutions, we argue that the pandemic requires implementing ideas called upon for years by researchers and advocates and more proactive planning to address market deficiencies.

Introduction

The focus of this article is on the effects of the COVID-19 pandemic on housing challenges in mid-sized cities. While there are lots of stories illustrating how the pandemic constitutes a new era for cities, to date, there is little to indicate that housing challenges are dominated by entirely new trends. We examine two of the major housing trends that were shaping many mid-sized communities before the pandemic, and critically reflect on what we already know thus far about

the ways in which the pandemic is impacting those trends and wider housing issues. The first of these trends is inward migration from big urban regions. Despite considerable media attention about an exodus from large cities (Alini, 2021; Haag, 2020; Haigh, 2021; Marsh, 2020; Sheehan & Sheehy, 2020), the outmigration from large urban regions towards midsized cities within a one or two hours' drive has been a major trend within the Canadian urban system for several decades (Hou & Bourne, 2006; Ley, 2007).

The second trend is a persistent affordability crisis (including homelessness) for low-income populations that has been percolating up towards middle-class households in recent years. Some of this is due to in-migration from larger urban regions (where buyers 'cash out' of even more expensive housing markets and therefore bring far more capital to mid-sized regions), but there are other factors as well.

While it is likely that the pandemic is causing some people to relocate, thereby affecting affordability, we caution that knee-jerk policy responses to premature analyses should be avoided, as there is potential scope for error in researching and making recommendations based on a phenomenon that is yet to run its full course. To conclusively answer the question of whether *more* people are moving into mid-sized cities as a result of the pandemic will require both an analysis of the 2021 Census (with data not available until well into 2022), as well as interviews with people who have moved to determine the role the pandemic played in their relocation. However, there is an even greater need to implement ideas about affordable housing in particular, that scholars, researchers, and advocates have been calling for for many years.

This article offers critical reflections and analysis of how the trends witnessed thus far during the pandemic align with the pre-existing housing challenges that were already evident before 2020. While scholars generally prefer to conduct research after the fact, this could be years away. However, there is an urgent need for reflection and analysis in a rapidly evolving context in order to ensure that planning decisions are made with the best available information at that time (Doucet et al., 2021). Two objectives guide our critical reflection and analysis:

1. Understand to what extent the housing challenges of the pandemic constitute new issues for mid-sized cities.
2. Enhance planning and policy debates by articulating key insights, lessons, and considerations for how to deal with housing challenges during a pandemic.

In this analysis, we use a case study of the Region of Waterloo, in Ontario, Canada. Situated 100km west of Toronto, the Region of Waterloo is home to approximately 600,000 people. It is within the outer rim of the Greater Golden Horseshoe (GGH), a secondary region comprising the most densely populated and industrialized area in the country, with the City of Toronto, and the Greater Toronto Area (GTA) at its centre. The Region of Waterloo encompasses three mid-sized cities (Kitchener, Waterloo, and Cambridge) and four predominantly rural townships in a two-tiered municipal structure (upper and lower).

The remainder of this article is structured as follows: the next sections outline the methodology adopted in this paper, issues of housing in mid-sized cities, and the impact of COVID-19 on housing. We then examine two aspects of the housing landscape in more detail: in-migration from the GTA and growing pressures on affordable housing. Finally, in the conclusion, we examine specific areas where local planners in mid-sized cities can help to create a more equitable and sustainable housing market in the pandemic and post-pandemic periods, stressing how recommendations that predate the pandemic are still relevant and important today.

Methodology

This article derives from a policy project focused on the impact of COVID-19 on housing in the Region of Waterloo (Doucet & Van der Merwe, 2020). We employ a critical content review of media, research, and policy reports, particularly during the first wave of the pandemic (March-August 2020) (for other examples of this approach, see: Parsell et al., 2020; Rogers & Powers, 2020; Vilenica et al., 2020). Rather than speculate on the future of cities, our critical reflection is

centred on whether the impacts of COVID-19 on housing in mid-sized cities are new, or if they present an acceleration and amplification of existing challenges? With this approach, we can better assess to what extent responses to the pandemic require *new* solutions, or the implementation of what housing scholars and advocates have been calling for *prior* to the pandemic? This gives us insights into whether COVID-19 has altered both qualitative and quantitative dimensions of housing in mid-sized cities.

While our focus is the Region of Waterloo, we also examined literature on mid-sized cities more broadly. The primary data collection method was a systematic media search against our identified themes. Document searches also yielded reports and policy papers analyzing emerging patterns of the pandemic as it unfolded. The media search and analysis were carried out in four steps.

Step 1: Exhaustive keyword searches were conducted of the Region's main media sources (Waterloo Region Record; Cambridge Times; CBC Kitchener) covering the first State of Emergency declared in Canada (March-June 2020). Key themes were identified that covered the salient issues relating to housing. We then organized these articles according to our key themes: housing affordability; housing demand; homelessness; the relationship with Toronto and GTA; and housing type. The 'Homelessness' and 'Housing demand' themes had the largest number of relevant articles.

The themes 'the relationship with Toronto and the GTA' and 'Housing types' required a more targeted, purposeful search (see Step 3). Regarding the former, some articles that originally appeared in *The Toronto Star* were also syndicated in the regional media. Only one letter to the editor (mentioning housing intensification) was placed under 'housing types.' Consequently, this theme fell away as a unique category.

Given the unfolding nature of the pandemic, we also created a 'miscellaneous' category consisting of articles on COVID-19 and Indigenous communities, COVID-19 and mental health issues, COVID-19 and long-term care homes, and broader op-ed pieces related to creating a

more equitable city, etc. These matters were ostensibly not new categories on their own but featured as possible sub-themes under the other themes and in as far as they related to housing.

Step 2: The goal of this step was to create a thick, narrative account of events in the Region of Waterloo under each theme (homelessness and housing demand/affordability) by placing the articles in chronological order and discussing the main events and issues as they unfolded. This served as a reference for understanding the flow of events over the first four months of the pandemic (what happened, when, where, and why) and served to highlight the more fine-grained themes that required further exploring, i.e., media searches drawing from sources beyond the Region.

Step 3: This step involved augmenting the Region's media with wider but discerning thematic media searches based on the themes identified in the basic narrative accounts in Step 2, and including the Region's relationship with Toronto and the GTA. This search was also delimited according to geography (comparable mid-sized cities and regions in Ontario, Canada, and North America), and further refined according to the number of relevant hits received.

Step 4: This step involved augmenting the existing narrative accounts under each theme with insightful but more generic analyses from beyond the Region.

Combined, these systematic steps provided us with information to critically reflect on housing challenges during the pandemic. As housing researchers, our prior work on housing, gentrification, and displacement in Waterloo Region and Hamilton has been important in contextualizing the immediate issues pertaining to the pandemic. In addition to this, we have analyzed a custom data set from Statistics Canada that breaks down intraprovincial five-year migration data by city of origin across Ontario. We have done this for the 2006 Census (2001-06 time period) and 2016 Census (2011-16 time period). We have used publicly available data to examine broader trends within intra-provincial migration at the Census Metropolitan Area (CMA) level, through both the components of population change by census division (dating back to

2001) data set and the origin and destination data on intra-provincial migration at the CMA and Census Agglomeration (CA) level since 2016.¹

Mid-sized cities and housing

In recent decades, there has been a divergence in the trajectories of cities across Canada. Large urban areas attract international migrants and talented domestic workers, while many mid-sized cities have struggled economically and seen far less population growth (Bourne & Simmons, 2003; Donald & Hall, 2015; Jamal, 2018). Mid-sized cities constitute a growing site of study in the urban hierarchy (Gordon et al., 2019). They are classified as cities with populations between 50,000 to 500,000 according to researchers at the University of Waterloo's Centre for Core Area Research and Design, and the Mid-Size City Research Centre (Seasons, 2003, p. 66), although more recent publications also include cities whose populations have crossed the 500,000 threshold (such as those studies conducted as part of the Evergreen Midsized City Research Series). Waterloo Region is generally considered to be part of the Canadian group of mid-sized cities. Based on updates from Statistics Canada, the population of the Kitchener-Cambridge-Waterloo CMA (roughly, though not entirely corresponding to the Region of Waterloo), was 593,882 in July 2020.²

In Canada, despite a widening gulf between large and mid-sized cities, there are also very different growth, migration, and economic trajectories *between* mid-sized cities as well (Gordon et al., 2019; Jamal, 2018; Seasons & Warkentin, 2017). Within this is a group of cities that sit in relatively close proximity to large urban areas, including Waterloo, Guelph, Peterborough, Hamilton, St. Catharines, Brantford, and Abbotsford. These cities are more likely to experience spillover effects from major metropolitan areas. These mid-sized cities have very different trajectories compared to places such as Windsor, Sudbury, Trois-Riviere or others that are beyond commuting distance to large cities.

The housing needs of mid-sized and large cities are characterized by different growth patterns and demographics. As Slack et al. (2006) note, large cities offer residents greater diversity of employment and higher incomes, and are normally the leaders in terms of talent concentration, production, and the necessary specialization that underlies innovation and economic growth. Large cities tend to have greater social and ethnic plurality, but also increased commute times. According to Slack et al. (2006), they are, on average, more damaging to the environment, and have higher incidents of social segregation and cultural alienation.

Smaller cities, often pay less for the same work (Baum-Snow & Pavan, 2012), have fewer employment opportunities, are less globally connected, and may be less diverse. Although not offering as wide an array of economic opportunities, they may also be renowned in a particular growth area of the economy (Puissant & Lacour, 2011). Innovation and technology in Waterloo Region is one such example.

In Canada, large cities such as Toronto, Montreal, and Vancouver are “gateway cities” that attract international immigrants, who account for most of their population growth (Ley & Lynch, 2020; Saunders, 2012). Intra-provincial migration levels are negative, meaning they lose more people to other parts of their provinces than they gain. The City of Toronto lost a net average of 39,061 people per year to other places in Ontario from 2001-2020 (see Figure 1). Conversely, mid-sized cities, particularly those that are within a broad commuter shed of larger ones, see the bulk of their new residents originating from elsewhere within the same province, largely in the form of households leaving large urban regions (Hou & Bourne, 2006; Ley, 2007) (Figure 2).

Being less of a global hub for commerce, tourism, and politics - mid-sized cities cultivate niche appeals in various local markets (Puissant & Lacour, 2011). They are also more affordable, particularly for households searching for larger properties; in big urban regions such as Toronto or Vancouver, the dream of a suburban home with a backyard is out of reach for

many middle-income households (Ley, 2007). Mid-sized cities also offer increased access to green spaces, reduced density, and less congestion. However, this in-migration contributes to distorting local housing markets, which under normal circumstances, have become accustomed to absorbing the seasonal flows of students, workers, and tourists (Charbonneau et al., 2006; Teixeira, 2009). Households selling properties in large regions have more capital to invest in housing.

Canada's large metropolitan areas have been resilient in their ability to attract international migrants, even in the aftermath of the 2008-09 global financial crisis when employment levels failed to quickly rebound to pre-recessionary levels (Dubé and Polèse, 2016, p. 625). Yet in some ways,

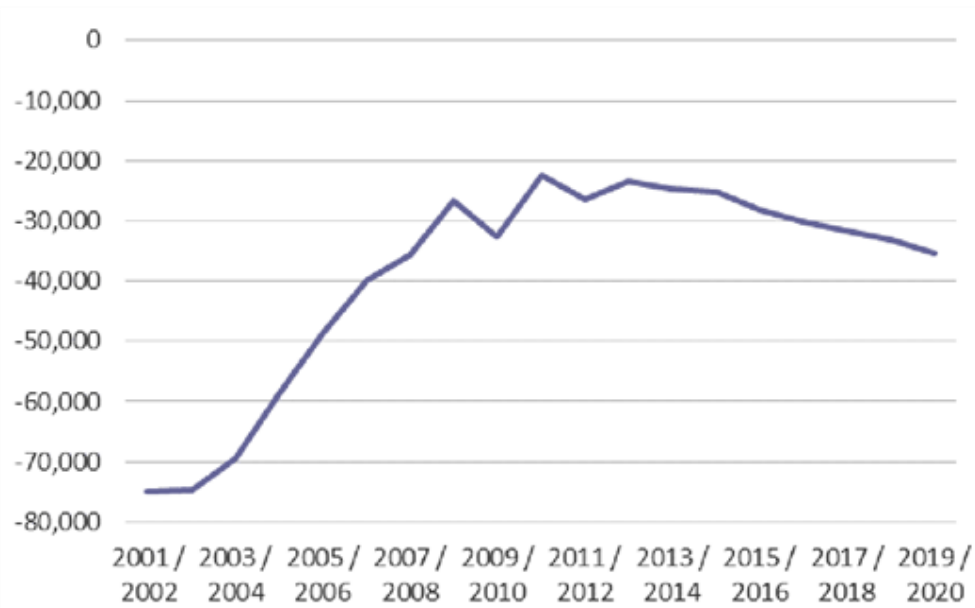


Figure 3. Net intra-provincial migration, City of Toronto (2001-2020).
 Source: Statistics Canada, Components of population change by census division, 2016 boundaries.

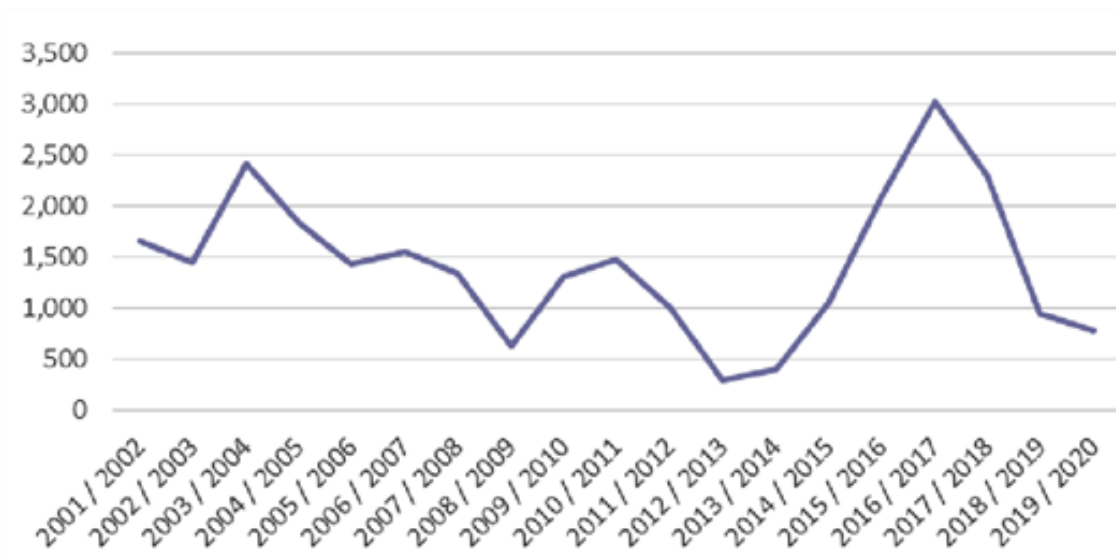


Figure 4. Net intra-provincial migration, Waterloo Region (2001-2020).

Source: Statistics Canada, Components of population change by census division, 2016 boundaries.

the nature of the COVID-19 pandemic is quite different to the global financial recession.

Immigration from abroad (the biggest source of new population for large cities) has slowed to a trickle since the onset of the pandemic. On the other hand, out-migration from big cities to mid-sized ones (the biggest source of new population for communities such as Waterloo Region) appears to be accelerating as 2020 saw a record year for house price increases, forcing many households to look further afield for affordable housing (Moffatt, 2021).

Despite recent media attention to gentrification in mid-sized cities such as Hamilton (Harrap, 2018), there have been relatively few studies that explicitly examine the role that large cities play in shaping gentrification in mid-sized ones. The dominant view of the spread of gentrification is that it ‘cascades’ down the urban hierarchy from global cities (see Atkinson & Bridge, 2005; Bridge, 2003; Lees et al., 2008), through economic, cultural, or policy diffusion (Lees, 2006). However, very few studies have empirically examined this relationship; Dutton’s (2003, 2004) studies of Leeds showed that gentrification in the city was partially driven by households ‘cashing out’ of the London property market. However, Lees’ (2006) findings in

Portland, Maine, suggest that gentrification did not ‘lag behind’ cities such as New York or Boston, but rather existed contemporaneously, unnoticed by researchers.

COVID-19, housing and inter-regional migration

Housing has been central to our experiences of the pandemic, with ‘staying at home’ being one of the key public health measures to fight the spread of the virus. As Rogers and Power (2020) note, some housing policies have shifted incredibly quickly while others have remained static.

In 2020, there were many media articles that suggested an exodus of people from dense and congested big cities in search of more space in smaller places (Haag, 2020; Marsh, 2020; Sheehan & Sheehy, 2020). Many of these articles questioned whether or not big cities had a future (Florida, 2020; Michael, 2020; Specia, 2021). However, thus far, there have been very few empirical studies that have actually examined whether more people are leaving big cities and to what extent the pandemic has played a role in this decision. A study by the New York Times used change-of-address request data with the US Postal Service and found greater than normal outflows of residents from New York and San Francisco in 2020. However, in the United States, these were outliers and apart from this, migration patterns looked very similar to 2019 (Kolko et al., 2021).

Most of the studies that do exist focus on moving intentions, and some of the biggest come from the real estate industry. In May 2020, Redfin, a brokerage firm in the United States, conducted a survey of 900 of its currently employed users and customers based mainly in four metropolitan areas: New York, Boston, San Francisco and Seattle.³ The results indicated that more than 50% of people in these four metros would move if they were to work from home permanently. Those most likely to move were from major metropolitan areas, and they were most likely to move to nearby mid-sized or smaller urban areas, such as Sacramento (San Francisco), Tacoma (Seattle), and New Hampshire (Boston) (Ellis, 2020).

While we will need to wait for more migration data, three areas of housing are worth critically reflecting on as they intersect with the COVID-19 pandemic. First, the link between housing and health is indisputable. Overcrowded housing conditions have been linked with spreading of the virus (Almagro et al., 2020). Overcrowding exists when more people reside in a dwelling than it was designed for and often involves sharing bedrooms and having little, or no private space. Data from Toronto during the first wave of the pandemic showed that areas with the highest rates of household overcrowding had infection rates of 568 per 100,000 people, compared to 144 per 100,000 people in areas with the lowest rates of crowding (Grant, 2020). Crowding is often a systemic challenge facing low-income groups and visible minorities, and can therefore exist in all types of cities; an analysis of the geography of COVID-19 cases in Waterloo Region found that it was far more prevalent in areas that were predominantly Black and/or overcrowded (Areguy & Outhit, 2020). However, the supposed growing allure of mid-sized cities is partly based on their association with lower densities and more space. Density and overcrowding are distinct, and overcrowded housing can occur in areas of lower densities, and vice versa. Density is simply the number of people residing in unit geographical area, such as a square kilometre.

Second, the literature on COVID-19 and housing highlights the mental health and domestic burden placed on residents during the extended periods of lockdown. Some of this is related to domestic violence, especially for women, LGTBQ youth, and those with substance-use addictions (Evans et al., 2020; Goodsmith et al., 2020; Rezene, 2020; Salerno et al., 2020). The types of dwellings also play a role in mental health, and our experiences of lockdown. Hubbard et al. (2021) discuss how micro apartments that have come to typify new urban developments are ill-suited to long periods of confinement to one's home. Both privacy and intimacy are compromised in such an arrangement. Several studies have found that the main differences in peoples' experiences during the pandemic centre on the size and availability of indoor and outdoor space at their disposal, which includes both spaces within their own

dwellings, and access to trails and quality public and green spaces (Nanda et al., 2021; Rogers & Power, 2020).

A third theme focuses on how the pandemic intensifies existing housing inequalities (Accornero et al., 2020; Ali et al., 2020; Chen & Krieger, 2021). This can be due to overcrowded living conditions, precarious employment, or the inability to work from home. When precarious work and precarious housing intersect, the opportunities to contract and spread the virus also grow (see Stevens, 2021; Xavier, 2021). Many low-income residents have been especially vulnerable to sudden changes in their circumstances owing to pandemic-related job cuts and closure of businesses (Couch et al., 2020). Racialized communities, women, single parents, and those with, or caring for someone with a disability were the most vulnerable (Almagro et al., 2020). These groups were often exposed to the triple-threat of overcrowded living quarters, employment in essential businesses or services that cannot be performed at home, and a reliance on public transit (Carrington, 2020a; Cheung, 2020; Grant, 2020; Pitter, 2020). It is worth noting that the situation facing the homeless during the pandemic is both unique and also related to the abovementioned themes (e.g., the dangers of shelter-based group sleeping arrangements, having no private dwelling to self-confine, increased precariousness, etc.) (Lima et al., 2020).

A key theme of this literature stresses how most of the housing challenges that have been rendered visible during the pandemic long pre-date the arrival of COVID-19. The pandemic has amplified these social, spatial, and racial inequalities and how they play out in housing (Doucet et al., 2021). In the remainder of this article, we examine how this is affecting housing challenges within the Region of Waterloo, focusing on two factors: intra-provincial migration and growing demand for all kinds of affordable housing.

Migration: Intra-provincial migration, specifically from the GTA

When examining how the COVID-19 pandemic is affecting cities, it is important to situate what is happening during the pandemic within trends that were well-established beforehand. While migration to mid-sized cities such as Waterloo Region has received significant attention since 2020, these trends are, in fact, nothing new. Table 1 demonstrates that the biggest share of new population to the Region over the past twenty years has come from intra-provincial migration, rather than from other provinces or abroad. Broken down by origin location within Ontario, of the 42,900 people that moved into the Kitchener-Cambridge-Waterloo CMA from elsewhere in the province between 2011-2016, 41.7% came from the GTHA, with a further 31.1% originating from the outer ring of the Greater Golden Horseshoe (Table 2).⁴ Of note is that the number of people moving from the City

Table 1. Kitchener CMA: Population and Migration. 2006 to 2016

	Total Population		Change	
	2006	2016	2006 to 2016	
	#	#	#	%
Population	451,235	523,890	72,655	16.1
Migration	2001-06	2011-16	2001-06	2011-16
	#	#	#	%
Recent Movers	188,860	190,915	2,055	1.1
<i>Local Movers</i>	105,985	103,905	-2,080	-2.0
<i>Intra-provincial Migrants</i>	58,070	61,770	3,700	6.4
<i>Inter-provincial Migrants</i>	6,705	5,650	-1,055	-15.7
<i>External Migrants</i>	18,095	19,585	1,490	8.2

Source: Statistics Canada (2019) Custom Tabulation, based on the 2006 and 2016 Census, five year residential mobility, intra-provincial migration by Census Subdivision (CSD).

Table 2. Kitchener CMA: Intra-provincial In-Migration, 2001-06 to 2011-16

Origin Point	Total Population		Change	
	2001-06	2011-16	2001-16 to 2011-16	
	#	#	#	%
All of Ontario	41,795	42,900	1,105	2.6
GTHA	17,015	17,895	880	5.2
Toronto	6,810	5,520	-1,290	-18.9
Hamilton	1,890	2,160	270	14.3
905	8,315	10,215	1,900	22.9
<i>Halton</i>	1,830	3,125	1,295	70.8
<i>Peel</i>	4,265	4,795	530	12.4
Outer Ring	11,730	13,350	1,620	13.8
<i>Wellington</i>	825	995	170	20.6
<i>Niagara</i>	1,220	1,090	-130	-10.7
<i>Brant</i>	1,235	1,500	265	21.5
<i>Simcoe</i>	850	1,090	240	28.2
Rest of Ontario	13,050	11,655	-1,395	-10.7

Source: Statistics Canada (2019) Custom Tabulation, based on the 2006 and 2016 Census, five-year residential mobility, intraprovincial migration by Census Subdivision (CSD).

Table 3. In and out intra-provincial migration to Kitchener-Cambridge-Waterloo CMA, 2016-2019

	In-migration			Out-migration			Net migration			Total: 2016- 2019
	2016 / 2017	2017 / 2018	2018 / 2019	2016 / 2017	2017 / 2018	2018 / 2019	2016- 17	2017- 18	2018- 19	
Ottawa - Gatineau CMA (Ontario part)	303	336	326	442	499	532	-139	-163	-206	-508
EASTERN ONTARIO	298	315	292	345	362	383	-47	-47	-91	-185
Centre Wellington (CA)	240	141	218	204	234	252	36	-93	-34	-91
Oshawa (CMA)	205	172	192	127	135	144	78	37	48	163
Ingersoll (CA)	28	26	45	123	142	132	-95	-116	-87	-298
Toronto (CMA)	7,994	8,103	7,489	3,903	3,767	4,082	4,091	4,336	3,407	11,834
Hamilton (CMA)	1,134	1,107	1,010	732	738	909	402	369	101	872
St. Catharines Niagara (CMA)	314	322	237	244	241	310	70	81	-73	78
Brantford (CMA)	508	624	513	786	735	802	-278	-111	-289	-678
Woodstock (CA)	198	223	237	641	607	555	-443	-384	-318	-1,145
Tillsonburg (CA)	32	37	35	60	76	62	-28	-39	-27	-94
Norfolk (CA)	125	93	103	160	135	182	-35	-42	-79	-156
Guelph (CMA)	1,687	1,612	1,461	1,032	1,119	1,055	655	493	406	1,554
Stratford (CA)	160	157	197	247	282	289	-87	-125	-92	-304
London (CMA)	643	631	709	752	892	806	-109	-261	-97	-467
SOUTHWESTERN ONTARIO	398	375	401	432	477	531	-34	-102	-130	-266
GEORGIAN BAY, BARRIE	278	317	255	285	320	332	-7	-3	-77	-87
NORTHERN ONTARIO	294	260	235	220	244	269	74	16	-34	56
Area outside census metropolitan areas and census agglomerations,	1,975	2,038	1,713	2,995	3,391	3,020	-1,020	-1,353	-1,307	-3,680

Ontario

Total	16,814	16,889	15,668	13,730	14,396	14,647	3,084	2,493	1,021	6,598
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EASTERN ONTARIO: Kingston, Belleville, Peterborough Census Metropolitan Areas (CMA), Cornwall, Arnprior, Carleton Place, Brockville, Pembroke, Petawawa, Coburg, Port Hope, Kawartha Lakes Census Agglomerations (CA)

SOUTHWESTERN ONTARIO: Windsor (CMA), Chatham-Kent, Leamington, Sarnia (CA)

GEORGIAN BAY, BARRIE: Barrie (CMA), Wasaga Beach, Owen Sound, Collingwood, Orillia, Midland (CA)

NORTHERN ONTARIO: Greater Sudbury, Thunder Bay (CMA), Elliot Lake, Timmins, Sault Ste. Marie, Kenora (CA)

Source: Statistics Canada (2021) Inter-provincial and intra-provincial migrants, by census metropolitan area and census agglomeration of origin and destination, 2016 boundaries.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1710014101>

of Toronto actually went down by 18.9% between 2006 and 2016, though this was offset by a 22.9% growth in in-migration from the 905 region around the city (Durham, York, Peel, and Halton Regions). Within that, there was 70.8% growth from Halton Region between 2001-6 and 2011-16.

Housing in Waterloo Region is heavily influenced by its proximity to the GTA. The trend of ‘driving until you qualify’ for a mortgage – moving further out along Highway 401 in search of more affordable housing – is therefore not new (Moffatt, 2021). Data from Table 2 do not include out-migration from Waterloo to elsewhere in the province. Updated annual statistics from 2016-2019 provide some more insights on overall intra-provincial migration trends (Table 3). They also update some of the data from the 2016 Census, albeit at a larger origin scale than noted above. These data indicate that the Toronto, Guelph, and Hamilton CMAs represent the biggest source of in-migration, each of which have net positive migration levels. While the Toronto and Guelph CMAs are the largest destinations for those leaving Waterloo Region, Brantford, Woodstock, and London have all seen more in-migration from Waterloo Region than out-migration to Waterloo, reflecting Moffatt’s (2021) idea of the musical chairs effect, which pushes people further away. Two further points are also relevant. First, the Waterloo CMA loses more than one thousand more people per year than it gains to rural parts of the province. Second, net

intra-provincial migration has declined in each of the three years, from 3,084 in 2016-17 to only 1,021 in 2018-19.

This is the context in which the pandemic arrived. We will need to wait for updated figures from 2021-22, as well as the detailed migration data from the 2021 Census in order to start to understand the impact of the pandemic on these trends. A full assessment of how the pandemic impacted intraprovincial migration will be years away, especially understanding whether the stories of accelerated migration into mid-sized cities such as Waterloo (Davis, 2020a; Sharpe, 2021) constitute a blip or a major realignment of these trends. Royal LePage CEO Phil Soper stated that the pandemic “supercharged” the acceleration of this trend (Kalinowski, 2020a). In July 2020, the *Toronto Star* boldly proclaimed that Torontonians were “fleeing” the city for cheaper homes and more space, although it was noted that this was a “perceived” trend (Kalinowski, 2020c). Colleen Koehler, president of the Kitchener Waterloo Association of Realtors, estimated that upwards of 50% of realtors showing properties to clients in the Waterloo Region in July 2020 were actually from the GTA (Canadian Television Kitchener, 2020). The Ontario Real Estate Association conducted an online survey of 1,073 Ontario residents in May, 2020 and found that demand for housing was shifting, with buyers seeking bigger properties with more space/amenities (28%) and more outdoor space (25%) (Ontario Real Estate Association, 2020).⁵

Waterloo, and other mid-sized communities within the outer ring of the GGH (i.e., Peterborough, St. Catharines) have several factors relevant to these reported trends. First, they offer more spacious housing units at lower prices than cities within the Toronto region. Second, proximity to employment (particularly office-based jobs) may have less importance to potential homebuyers if some form of working from home, or flexible working arrangements continue for years to come. Several prominent companies, including Shopify, announced early in the pandemic that they were switching to a permanent work-from-home model (Canadian Broadcasting Corporation, 2020). Third, the push factors from Toronto are growing, partly due to

the pandemic. These include the high cost of housing, congestion, density, lack of green space, and smaller housing units.

Despite the pandemic-induced recession, housing prices, particularly for single-detached dwellings, have risen significantly, both in the GTA (Kalinowski, 2020b) and Waterloo Region (Davis, 2020b). Low interest rates and reduced inventory on the market play a role; in July 2020, inventory was 28% lower in the Region of Waterloo than it was in July 2019 (Shetty, 2020). In August 2020, the median price of all properties sold in the Region was \$597,955, an increase of 20.8% compared to August 2019 (Davis, 2020b).

In the Region of Waterloo, demand for single-detached homes has grown stronger than any other housing type since the onset of the pandemic, something reflected in international trends (The Economist, 2020). Prices rose 23% between July 2019 and July 2020 (Davis, 2020b), and in February 2021, the average selling price for a detached home reached 850,000, an increase of 30% in one year (Sharpe, 2021). It is worth noting, however, that there are very few family-sized units constructed within the urban core, and most new condo developments comprise mostly one-bedroom units. This means that households looking for more space have few options beyond suburban sprawl, or increasingly expensive and gentrified housing in older urban neighbourhoods (Parker, 2017). Despite these trends and these recent price increases, housing in Waterloo Region is cheaper than in the GTA. While price increases during the pandemic were referred to as “mind-blowing” by the president of the Kitchener Waterloo Association of Realtors (Sharpe, 2021), in early 2021, the cost of an average detached home in the Region was around \$400,000 cheaper than in Toronto.

Affordable Housing: Growing demand across the spectrum

While most in-migrants from the GTA will be either purchasing homes, or renting within the private market, these flows, combined with other factors, are placing strains on all segments of

the housing market. Demand for affordable housing was already high, with waiting times averaging eight years for a one-bedroom in subsidized housing (City of Waterloo, 2020).

During 2020 and 2021, the skyline of Waterloo Region was dominated by more than a dozen construction cranes erecting new condominium towers (with a few purpose-built rentals). Despite the record number of new units constructed within the urban core, the cost of housing has not decreased. This new density is part of the Region's growth strategy to concentrate the majority of new developments within the existing urban footprint, rather than as sprawl on productive and culturally significant agricultural land surrounding the three cities. The Region sought to achieve this primarily through development of the ION LRT project, which commenced operation in June 2019, and the Countryside Line, a growth boundary enacted into the Official Plan more than a decade ago. However, in terms of what gets built (size, tenure, ownership), the Region has taken a hands-off approach, leaving decisions about number of bedrooms and the price and levels of affordability to developers and the private market. The result has been large numbers of small units (primarily one-bedrooms) that are popular with investors.

While this growth model has produced a more compact city, several points are worth reflecting on, particularly with regard to the demand for housing both before and during the pandemic. First, because many of the new condo units are small, they sell at prices which have been under the Region's threshold for units that are considered to be affordable (measured by a crude ratio of price to average earnings) (Region of Waterloo, 2019). However, as noted in international studies, these types of micro-apartments are not conducive to both mental health and well-being in general, and the specific challenges of the pandemic (Hubbard et al., 2021).

While these developments meet demands for investment, the types of units (size, affordability) do not necessarily meet the needs of local residents who are looking for affordable housing options along good transit routes. Research along the ION LRT corridor conducted prior to its opening found that there was a lack of supply of larger units, which combined with rising rents, limited housing opportunities for many people who want to live in the urban core,

where opportunities for more sustainable and less car-dependent lifestyles are more plentiful than in the region's suburbs (Pi, 2017; Tran, 2016). A particular challenge was when people wanted to switch from renting to owning: for larger households, there were few affordable options along the LRT corridor. Pi's (2017) survey found that many people ended up in car-dependent suburbs not out of choice, but because housing supply in the urban core was not affordable. It is also worth noting that while there is little empirical research on the role of the short-term rental market (e.g., Airbnb) in Waterloo Region, studies elsewhere have found that it has a profound impact on affordability and accessibility of the local housing market, particularly in core urban areas (Wachsmuth et al., 2017; Wachsmuth & Weisler, 2018).

The second issue with respect to new condominium development is that some of it has taken place on top of formerly affordable housing units that were demolished to make way for these new developments. Unfortunately, local planners or other government bodies have not been keeping track of how many units of housing have been lost in the wake of \$3 billion worth of investment along the LRT corridor. However, our partnership between the University of Waterloo and the Social Development Centre Waterloo Region has sought to use oral histories and counter-mapping in order to assemble local knowledge about the types and quantities of housing that has been lost (Social Development Centre Waterloo Region, 2020). This work has found far more instances of displacement and the loss of already existing affordable housing (through demolition or renoviction) than show up in conventional statistics that primarily shape planning decisions.⁶

Another challenge is the role that Real Estate Investment Trusts (REITs) are playing in reducing the supply of already-existing affordable housing. August (2020) and August and Walks (2018) demonstrated the detrimental effect REITs have on eroding the supply of affordable housing. Another process evident in Waterloo Region is 'renoviction' - where landlords evict lower-income tenants, renovate their properties, and subsequently rent them at higher rates to more affluent households. There have been several high profile renovictions in

downtown Kitchener in recent years (Canadian Broadcasting Corporation, 2015; Global Newswire, 2015; Mercer, 2015; Thompson, 2019a). Our ongoing work documenting displacement has found many instances of renoviction in both the core and suburbs of the Region (see Social Development Centre Waterloo Region, 2020); we have also found that these displacement and eviction pressures have continued during the pandemic (Turman et al., 2021).

There are indications that the COVID-19 pandemic has accelerated these trends. A report by the Canadian Centre for Policy Alternatives noted that private-market rents in Waterloo Region increased by 4% between October 2019 and October 2020 despite one of the most severe recessions in modern times. The authors of the report found that landlords were generally unwilling to lower asking rents and they provided a useful and empirically grounded counterargument to media accounts that cities were becoming “renters’ markets” during the pandemic (Aldridge & Tranjan, 2021). They found incentives to evict low-income tenants were still in place during the pandemic, noting that: “the market incentive to push tenants out – due to arrears accumulated during lockdowns, via renovictions, or any other reason—is still very much present. In the absence of rent controls on vacant units, there is money to be made from evictions, and some landlords will cash that money, pandemic or not (Aldridge & Tranjan, 2021)

As Rogers and Power (2020) noted, some housing policies shifted incredibly rapidly in the early phases of the pandemic. Ontario’s provincial government halted evictions in March 2020 (although this ban was subsequently rescinded). However, there were many reports of landlords harassing tenants by threatening them with evictions, even when the ban was in place (Press Progress, 2020). By July 2020, the Ontario Landlord and Tenant Board received more than 6,000 applications to evict tenants for not paying their rent during the pandemic (Gibson, 2020). Many tenants who lost their jobs because of the impact COVID-19 had on the economy were unable to pay some or all their rent, even while receiving Canadian Emergency Response Benefit (CERB) payments from the Federal government (D’Amore, 2020).

Another rapid move during the first phase of the pandemic was to provide shelter for homeless individuals (Seto, 2020). This has been a common theme in cities around the world, and in many instances, governments have used hotels as temporary sites to house the homeless. The House of Friendship, a large men's shelter in downtown Kitchener, temporarily moved into the Radisson Hotel, providing a safer and more dignified experience for its residents, while also ensuring sufficient space to self-isolate and quarantine (Osman, 2020; Thompson, 2020b). This helped in an immediate time of crisis, as noted by one comment from a resident in the Radisson: "I feel like for the first time in a long time I'm ready to tackle my addiction...I've been able to see a health care provider for the first time in over five years. I'm sleeping, really sleeping. I'm starting to feel like me...I realize I can live a life worth living, and that I can do this" (Thompson, 2020a).

The owner of a small convention centre, Lot42, permitted the establishment of A Better Tent City (ABTC) on his property (Latif, 2020). Approximately 40 residents, some of whom had been displaced from the downtown core, set up temporary tiny houses and tents. The site provides access to bathrooms, a shared kitchen and communal washing stations, with health services and non-profits making regular rounds (see Turman et al., 2021).

However, as other researchers have also noted, many such measures enacted quickly during the pandemic have been designed to be temporary. Parsell et al. (2020) examined responses to homelessness in Australia and found that many measures were implemented, not out of concern for the health and well-being of homeless populations, but from the perspective of wider public health, where unsheltered populations are seen as a threat to the wider population. In Waterloo Region, using hotels as shelters, ABTC, bans on evictions, and the lack of bylaw enforcement against homeless encampments are all temporary and little, if anything, has been done to address either the chronic lack of affordable housing in the region, or the commodification of housing and exploitation by landlords.

Discussion: Planning in the face of continuity and change

In this article, we have stressed the continuity (and acceleration) of housing challenges, rather than dramatically new trajectories brought about due to the pandemic. We have done this by rooting what we are observing in the present, with the preexisting housing challenges that were already firmly entrenched before the arrival of COVID-19.

There is a need for informed, critical reflection to shape planning and policy debates in the midst of an ever-changing global pandemic. However, we advise caution in assuming that everything has changed. There is no shortage of speculation about the impact of the pandemic and future trajectories of cities. For mid-sized cities, much of this revolves around growing levels of in-migration due to stories of an urban exodus from big cities. However, until there are firm numbers detailing how many people have actually moved during the pandemic, and qualitative research that analyzes why (and what role, if any, the pandemic played in shaping those decisions), we must treat anecdotes – particularly from the media or real estate industry – with a certain degree of caution.

The recent report by Aldridge and Tranjan (2021) demonstrates why rigorous, critical research remains necessary. In the early phases of the pandemic, there were many anecdotes about falling rents, particularly in big cities (that people were supposedly fleeing) and a narrative emerged about the shift towards a renters' market. However, their analysis of rental prices across Canada revealed a very different picture, showing that rents were rising far faster than inflation across the country, including in big cities such as Toronto. They found that that average rents for a two-bedroom apartment across Canada rose by 3.5% between October 2019 and 2020 (despite inflation of only 0.7%).

While on the surface, it appears that everything has changed during the COVID-19 pandemic, critical reflection of the pre-existing conditions of cities and the events of the past year prompts us to pose this question in a different way: what challenges have either remained the same, or been accelerated by the pandemic? Seen from this perspective, there are many

elements of continuity. Despite high-profile examples and media stories of people leaving big cities and moving to nearby mid-sized ones, it is clear that this was already a dominant trend for decades (Ley, 2007; Moffatt, 2021). While issues of affordable housing have been front and centre in planning discussions in 2020 and 2021, they were already among the most important local political and planning issues in 2019.

Rather than interpreting the arrival of COVID-19 as the beginning of an entirely new era for mid-sized cities such as Waterloo Region, our considerations and reflections for planners emphasize the links between the pre-pandemic and pandemic housing challenges. As a result, we suggest four areas that need to be central to planning debates and conversations as we move through the pandemic.

1. At this stage of the pandemic, when so little of the long-term trajectories of cities are not yet known, it would not be advisable to embark on knee-jerk reactions to dramatically shift planning and policymaking in order to cater to the stories of people leaving big cities in droves. In Waterloo Region, we are specifically referring to the Countryside Line, which has limited sprawl by creating a growth boundary around the built-up areas of the region, thereby encouraging more intensification. Over the past decade, it has led to a remarkable shift in development, whereby the majority now takes place within the existing urban footprint.

Given the increased number of stories of people leaving big cities in search of more space and affordable housing in mid-sized cities and smaller communities, it is likely that local governments in mid-sized cities will come under increased pressure to allow more sprawling developments on their fringes. This would go against decades of growth management policies and sustainable planning ideas. Sprawl (and its associated automobile dependency) also comes with its own negative health effects and research has shown that air pollution can exacerbate the health effects of COVID-19 (see Carrington, 2020a, 2020b). As we have stressed throughout this article, there is continuity in housing challenges and we do not yet know whether the housing trends witnessed during the pandemic will be a blip or the start of a new era. Until

more is known, we would discourage planners from radically re-writing land use plans and masterplans and instead focus on how their existing frameworks can be improved, (recognizing that many of these improvements were also necessary before the arrival of the pandemic).

2. With the above point in mind, it has been clear that the new intensification seen along Waterloo Region's LRT corridor has not addressed both the long-standing housing challenges and those exacerbated by the pandemic (Doucet, 2017, 2019). As noted earlier, most new units are very small, which was already problematic before the pandemic because, while they were popular with investors, they did not address housing needs of larger families, or those on lower-incomes. Previous research, however, already documented the latent demand for family-sized housing within the urban core that private developers were unwilling or unable to build (Parker, 2017; Pi, 2017; Tran, 2016). This lack of larger units has become even more problematic during the pandemic, as very small studio and one-bedroom units are highly unsuited to long periods of staying at home under quarantine, the need to self-isolate, or the space required to work from home (Hubbard et al., 2021).

While Waterloo Region (and other mid-sized cities across the country) have been proactive in shaping where development takes place, the decisions about what goes on inside buildings (affordability and the number and size of units) is largely decided by the private market and based on what is most profitable. A more proactive approach to matching new developments with local housing needs (affordability, tenure, size) was already called for before the pandemic (Bozikovic et al., 2019), but has taken on a greater sense of urgency because of it. While this type of approach is much more common in Europe, there are some Canadian examples of cities being more proactive in this regard. Montreal recently enacted a new bylaw that stipulates that in developments of more than 450m², 20% of units must be social housing, 20% affordable housing and 20% family-sized units.

3. Cities must also be much more proactive in both creating new affordable housing units and protecting the existing supply of affordable housing, particularly in the private sector, where

many apartments have already been demolished or renovated. Again, this is not new, but ensuring that everyone can exercise their right to safe, secure, and affordable housing has taken on a greater sense of urgency as overcrowding within homes is a key way in which the virus spreads. There are several strategies that mid-sized cities can adopt; importantly, the pandemic has only heightened the need to implement these ideas. New Westminster, British Columbia, has enacted a bylaw that fines landlords who do not relocate tenants while their units are being renovated, as well as measures to ensure that they can return at the same rents they paid before (Boynton, 2020). Montreal has had rules in place since 2016 that give the city the right of first refusal of any property that comes on the market. This can help add, or maintain affordable housing supply and prevent apartment buildings from being bought up by REITs. If a private buyer makes an offer on a property, the city has sixty days to match that offer. The City of Montreal has identified 300 properties that it intends to purchase and has plans to add 12,000 more units of housing to its portfolio (Olson, 2020).

Working with non-profits to build new affordable housing, and acquire existing properties is another strategy that has been proven to increase the supply of housing available to people on low-incomes (Boone & Roseland, 2020). In Toronto, the Parkdale Community Land Trust has acquired properties to ensure that they remain affordable in a rapidly gentrifying neighbourhood. For middle-income households, the Whistler Housing Association builds new developments on publicly owned land that must be inhabited as primary residences by people employed in Whistler. The prices of these units are decoupled from the market and are set to a ratio of average incomes, meaning that a detached house costs around \$750,000, compared to over \$2,000,000 on the open market (McElroy, 2019). Schemes such as this are therefore part of creating *permanently affordable housing* decoupled from speculation, rather than affordable units that only remain so for a fixed period of time, often negotiated with developers as part of profit-driven projects (Small Housing BC, 2019).

Cities can be more proactive in using their own land for the development of new affordable housing. In Waterloo, the most prominent piece of publicly owned land is the former Charles Street Bus Terminal, which was closed after the opening of the LRT (Thompson, 2019b). Surface parking lots also offer the potential to be redeveloped into housing. In July 2020, Toronto City Council approved turning a municipally owned parking lot in Kensington Market into a new affordable housing development. The city will launch a competitive call for proposals to identify a non-profit developer and operator to build new housing on this site.⁷

4. Finally, planning and policymaking will need to incorporate lived experiences of marginalised communities if equity and inclusion are to be central to housing responses to the pandemic. The pandemic has further exacerbated existing economic, social, spatial, and racial inequalities in cities around the world. Too often, however, planning is done in the name of powerful groups, rather than centring marginalized communities within decision-making; thus far in the pandemic, there is little to suggest these power relations have shifted (Doucet et al., 2021). The City of Kitchener (2020) has made some important steps in including incorporating lived experience voices in housing policy in its new affordable housing strategy. The challenge remains moving beyond nice words, tokenism, or merely inviting people to the table, but rather centring the lived experiences and knowledge of those facing housing precarity, homelessness, and marginalisation within planning and policymaking.

You may find yourself asking, what is new with these recommendations and what do they have to do with the pandemic? While the pandemic has dramatically changed life in many ways, our critical reflection of its impact thus far on housing in midsized cities shows very little indication that the structural conditions that produced unequal and divided cities have been addressed. Furthermore, many of the trends that are now central in planning and policy conversations (such as in-migration from big cities and affordability challenges across the housing spectrum), were clearly established before the arrival of the pandemic.

The challenge, therefore, is not thinking of new ideas, but rather being able to implement the ideas that have been demonstrated to work in curbing speculation, protecting existing, and building new affordable housing, and ensuring supply meets demand for houses to live in, rather than investment opportunities. The pandemic has made these challenges more difficult as it has exacerbated inequalities at all social and spatial scales, but this has also made implementing them more urgent.

Therefore, we are keen to stress to planners, policymakers, and politicians that the pathways to creating more equitable, just, and affordable housing systems have altered very little because of the pandemic. We are not alone in stressing the continuity of the pre-pandemic and pandemic periods. As other scholars have noted, the solutions to dealing with housing challenges during the pandemic are very similar to what has been called for for many years: proactive approaches to ensure market-driven housing addresses local demand; new investments in social housing; banning unjust evictions; curbing property speculation; and permanent rent controls (Buckle, 2021; Maalsen et al., 2020). With that in mind, we encourage planners to avoid speculating on what role the COVID-19 pandemic will have on the future of cities and instead critically ask the question of what factors need to change (and have needed to change for some time) in order to create a more just and equitable housing system?

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Endnotes

¹ Inter-provincial and intra-provincial migrants, by census metropolitan area and census agglomeration of origin and destination, 2016 boundaries, Available at: <https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1710014101>.

² Annual demographic estimates, census metropolitan areas and census agglomerations: Interactive dashboard, Available at: <https://www150.statcan.gc.ca/n1/pub/71-607-x/71-607-x2020003-eng.htm>.

³ To derive statistics for the country, the responses were weighted by population to stop the four main metros from skewing the data. Respondents were questioned on their remote working patterns before, during, and after the COVID-related shutdowns, and their preference to move to other areas or cities.

⁴ A note on the different total intra-provincial migration numbers in Tables 1 and 2: In 2016, the total intra-provincial figure of 61,770 also includes internal migration between cities (CSDs) within the Kitchener-Cambridge-Waterloo CMA (i.e., people who moved from Kitchener to Waterloo). The total figure of 42,900 for all intra-provincial migration from 2016 in Figure 2 excludes these moves between different CSDs within the Kitchener-Cambridge-Waterloo CMA.

⁵ The survey targeted residents older than 18 years who were active in the real estate market. It was conducted by Nanos Research Group from 7 to 15 May 2020. The total participants were weighted by age and gender based on Statistics Canada data. The sample is geographically stratified and is representative of Canada.

⁶ For more on life stories of displacement in Waterloo Region, see <http://www.waterlooregion.org/life-stories-of-displacement>.

⁷ To read more about this new affordable housing development in Kingston Market, see <https://mikelayton.to/2020/07/23/new-affordable-housing-in-kensington-market/>.

Chapter 4: Conclusion

Chapter summaries

This thesis investigated spillover gentrification from global cities into mid-sized ones within commuter sheds by probing two major areas: movers' motivations for leaving the big city, and the affordable housing challenges that the (real or imagined) influx in in-migration can cause within mid-sized cities.

The two empirical chapters explored different cases, both illuminating current and possible changes in metropolitan Canada. The common themes in the Hamilton and Region of Waterloo cases were migration from global to mid-sized cities and the role that the COVID-19 pandemic and remote work played in these movements. Chapter 2 was an in-depth study of the moving motivations of 42 movers from the Greater Toronto Area (GTA) to Hamilton's Lower City. Based on a critical media review of mostly Waterloo Region news sources, and not the same interviews, Chapter 3 directly investigated the likely changes to migration brought on by COVID-19 and remote work.

Chapter 2: Spillover gentrification between Toronto and Hamilton

How does gentrification spread between large and mid-sized cities within a regional commuter shed?

Chapter 2 demonstrated how spillover gentrification spreads in mid-sized cities within a wider commuter shed. This is achieved through a capital-demand dialectic. Movers from the GTA expressed feeling economically displaced; yet they enjoyed a certain class reflexivity and aspirational quality in the new city. This was illustrated by the fact that they were both 'displacees' in the former big city but also considered 'displacers' in the mid-sized one. Pragmatically, the range of cities they chose from was restricted to mid-sized cities roughly within an hour's commute of the big one.

However, once the decision to move had been made, demand preferences facilitated decision-making of the exact mid-sized city and which neighbourhood was chosen within it. Here, the capital-demand relationship shifted again: now demand valorized city and neighbourhood, and capital followed. With demand preferences driving neighbourhood choice, class transformation was occurring in Hamilton's Lower City neighbourhoods based on a middle class identity inspired by the big city neighbourhoods. Seeking out and building of class likeness in the new environment was not only apparent through neighbourhood choice but also through an active courting of class-similar members from the big city.

Chapter 3: Housing challenges in mid-sized cities during the pandemic *Is COVID-19 playing a particular role in accelerating a type of tiered and cascading gentrification throughout city regions?*

Chapter 3 demonstrated that claims of an exodus of people leaving big cities because of COVID-19 resulting in a sudden influx of residents into mid-sized cities, should be interpreted cautiously. Although migration flows from core metropolitan areas to mid-sized cities on the urban periphery of city regions is an established pattern (Frey; 2002; Hou and Bourne, 2006; Ley, 2007), it is prudent for planners and policy-makers in these mid-sized cities to wait until there is more substantive evidence, before actually deviating from existing housing policy to accommodate this supposed increased flow. Aside from immediate housing relief for the homeless and low-income groups due to COVID-19, the housing challenges within these cities are likely to remain the same - but will be amplified because of COVID-19. Greater pressure for affordability is likely to be experienced across the housing spectrum as market disruption caused by shifts in housing preferences and economic hardship linked to the pandemic, caused further housing inequality in these smaller housing markets. Accordingly, planners should be implementing the same policies that have been suggested for years but with increased vigour and urgency given the pandemic, and until new, authoritative evidence suggests otherwise.

Synthesis and reflection on literature

This thesis confirmed that spillover gentrification is occurring between global cities and mid-sized ones within wider commuter sheds. Analysis of moving and housing discourses, demonstrated that gentrification cascades down the regional urban hierarchy acting as a centrifugal force pushing out across city regions.

The findings of the two chapters complemented each other. A synthesis of the findings presented in the two chapters suggests that pent up push factors (relating to prohibitive housing costs and general costs in the big city) get released down the regional urban hierarchy of the wider commuter shed.

As smaller urban areas become increasingly attractive for such movers, they become subjected to spillover gentrification from the global city. As a result of this increased migration, these smaller receiving geographies experience increased housing challenges linked to affordability as the elevated interest in these communities pushes up housing demand, further reducing affordable options for locals and low-income residents and displacing some locals further down the urban hierarchy. This is especially the case when considering that those who made the move in the first place, were effectively displaced from the metropolis themselves. The fact that COVID-19 caused a real or imagined influx in in-migration to mid-sized cities (something which we will only know conclusively after analysis of the 2021 round of Census data), does not really matter, as the resultant expectation in the market had been created anyway causing difficulties for locals.

Considered together, the empirical chapters suggested that planners need to pay particular attention to the systemic pressures accruing between various 'nodes' within the urban hierarchy of commuter sheds, as spillover gentrification exerts a discernable pressure down the urban system of these commuter sheds. This thesis therefore makes a call for a wider systemic understanding of the scales of gentrifying capital. Planners in the Greater Toronto and Hamilton Area, as well as in commuter sheds more generally, should focus on the systemic downward

pressure caused by the ebb-and-flow of capital throughout their regions, as it valorizes and devalorizes neighbourhoods and suburbs around global cities. Additionally, as the Hamilton case alluded to, to suitably 'unscramble' spillover gentrification around global cities, we need a refocusing of planning debates, and directing of future research to the neighbourhood and suburb scale instead of a metropolitan one (see also the last section in this chapter, 'Unscrambling' spillover gentrification?).

Spillover gentrification

This thesis made several observations regarding what may be called spillover gentrification. These observations deserve reflection against the existing literature and current approaches used in gentrification analysis.

First, the concept of spillover gentrification raised the idea that we should apply a regional awareness when analyzing displacement patterns within commuter sheds of a global city. Although this is nothing new *per se* (Lees, 2000, 2012), it can lead to further conceptual innovation regarding displacement and how violence operates through these intercity moves. Marcuse's definition of displacement included what he called "chain displacement". By using this concept, Marcuse intended to measure displacement which had occurred in the same residential location to successive people. To distinguish between "last resident displacement" and "chain displacement" Marcuse (1985, p. 206) states:

One method looks at the number of housing units affected. This method considers only the last resident of that unit as displaced. This type of displacement is called "last-resident displacement"...Another household, however, may have occupied that unit earlier, and also may have been forced to move at an earlier stage in the physical decline of the building or an earlier rent increase. This type of displacement is called "chain displacement."

However, there is arguably another type of chain displacement that operates through urban hierarchies and connects cascading and varied geographical nodes in commuter sheds. Similar to the way in which Marcuse focused on units, one could also focus on how many times a household has had to relocate to a new city and neighbourhood down the urban hierarchy. This is because gentrification processes which originated in large cities spillover into mid-sized cities as relatively less affluent residents get displaced by relatively more affluent ones in each successive move. In this sense, gentrification may be thought of as a regionally defined, cascading and systemic process across space and time, and spanning several cities, with a successively less affluent resident being displaced each time (see Lees, 2000, 2012).

Accordingly, the literature on the geography of gentrification (Lees, 2000, 2012) should place greater focus on the downstream 'tracking' and life stories of those who are displaced across multiple cities and neighbourhoods within wider commuter sheds. The knock-on effects for mid-sized cities or the stressors placed on the receiving geographies have not really been fully considered.

In addition, the notion of displacement being an inherently violent process (Atkinson, 2015; Bricknell et al. 2017; Elliot-Cooper et al., 2020), deserves some interrogation across cities. Here, the building of class likeness based on identities drawn from big cities ('making Hamilton more like Toronto') becomes a form of subtle violence to 'unhome' locals through neighbourhood change and direct as well as indirect displacement (changing the character of neighbourhoods to the extent that locals will eventually leave). This 'strategy' displaces people further and further down the urban hierarchy; with the wider consequence being that the city region falls increasingly within the commuter orbit of the big city and is structured on car dependent sprawl based on its likeness as well as meeting the objectives of capital accumulation (Harrap, 2018; Jones and Chanoff, 2012; Liukku and Mandias, 2016; Moffat, 2021).

Second, related to the above point, penetration of spillover gentrification into a mid-sized city and its subsequent class impacts at neighbourhood level will vary from city to city. The local impacts should not be considered homogenous or as 'one size fits all'. Historical and economic conditions of the mid-sized city matter (Bourne and Simmons, 2003; Bunting et al., 2007; Donald and Hall, 2015; Gordon et al., 2019; Jamal, 2018). For example, Risager's reflections on how neighbourhoods have become the primary site of struggle between labour and capital in Hamilton, a post-industrial, working class city (and not its steel mills anymore), are particularly interesting. According to Risager (2021, p. 284), "Housing struggles—and other struggles outside the workplace, i.e. in the sphere of social reproduction—might in many cases be central to post-industrial class politics".

The result, according to Risager, is that neighbourhoods take centre stage as the main arena for class struggle, not least because these neighbourhoods are the primary site of capital accumulation (Harvey, 2012; Lefebvre, ([1970] 2003). These reflections are interesting when considered against the Region of Waterloo's much more settled, suburban dominance, and earlier transition from manufacturing dominant sectors to technology, post-secondary institutions and financial sectors. However, Hamilton is also increasingly transitioning away from fossil industries to post-secondary institutions, medical research and hospitals, as well as finance and technology (Harris, 2020; Trapunski, 2017; Weaver, 2012).

Spillover gentrification debates need to pay closer attention to the interrelationship between classes from different cities and the strategic decisions that class members make when moving between cities within commuter sheds, and as they relate to neighbourhood choice and overall placement in a new city (see Boterman and Bridge, 2015; Bridge, 2006; Ley, 1996, 2003). Literature on gentrification within commuter sheds should consider what the overall class 'goals' of such a move are and how the 'newcomers' mesh with the local class structures and the historical-geographical development of capital in that area.

Third, this thesis concurred with Slater (2009, p. 746) that debates over whether gentrification follows a strictly economic or cultural route are myopic. Instead, rounded examination of gentrification needs to engage both levels of analysis. Regarding the geography of spillover gentrification, this thesis tended to favour the cascading argument to explain how gentrification spreads throughout regional commuter sheds and urban hierarchies (Bridge, 2003; Lees et al., 2018). The cascading perspective reads sensibly in the bigger developmental perspective of how development and capital spread across space from major centres to lesser ones (Lees, 2006). Gentrification spreading in cascading fashion is also possibly what neoliberalism would want us to believe, suggesting that the transplanting of capital from major to smaller centres is a 'natural' evolutionary process of capital accumulation over space as alternating spatio-temporal fixes exploit uneven rent gaps (Harvey, 1982; Smith, 1987). Additionally, the current period of financialization has expedited these forces as capital can now move with ease across borders (Brenner et al., 2002). Stated plainly, capital wishes to accumulate, and demand enables it to do so across urban environments.

However, this is not to suggest that the idea that gentrification spreads contemporaneously between urban nodes does not hold merit, and especially in regional commuter sheds. The idea that gentrification spreads concurrently through urban nodes is based on capital's aggrandizing effect on property at different spatial scales and relative rent gaps being simultaneously exploited (Lees, 2006). Those in favour of this argument would suggest that capital does not only move in waves from large to smaller cities, but rather, that independent capital and class formations have reached maturation levels whereby they no longer need to rely on their linkages to bigger urban centres (Lees, 2006). In addition, media, communications and the various networks which influence demand move in ways that fashion and taste preferences are equally influenced by a range of geographies and have their own movements and tastes which may originate within smaller cities.

This thesis therefore supports the call by Smith (2002) for an understanding of the phenomenon of gentrification against its wider geographical plains and influences. 'Closed circuit' debates on the geography of gentrification are prone to blindspots introduced by these wider terrains of capital (Smith, 2002). Overspill gentrification should not only be understood as a mere cascading of gentrification across 'closed' space. But rather a space-time process happening at various scales and is time-bound because of demand preferences - serving up 'new' fashions layered on to what preceded it. Stated otherwise, capital cascades, demand makes spatial but also temporal jumps in serving up recycled ideas, materials and technologies.

Policy recommendations

Housing as a systemic regional problem

On the back of about ten years of growing debt, rising assets and immigration-driven growth strategies, big cities in Canada have been amongst the first to register affordable housing crises (Carrick, 2021; Frey; 2002; Hou and Bourne, 2006; Ley, 2007). As capital accumulation and property speculation rides on waves moving from bigger cities into smaller, adjacent property markets, these housing crises have spread from big cities into their surrounding areas (Alini, 2021; Bozikovic et al., 2019; Haigh, 2021; Harrap, 2018; Jones and Chanoff, 2012; Liukku and Mandias, 2016).

Planners and local government officials need to pay particular attention to the systemic push factors building up throughout the urban system of these commuter sheds. This would allow for increased foresight in anticipating ripple effects in the downstream markets and help to avoid 'bottlenecks' throughout the housing spectrum in these smaller communities. Put plainly, a push-pull analysis of housing within commuter sheds should be the entry point to understanding how migration forces percolate and their inherent circulatory or systemic nature at the regional scale.

Evidence-based decision making within commuter sheds

Planners and policy-makers need to base their housing planning decisions on the best available evidence. This is especially true of planners within mid-sized communities who are within the orbit of a big city (Alini, 2021; Bozikovic et al., 2019; Haigh, 2021; Harrap, 2018; Jones and Chanoff, 2012; Liukku and Mandias, 2016). However, to date, there is little empirical research focusing on migration flows within wider commuter sheds, and policy, public and planning decisions are largely based on hyperbole in the media and various anecdotes that get amplified as the dominant narrative in the matter (Moffat, 2021).

The need for accurate data and informed research in migration flows from big to mid-sized cities was particularly strong during the COVID-19 pandemic due to the supposed fleeing of large, overcrowded metropolitan areas known for their cramped living conditions (Haag, 2020; Marsh, 2020; Sheehan and Sheehy, 2020). The nature of the pandemic also meant that housing emergencies were time sensitive and required appropriate responses to unfolding information and circumstances, e.g., how the pandemic spreads and which groups were at most risk.

Despite the need to act swiftly and decisively, planners should also resist the urge to respond injudiciously or even over-respond to these calls for housing expansionism. Knee-jerk reactions to the pandemic are not required, but instead implementing many of the solutions that have been called for for years. In many ways, continuing with the status quo, particularly with regard to affordable housing, is also problematic, because it has failed to deliver genuine solutions. Therefore, evidence-based decision making and understanding the needs and motivations of movers entering the community, would assist in tailoring appropriate and suitable housing responses in ways that meet sustainability goals and manage to uphold social justice.

Housing planning within mid-sized communities is therefore a fine balancing act between remaining consistent, yet also flexible enough to accommodate new information as and when it arises. Planners are further encouraged to scrutinize the veracity of information sources,

especially amidst claims of a ‘tsunami’ of new residents from big cities, no matter how persuasive media articles may be.

Remote work and commuter sheds

With remote work having altered the geography of middle class housing within commuter sheds (Florida, 2020; Florida and Ozimek, 2021), the supposed pandemic-induced exodus has suggested, that if the question for those living in a big city is displacement in your current neighbourhood, or lifestyle maximization somewhere else, middle class residents are certainly likely to take their chances and relocate to a nearby mid-sized city.

This places those in these mid-sized cities within wider commuter sheds in direct competition for housing, as competing with big city money in their hometowns is very real and *may* be here to stay. The net result is that big city capital entering these communities pits people against each other; outside/external capital finds expression in friction through the local housing market as neighbourhoods and property markets become terrains of struggle for locals (Ellis-Young, 2020; Risager, 2021).

As noted above, key to understanding the patterns of housing pressures within these mid-sized communities is actually assessing ‘fad’ from reality concerning intercity migration trends (Moffat, 2021). Here, the phenomenon of remote work needs both some time to play out in society and a realistic appraisal of the *durable* changes that society’s experiment with remote work is likely to have, if any (Canadian Broadcasting Corporation, 2020). Some have suggested that remote work and its spatio-temporal implications for regional commuter sheds are the single most significant impact that the pandemic is likely to have on urban geography (Florida, 2020; Florida and Ozimek, 2021). Another aspect to this is that those people who moved out of the big city may also find that they experience remorse for buying a house in another city once remote work ceases and they must commute daily to a downtown office, placing further strain on roads coming into big cities.

Indeed, planners and policy makers in commuter cities should remain cognizant of the irrationality in housing markets and unsustainable nature of rampant property speculation caused by these shifts in urban geography and currently being experienced in places like Hamilton and the Region of Waterloo (Housing Market Report, 2021; Mitchell, 2021; Davis, 2020). Housing price patterns are, however, notoriously hard to predict as to how they will play out in the medium to longer term with some suggesting a bursting of a housing bubble while others suggest that markets within these extremities of commuter belts are only going to get worse (Carrick, 2021).

Focus on what can be controlled

Although issues such as lending rates, access to funding and mortgage markets are defining in purchasing a house, so is demand, with the boundaryless, transnational and sometimes illicit nature of speculative capital playing an often-overlooked role in increasing demand and competition (through foreign buyers, trusts, etc.). This pushes up local value, adds to local market hysteria and displaces the young, would-be first-time homebuyers, and the poor (Fumano, 2019). In such a setting, planners might be forgiven for feeling that they may not have much control over what goes on in the private housing market.

Although it is true that planners and government officials are limited in the change that they can effect in the private housing market (e.g., market housing versus non-market housing), through various supply-side interventions planners and policy-makers can help to set the tone for and direct a community's housing supply in the public interest (e.g., through inclusive zoning, land/development incentives, fast-tracking approvals, the building of community infrastructure which stimulates housing demand, or by directly investing in new housing stock).

Recommendations presented in Chapter 3 ranged from the government taking greater control over the quality of buildings and not just signing off on the number of units being built; to the use of existing public land for the building of affordable housing; as well as working with

various non-profits. Lastly, it is worth reiterating the value of incorporating lived experiences in housing policy to include the voices of those residents most severely affected by spillover gentrification. The downward pressure exerted throughout the urban hierarchy bears heavily on those facing housing precarity in commuter sheds, as they get pushed to the outer extremities of the region and beyond. Both Chapters 2 and 3 pointed to the displacement patterns pushing down the urban hierarchy onto low-income groups, the homeless, and vulnerable (minority racial groups, the elderly, women, single parents, etc.).

Future theoretical research and final thoughts: ‘Unscrambling’ spillover gentrification?

This study contributed to theoretical debates on mid-sized cities and the geography of gentrification, and on the production of gentrified space, i.e., how middle class residents actively seek to (re)produce a gentrified landscape in a different city. Here, there is scope for future research to further reflect on the shifting role of some mid-sized cities that are within commuting distance of global ones. This is especially true since the empirical work (at least for Hamilton) was not focused on metropolitan scale, but on that of the neighbourhood.

In a broader sense, the findings in Hamilton, that displaced Torontonians actively seek to recreate a piece of Toronto in Hamilton, raise important points for reflection on the shifting nature of metropolitan Canada and for the GTHA. Is Kirkendall just another urban neighbourhood within the Toronto region? Not generally asked but equally important: is Flamborough just another GTA suburb? Further theoretical reflection is likely to yield new insights into the shifting role of mid-sized cities like Hamilton and Waterloo. To properly ‘unscramble’ spillover gentrification around global cities, we therefore need a refocusing of planning debates, and directing of future research to the neighbourhood and suburb scale instead of a metropolitan one.

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