

May 17, 2019

Ms. Kimberley Kitteringham
City Clerk
City of Markham
101 Town Centre Boulevard
Markham, ON L3R 9W3

Dear Ms. Kitteringham:

Re: Planning for Employment Background Report

On May 16, 2019 Regional Council adopted the following recommendations:

1. Council direct staff to proceed with consultation on the draft employment framework as outlined in this report and attachments as part of the Municipal Comprehensive Review.
2. The Regional Clerk forward this report and attachments to the Ministry of Municipal Affairs and Housing and the Clerks of the local municipalities.

The original staff report is enclosed for your information.

Please contact Paul Bottomley, Manager, Policy, Research and Forecasting at 1-877-464-9675 ext. 71530 if you have any questions with respect to this matter.

Sincerely,



Christopher Raynor
Regional Clerk

Attachments

The Regional Municipality of York

Committee of the Whole
Planning and Economic Development
May 9, 2019

Report of the Commissioner of Corporate Services and Chief Planner

Planning for Employment Background Report

1. Recommendations

1. Council direct staff to proceed with consultation on the draft employment framework as outlined in this report and attachments as part of the Municipal Comprehensive Review.
2. The Regional Clerk forward this report and attachments to the Ministry of Municipal Affairs and Housing and the Clerks of the local municipalities.

2. Summary

The Growth Plan for the Greater Golden Horseshoe (Growth Plan) requires municipalities to plan for employment by ensuring availability of land in appropriate locations to accommodate the employment forecast and by designating and setting density targets for employment areas in the Regional Official Plan. This report along with attachments provides background analysis and forms the basis for consultation on a proposed employment framework as part of the Municipal Comprehensive Review (MCR).

Key Points:

- York Region has become a top destination for business across a number of economic sectors. The employment growth outlook is for stable growth in manufacturing and rapid growth in services including jobs in knowledge and creative industries.
- Despite 24% of the Region's labour force being at risk of automation, York Region is well positioned to withstand the impacts of automation and Artificial Intelligence (AI) with an economy increasingly focused on higher skilled activities. The impacts are anticipated to be gradual, with automation likely to create more jobs in the long run.
- Amenity rich and transit accessible work environments are increasingly important to employers to attract talent. Regional Centres and Corridors are well positioned to attract highly skilled, knowledge-based jobs.
- Maintaining an appropriate supply of employment areas will be critical for providing flexibility for employers in high quality locations over the long term.
- Staff will continue to consult with local municipalities, the public, and other stakeholders in developing the Employment Strategy as part of the MCR.

3. Background

Business and job growth are fundamental to the economic vitality and long term livability of York Region

York Region is in competition with municipalities around the world to retain and grow existing businesses, attract new employers, skilled employees, and good paying jobs. The attraction of new businesses and growth or expansion of existing business operations are the generators of wealth and job creation. A region that can attract and keep high quality jobs across a range of sectors will increase economic stability for the entire community, improve resiliency, and raise the overall standard of living.

Providing residents with access to a full range of employment opportunities contributes toward the overarching goal of the Growth Plan of building complete communities. Complete communities provide opportunities for residents to work close to where they live, reducing impacts on the environment and reliance on the automobile. Communities that offer a mix of land uses and a range of commuting alternatives offer optimal conditions to support knowledge based employment growth and to attract highly skilled and talented employees.

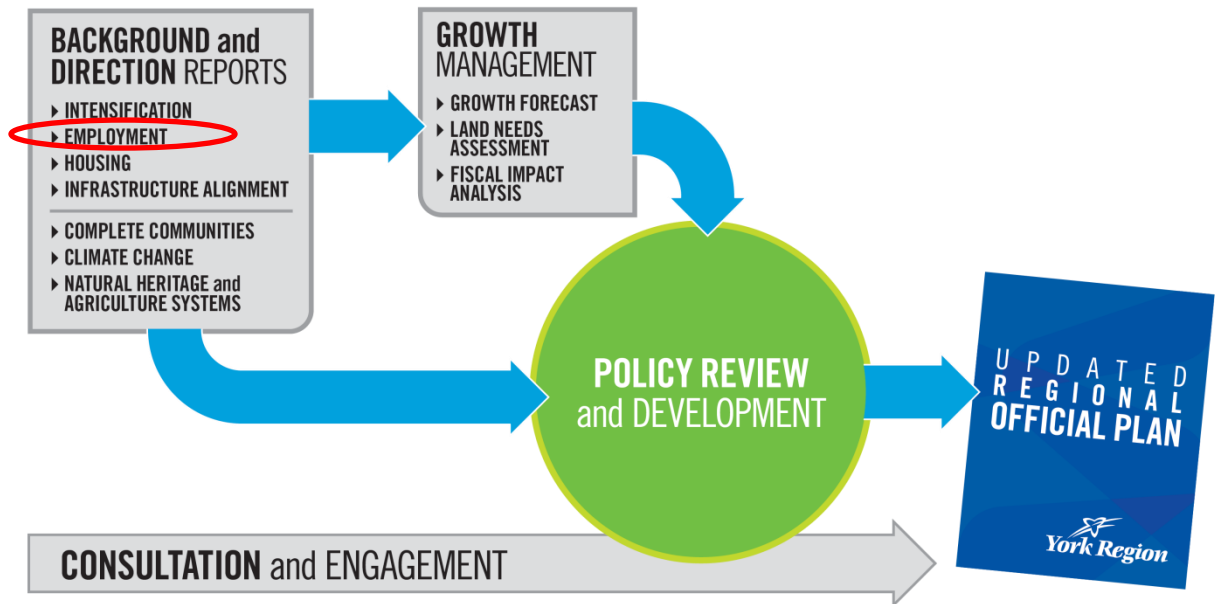
This is one of a series of reports to support planning for employment through the Regional Municipal Comprehensive Review

Through the MCR, York Region will be updating employment policies and the employment forecast in the Regional Official Plan (ROP). The Region is forecast to grow to 900,000 jobs by 2041, growth of approximately 264,000 jobs from 2018. To plan for this employment growth, a number of employment related reports are being presented to Council:

1. [Proposed Employment Area Conversion Criteria](#) and [York Region 2018 Employment and Industry](#) reports presented to Regional Council in March 2019
2. Planning for Employment Background Report
3. Employment forecast (by employment type) and land needs assessment to 2041, incorporating staff recommendations on employment area conversions
4. Draft policies and mapping of employment areas for the York Region Official Plan

These reports will form part of a broader series of reports and studies summarized in Figure 1 associated with the Region's Municipal Comprehensive Review.

Figure 1
Municipal Comprehensive Review Components



Source: York Region Planning and Economic Development

The report provides an overview of recent and anticipated employment trends and key findings from a global jurisdictional scan on planning for employment

For forecasting and land needs assessment purposes, employment is categorized into four types:

1. Employment area: employment within designated employment areas, excluding major office, and typically including manufacturing, warehousing, and ancillary retail uses
2. Major office: employment in free standing office buildings of 20,000 square feet or greater
3. Population-related: jobs serving the local population such as retail and services, including those working from home
4. Rural: primary and agricultural jobs dispersed throughout rural areas

This report is a summary of the content contained in Attachment 1 and provides an overview of recent and anticipated employment trends in the Region as well as key themes from a global jurisdictional scan of municipalities planning for the changing nature of employment. To inform the analysis on anticipated employment trends, York Region retained Hemson Consulting to prepare a [York Region Future Employment Trends Study](#).

Understanding employment trends will be a critical input to the Region's employment forecast and policy update as well as the designation of employment areas in the Regional Official Plan, a responsibility that was uploaded to the Region by the 2017 Growth Plan.

Local municipalities, Regional programs, and a number of industry partners play important roles in achieving the Region's long term employment goals

Through its updated forecast to 2041, York Region will be responsible for distributing employment growth to each of the nine local municipalities. Local municipalities will then be required to update their official plans to conform to the Regional Official Plan and plan to achieve the employment forecast. While the trends work presented in this report is important to inform the forecast, close collaboration between regional and local municipal staff will continue in order to ensure that regional policy directions align with local municipal planning objectives. Regional staff have been meeting with local municipal staff on a regular basis to discuss specific local issues.

Business attraction and economic growth in the Region is highly dependent on Regional plans, studies, and programs that recognize the importance of economic vitality as well as collaborative efforts of a number of public and private partners such as the Building Industry, local Chambers of Commerce, Boards of Trade, and institutions such as colleges, universities, and hospitals. Planning for employment through the MCR is also being coordinated with the update of York Region's Economic Development Action Plan, which sets out a strategic course of action for the economic growth and prosperity of the Region over the four year Council term.

4. Analysis

TRENDS ANALYSIS

The globalization of markets, automation, and the 'digital economy' are key drivers reshaping the Greater Golden Horseshoe economy

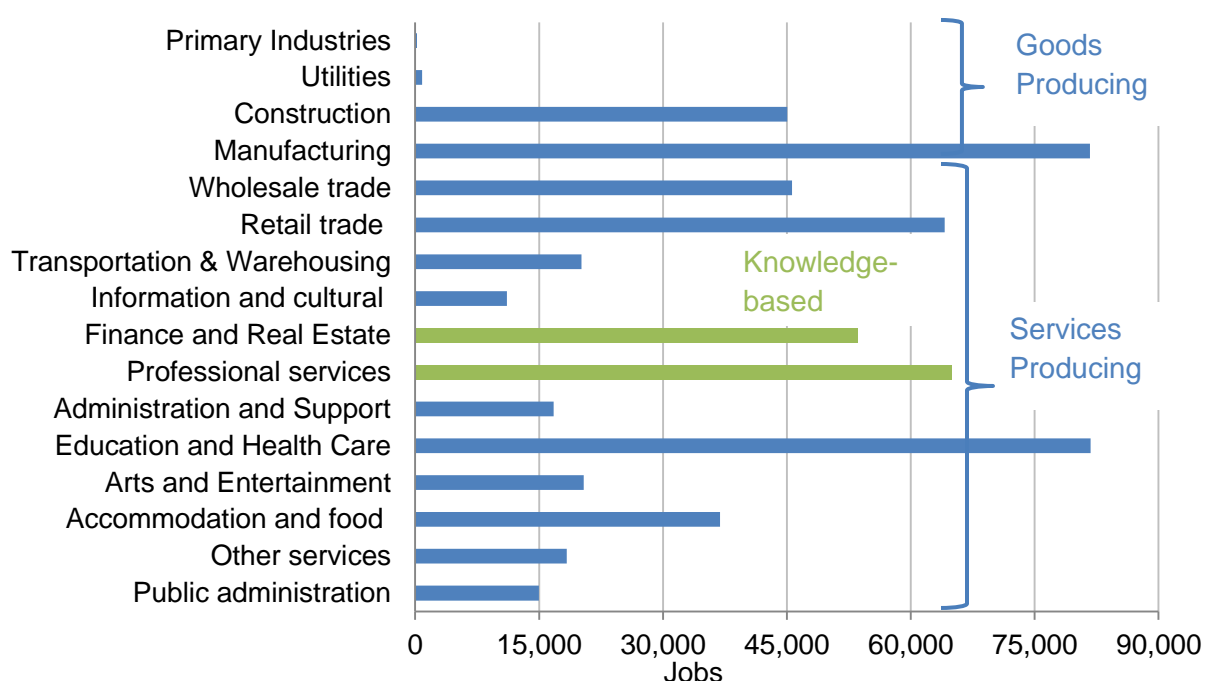
The economic landscape of the Greater Golden Horseshoe (GGH) has undergone economic transformation over the past several decades. According to recent studies, innovation, automation, and globalization are the main drivers of this economic change. The shift towards automation is resulting in less demand for lower skill and routine-based work and fostering growth in high skilled and knowledge-intensive industries such as business services, professional, scientific and technical services, finance, and insurance. Office space is being re-defined as a result of computer and digital technologies, and the emergence of e-Commerce has resulted in significant growth in the distribution and logistics sector and impacted traditional retail operations.

This shift is having an impact on locational preferences and the nature of work. There has been a growing concentration of employment in Downtown Toronto due to a number of factors including employee preferences of the millennial workforce, downtown transit connections, and access to a range of amenities. There has also been an increase in self-employment and the number of people working at home or with no fixed workplace address, and in contract or part-time capacity.

The outlook for employment growth in York Region remains favourable, driven by rapid growth in higher skilled and knowledge-based jobs

Within broader economic trends, the growth outlook for the GTHA and York Region remains positive. Since 1971, employment growth in the Region has outpaced population growth, growing at an average rate of 5.8 per cent per year, compared to population growth of 4.3 per cent. York Region has evolved into a top destination in the GGH and Canada for businesses across a number of industries and key economic clusters. As shown in Figure 2, the diversity of the Region's employment base promotes resiliency in the face of potential disruptions. The Region is home to the highest technology sector concentration in Canada relative to population and the second largest financial services cluster in Ontario. Some of the world's biggest companies are located in the Region, many of which are leaders in their industries. A sample of these companies includes IBM, Allstate, Honda, Johnson & Johnson, Oracle, FedEx, and General Motors.

Figure 2
Distribution of York Region Employment by Sector, 2018



Source: York Region Planning and Economic Development, 2018

The outlook for employment growth in York Region is for relative stability in the manufacturing sector with continued rapid growth in professional and service-based industries. With an economy increasingly focused on higher-skilled activities, including knowledge-based and creative industries, York Region is well positioned to compete for new business investment in the years to come. Over the past decade, employment in knowledge-based sectors (industries premised on their intensive use of technology and/or human capital) grew by 40 per cent compared to employment Region-wide at 32 per cent. Investment from Regional Council in key business supportive initiatives such as the recent introduction of Region-wide bandwidth (YorkNet) and commitment to a York Region

University Campus in Markham is important in supporting existing and new businesses in these rapidly growing sectors.

York Region is well positioned to withstand impacts of automation

The impacts of automation and AI by economic sector are related to several factors including overall susceptibility to automation, level of employment, and concentration of certain industries within the economy as well as the ability for displaced workers to transition to comparable jobs. According to Hemson, the impacts of automation and AI will occur gradually and likely create more jobs in the long run. This is consistent with broader historical trends that have seen technological advancements create jobs that did not exist in the past.

As shown in Table 1, based on the analytical framework developed by the Brookfield Institute and analysis from Hemson, an estimated 24 per cent of York Region's 2016 employed labour force, or 133,200 jobs, is at risk of automation over the next 10-20 years. A similar analysis for jobs located within the Region indicates that 143,000 jobs, or 25 per cent of 2018 surveyed employment, are at risk of being automated. Automation has the potential to impact all economic sectors; however, relatively lower-skilled and routine-based occupations such as manufacturing are particularly susceptible. Compared to the national average of 42 per cent, the share of occupations at risk is much lower in York Region as a result of its diverse economy and strength in high-skilled knowledge based sectors less susceptible to automation.

Table 1
Jobs at risk of Automation in the York Region Employed Labour Force

Occupation	Potential for Automation	Potential Jobs Lost
Manufacturing and Utilities	62%	12,800
Trades and Transport	39%	22,400
Business, Finance, and Admin	39%	41,600
Sales and Service	35%	43,300
Natural Resources and Agriculture	16%	800
Health Occupations	7%	2,300
Arts, Culture, Recreation & Sport	5%	900
Natural and Applied Sciences	7%	3,800
Management Occupations	4%	3,000
Education, Law, & Government	4%	2,300
York Region Total	24%	133,200

Note: Reflects jobs held by York Region residents, does not represent actual jobs in the Region.

Source: Hemson Consulting based on methodology from Brookfield

Automation has the potential to increase demand or create jobs in higher-skilled industries

Automation and other technologies have the potential not only to replace existing jobs, but to result in increased demand in others, or create entirely new ones. The adoption of technology has led to increased productivity and demand for human skills, judgement, cognitive, and interactive tasks. Many significant sectors in the economy such as website and application designers did not exist a few decades ago. As computer and information technologies continue to expand and evolve, knowledge-based industries such as software engineering and data analysis are likely to grow and compensate for losses in other industries.

The Region's urban structure supports a range of employment opportunities

As the backbone of the Region's urban structure, Regional Centres and Corridors are planned to achieve the highest population and employment densities in the Region and become mixed-use economic hubs with a range of live-work opportunities for York Region residents. The Growth Plan requires municipalities to direct major office employment to these areas. Clustering of economic activities, compact community design, and access to transit enhances the attractiveness of Centres and Corridors for businesses to cluster and gain access to a highly skilled and talented workforce.

Strategically located throughout the Region, employment areas continue to be major drivers of economic activity

Employment areas offer sites for small and large businesses at lower costs than elsewhere in the Region. Although traditionally home to industrial business uses, employment areas have evolved over time to support a wide range of business uses. Among the Region's employment areas are three key nodes (shown in Attachment 2) that play important, but distinct roles in the Regional economy:

- The high-tech node in Richmond Hill and Markham forms part of the Tor-East megazone identified by the Neptis Foundation and has been identified by Hemson as one of only three major office nodes outside of Downtown Toronto
- The node in Central and West Vaughan includes lands in the Tor-West megazone and is strategically located around major rail and highway infrastructure such as the 400 and 427 and home to a large number of traditional/industrial type jobs
- Emerging employment areas along the 404 north provide attractive vacant sites to support significant employment growth moving forward

Outside of the Region's Centres and Corridors and employment areas are community and residential areas. Driven by population growth, employment in these areas is largely population-related and includes a number of people working at home (an estimated 51,100, or 8 per cent of total employment in 2018). Local retail and personal services such as schools, hospitals, and medical clinics in these areas are key components to mixed-use

communities as they allow residents, workers, and visitors to purchase goods locally. Shopping locally promotes active lifestyles, reduces travel times and congestion, and supports the Region's economy.

There are also 14,700 jobs (or 2 per cent of total 2018 employment) in the Region's rural areas outside the urban boundary that support primary and agricultural-related employment.

Driven by rapid growth in Centres and Corridors, major office employment is anticipated to continue to outpace growth in all other employment types

As of 2018, one out of every five surveyed jobs (22 per cent) in the Region was located in Centres and Corridors, accounting for approximately 22,400 new jobs over the past decade. Approximately 72 per cent of the jobs created in Centres and Corridors since 2008 have been in the major office employment category. Region-wide, major office employment has outpaced employment growth overall, growing by over 33,400 jobs, or 48 per cent since 2008 to an estimated total of 102,300 jobs in 2018.

As the knowledge economy continues to evolve, the concentration of major office growth in Toronto is likely to continue which presents both challenges and opportunities for the Region. The challenge is that the overall demand for new office buildings outside Toronto has been reduced and is compounded by the increasing prevalence of office employment in non-office forms such as multi-unit industrial buildings. The opportunity will likely arise from the growing costs and other dis-benefits associated with Downtown Toronto such as congestion and crowding on transit which may drive employers to consider locations outside the City. Since 2010, the Region has attracted companies such as Aviva, Celestica, and Lenovo that were previously located in Toronto.

Outside of the City of Toronto, York Region is positioned better than most to compete for office development. Over the past ten years, York Region has accommodated 25 per cent of new major office jobs created in the GTHA. As of 2018, there were 21.6 million square feet of major office space in the Region with an additional 640,000 square feet (8 buildings) under construction and 3.9 million square feet (38 buildings) within proposed applications.

Amenity rich and transit accessible work environments will be critical to attract and retain talent

Key factors for knowledge and creative industries are access to talent and amenity-rich office space and work environments. The competition for talent is driving companies to locate in areas well served by transit with access to services such as restaurants and retail that cater to younger workers.

Attracting talent and business growth to York Region is supported by the Region's commitment to infrastructure investments and transportation expansion. Viva bus rapid transit and the Spadina Subway extension into Vaughan have supported significant office and residential construction. Working with the Province on the Yonge subway extension and all day two-way GO service will further support new business opportunities.

Increasing the attractiveness of Centres and Corridors for businesses and the broader GGH labour force will be dependent on prioritizing development of a high-quality, sustainable, and walkable public realm. As the urban structure evolves and Regional Centres and Corridors mature, these core attributes will promote the continued competitiveness of the Region as a top business location in the GTHA.

Protection of employment areas is essential as the demand for employment land is anticipated to remain strong

Employment areas are vital to the Regional economy. As of 2018, 53 per cent of York Region jobs were located in employment areas, including 76 per cent of the Region's largest employers. As of 2017 there were 2,600 ha of vacant employment land in the Region, protection of these areas to 2041 and beyond will be critical to ensure that choice is available to prospective businesses. More detail on each of the Region's employment areas can be found in Attachment 2.

Future demand for employment area development in York Region is anticipated to remain strong. Growth in e-Commerce has driven a surge in demand for distribution space close to major urban centres. Manufacturing will continue to play an important role with fewer workers and more automation. Mixed-use employment areas are not appropriate to support growth in these sectors because of higher land costs and because businesses in these industries often have specific location requirements that are often incompatible with sensitive uses such as residential and institutional.

Growth in employment areas will be driven by increasing demand for large sites with superior transportation access and evolving trends towards office uses in industrial flex space and older multi-unit industrial buildings. An appropriate land supply will be required for all types of industry to provide flexibility for employers over the long-term. The Region's strategically located employment areas, particularly along major highways and near intermodal facilities, will be important assets as these industries grow. While the composition of jobs is likely to shift toward more advanced forms of manufacturing, protection of employment areas will be important to accommodate employment growth in this export-based sector.

The Province is contemplating the introduction of Provincially Significant Employment Zones through proposed Amendment 1 to the Growth Plan but no amendments have been finalized at this time. It is staff's opinion that the identification of these zones, and Council's recommendations to the Province on Amendment 1, does not impact this background report. Future MCR related reports will address any applicable Growth Plan amendments once finalized.

Increasing office uses and intensification will contribute to higher densities in employment areas

While the Region encourages office development in Centres and Corridors, recent trends show that increases in employment area employment have been driven primarily by growth in service and knowledge-based sectors. These office-based sectors are being accommodated in a range of building types, specifically flex-office space and older industrial

buildings that have been re-purposed to accommodate higher density uses. The impact of this trend has been a “blurring of the lines” between traditional employment area employment such as manufacturing and industrial uses, and office employment. Approximately 54 per cent of “office type” jobs in employment areas are accommodated outside of major office buildings, a trend likely to continue as service sector and knowledge based uses are accommodated in employment areas. Flex-office and multi-unit industrial building types in employment areas will play an important role moving forward by providing space at a lower cost than other areas of the Region, particularly for small businesses and technology-related start-ups.

Intensification in employment areas is another factor contributing to increased densities. Since 2011, over 60 per cent of employment area growth has been accommodated through employment intensification of existing built parcels and buildings. Despite part of this growth being attributed to re-occupancy of vacant space following the 2008/2009 recession, considerable job growth is anticipated to be accommodated through intensification moving forward.

These trends have resulted in an overall decrease in floor space per worker and a corresponding increase in employment area density over the past five years from 65 jobs per hectare in 2013 to 70 jobs per hectare in 2018. Largely due to location and the sector makeup of employment areas, densities vary across the Region. In West Vaughan where there are a large number of warehouse and distribution facilities, densities are as low as 15 to 25 jobs per hectare compared to densities of 290 jobs per hectare in employment areas such as the Commerce Valley business park in Markham where there is a large concentration of professional service employment in office and multi-unit industrial buildings.

Retail locations remain important as their role evolves to incorporate different types of retail delivery and support online retailers

Along with growth in e-Commerce and demand for industrial distribution there has been a shift in the pattern of retail development, as evidenced by recent closures of major large North American brick and mortar stores. While this trend may continue, it is being moderated by the establishment of retail stores by major online retailers, notably Amazon, to create a physical footprint for the sale and delivery of goods. Other related trends are growth in stand-alone pick up locations and the ability to order items online and pick up in stores (“click and collect”).

The likely impact will be a reduced need for new retail space combined with the continued repurposing of existing stores to accommodate a wider range of uses. At a local scale, needs of residents still need to be met, and at a regional scale, there is still demand for space in regional malls because of the enduring appeal of the shopping experience. Most of the change will be in mid-scale developments such as community shopping centres as traditional anchor tenant’s move their business online.

These shifts are likely to result in a reduction in employment in the retail sector due to the continued automation of routine-oriented service tasks.

EMPLOYMENT AREA PLANNING

Municipalities in Canada and around the world are changing the way in which they plan employment areas

The employment trends presented in this analysis are reflective of broader national and global economic trends that relate to employment policy planning. To better understand and address these trends and plan for the changing nature of employment, municipalities worldwide have completed studies to review employment areas. In Canada, Toronto, Waterloo, Milton, Victoria, British Columbia, and Surrey, British Columbia and others such as Sydney, London, Stockholm, and Anaheim have created new policy direction to help prepare and plan for future change. Common findings from these studies are summarized below, and Attachment 3 provides additional detail on each study.

Increasing flexibility along corridors and improving built form are two common approaches to increase attractiveness of employment areas

While the overarching theme in all municipalities studied was an emphasis on protecting and preserving employment areas, there was a focus on improving the attractiveness of these areas for businesses and improving live-work relationships for residents. To accomplish this, two inter-related policy directions emerged: the need for increased flexibility in employment area designations along corridors and the need to improve built-form and the pedestrian environment.

Jurisdictions studied are amending existing policies to both limit the number of employment area designations and introduce designations that permit a broader range of employment uses in strategic locations. Locations identified include areas adjacent to major arterial roads or within broader community centres. Through the introduction of increased flexibility, municipalities are hoping to better align these targeted areas with other city building initiatives to capitalize on investments in infrastructure, better integrate employment and non-employment uses, and provide for a broader mix of employment uses and amenities. While increasing flexibility in strategic locations, municipalities are stressing the importance of protecting inner and core areas for traditional employment uses such as manufacturing and industrial uses.

Municipalities are also developing implementation plans, guidelines, programs and incentives to improve the built form of employment areas to make these areas more attractive to employers and employees. Municipalities cited use of landscape and urban design guidelines to improve pedestrian environments and encourage mobility and connectivity to support multi-modal uses in employment areas.

Municipalities are developing creative solutions to rejuvenate employment areas and stimulate economic growth

Municipalities are recognizing older employment areas that may be in transition and are developing strategies and policies to support redevelopment where appropriate. This may

include use of Community Improvement Plans and/or identification of Business Improvement Areas to revitalize sites previously occupied by heavy industry or rail yards. In some cases, financial incentives are being used to encourage office development in “innovation or creative districts”.

Analysis will inform the Region’s employment forecast and policy considerations

This report, along with Attachments, provide background analysis for the Region’s employment forecast and policy update which forms part of the Municipal Comprehensive Review and update of the Regional Official Plan. The following are examples of policy considerations that will be explored with local municipalities and the public in development of the Region’s policy framework:

- Planning for the changing nature of employment by promoting transit supportive high quality urban environments attractive to office development as the knowledge economy evolves
- Protecting employment areas over the long term for a broad range of employment uses, including growth in transportation, logistics, and warehouse facilities
- Appropriate land use flexibility in suitable employment area locations
- Developing strategies to support redevelopment and rejuvenation of employment areas

Further analysis is required to designate employment areas in the Regional Official Plan and derive employment area density targets

Preserving employment areas is an important planning tool for securing the Region’s economic future. Over the coming months, Regional staff will be working with local municipalities to ensure the unique needs of each local municipality are considered when delineating and designating employment areas in the Region Official Plan. The work will incorporate the following:

1. Findings from the historical and future trends analysis and jurisdictional scan
2. Results of the assessment of site specific conversion requests
3. A broader review of the Region’s employment areas in the context of the evolving urban structure, infrastructure investments, and the changing nature of employment

A key input to this work will be a Council Workshop which has yet to be scheduled.

5. Financial

Work related to analysis of employment data is completed by internal resources and all costs are addressed in the approved Planning and Economic Development budget. Consideration

of the findings and observations through the review and update of the Regional Official Plan will occur within the existing staff complement and necessary consultant services through the approved budget.

6. Local Impact

York Region staff have met with local municipal planning staff to discuss employment planning. Extensive consultation with local municipal staff will continue to occur when developing the Region's employment forecast, policy update and when designating employment areas in the ROP, including assessment of employment area conversion requests. Local municipalities are key partners in planning for employment in the Region.

7. Conclusion

York Region has a diverse employment base with a range of industries and key economic clusters that continue to grow and prosper. Moving forward, consistent with broader economic trends, knowledge-based sectors are expected to be among the fastest growing sectors in the Region. The Region's strengths in these industries will contribute towards a more resilient economy to withstand impacts of automation.

In planning for future employment growth through the employment forecast and policy update, protection of employment areas will continue to be important to accommodate an increasing demand for warehouse and distribution facilities as well as flex-office space uses. Increasing flexibility in strategic locations and improving built form of employment areas through creative solutions will also be an important policy consideration.

For more information on this report, please contact Paul Bottomley, Manager, Policy, Research and Forecasting at 1-877-464-9675 ext. 71530. Accessible formats or communication supports are available upon request.

Recommended by: **Paul Freeman, MCIP, RPP**
Chief Planner

Dino Basso
Commissioner of Corporate Services

Approved for Submission: **Bruce Macgregor**
Chief Administrative Officer

April 25, 2019
Attachments (3)
eDOCS #: 9313516

2019 **PLANNING** FOR **EMPLOYMENT** **BACKGROUND REPORT**

YORK REGION'S MUNICIPAL COMPREHENSIVE REVIEW

MAY 2019



1.0 SUMMARY

The Growth Plan for the Greater Golden Horseshoe, 2017 (Growth Plan) requires the Region to plan for employment as part of the Regional Municipal Comprehensive Review (MCR). This report provides the background analysis to support development of the Region's Employment Strategy. This Planning for Employment report:

- Summarizes the Provincial, Regional and local municipal policy context for employment
- Assesses historic employment trends in the Greater Toronto and Hamilton Area and York Region
- Provides an overview of anticipated employment trends in the Region based on a "York Region Future Employment Trends Study" produced by Hemson Consulting
- Summarizes a jurisdictional scan on how municipalities are planning for the changing nature of employment
- Identifies key policy considerations, directions, and next steps for the forthcoming York Region Employment Strategy

The report includes the following key findings:

- Since the Region was created in 1971, employment growth has outpaced population growth, increasing at an average rate of 5.8 per cent per year compared to 4.3 per cent per year, for population.
- York Region's economy has evolved into a top destination for business across a number of industries and key economic clusters such as information and communications technology (ICT), finance and business services, distribution and logistics, as well as manufacturing.
- The structure of employment in York Region is well-established through Regional Centres and Corridors which are attractive for office development and related services and amenities and accommodate one in every five jobs in the Region.
- Employment areas contain 53 per cent of the Region's employment base including 76 per cent of the Region's largest employers.
- Residential community areas provide retail and service jobs that are important for serving the needs of local communities.
- According to Hemson Consulting, the employment growth outlook for York Region is favourable and is anticipated to be characterized by stable growth in manufacturing and rapid growth in services-producing industries including high-skilled jobs in knowledge and creative industries.
- Despite 24 per cent of the Region's labour force being at risk of automation, York Region is well positioned to withstand the impacts of automation and Artificial Intelligence (AI)

with an economy increasingly focused on higher skilled activities. The impacts are anticipated to be gradual, with automation likely to create more jobs in the long run.

- Amenity rich and transit accessible work environments are increasingly important location decisions for employers to attract talent. Regional Centres and Corridors are well positioned to attract highly skilled, knowledge-based jobs.
- Demand for employment areas is anticipated to remain strong and be driven by land-extensive logistics and warehouse facilities as the role of e-Commerce continues to expand as well as increasing shares of service sector employment in small offices and multi-unit industrial buildings. Maintaining an appropriate supply of employment areas will be important for all types of industry to provide flexibility for employers in high quality locations over the long term.
- To plan for the changing nature of employment, municipalities around the world are increasing flexibility in employment area designations in strategic locations, implementing strategies to improve built-form, and introducing plans to redevelop and rejuvenate older employment areas.

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1.0 INTRODUCTION

The Growth Plan, 2017 requires that all municipalities develop and implement, through their official plans and other supporting documents, an employment strategy.

This report provides the foundation for developing the York Region Employment Strategy by presenting background work completed to date and providing direction for the Region's employment forecast to 2041 and regional official plan policy updates.

The report:

- discusses historical and current employment trends in York Region and the GTHA
- discusses the potential impacts of automation, artificial intelligence, and other disruptors on the future of employment
- assesses existing densities and the potential for intensification in employment areas
- summarizes a jurisdictional scan on how municipalities are planning for the changing nature of employment
- identifies preliminary policy considerations and next steps

The final York Region 2041 Employment Strategy will inform the York Region Official Plan update to bring it into conformity with the Growth Plan and the Provincial Policy Statement, 2014 (PPS) by:

- demonstrating the Region's ability to achieve the employment forecast
- presenting the Region's employment area density target
- identifying opportunities for intensification of employment areas
- providing the framework for updating employment policies in the York Region Official Plan, including mapping and designating employment areas

2.0 BACKGROUND

2.1 Provincial Policy Context

The Planning Act and Provincial Policy Statement recognize the importance of employment and economic vitality

A number of provincial planning documents recognize the importance of planning for employment in building complete communities. The Planning Act declares that the adequate provision of employment opportunities is of provincial interest. The PPS recognizes the need to protect and preserve employment areas for current and future uses, especially in prime locations along 400-series highways and other major goods movement corridors.

Stressing the importance of employment areas to the vitality of a Region, the PPS allows planning authorities to plan beyond a 20-year horizon for the long term protection of employment areas.

A guiding principle of the Growth Plan is to allow flexibility to capitalize on new economic opportunities while providing certainty for traditional industries

The Growth Plan strives to support the achievement of complete communities designed to support healthy and active living and meet peoples needs through an entire lifetime. Ensuring that employment opportunities are available for residents is a key component of building complete communities. Policy direction in the Growth Plan, therefore, aims to align land use planning with economic development goals and strategies to retain and attract investment and employment by:

- Directing major office and major institutional development to urban growth centres, major transit station areas and other strategic growth areas
- Better connecting areas with high employment densities to transit
- Directing retail and office uses to locations that support active transportation
- Planning for a transit-supportive and compact built form by encouraging the integration of retail and office uses with other land uses
- Supporting office parks by improving connectivity with transit and active transportation
- Providing for an appropriate mix of amenities and open space to serve the workforce

The Growth Plan has strengthened protection of employment areas

The Growth Plan directs municipalities to protect employment areas and ensure the availability of sufficient land, in appropriate locations, for a variety of employment types. Employment areas are defined in the PPS as “areas designated in an official plan for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices and associated retail and ancillary facilities”.

New policy direction in the Growth Plan, 2017 requires upper- and single-tier municipalities to:

- Delineate and designate employment areas in the Regional Official Plan
- Consider identifying employment areas located near goods-movement facilities and corridors as prime employment
- Establish a minimum density target for employment areas that incorporates opportunities for intensification of employment uses

In planning for employment areas, updates to the Growth Plan require municipalities to prohibit or establish a size or scale threshold for major retail uses. Any new or expanded permissions for major retail in an employment area can only occur through a Regional MCR.

The Growth Plan only allows for the conversion of employment areas to non-employment uses at the time of a Regional MCR based on a set of criteria. Additionally, provincial policies prevent appeals of conversions and conversion policies in Regional Official Plans, once approved by the Province.

Proposed Amendment 1 to the Growth Plan, if approved, will not have a significant impact on how the Region plans for employment

On January 15th, 2019, the Province released proposed Amendment 1 to the Growth Plan and a Proposed Framework for Provincially Significant Employment Zones. Changes related to employment policies include:

1. Provincially Significant Employment Zones – 29 areas across the Greater Golden Horseshoe (GGH) that are important to the provincial economy and should not be converted outside of an MCR. Five of these zones include land within York Region
2. A policy that would allow consideration of employment area conversions in advance of the next MCR, outside of Provincially Significant Employment Zones
3. A requirement to establish minimum density targets for all employment areas, rather than an overall target
4. Removal of the consideration for prime employment areas

[Staff's and Council's position](#) on these aspects of proposed Amendment 1 is that all requests for employment area conversions only be considered comprehensively through the MCR process. The Province is contemplating the introduction of Provincially Significant Employment Zones through proposed Amendment 1 to the Growth Plan but no amendments have been finalized at this time. It is staff's opinion that the identification these zones, and Council's recommendations to the Province on Amendment 1, do not impact this background report. Future MCR related reports will address any applicable Growth Plan amendments once finalized.

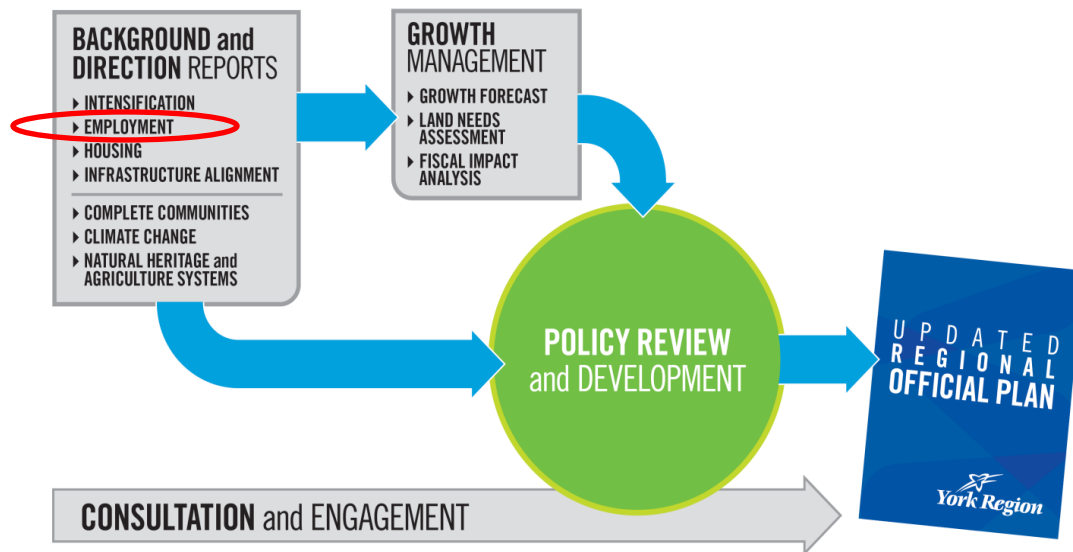
2.2 Regional Context

The Region is forecast to grow to 900,000 jobs by 2041

The Growth Plan forecasts York Region to grow to 1.79 million people and 900,000 jobs by 2041. The 2018 employment survey estimates that there were approximately 636,600 jobs in the Region as of mid-2018, requiring growth of 263,400 jobs by 2041 in order to meet the forecast. Updates to the employment forecast will be informed by the directions provided in this report. The historical and future employment trends analysis discussed in this report will be particularly important in planning for growth of this magnitude.

Planning for employment will form part of the Region's MCR. Figure 1 summarizes the various components of the MCR.

Figure 1: Municipal Comprehensive Review Components



Source: York Region Planning and Economic Development

Changes to the Growth Plan have uploaded the designation of employment areas and assessment of requests for employment area conversions to the Region

Changes to employment policies in the Growth Plan have resulted in an uploading of the following responsibilities to the Region previously undertaken at the local municipal level: designating employment areas and assessing requests for employment area conversions. Despite now being the responsibility of the Region, this work will continue to be done in close consultation with local municipalities throughout the MCR process.

The Region monitors employment trends in order to respond to changing industry needs

The employment trends data presented in this report is closely tied to data portrayed in other regional reports and studies. The Region undertakes a considerable amount of research and analysis on the regional economy and employment, including:

- An in-depth analysis of employment growth by sector through an annual Employment and Industry Report. Data is gathered through a region-wide Employment Survey
- An annual Economic Development Year in Review which highlights economic activity in the Region and the impact of York Region programs on business and job growth
- An annual Growth and Development Review that provides updates on key development and population indicators in the Region and reports on the competitiveness of York Region's economy within the GTHA and Canada
- Annual Regional Centres and Corridors reports which provide updates on development activity and transit investments within Regional centres and corridors

- A Vacant Employment Land Inventory which provides an overview of the supply and characteristics of vacant employment lands in the York Region. The inventory was last updated in 2017.

Employment is categorized into four main categories

For forecasting and land needs purposes, the Region organizes employment into four main employment categories:

1. Major office: Employment occurring in free standing buildings of 20,000 square feet or larger (excluding city or town halls, hospitals or school board offices and other local serving office uses)
2. Employment area: Refers to employment within the Region's designated employment areas and business parks, excluding major office employment, and includes activities such as manufacturing, research and development, warehousing and ancillary retail, office, and service uses
3. Population-related: Employment serving the local population such as retail, services, education, municipal government, institutions, and community services. This type of employment tends to increase with population growth and also includes home-based businesses.
4. Rural: Jobs dispersed throughout rural areas (i.e. agriculture, primary industries)

Employment area land need will be assessed through the land needs assessment

Employment area employment is an important component of the land needs assessment exercise which staff will be undertaking later in the MCR process, informed by this report. Through this process, it will be determined if additional employment area land is required to accommodate the 2041 employment forecast. Findings in this report will also support the designation of employment areas in the Regional Official Plan. A map of the Region's employment areas can be found in the [York Region 2017 Vacant Employment Land Inventory](#), presented to Council in March of 2018.

2.3 Local Municipal Context

Local municipalities are important partners in achieving long term employment goals of the Region and meeting the 2041 employment forecast

Local municipalities play a key role in attracting and supporting business growth in the Region. Aligning updates to employment area policies in the Regional Official Plan with local municipal planning and economic development goals will be critical in continuing to provide York Region residents with access to good quality, high paying jobs.

Through its updated employment forecast, the Region will be responsible for allocating employment growth to 2041 to each of the nine local municipalities. Local municipalities will then be required to update their official plans to conform to the Regional Official Plan and plan to achieve their 2041 employment forecasts. Local municipal official plan conformity is to occur

within one year of the Regional Official Plan being approved by the Province. This has reinforced the need for continued collaboration between regional and local municipal staff to ensure that regional policy directions align with local municipal planning objectives. Regional staff meet with local municipal staff on a regular basis to discuss local specific issues.

3.0 EMPLOYMENT AND ECONOMIC VITALITY IN YORK REGION

Business growth, job growth, and the creation of wealth are fundamental to the economic vitality and long term livability of York Region

Aligning planning and growth management policies with economic development goals is critical for the economic viability. York Region is in competition with jurisdictions around the world to retain and grow existing businesses, attract new employers, skilled employees, and good paying jobs. The attraction of new businesses and growth or expansion of existing business operations are the generators of wealth and job creation. A region that can attract and keep high quality jobs across a range of sectors will increase economic stability for the entire community and raise the overall standard of living. Business growth leads to investment and supports the regional economy by providing residents with access to good paying jobs. Providing opportunities to work close to home reduces congestion and commuting times and provides more family time and opportunities for workers to both live and work in their own community.

There is a strong connection between the physical and social quality of place and economic growth

Providing residents with access to a full range of employment opportunities in proximity to where they live contributes toward an overarching Growth Plan objective of building complete communities. Complete communities provide opportunities to live, work, learn, and play locally, improve health outcomes, reduce impacts on the environment and reduce reliance on personal vehicle use by offering the potential for improved transit access and greater active transportation. In turn, communities that offer a mix of land uses and alternatives to the automobile offer optimal conditions to support knowledge-based employment growth and to attract highly skilled and talented employees. Communities catering to business growth also play a key role in achieving fundamental planning objectives related to the efficient use of infrastructure, sustainable transportation, and a livable region.

The Regional Official Plan provides a strong foundation for planning for employment growth in the Region

It is a goal of the York Region Official Plan to provide one job for every two York Region residents by creating a competitive and flexible economic environment that encourages investment and a diversity of employment opportunities. This is to be achieved through a policy framework that ensures:

- support for the Regional Centres and Corridors as the focus of economic activity and culture in York Region
- the long term supply and effective planning and design of employment areas

- that retail is well-designed and appropriately integrated into communities in a manner that encourages active transportation
- that growth is financially responsible

The Official Plan recognizes employment areas as strategic and vital to the Regional economy and aims to protect them over the long term by prohibiting conversions to non-employment uses, prohibiting major retail uses and limiting ancillary retail uses to 15 per cent of the employment area defined in the local official plan.

The 2041 conformity update of the Regional Official Plan aims to build upon and strengthen the existing policy framework. Updates will address changes to the Growth Plan and reflect the changing nature of employment in the Region as a result of historical and future trends.

A number of competitive advantages position the Region as a top business destination

Its location in one of the most attractive and vibrant economic areas in North America position the Region to capitalize on opportunities in the economy.

1. The Region benefits from core underlying economic attributes of strong population and employment growth, a highly educated labour force, and a high quality of living. In addition to being Ontario's fastest growing large municipality and third largest business hub, York Region's median household income ranks second among all municipalities in Ontario.
2. The Region's location in the GTHA is also strategic from a goods movement perspective. York Region is within a one day drive to the United States market with over 140 million people and a one hour flight to global markets like New York, Philadelphia, Boston, Chicago and Detroit. It is located in close proximity to Toronto Pearson Airport, is home to both the CP intermodal facility and the CN MacMillan rail yard, and has a strong network of 400-series highways which connect the Region to both the broader provincial and national markets as well as the United States border.
3. The Region has recently committed to key business supports such as consistent high-level bandwidth, the Ontario Research and Innovation Optical Network in Newmarket, and a York University campus to Markham Centre.

Council has endorsed a number of strategic plans and capital investments to support and attract employment growth

To support business attraction and job growth, Regional Council has made significant investments in infrastructure and endorsed a number of strategic plans, studies, and programs that recognize the importance of economic vitality.

- Vision 2051 has links to economic growth in all eight goal areas
- The 2019-2023 Strategic Plan provide high level policy objectives related to business growth, job creation, and maintaining a resilient economy
- The Economic Development Action Plan 2016-2019, including a Broadband Strategy. Post-Secondary Investment Attraction Strategy, and the York Link Investment and Marketing plan targeting office development in the Region

- The York Region Office Attraction Study (2015) identified the importance of clustering and access to amenities in office location decisions and confirmed that Centres and corridors should be developed as economic hubs with a high concentration of major office uses
- The Retail Trends Study (2015) presented an analysis of retail in the Region and a potential outlook for the retail market moving forward
- Long term infrastructure planning ensures that services will be provided in appropriate locations to support population and employment growth over the 2041 planning horizon

Continued transit investment in Regional Centres and Corridors is a catalyst for economic growth

Business and job growth is supported by transit investments in the Region, particularly in the Region's Centres and Corridors. The Regional Official Plan establishes the Regional Centres and Corridors as the backbone of the Region's urban structure and city building initiatives. Regional Centres and Corridors are planned to achieve the most intensive and greatest mix of development in the Region and are supported by over \$3 billion in transit infrastructure investment.

Transit investment helps connect people and jobs more efficiently and increases employers access to a talented workforce. Transportation infrastructure such as the Viva bus rapid transit and Spadina Subway extension into Vaughan support significant office and residential construction and business attraction. The new subway to the Vaughan Metropolitan Centre (VMC), the anticipated arrival of two-way all day GO transit service and continued construction on Bus Rapid Transit corridors will be a catalyst for office development in the Region's Centres and Corridors, realizing the vision of mixed use centres. As the Region's urban structure continues to evolve and the Regional Centres and Corridors mature, these core attributes help maintain and promote continued competitiveness as a top business location in the Greater Toronto Area.

Regional economic development plans and programs support growth of local businesses

The Economic Development Action Plan 2016 to 2019 was endorsed by Council in 2016 and sets out a strategic course of action for economic growth and prosperity of York Region. The Plan guides economic development activities of the Region and outlines programs that explore the Region's economy and business needs, connect businesses into a network that promotes innovation and growth, and share success stories with audiences to generate interest and excitement both within and outside York Region. York Region's Economic Development Action Plan addresses key economic challenges and opportunities facing York Region, and translates them into economic action areas for programs.

In collaboration with local municipalities and a network of business partners, York Region provides services in the areas of business advisory, economic research, innovation, and investment attraction marketing and sales. Innovation and business expansion/attraction are supported region-wide by York Link, the Region's Investment and Marketing platform and the

Strategic Economic Initiatives programs. Entrepreneurship support is delivered in York Region's northern six municipalities by the York Small Business Enterprise Centre (YSBEC).

In March of 2016 Regional Council authorized staff to enter into an agreement with Toronto Global to undertake global investment attraction on behalf of Greater Toronto Area municipalities. Toronto Global's mandate is to identify and attract new investments from foreign companies into the Greater Toronto Area (GTA).

The Region collaborates with a number of public and private sector partners to support and grow the economic base

Business attraction and economic growth in the Region is highly dependent on the collaborative efforts of a number of public and private sector partners. Some key partners are listed below:

- Federal and provincial government
- Local Municipalities
- Building Industry and Land Development Association
- Local chambers of commerce and boards of trade
- Venture LAB
- York University and Seneca College
- Greater Golden Horseshoe Agricultural Alliance

Together with the Region, these partners have provided York Region residents with access to high quality employment opportunities. Continuing to foster these relationships will be important in sustaining and growing the economic base.

York Region is home to a number of global companies across a range of industry clusters

An industry cluster is a geographic concentration of interconnected businesses and institutions in a common industry that both compete and cooperate. Industry clusters advance regional economic growth through the benefits that can be realized as a result of firms in related industries locating in close proximity to one another. Industry clustering provides a number of key economic benefits including encouraging networking, innovation and facilitating the incubation of new businesses. New firms and workers are drawn to the cluster which further contributes to overall productivity and efficiency.

York Region is a top destination in the Toronto area and Canada for businesses across a number of industry clusters. The Region is home to:

- the highest technology sector concentration in Canada relative to population
- the second largest financial services cluster in Ontario
- the second largest consulting engineering, building and construction cluster in the GTA
- the top automotive cluster in the GTA and Canada's fifth largest manufacturing cluster

York Region businesses also play a role on the global stage by delivering goods and services around the world and attracting international investment. Over 2,000 businesses in the Region rely on exporting as their primary source of revenue collectively generating \$19 billion annually.

The Region is attractive for international investment and home to major global research and development centres for some of the world's biggest companies. Foreign companies account for close to 10 per cent of local jobs and business investment in the Region. There are an estimated 500 foreign companies operating in York Region providing over 50,000 local jobs. A sample of these companies includes IBM, Allstate, Aviva, Honda, Johnson & Johnson, Oracle, FedEx and General Motors. These companies typically provide high paying knowledge-based jobs and export goods and services around the world.

More is required to continue to attract employment growth in York Region

The Region's investment and strategic planning initiatives to fostering job growth and economic development has been significant but needs to continue due to the following threats that may restrict economic growth moving forward:

1. Strong competition for business investment and attracting talent within the GTHA, Ontario and around the world. Recent economic restructuring has brought about the hyper-concentration of economic activity in and around downtown Toronto
2. Continuing traffic congestion as a result of the Region's rapid growth has the potential to make the Region and its strategic location less attractive to prospective businesses
3. Housing in the Region becoming increasingly less affordable. Many people that work in the Region can't afford to live in the Region, resulting in long commute times, further impacts on congestion, and the risk that these employees will find jobs elsewhere

4.0 HISTORICAL AND CURRENT TRENDS ANALYSIS

A more detailed understanding of employment trends will inform updated forecasts and policy review

The following section outlines key economic and employment trends in York Region and the broader GTHA, including:

1. A high level overview of the changing nature of employment growth in the GTHA and York Region's role in the broader regional economy
2. An overview of how the York Region economy has evolved since the Region was created in 1971
3. A detailed review of employment trends over the most recent ten year period (2008-2018)
4. A detailed analysis of the structure of employment in York Region with a specific focus on major office and employment area employment trends in the past 10 years

The analysis is intended to provide insight into the nature of future employment growth with respect to the rate and location of development, employment density and built form, and the mix of employment uses. Unless otherwise stated, the analysis below has been conducted using surveyed employment data for 2008 and 2018. It does not include estimates for businesses that were unable to contact, home based, or agriculture/farm based operations.

4.1 Employment Growth in the Greater Toronto and Hamilton Area

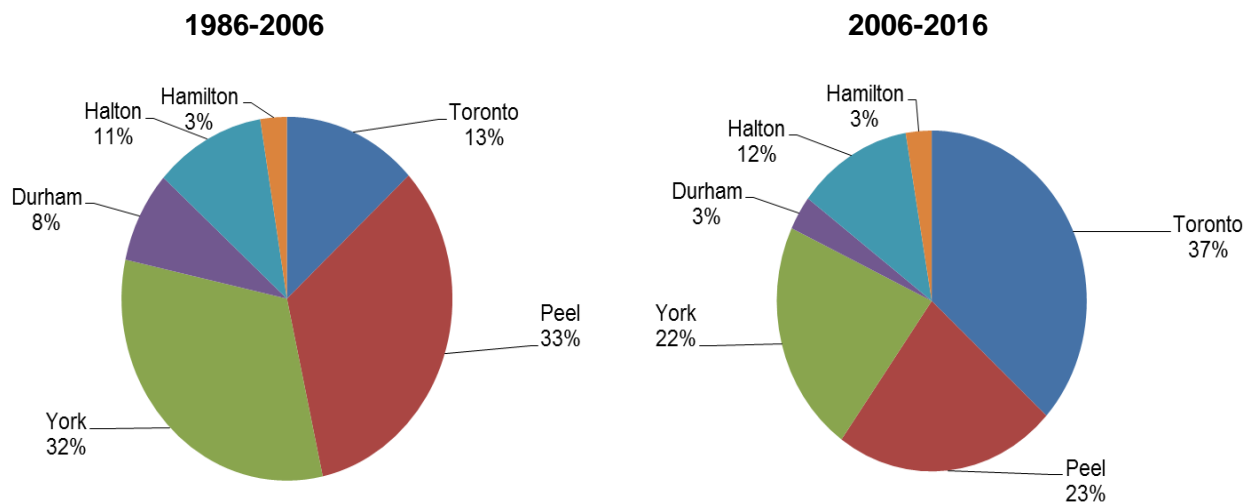
The economic landscape of the GTHA has undergone significant transformation over the past several decades as the broader regional economy continues to evolve

York Region is not an isolated economy, and local business and employment growth are closely tied to external economic conditions, trends, and government policies. For the past 30 years, the GTHA has been one of the fastest growing urban areas in Canada and the United States, reaching over 3.5 million jobs in 2016. Similar to national and provincial trends, the composition of GTHA employment has gradually shifted from a goods-producing economy to a services-producing economy over the past several decades. This has been led by a decline in industrial and manufacturing employment in favour of growth in services-producing sectors such as business services, financial services, health care and social assistance, professional, scientific, and technical services, and retail trade.

More recently, innovation, automation and globalization have been main drivers of economic change and are reshaping the economic makeup of the GTHA. The shift is resulting in a lower demand for low skill and routine-based work, and fostering growth in skilled, tech-related and knowledge – intensive industries such as professional scientific and technical services as well as finance and insurance. Office growth is being re-defined as a result of computer and digital technologies, and the emergence of e-Commerce has resulted in significant growth in the distribution and logistics sector and continues to impact traditional retail operations.

The shift is having an impact on the makeup of employment within the GTHA. As shown in Figure 2, the distribution of Census employment growth more heavily weighted towards York and Peel Regions in the 20-year period between 1986 and 2006 has given way to significant employment growth in downtown Toronto and lower shares of growth in the “905” between 2006 and 2016.

Figure 2: GTHA Employment Growth by Municipality, 1986-2016



Source: York Region Planning and Economic Development based on Statistics Canada

York Region is an important contributor to the GTHA economy and home to regionally-significant employment nodes

York Region is centrally located within the GTHA and has experienced some of the fastest employment growth within the broader economic region. Between 2006 and 2016, over 1 in every 5 (22 per cent) new jobs created in the GTHA were accommodated in York Region. Within the GTHA, the Neptis foundation has identified three regionally, provincially, and nationally significant employment zones. These zones are large, continuous multijurisdictional areas focused on “core”, or traded or tradeable industries that bring revenue and income into the region to drive its growth. Two of these three zones (shown in Attachment 2), have significant portions within York Region, each playing a different role in the regional economy.

The Tor-York East megazone surrounds the interchange of Highways 404 and 407, including parts of the cities of Markham and Richmond Hill, and represents a significant regional concentration of finance and business services, manufacturing, and the information and technology cluster.

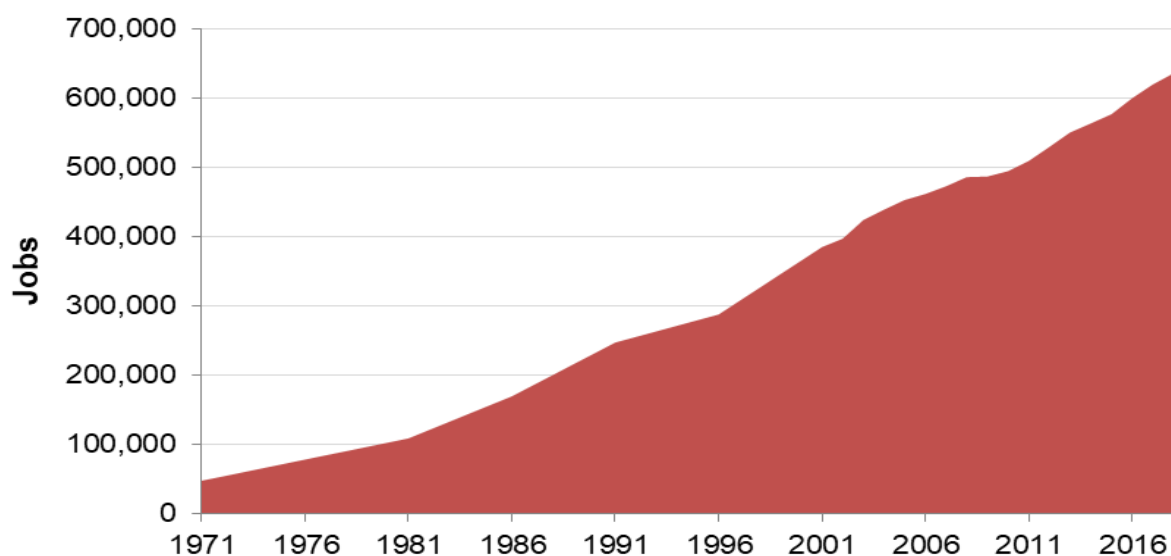
The Tor-York West megazone covers a large area in the City of Vaughan, including the CN MacMillan facility. This megazone has a significant concentration of manufacturing, construction, and wholesale trade and transportation jobs. Although this megazone has experienced recent declines in manufacturing employment, these declines have been largely compensated for with employment growth in construction, business services, higher education and personal services. This area is experiencing significant transition, with new office development in the VMC driven by major transit investments in the extension of the Spadina Subway and the addition of bus rapid transit on the Highway 7 corridor.

4.2 The History of Employment in York Region

Employment in York Region has grown by 588,800 jobs since the Region was created in 1971

When York Region was created in 1971, it was considered a bedroom community with most of the existing development being residential in nature and workers commuting outside of the Region for work. The Region had a population of 169,200 and 47,800 jobs. As shown in Figure 3, since 1971 the Region has increased its employment base by over 13 times to an estimated 636,600 total jobs in 2018, increasing its share of GTHA employment from 4 per cent in 1971 to 15 per cent in 2016.

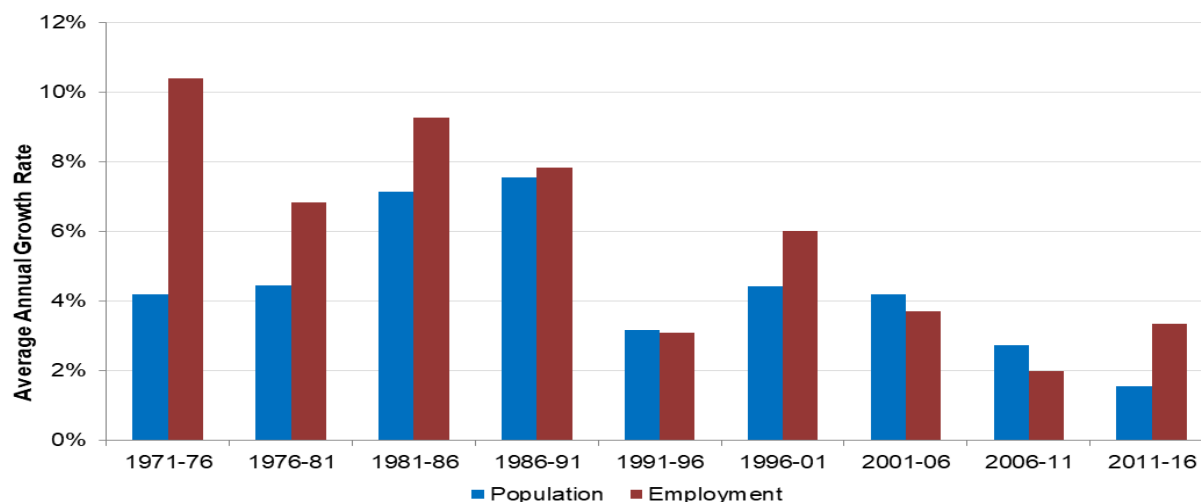
Figure 3: York Region Total Employment, 1971-2018



Source: York Region Planning and Economic Development

Despite economic recessions over the 45-year period, the Region has experienced strong overall employment growth, outpacing population in terms of average annual growth during most five year periods as well as overall (Figure 4). Since 1971, employment growth has averaged 5.8 per cent per year compared to population growth at 4.3 per cent per year resulting in a better balance between jobs and residents.

Figure 4: Average Annual Population & Employment Growth by 5-Year Period, 1971-2018



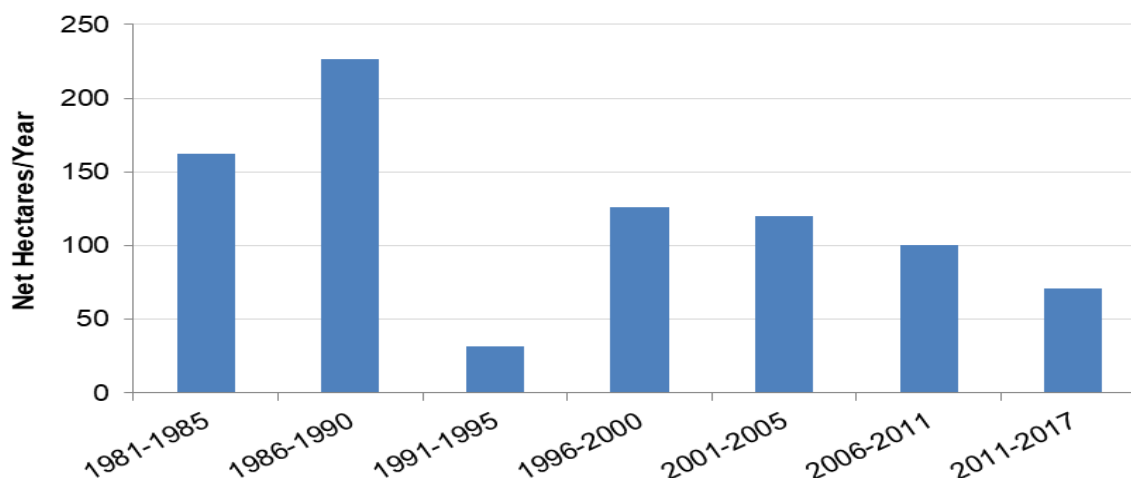
Source: York Region Planning and Economic Development

Employment growth in York Region peaked in the 1980s

After its creation in 1971, the Region grew quickly during the 1970s, but less so than some other GTHA locations, particularly the Region of Peel. Growth was constrained until completion of the York-Durham water and sewer-servicing scheme in the late 1970s. This led to significant levels of growth in York Region during the 1980s, a period of overall strong population and employment growth in the GTHA.

Total employment in the Region almost doubled during the 1980s, growing from 103,000 jobs to 232,000 jobs, or at a rate of 8.5 per cent per year over the ten-year period. As shown in Figure 5, the 1980s were also a peak for employment land absorption in the Region, averaging 195 ha per year.

Figure 5: Average Annual Employment Land Absorption, 1981-2017



Note: 1981-2006 are full year; 2007-2017 are mid-year to mid-year

Source: York Region Planning and Economic Development

Largely due to a recession toward the beginning of the decade, the nineties averaged steady, but slower employment growth than the 1980s. Employment growth in the 1990s averaged 13,400 jobs per year, or a growth rate of approximately 4.7 per cent per year. Despite another economic recession in 2008/2009, total employment has continued to grow at an average of 15,000 jobs per year between 2000 and 2018.

The economy underwent significant diversification in the 1980s and 90s as the Region's goods movement network and high tech office cluster began to take shape

With the completion of a number of key infrastructure projects including the York-Durham servicing scheme, Highway 404, and the CP intermodal facility in Vaughan, York Region's economy experienced not only rapid growth, but significant diversification in the 1980s and 1990s.

The strengthening of the goods movement network in the 80s and 90s perpetuated strong growth in the manufacturing sector but also facilitated the beginning of the warehouse and logistics market in Vaughan as well growth in the office sector. The opening of Highway 404 and the intermodal terminal allowed Vaughan and Aurora to develop strong employment bases in the auto parts industry while the intersection of Highway 404 with Highways 7 and 407 in Markham and Richmond Hill enabled the development of a high-tech manufacturing and office centre.

Through the 90s and early 2000s, the continued diversification of the Region's economy can be attributed to the beginning stages of the Region's Centres and Corridors and the development of three unique large scale employment nodes. These three zones consist of the office/high tech employment growth in Markham/Richmond Hill (Tor-York East megazone), manufacturing, transportation and logistics jobs in Central and West Vaughan (Tor-York West megazone), as well as employment growth in emerging employment areas in Aurora and Newmarket.

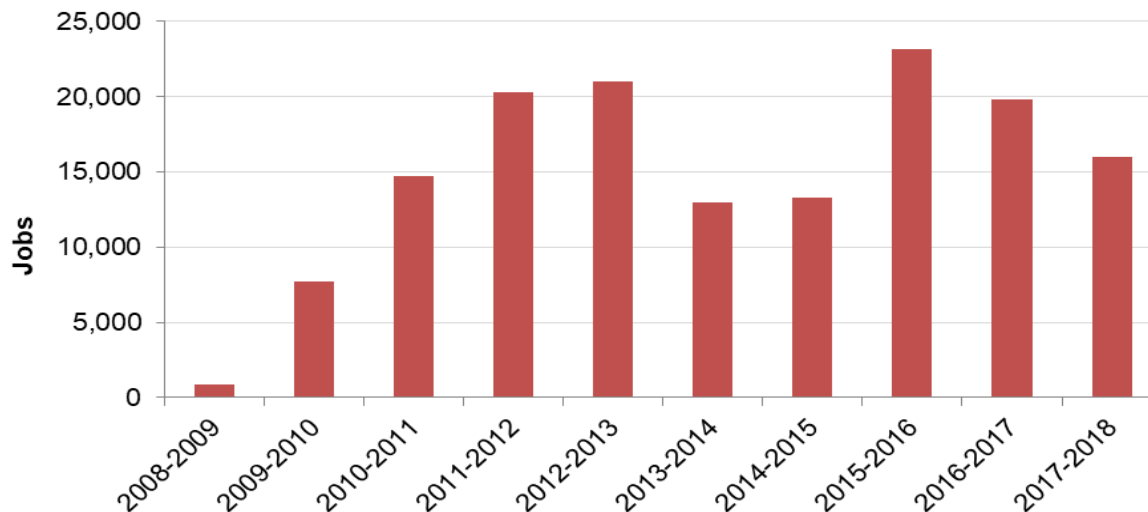
4.3 Employment and Industry Trends since 2008

Similar to the GTHA, following the 2008/2009 recession the regional economy has continued to shift from goods to services-producing sectors, with a profound shift occurring towards knowledge-based industries. This shift and the impacts to employment growth, land use and built form, are explored in detail in the following section.

Employment growth continues to outpace population growth in the Region

As shown in Figure 6, since 2008, total employment in York Region has grown by 149,900 jobs, representing a strong average annual growth rate of 2.7 per cent over the ten-year period. While population growth has also been strong over this period at 1.8 per cent per year, employment growth continues to outpace population growth in the Region.

Figure 6: York Region Annual Employment Growth, 2008-2018

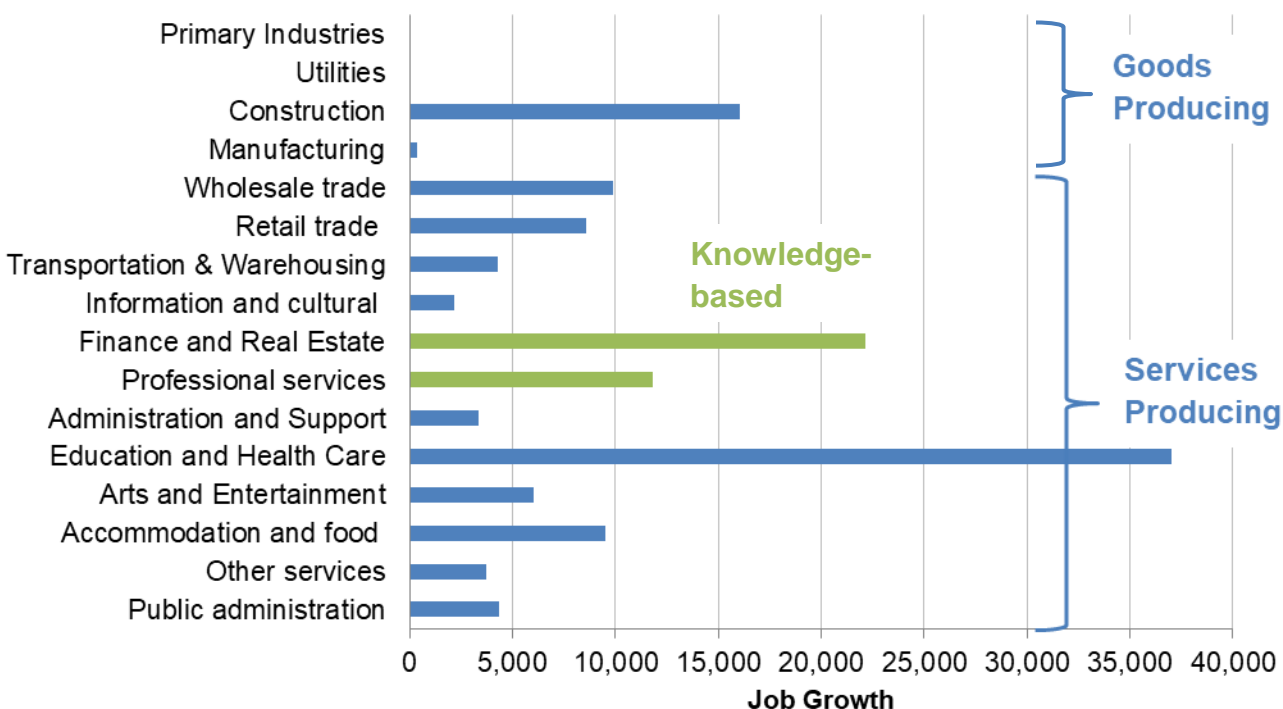


Source: York Region Planning and Economic Development

Knowledge-based sectors are among the fastest growing sectors in the Region

Employment growth since 2008 has been largely in services-producing sectors. As shown in Figure 7, over the past 10 years, 88 per cent of jobs created in the Region have been in services-producing sectors, increasing its overall share of jobs in 2018 to 78 per cent compared to 75 per cent in 2008. Services-producing industries include technology support, financial services, research and development as well as the sale of goods. Businesses in the goods-producing industries make tangible products and are primarily found in the manufacturing and construction sectors.

Figure 7: York Region Employment Growth by Sector, 2008-2018



Source: York Region Planning and Economic Development

The high growth in service-based industries can be attributed to rapid growth in a subset of service based industries that are generally accepted as being knowledge-based. These industries are those which, based on their intensive use of technology and/or human capital, include sectors such as finance and insurance, real estate, and professional and scientific services. Over the past ten years, knowledge-based jobs grew by 40 per cent compared to employment Region-wide at 32 per cent.

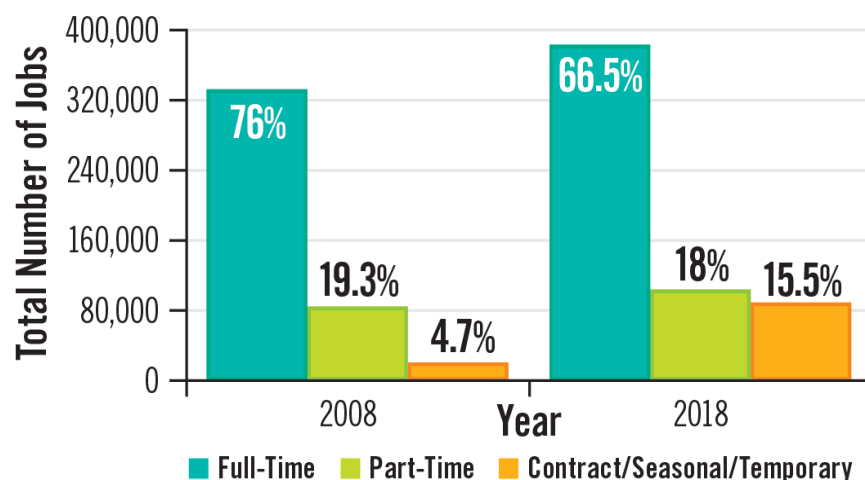
Employment in knowledge-based sectors such as finance and insurance and management of companies increased by over 50 per cent since 2008, while jobs in the real estate sector more than doubled over the past decade.

Growth in York Region residents who are self-employed, working at home, or with no fixed workplace address has outpaced employment growth for those with a usual place of work

Globalization, advances in technology, and strong growth in knowledge-based sectors have had an impact on the type of work in the Region. Statistics Canada Census data illustrates that the growth in York Region residents who were self-employed, working at home, or with no fixed workplace address has outpaced growth in those with a usual place of work. No fixed workplace employment has grown the fastest since 2006, experiencing a 36 per cent increase while work at home employment increased by 32 per cent. Both of these have outpaced growth in residents with a usual place of employment, which has grown by 16 per cent.

Part time and contract/seasonal work has increased dramatically over the past ten years. As shown in Figure 8 below, contract/seasonal employment accounts for 15.5 per cent of the 2018 jobs in the Region compared to 4.7 per cent in 2008, while full time employment has decreased from 76 per cent to 66.5 per cent. The decreasing share of full time employment is part of a global trend. Many business leaders indicate this trend is likely to continue as more people are employed in contract/temporary employment positions. Many of these jobs are highly skilled professions as workers prefer the flexibility that contract/temporary employment provides.

Figure 8: York Region Employment by Type of Worker, 2008 and 2018



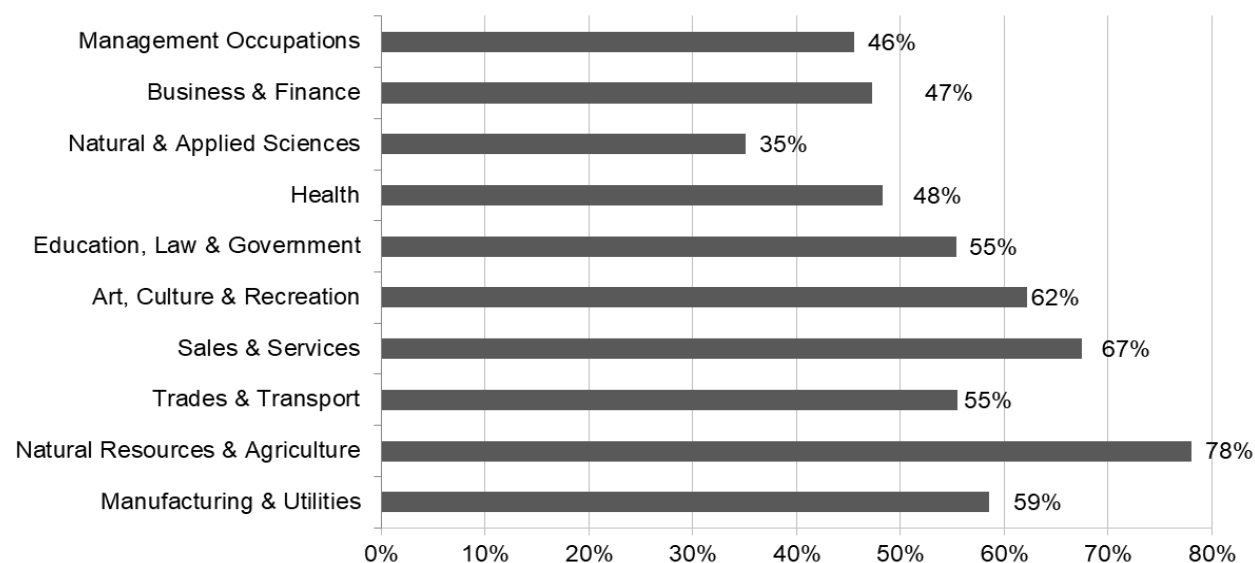
Source: York Region Planning and Economic Development

York Region has a highly educated labour force with training in knowledge-based occupations

Live work percentage (percentage of residents who live and work within the Region) provides a measure of how well the resident labour force is served from an employment standpoint in the Region. A higher live-work percentage is positive for the economy as it generally means shorter commute times, less traffic congestion, and more quality time for workers to spend with their families.

Over the past decade, the live-work percentage in York Region has increased from 56 per cent in 2006 to 58 per cent in 2016. As shown in Figure 9, there is significant variation in the live-work percentage by occupation in the Region. While the percentage of residents finding jobs in the Region in natural resource and sales and service occupations are high, only 1 in every 3 residents trained in natural and applied sciences are working within the Region.

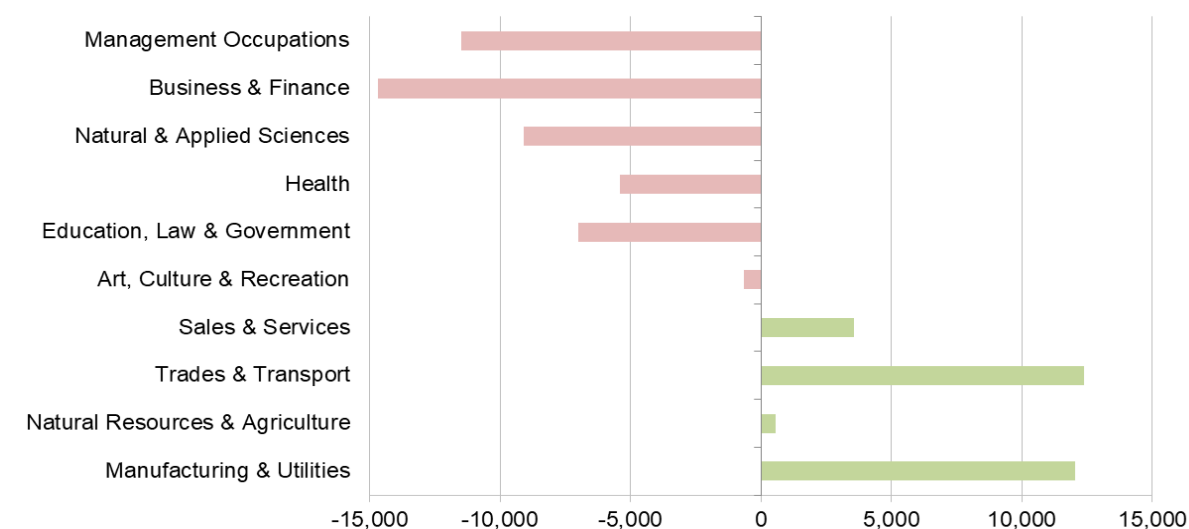
Figure 9: Live-work percentage by occupation, 2016



Note: Based on York Region residents with a usual place of work (excludes work at home and no fixed workplace address).
Source: York Region Planning and Economic Development based on Statistics Canada

Related to the Figure above, York Region's resident labour force is trained in high skilled occupations without corresponding jobs in the Region. As shown in Figure 10, there are significantly more York Region residents trained in business and finance occupations than there are job opportunities in the Region. On the other hand, there are more manufacturing and utilities occupations in the Region than York Region residents working in those occupations. Putting this simply, York Region residents who are trained in business and finance are more likely to look for employment opportunities outside the Region, while others in the GTHA and beyond are commuting into the Region to fill jobs in manufacturing.

Figure 10: Labour Force Demands vs Availability of Jobs in the Region, 2016



Source: York Region Planning and Economic Development based on Statistics Canada

4.4 The Structure of Employment in York Region

Regional Centres and Corridors, Employment Areas, and Community Areas are important to provide a range of employment opportunities

As the backbone of the Region's urban structure, Regional Centres and Corridors are a focal point of commerce, businesses, and cultural activities. These areas are planned to achieve the highest population and employment densities in the Region and to become mixed-use economic hubs with live-work opportunities for York Region residents. The clustering of economic activities, compact community design, and accessibility of these areas from transit will enhance their attractiveness to the talented GTHA labour pool.

Strategically located throughout the Region, employment areas continue to be major drivers of economic activity. These areas offer sites for small and large businesses at lower cost than elsewhere in the Region where a broader range of uses are permitted. Although traditionally home to primarily industrial uses, employment areas have evolved over time to support a wide range of employment activities.

Among the Region's employment areas are three key nodes that play important, but distinct roles in the Regional economy. A map of these nodes is provided in Attachment 2.

- the high-tech node in Richmond Hill and Markham is within the Tor-York East megazone identified by the Neptis Foundation and is as one of only three major office nodes outside of Downtown Toronto
- the traditional manufacturing / industrial node in Central and West Vaughan (Tor-York West megazone) is home to a significant number of jobs and a wide range of industries. Its strategic location around the CP intermodal facility, the CN rail yard, and a network of 400-series highways, such as the 400 and 427, makes this area attractive for growth, particularly in the distribution and logistics sector
- emerging employment areas along the 404 north provide attractive sites with significant vacant capacity to support employment growth, including land extensive employers, moving forward

Integrated into the urban structure are the Region's community areas. Employment in these areas is generally tied to population growth and includes a growing number of people working at home. Local retail and personal service jobs in community areas are key components to mixed-use communities as they allow residents, workers, and visitors to purchase goods locally. Shopping locally reduces travel times and congestion, and support's the Region's economy.

4.4.1 Centres and Corridors

One in every five jobs in the Region is located in Centres and Corridors

As of 2018, an estimated 22 per cent of the Region's employment was located in Centres and Corridors. Over the past decade, over 22,400 jobs have been created in these areas. During the same period, Centers and Corridors have also supported growth of 18,400 new residential units accommodating an estimated 40,000 people. Since 2008, employment growth in Centres and

Corridors has been almost exclusively in service-based sectors (97 per cent), with almost 1 in 2 jobs (49 per cent) created being in knowledge-based industries.

A significant driver of growth in the Regional Centres and Corridors has been in the major office employment category. The extension of the Spadina subway to the VMC and developing Bus Rapid Transit along Highway 7 has been a catalyst for major office growth in the Region. Over the past decade, major office employment in York Region grew by over 33,400 jobs to an estimated total of 102,300 jobs in 2018. Just under half of this growth (16,200) was in Centres and Corridors, accounting for 72 per cent of total employment growth in these areas.

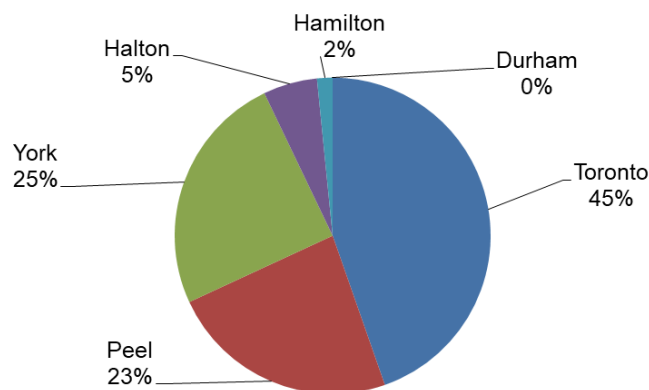
4.4.2 Major Office Employment

Despite the City of Toronto being the focal point for new office development, York Region's share of the GTHA major office market is increasing

One of the major outcomes of the economic and demographic trends discussed so far has been the recent concentration of office growth in the City of Toronto and corresponding high vacancy rates in the GTHA that have only recently started to decline. According to Hemson Consulting and shown Figure 11, over the most recent 10-year period, 45 per cent of major office employment growth in the GTHA has been in the City of Toronto. The concentration of new office growth in Toronto is well documented, and is driven by a number of factors including access to an extremely large labour pool via the multi-modal transportation network converging at Union Station.

Although not immune to the new realities of the current competitive environment, York Region has been more successful than other "905" GTHA municipalities in competing for office development outside Toronto. Major Office employment growth in York Region is outpacing growth in other "905" municipalities and between 2006 and 2016, major office employment in the Region grew almost three times faster than major office employment growth GTHA-wide. As shown in Figure 11, over the 10-year period, one in four new major office jobs created in the GTHA was accommodated in York Region, bringing the Region's share of the GTHA major office employment to 10 per cent compared to 8 per cent in 2006.

Figure 11: Distribution of 2006-2016 GTHA Major Office Employment Growth



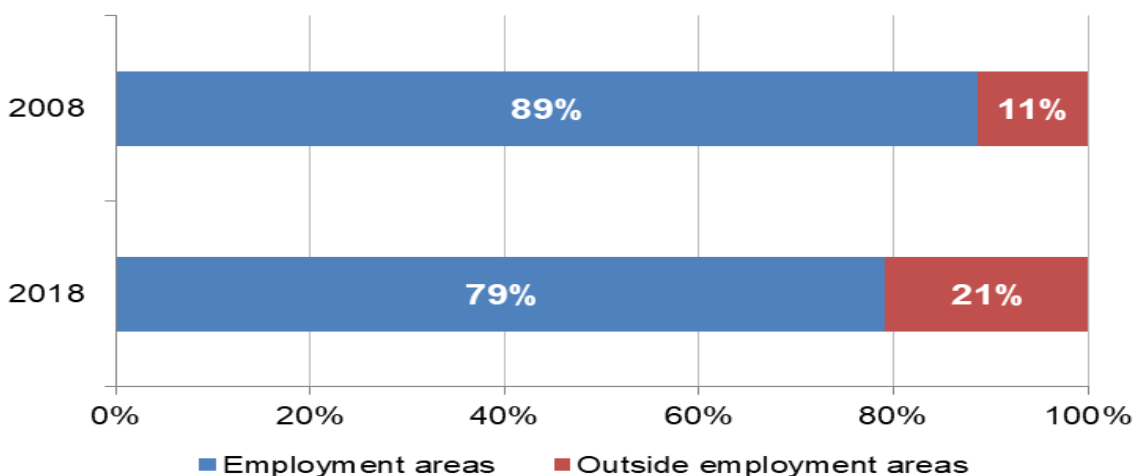
Source: Hemson Consulting based on Statistics Canada

Driven by rapid growth in Centres and Corridors, growth in major office is outpacing employment growth region-wide

The strength of the Region's major office category is further illustrated by its pace of growth relative to employment growth overall. Over the past decade, major office employment grew at an average annual rate of 4.0 per cent, faster than employment growth overall which grew by approximately 2.8 per cent per year. Of the Region's major office employment growth between 2008 and 2018, 61 per cent was in knowledge-based sectors. The finance and insurance sector in particular accounted for 22 per cent of major office employment growth over the last decade.

As shown in Figure 12, major office employment is still primarily located in employment areas, has seen a shift towards Centres and Corridors. This supports the Growth Plan objective of directing major office growth towards areas supported by higher order transit. It should be noted that some of the Region's major office employment is located within employment areas that overlap Centres and Corridors.

Figure 12: Distribution of York Region Major Office Employment by Location



Densities in Major Office buildings are increasing

The major office market in the GTHA is exhibiting a trend of decreased floor space per worker (an increase in density) especially in newer buildings. The average space per worker has been declining for decades, particularly since the early 2000s when, according to the Financial Post, average densities across North America were 250 sqft per employee compared to an estimated 150 sqft per employee in 2017. A declining floor space per worker means that more jobs can be accommodated within the standing inventory as well as in new buildings.

This trend is a result of many factors including demographic change, changing workplace practices, more efficient space design, and the preference of employees to reduce commuting time and/or have ready access to an attractive live-work environment. To partially illustrate this trend in York Region, Table 1 compares the share of onsite and offsite employment in major office buildings in 2008 and 2018. Between 2008 and 2018, the share of offsite employment within the major office category increased to 20 per cent of all jobs, compared to per cent in

2008. York Region specific major office density trends will be determined through the updated employment forecast.

Table 1: York Region Major Office Employment Onsite vs Offsite, 2008 and 2018

	Onsite Jobs	Offsite Jobs
2008	89%	11%
2018	80%	20%

Source: York Region Planning and Economic Development

The outlook for Major Office growth remains positive

The major office market in York Region is expected to continue to experience strong growth moving forward. As of 2018, there were 21.6 million square feet of existing major office space in the Region with an additional 640,000 square feet (8 new buildings) under construction and 3.9 million square feet (38 new buildings) within proposed applications. This equates to an estimated 16,600 new major office jobs. As shown in Table 2, over half of new major office space is expected to locate in employment areas compared to a third in Centres and Corridors.

Table 2: Proposed Major Office developments in York Region

	Under Construction sq.ft. (# buildings)	Proposed sq.ft. (# buildings)	Share of total sq.ft.
Centres and Corridors	0.2 M (1)	1.3 M (8)	33%
Employment Areas	0.3 M (4)	2.2 M (24)	56%
Other	0.1 M (3)	0.4 M (6)	11%
Total	0.6 M (8)	3.9 M (38)	100%

Source: York Region Planning and Economic Development

4.4.3 Employment Area Employment

The following presents the current state of employment areas in the Region, as well as a detailed analysis of growth trends since 2008. More detail on each of the Region's employment areas as well as a summary of employment area employment in each of the nine municipalities can be found in Attachment 2.

Employment areas are vital to the Regional economy

Employment areas play an important role in York Region's economy and are fundamental to job growth and business attraction. These areas are often the only viable home for businesses that require sites close to goods movement corridors such as 400 series highways, intermodal facilities, and rail yards at lower development costs. Examples of these businesses include land-extensive distribution and logistics facilities and manufacturing based businesses that are often incompatible with sensitive land uses such as residential. York Region provides prospective employers with flexibility and choice in employment areas with approximately one third (2,600 net ha) of the close to 7,800 net ha of employment land in the Region being vacant and available for future development.

Employment areas accommodate over half of the Region's employment base

As of 2018, the Region's employment areas accommodated 53 per cent of total employment and have accounted for 76,000 or 55 per cent of surveyed employment growth in the Region

over the past decade. Employment areas are also home to 76 per cent of the Region's largest employers. TD, Desjardins, and Honda are recent examples of large scale employers arriving into the Region's employment areas.

Continuing to protect employment areas is essential to accommodating a diverse range of industries in a variety of building types. In addition to a significant number of traditional manufacturing and industrial uses, the Region's employment areas are home to a significant number of major office and retail and personal services jobs. As referred to above, 79 per cent or 81,000 of the Region's 102,300 major office jobs are located within employment areas and approximately 10,100, or 12 per cent, of employment area jobs are within the retail and personal services category.

Employment areas continue to accommodate a broader mix of employment uses

There has been a trend in recent years toward an increasing number of offices, commercial, retail and mixed use employment in employment areas. Similar to overall employment trends, jobs created in employment areas have been driven by growth in service-based sectors. As illustrated in Table 3, between 2008 and 2018, 79 per cent of employment area employment growth was in service-based sectors. Breaking this down further, knowledge-based jobs accounted for 30 per cent of employment growth in employment areas over the past decade.

Table 3: Employment Area Employment in Goods- vs Services-Producing Sectors

	2008	2018	2008-2018
Goods Producing	39%	35%	21%
Services Producing	61%	65%	79%

Source: York Region Planning and Economic Development

While access and exposure to 400-series highways and major arterial roads are still critical for many industries, the general decline in goods-producing towards more service and knowledge-based jobs is increasing the demand for other more compact building types close to amenities and supported by transit. Space to accommodate this type of growth is still required, with smaller office and industrial condominium building types in employment areas being attractive for these types of industries. Employment areas are particularly important to support many of the Region's entrepreneurs and smaller businesses because of the lower land costs and rental rates in these areas. It is important that the Region protect these areas from conversion to other uses that will drive up land costs.

Employment area densities have been increasing as a higher share of employment is being accommodated through intensification

While employment area employment growth has remained strong, employment area absorption has been declining since 2011. An average of 71 ha per year was absorbed for greenfield construction between 2011 and 2017 with total absorption between 2011 and 2016 being lower than the single year peak of 361 ha in 1985. Demand for employment areas in recent years has begun to increase, with building permits showing approximately 4.2 million square feet of industrial/commercial space constructed or under construction in the Region's employment areas between 2017 and year end 2018.

The slower absorption of employment land in the Region's employment areas can be partially attributed to the shift from a manufacturing and goods-producing to a service and knowledge-based economy. The economic recession of 2008-2009 also resulted in some buildings becoming vacant, many of which have since been re-occupied. The result has been significant job growth without a corresponding uptake of land and an increase in employment area density from 65 jobs/Ha in 2013 to 70 jobs/Ha in 2018 (Table 4). Largely due to location and the sector makeup of employment areas, densities vary across the Region. In West Vaughan where there are a large number of warehouse and distribution facilities densities are as low as 5-10 jobs per hectare compared to densities of 290 jobs per hectare in employment areas like Commerce Valley with large concentrations of professional services employment in office and multi-unit industrial building types. For a list of 2017 employment area densities by employment area, please see Appendix A.

Table 4: Employment Area Density, 2013-2018

	2013 (jobs/Ha)	2018 (jobs/Ha)
Density (including major office)	65	70
Density (excluding major office)	55	58

Source: York Region Planning and Economic Development

Intensification in employment areas is one factor driving increasing densities in employment areas. Intensification in employment areas can occur in two main categories: Intensification on existing built parcels and intensification within existing space. For a more detailed methodology on defining and quantifying intensification potential, please see Appendix B.

1. Intensification on existing built parcels refers to the construction of new building space on employment area parcels that are considered built in the Region's employment land inventory. Intensification through new building space can occur through expansion of an existing building or through construction of an entirely new structure on the same parcel.
2. Intensification within existing space refers to new jobs that are accommodated within the existing floor space of a building.

Over the 2011 to 2017 period, an estimated 60 per cent of employment area employment growth has been accommodated through intensification of existing built parcels or growth in existing buildings.

The trend towards intensification in employment areas is likely to continue. As of 2017, there were 328 ha of intensification potential identified in the Region's inventory.

Office jobs in employment areas are increasingly occurring in building types other than major office

Contributing to increasing densities in employment areas and driven by an increase in knowledge-based jobs, a continuing trend in York Region has been for growth in office-oriented uses to occupy built-forms other than major office building types, notably 'flex space' and smaller co-working spaces in employment areas. Although office work activities occurring in

non-office spaces has long been a feature of the York Region space market, the prevalence of this has become much more widespread in recent years.

Increasingly, new industrial type buildings are being marketed as flex office space for initial tenancies. In many ways, these office uses represent a different part of the market demand for lower-cost and high amenity work environments. Demand for more flexible space continues to grow as employers cater to the millennial workforce, both in downtown and suburban locations with amenities nearby including transit access. Examples in York Region include the IBM Innovation Space in Markham, a tech-based co-working space offering access to IBM resources and joint education, marketing and promotion as well as the TechConnex HUB, also in Markham.

In York Region, 54 per cent of traditional “office type” employment in employment areas is accommodated in non-office forms. This refers to employment in sectors that have traditionally located in office-type buildings. Within designated employment areas, roughly half of the total office employment is accommodated outside of major office buildings, as shown in Table 5 below:

Table 5: Office Employment in Employment Areas, 2018

Sector	"Office" Sector Employment in Major Office	"Office" Sector Employment Outside of Major Office	Total "Office" Sector Employment	Proportion outside major office
Information and Cultural	3,300	5,800	9,100	64%
Finance and Insurance	15,100	8,000	23,100	35%
Real estate and rental	4,200	8,200	12,400	66%
Professional and Scientific	24,100	21,800	45,900	47%
Management of Companies	4,100	4,400	8,500	52%
Administrative and support	2,200	10,100	12,300	82%
Public Administration	1,200	4,300	5,500	78%
Health Care - doctor and dentist office	2,000	2,200	4,200	52%
Total	56,200	64,800	121,000	54%

Source: York Region Planning and Economic Development

Employment areas have experienced an uptake in large scale industrial building types with low employment densities

Although the trend is towards more mixed use development and higher overall employment area densities Region-wide, there has been an increase in land intensive warehouses in west Vaughan. This shift has increased desirability of large serviced, freight supportive vacant parcels of land in greenfield areas. New warehouse facilities in the Region include distributions centres for Costco and Fed Ex in West Vaughan. Unlike other employment area uses in the Region, the employment density in these facilities is very low, averaging 22 jobs/ha or 1,500 square feet per employee.

The GTHA is one of the largest industrial real estate markets in North America. According to Cushman and Wakefield, in the third quarter of 2018 industrial vacancy rates in the GTA

declined to an all-time low of 1.7 per cent, with a record high 9.4 million square feet of new space under construction; nearly 75 per cent of which is focused in the GTA west and north, including York Region.

4.4.4 Community Based and Rural Employment

Population-related employment growth continues to grow at a similar pace to employment overall

As stated above, population-related employment largely includes service type jobs including retail, commercial, personal services located in the Region's community and mixed used areas. Growth in this employment category is closely tied to population growth. Work at home employment, a rapidly growing employment type in the Region, is also captured in this category with an estimated 51,100 jobs, or 8 per cent of total employment as of 2018.

Population-related employment growth shares over the past decade have remained relatively constant. Between 2008 and 2018, population-related employment grew at a similar pace to employment growth overall, growing by 31 per cent and 32 per cent, respectively. As a share of total employment, population-related employment has remained the same at approximately 40 per cent.

While the share of population related employment growth has remained relatively constant, the ratio of population to population-related employment has decreased over the 10-year period. This ratio provides an indicator of the number of population-related jobs that are required meet the needs of a growing population and is an important input to the Region's employment forecast. Table 6 compares population-related employment ratios in 2008 and 2018.

Table 6: York Region population-related employment ratios, 2008 and 2018

	Population-related employment ratio
2008	5.2
2018	4.7

*Measured by dividing population by population-related jobs.

Source: York Region Planning and Economic Development

Rural employment growth has been modest

Rural employment includes primary and agricultural jobs dispersed outside of the Region's urban area. There were an estimated 14,700 rural jobs in the Region in 2018.

While rural-based and agricultural jobs are important to the Region's economy, growth in this employment category represents the smallest share of employment by type in the Region. As a share of overall employment, rural employment grew slower (20 per cent) than all other employment types and the share of overall employment decreased from 3 per cent in 2008 to 2 per cent in 2018.

4.5 Key Observations

1. York Region's employment growth over the past decade has remained strong at approximately 2.7 per cent per year, outpacing population growth at 1.8 per cent per year.
2. The GTHA and York Region economy is transitioning to a knowledge economy where access to talent and skilled labour are becoming increasingly important.
3. Knowledge-based industries such as finance, real estate, and professional services have been among the fastest growing sectors in the Region over the past decade.
4. York Region plays an important role in the GTHA economy, accommodating 22 per cent of employment growth over the 2006 to 2016 period.
5. The Region has evolved into a top destination for business with strengths across a number of sectors and major economic clusters.
6. The structure of employment in the Region is already well established through Regional Centres and Corridors which are attractive for office development, employment areas which contain 53 per cent of the Region's employment base, and residential areas that provide retail and service jobs that serve the local economy.
7. The nature of work is changing – self-employment, part-time, work at home and no fixed workplace employment are increasing.
8. Driven by the strength of the Region's Centres and Corridors, Major Office employment growth is outpacing growth in all other categories.
9. Intensification of existing built space and low land absorption have contributed to higher employment area densities.
10. Growth in population related and rural employment categories have been in line with population growth.

5.0 FUTURE TRENDS ANALYSIS

In the fall of 2018, York Region retained Hemson Consulting to prepare a York Region Future Employment Trends Study (Study). The intent of the Study was to develop an in-depth understanding of emerging technological trends and their impact on planning for employment growth in York Region. Key findings from this study will provide direction for the Region's Employment Strategy and inform the employment forecast and policy update.

The Study explored potential short and long term trends in the sectoral composition of employment as well as changing location preferences of employers, built forms, and patterns of real estate development. The following provides a summary of the Hemson Study, with additional analysis from recent studies from the Neptis Foundation (Planning the Next GGH) and the Brookfield Institute. The entirety of the Hemson Study can be found at the following [link](#) on York.ca.

5.1 High level economic, demographic, and technological trends impacting employment growth

Trends at the Global, National, Provincial and regional level (GGH) will continue to affect the employment growth outlook and demand for land in the Region

Trends in the global, national, provincial and GGH economy will continue to impact employment growth in York Region. Examples of high level trends with the potential to impact employment growth moving forward include:

- a national economy that is anticipated to grow at a somewhat slower rate than the global economy with the strongest influence on the distribution of growth being international immigration
- market access issues in the energy sector and the decline in oil production
- tighter labour markets, the current housing market slowdown, recent tariffs imposed by the United States, and rising interest rates
- emerging trends in non-usual place of work, co-working and the 'gig' economy (short to medium term contracts)
- automation of work activities in a growing number of industries
- changing consumer behaviours and preferences driving rapid growth in e-commerce and just in time delivery
- an economy increasingly focused on professional services, including knowledge-based and creative industries

Innovation and access to talent are playing an increasingly important role in the evolving economic landscape

Within the broader context of shifting employment composition, the key location factors for firms in professional services, especially knowledge and creative industries, is access to talent and amenities. The competition for talent is driving companies to locate in areas that are well served by transit and provide access to the infrastructure and services that cater to a younger working age cohort. This trend has underpinned the recent trend towards rapid population and employment growth in downtown Toronto.

Integration and co-location of workers with institution and research facilities has also been observed. There is an emerging trend in the development of employment spaces and facilities that integrate different functions including innovation, institutional, lab spaces, training, co-working, and production space.

5.2 Quantifying the potential for automation in York Region

The proportion of York Region's Labour Force at risk of automation is significantly lower than the national average

Based on the analytical framework developed by the Brookfield Institute, Hemson estimates that 24 per cent, or 133,200 residents, of the York Region employed labour force is at risk of having their jobs lost to automation over the next 10-20 years. Compared to the national average of 42 per cent, the share of occupations at risk is much lower in York Region as a result of its diverse economy and strength in high-skilled knowledge-based sectors that are less susceptible to automation. A similar analysis for jobs in York Region indicates that 143,000 York Region jobs, or 25 per cent of 2018 surveyed employment, are at risk of being automated.

From a timing perspective, there are a variety of views on long term impacts of automation. Hemson's view is that future changes in employment are likely to occur slowly and gradually as a continuation of existing patterns rather than some sudden change. Both the Neptis and Brookfield work agree that the restructuring of employment as a result of automation is not likely to be a one-time event, but rather a continuous process evolving over time.

Lower-skill work activities are particularly susceptible to automation

The potential for automation is likely to impact all economic sectors, to varying degrees. From an occupational perspective, the analysis shows that relatively lower-skill and more routine activities are particularly susceptible to automation (See Table 7). In particular, the occupations that show the greatest risk include:

1. Manufacturing (60 per cent of employed labour force)
2. Trades and transportation (40 per cent of employed labour force)
3. Routine business, finance, and administration (40 per cent of employed labour force)

Occupations with the lowest risk of automation are those which are more reliant on human judgement including professional services, education, and health care.

Table 7: Risk of Automation to the Employed Labour Force, 2016

Occupation	Potential for Automation	Potential Jobs Lost
Manufacturing and Utilities	62%	12,800
Trades and Transport	39%	22,400
Business, Finance, and Admin	39%	41,600
Sales and Service	35%	43,300
Natural Resources and Agriculture	16%	800
Health Occupations	7%	2,300
Arts, Culture, Recreation and Sport	5%	900
Natural and Applied Sciences	7%	3,800
Management Occupations	4%	3,000
Education, Law, Community & Government	4%	2,300
York Region Total	24%	133,200

Source: Hemson Consulting based on Brookfield Institute

Automation is anticipated to have less impact on jobs at the high end of the skills spectrum

While automation does have the potential to impact jobs at the high end of the skills spectrum, these jobs are likely to be replaced than jobs at the low end. In an analysis comparing manufacturing and finance and insurance, two of the largest sectors in Ontario, it is apparent that jobs that have been lost to automation in the manufacturing sector have not been easily replaced while the finance and insurance sector continues to experience significant growth. This is likely due to the ability of workers to find jobs in similar occupations because of transferable skills as well as advances in automation and other evolving technologies actually creating new jobs in knowledge-based industries.

Automation is impacting employment growth in the Region's major employment clusters

In partnership with York Region and neighbouring labour markets serving York Region employers, the Workforce Planning Board of York Region and Bradford-West Gwillimbury undertook a detailed study of York Region's three largest clusters, Information and Communication Technology (ICT), Manufacturing, and Financial Services that included engagement with over 50 York Region employers.

Universal among York Region employers surveyed were difficulties finding employees that have the "non-technical" skills, which appear to have become as important, or more important than technical skills. In fact, "soft" skills seemed to represent a bigger "gap" area than industry or subsector-specific skills shortages. Examples of these skills include: adaptability, problem solving and analysis, independence and pro-activity, and the ability to manage one's own work.

5.3 Implications on the structure of employment and demand for land

The growth outlook for York Region remains positive

Within these broader economic trends, the growth outlooks for the GTHA and York Region remain positive. With an economy increasingly focused on professional services, including knowledge-based and creative industries, the GTHA is very well positioned to compete for new business investment in years to come.

As part of this integrated and rapidly growing economic region, York Region's central location and large and diverse economic base makes the Region attractive within the broader GTHA and more resilient in the face of economic change. Rapidly growing industries such as information and communications technology (ICT), finance, higher order business services, life sciences, and healthcare technology are all expected to experience strong growth moving forward. The building and construction industry as well as transportation and logistics are also anticipated to perform very well.

According to Hemson Consulting, York Region is home to one of only three major office nodes in the GTHA outside central Toronto, which bodes well for attracting workers in occupations that require highly-skilled workers, are at low risk of being affected by automation, and are anticipated to grow more rapidly than the rest of the labour force. Further advantage can be

found in the clusters of economic activity located in the Region's major employment areas, along with a supply of vacant land to accommodate growth.

While concentration of office employment in Downtown Toronto is likely to continue, York Region is better positioned than many other GTHA municipalities to attract office growth. Major advantages include the existing cluster and critical mass of office development, an established role as a major office node in the GTHA, and a 'natural' location for future office development given superior highway and transit access. Current and pending transit infrastructure in the Region is likely to improve the competitiveness of many locations for new business investment. For example, the recent subway extension to VMC has been a catalyst for office growth, a trend that is expected to continue.

Over the long term, disbenefits in the form of congestion and inaccessibility to downtown Toronto may begin to shift some types of businesses to other locations, including York Region. Since 2010, significant companies such as Aviva, Celestica, and Lenovo have relocated to York Region from Toronto.

Higher skilled jobs will be the focus of employment growth going forward

The outlook for employment growth in York Region is for relative stability in the manufacturing sector with continued rapid growth in services. The Regional economy will almost certainly undergo a continued evolution and transformation both within and between sectors, towards higher-skill activities. Recent trends have shown that highly skilled and more educated labour will be a significant driver of growth in the future. Since this effect will be felt across all economic sectors, workforce development will become an increasingly important issue over time.

Technology has the potential not only to replace existing types of economic activities and jobs, but also to result in increased demand for certain types of jobs, or even create entirely new ones. Many significant sectors in the economy simply did not exist a few decades ago, such as website and app designers. As the use of computer and information technologies continue to evolve, knowledge-based jobs such as software engineering and data analysis are likely to be created and may compensate for losses in other industries.

According to Hemson, occupations that are likely to grow are those that have relatively lower probabilities of automation and either represent a high share of the overall employment base or are anticipated to grow rapidly over the forecast period. For York Region, these occupations may include:

- Occupations in management and in natural and applied sciences
- Professional occupations in the health sector, including nursing and related life science and health care technology activities
- Occupations in education, law and government services, along with a range of occupations in art, culture, recreation and sport

Demand for office space is expected to increase in both major office and non-office forms

The shifting office market dynamic has implications for the overall forecast by type (major office and employment area) as well as regional objectives for centres and corridors. As the knowledge economy continues to evolve and Centres and Corridors continue to develop, demand for major office space is expected to continue to increase.

An emerging trend is for growth in the service sector and office-oriented use in other built forms, notably 'flex space' and smaller co-working spaces throughout the community. Reasons for this include:

- The Region is well located with access to a network of 400 series highways as well as existing or planned transit routes
- Flexible industrial facilities tend to offer a larger and wider range of signage opportunities and more open work environments due to the lack of core building elements
- Units are frequently in large buildings that include warehousing capability which makes them attractive to a range of users including professional services, logistics, technology firms, medical/ pharmaceutical laboratories, and research and development firms

It is generally expected that the flex space market will continue to grow as tenants seek to reduce costs and maximize space efficiency, particularly in the context of the continued concentration of very intensive forms of development in Toronto and escalating disbenefits in terms of costs, among others.

As a result of continuing trends related to co-working and increasing numbers of employees working at home, office densities are likely to continue to increase.

High quality urban environments and continued investment in transit will be critical in attracting talent and supporting growth in knowledge-based industries

Amenity rich and accessible work environments are increasingly important in the location decisions of employers, particularly in knowledge and creative industries. Access to transit along with high-quality urban environments is important to the attraction of new business investment in office-type uses as well as industrial development, which have been increasingly marketed with an emphasis on amenities to attract workers. One of the key competitive advantages driving the recent concentration of employment growth in Toronto has been the City's ability to provide access to a labour pool that is both wide and deep. As the economy continues its transition toward knowledge-intensive activities, developing high quality urban environments accessible by higher order transit will be critical in attracting and retaining the Region's talented labour force.

The Region's commitment to infrastructure investments and transportation expansion will increase the Region's competitiveness for economic development by improving access to talent. Viva bus rapid transit and the Spadina Subway extension into Vaughan support tremendous office and residential construction and business attraction. Regional Council continues to place

a priority on future infrastructure improvements such as the Yonge subway extension and two-way GO service that will support new business opportunities.

In addition to transit investment, it will be important for the Region to recognize the importance of other attributes of urban environments that contribute to business and talent attraction. Prioritizing the development of high-quality, walkable public realms with access to amenities in areas that are already served by higher order transit will help create attractive employment nodes that are accessible to the broader GTHA labour force.

Demand for employment areas expected to remain strong

Future demand for employment area development in York Region is anticipated to remain strong. Growth in e-Commerce has driven a surge in demand for distribution space close to major urban centres such as the GTHA. Mixed-use areas are not appropriate to support growth in these sectors because of the higher land costs associated with these areas and because businesses in these industries often have specific location requirements that are incompatible with sensitive uses such as residential and institutional.

Manufacturing will continue to play an important role with fewer workers and more robots relative to the past. This new space demand is likely to be off-set by the simultaneous repurposing of older manufacturing space, as has been the case for many years, to accommodate other types of employment uses.

Growth in employment areas will be driven by increasing demand for large sites with superior transportation access and evolving trends towards office uses in non-office forms in employment areas closer to transit with access to amenities. An appropriate land supply will be required for all types of industry to provide flexibility for employers in high quality locations over the long-term.

While the increasing prevalence of office uses in employment areas is likely to continue to result in increasing employment areas densities overall, densities by employment area are likely to vary significantly as a result of their location within the Region as well as their sectoral composition.

The role of the Region's three employment nodes is expected to evolve and strengthen

The three major employment nodes all play distinct roles in the regional economy in terms of the amount and types of employment, the occupied and vacant land supply, and growth expectations moving forward:

1. Markham/Richmond Hill

The employment node at Highway 404 and 407 has the highest employment density among employment areas in the GTHA, owing in part to the significant amount of office activities occurring in the industrial building stock in the area, including a number of major office buildings. Moving forward, this area is likely to continue to accommodate the highest employment area densities in the Region and will remain important for accommodating the existing employment base and new office development.

2. Central and West Vaughan

Given current trends in e-Commerce and industrial land markets, strong demand for employment areas is likely to continue and the Region's ability to provide large parcels of development lands is a major competitive advantage. The West Vaughan Employment Area, for example, is one of the largest employment areas remaining in the GTHA and likely to be in very high demand, particularly for large distribution uses and transportation/logistics providers in close proximity to the CP intermodal yard. Retention of these lands will be critical. The key challenge from a Regional perspective will be to ensure that lands are brought to market in a timely and orderly fashion in order to take advantage of these opportunities.

3. 404 North

The employment node in northern York Region along Highway 404 is characterized by a mixture of occupied and developing areas and demand for these areas is likely to be more long term. Given that many of these lands require servicing before they can be brought to market, the timing of development in these areas is tied in part to the timing of infrastructure delivery.

Retail locations anticipated to remain important as their role evolves to incorporate different types of retail delivery and support online retailers

Along with growth in e-Commerce and demand for industrial distribution there has been a shift in the pattern of retail development, as evidenced by recent closures of major large North American brick and mortar stores. While this trend may continue, it is being moderated by the establishment of retail stores by major online retailers, notably Amazon, to create a physical footprint for the sale and delivery of goods. Other related trends are growth in stand-alone pick up locations and the ability to order items online and pick up in stores ("click and collect").

The likely impact will be a reduced need for new retail space combined with the continued repurposing of existing stores to accommodate a wider range of uses. At a local scale, needs of residents still need to be met, and at the regional scale, there is still demand for space in regional malls because of the enduring appeal of the shopping experience. Most of the change will be in mid-scale developments such as community shopping centres as traditional anchor tenants move their business online.

The continued automation of routine-oriented service tasks will drive a number of shifts in retail jobs, moving away from traditional retail outlets towards other sectors, including warehousing and logistics.

Planning and economic development initiatives should continue to be considered by the Region to support business growth and attraction

Additional considerations and recommendations provided by Hemson include:

- Devoting the resources necessary to encourage expansion of the Regional innovation "ecosystem" (for example, initiatives such as ventureLab), particularly in regards to the commercialization of new products or processes.

- Proactively support and grow the regional office market through all available means, including planning tools, consideration of financial and other incentives, as well as ongoing economic development and investment attraction efforts
- Together with economic development, local municipalities, post-secondary institutions and other partners, support and advance current skills training initiatives and consider additional strategies to attract and retain local talent in sectors that are of strategic importance to the Region as well as those at high risk of automation
- Consider place based strategies to focus redevelopment and renewal initiatives on the locations with the best market prospects and development potential
- Carefully balancing opportunities for residential and non-residential development in Urban Growth Centres and Major Transit Station Areas

5.4 Key Observations

1. The employment growth outlook for York Region is favourable and is anticipated to be characterized by stable growth in manufacturing and rapid growth in services including high-skilled jobs in knowledge and creative industries
2. Despite 24 per cent of the Region's labour force being at risk of automation, York Region is well positioned to withstand the impacts of automation with an economy increasingly focused on higher skilled activities. Impacts of automation and AI are likely to be slow and gradual. Automation will impact all economic sectors and likely create more jobs in the long run.
3. Amenity rich and transit accessible work environments are increasingly important for the location decisions of employers to attract talent. Regional Centres and Corridors are well positioned to attract highly skilled, knowledge-based job
4. Demand for employment areas will remain strong and will be driven by land-extensive logistics and warehouse facilities as the role of e-Commerce continues to expand as well as increasing shares of service sector employment in small offices and industrial multiples. The overall impact is likely to be an increase in density in employment areas.
5. Investing in and supporting a highly skilled labour force will be critical in remaining competitive in the midst of the dramatic restructuring of the GTHA economy.

6.0 EMPLOYMENT AREA PLANNING

6.1 Designating Employment Areas in the Regional Official Plan

Employment areas are those designated for employment uses in official plans

The existing York Region Official Plan defines employment areas as lands that are designated for employment uses including land designated as industrial and business park in local municipal official plans.

From a regional standpoint, uses currently not permitted in employment areas include residential, major retail, and other non-ancillary retail and commercial. Local municipalities differentiate between types of employment areas with additional official plan designations. These designations are usually reflective of sectoral employment or location based categories. Local municipal Official Plan designations provide explicit direction on permitted uses for those lands.

The Growth Plan requires the Region to map and designate employment areas in the Regional Official Plan

As previously mentioned in section 4.1 of this report, the economic landscape of the GTHA, including York Region, has undergone significant transformation over the past several decades as the regional economy continues to evolve. In response to the ever-changing economy, it is increasingly important to have employment policies in place that provide a supply of employment areas that allow flexibility for business location decisions and that protect and preserve employment areas over the long term.

The Growth Plan has reinforced the protection of employment areas by introducing new policy direction for employment area planning. One of the most significant changes of the 2017 Growth Plan was for upper tier municipalities to designate and map employment areas in their Official Plans, a responsibility previously assumed by local municipalities. While the existing Regional Official Plan does not map employment areas, the Region does have a high level policy framework for their planning and protection.

The Growth Plan requires upper-tier municipalities to set density targets for employment areas and encourages them to make more efficient use of employment areas by considering opportunities for intensification. Intensification and density assumptions for employment areas will be used when determining existing capacity in the Region's employment areas as input to the land needs assessment.

Existing Regional Official Plan policies are premised on the long term protection and high quality design of employment areas

The employment area planning policy framework in the existing Regional Official Plan states that the ongoing viability of employment areas is contingent upon long term protection, effective planning and design, and a shift towards increasingly sustainable and innovative industrial processes. At a high level, policies aim to:

- Ensure a sufficient supply of employment areas
- Protect, maintain, and enhance the long term viability of employment areas by requiring that employment areas are designated and protected in local municipal official plans for employment area uses
- Limit ancillary uses (retail and commercial uses servicing the needs of the employment area) to a maximum of 15 per cent of an employment area
- Encourage intensification and higher density employment uses, particularly in centres and corridors

- Direct municipalities to establish criteria for conversion of employment areas to non-employment uses

There are currently 24 different employment area designations across the Region

Prior to designating employment in the Regional Official Plan, it was important for staff to gain an understanding of existing employment designations across the Region, staff performed an analysis of employment designations in each of the nine local municipalities and organized them into four broad categories. The results of this analysis are provided in Appendix C.

The main conclusion of the analysis was that there were differences across the Region in the way in which local municipalities designate employment areas. There are 24 different employment designations across the Region, all with varying extents to which specific uses are permitted. While all nine municipalities have designations that allow for traditional industrial and manufacturing uses, there are differences in the extent to which retail and office uses are permitted employment designations. Additionally, only six municipalities have a specific designation that allows for a broad range of employment uses, including industrial, office, and retail.

6.2 Planning for employment areas

Municipalities in Canada and around the world are changing the way in which they plan for employment areas

The employment trends presented in this analysis are reflective of broader national and global economic trends that are challenging employment policy planning. To better understand and plan for the changing nature of employment, municipalities worldwide have recently completed studies and reviews of their employment areas. Through these reviews, jurisdictions in Canada such as Toronto, Waterloo, Milton, Victoria British Columbia, and Surrey, British Columbia and others around the world such as Sydney (Australia), London (England), Stockholm (Sweden), and Anaheim (California) have created new policy direction to help prepare and plan for change. The common findings of these studies are presented below while Attachment 3 provides a matrix with additional detail on each review.

There is continued emphasis on protecting “core” employment areas for traditional employment uses

Despite an overall trend toward increasing flexibility in employment areas to accommodate a broader range of uses, jurisdictions identified the need to continue to protect and preserve employment areas, specifically inner and core areas, for more industrial, manufacturing, and land-intensive employment uses.

Municipalities recognize that these types of “traditional” employment area uses typically have lower employment densities, have specific location requirements adjacent to goods-movement corridors, and have the potential to create land use conflicts with sensitive uses such as residential. As a result, jurisdictions identified the need to protect employment areas that meet these criteria. An example of this is the Town of Milton, which has identified areas meeting these criteria as “historical industrial areas” and has provisions in its Official Plan to preserve them.

A broader range of employment uses are being permitted in strategic locations on the fringe of employment areas and within centres and nodes

Several jurisdictions studied are recommending employment area designations that permit a wide range of employment uses in areas that are adjacent to major road arteries or within broader community nodes. In doing so, municipalities are aiming to better align these areas with other city building initiatives. The premise is that more flexibility will create a better integration of employment areas with adjacent non-employment uses and attract high density employment uses that could benefit from more mixed-use and amenity rich environments with access to transit.

The intent is also to provide amenities for businesses within or in close proximity to employment areas. For example, the City of Toronto has a provision in their Official Plan that states that “uses that support the prime economic function of employment areas, such as parks, small scale retail stores and services to meet the daily needs of businesses and employees, workplace daycare and restaurants, must also be readily accessible within employment areas.”

Guidelines and implementation plans are being developed to improve the built form and public realm in employment areas

Aging built form has commonly been identified as a weakness of employment areas. In response, municipalities are developing guidelines, implementation plans, and programs to improve the built form and public realm of employment areas. In order to become more attractive to employers and more desirable to employees, studies identified the importance of improving the integration of urban design with natural features, improving connectivity between buildings, and creating an improved sense of community, place, and character. An example of this is the City of Anaheim with landscape design guidelines and a mobility and connectivity plan as part of a multi-faceted approach to improve the built form of employment areas and create a safer & healthier pedestrian environment.

Municipalities are developing creative solutions to rejuvenate employment areas and stimulate economic growth

Municipalities are recognizing that older employment areas may be in transition and strategies and policies are being developed to support redevelopment where appropriate. Implementation techniques include the use of Community Improvement Plans and marketing strategies in Waterloo and the identification of Business Improvement Areas or Creative Districts supported by financial incentives to encourage office development in Victoria BC.

North Okanagan is taking this one step further and prioritizing parcels of land that would yield the most benefit in terms of employment area development and identifying these areas as Investment Zones. These areas were defined as having sufficient infrastructure, accessibility, visibility, and market (investor) attractiveness to attract new development.

7.0 PRELIMINARY POLICY CONSIDERATIONS

The PPS, Growth Plan, and existing York Region Official Plan provide a policy framework for employment growth moving forward. The following provides a review of the existing employment policy framework as well as considerations for potential changes and/or additions in order to conform to the Growth Plan. A matrix providing a comparison between employment policies in the PPS, Growth Plan, existing Regional Official Plan, and the following policy considerations is attached in Appendix D.

7.1 Supporting and growing a resilient and diverse employment base

York Region is located in one of the most attractive and vibrant economic areas in North America. Employment in the Region is distributed across a diverse economy within a broad range of industry sectors. Knowledge-based sectors are anticipated to play a more important role in the Region's economy, including information and communication technologies, health and life sciences, engineering and building, transportation and logistics, and advanced manufacturing. There are also a number of emerging sectors in York Region including green industries, such as sustainable agriculture and alternative energy. Attracting high quality jobs that match the skills in the labour force will generate good paying employment opportunities for York Region residents, increase live-work opportunities, and continue to foster the high standard of living in the Region.

Policy considerations may include:

- Continuing to provide York Region residents with access to high quality jobs by maintaining the 2:1 people to jobs target
- Continuing to emphasize the development of complete communities with access to transit to facilitate attracting talent and the skills of the York Region and GTHA labour force
- Improving coordination with the Region's Economic Development initiatives (including the 2019 update to the Economic Development Action Plan)
- Encouraging and strengthening public and private partnerships with local municipalities, York Region Boards of Trades, Chambers of Commerce, and Post-Secondary Institutions etc. to improve live-work opportunities and reduce commute times for York Region residents by focusing on attracting high quality jobs that match the skills in the Region's labour force
- Strengthening the Region's economic clusters by developing a built form that supports a better linking of talent to employers

7.2 Positioning Centres and Corridors as the primary location for office development

Regional Centres and Corridors are a focal point of commerce, business, and cultural activities. The Region and local municipalities should continue to support the development of Regional Centres and Corridors by encouraging attractive, compact community design, and the clustering

of economic activities. This will promote creativity, the exchange of ideas, ease of business transactions and an increased opportunity for economic spin-offs.

Policy considerations may include:

- Continuing to plan Regional Centres and Corridors for the highest concentration of major office, mixed-use commercial, and high-density residential development
- Integrating employment areas in Centres and Corridors with Major Transit Station Areas and other intensification areas
- Further exploring the potential for financial incentives to attract new office development

7.3 Fostering innovation and attracting talent

Both the Hemson and Neptis studies emphasize the growing importance of access to a large and talented workforce in the location decisions of employers. It will be important for the Region to develop a policy framework that is directed at attracting and retaining talent as well as growth in knowledge-based industries. Developing these areas as high quality urban environments where employees want to spend their time will also be important.

Policy considerations may include:

- Developing a policy framework that is tailored to support growth in knowledge-based industries, skills development, and investment in business supportive resources
- Strengthening relationships with higher education and post-secondary institutions and attracting investments supporting training, research, and higher education
- Continuing to promote high quality business resources such as the Regional broadband strategy
- Prioritizing high quality urban environments that are accessible by transit
- Recognizing that multi-modal transportation access is increasingly important
- Improving the competitiveness of major office nodes accessible by transit

7.4 Protecting employment areas over the long term

York Region is committed to maintaining and enhancing the long term viability of employment areas. Employment areas are major drivers of economic activity and contain over 50 per cent of the Region's employment. These areas play a significant role in the Region's economy, primarily accommodating industrial and business uses. Employment areas are strategic to the Region and critical to maintaining an appropriate balance between population and employment growth over the long term, which exceeds the 20-year planning horizon.

The ongoing viability of these lands is contingent upon long term protection, effective planning and design, and a shift towards increasingly sustainable and innovative industrial processes. Employment areas located within close proximity to 400-series highways and other goods-movement corridors are particularly important as highway access continues to be important to export based businesses. These sites also provide access to labour as well as exposure.

Policy considerations may include:

- Protecting employment areas over the planning horizon and beyond for businesses with specific locational requirements
- Maintaining a sufficient supply of employment areas to accommodate the employment forecast, including continuing to monitor employment area supply on a regular basis to ensure an adequate supply of sites that provide choice in location, site size etc.
- Ensuring servicing and critical infrastructure are available in employment areas to attract investment
- Supporting the goods movement network by ensuring protection of employment areas adjacent to existing and future freight rail and highway corridors
- Ensuring an adequate supply of employment land in all three of the Region's major employment area nodes as well as in northern communities to promote live/work opportunities
- Protecting employment areas from conversion to non-employment uses through incorporating employment area conversion criteria into the Regional Official Plan
- Continuing to restrict major retail and limit retail uses in employment areas

7.5 Planning for and designating employment areas in the Regional Official Plan

In light of the Growth Plan requirement to map and designate employment areas in the Regional Official Plan, further consideration should be given to increasing flexible in employment area designations, where appropriate. The Region's trends analysis, literature from the Neptis Foundation, and the jurisdictional scan performed by regional staff have indicated that employment areas are continuing to see a broader range of uses than in the past. In response to this, some municipalities studied are recommending fewer, and more general designations in employment areas, while others are proposing to loosen permissions in fringe areas along corridors and in local nodes. The Growth Plan policy for integrating employment areas with adjacent non-employment areas and developing vibrant, mixed-use areas and innovation hubs, where appropriate, provides further justification for this policy direction.

Policy considerations may include:

- Increasing flexibility in select employment area designations, particularly along major arterial roads and nodes
- Focusing ancillary retail and office uses to locations that are transit-supportive and exhibit a compact built form
- Encouraging local municipal implementation plans and guidelines to improve built form, urban structure, and public realm
- Encouraging a safer, healthier, and more desirable built environment

- Encouraging high quality and sustainable urban design as well as a mix of amenities and open space to serve the workforce
- Planning for higher overall densities in employment areas while protecting for low employment densities uses in appropriate locations
- Strengthening policies for intensification in employment areas
- Exploring transit solutions for the workforce that address the “last mile” challenge in low density employment areas

7.6 Proactively planning for the changing nature of employment

An aging labour force, changing consumer preferences, e-Commerce, the changing nature of employment, and the impacts of automation and AI have the potential to significantly change the landscape of employment in the Region. Proactively addressing these evolving macro-demographic and economic trends and their impacts on employment will be critical in maintaining a resilient economic base.

Policy considerations may include:

- Preserving employment areas for land-extensive uses to support stabilizing growth in manufacturing and rapid growth in transportation, logistics, and warehouse facilities
- Planning for the evolving nature of the retail landscape, particularly mid-scale developments such as community shopping centres that are experiencing decreasing demand as more and more companies move their business online
- Encouraging innovation in the manufacturing sector
- Supporting and promoting high quality, transit supportive, urban environments that are attractive to office-type development as the knowledge economy continues to evolve and outpace growth in other goods and service based industries

8.0 CONCLUSIONS AND NEXT STEPS

The Planning for Employment Background report provides analysis and a draft framework for developing the Region’s Employment Strategy and satisfying the requirements of the Growth Plan. This work builds upon existing policies in the Regional Official Plan and incorporates key findings from a York Region Future Employment Trends Study undertaken for the Region by Hemson Consulting.

York Region is in competition with municipalities around the world to retain and grow its existing businesses, attract new employers, skilled employees, and good paying jobs. The attraction of new businesses and growth or expansion of existing business operations improves the overall quality of life for York Region residents by creating high quality, good paying jobs close to where they live. Providing residents with access to a full range of employment opportunities also contributes toward overarching goals of the Growth Plan of building complete communities and reducing the impacts of congestion.

York Region is well positioned to continue to attract employment growth. Transit investment in the Region's Centres and Corridors such as the extension of the Spadina Subway, Bus Rapid Transit, GO service improvements and planned future extension of the Yonge subway will support growth in knowledge-based and creative industries and be critical in the attraction and retention of talent.

Employment areas are vital to the Regional economy and will be in high demand moving forward, particularly for land extensive distribution and warehouse facilities as the role e-Commerce continues to expand, as well as smaller office and multi-unit industrial uses to support the increasing share of service sectors and knowledge-based jobs in employment areas. An adequate supply of employment areas will be important for all types of industry to provide flexibility for employers in high quality locations over the long term.

Finally, the Region's community and residential areas will continue to support local retail and personal services jobs to allow residents, workers, and visitors to purchase goods locally.

Over the coming months, Regional staff will be working with local municipalities to ensure the unique needs of each local municipality are considered when delineating and designating employment areas in the Region Official Plan. The work will incorporate the following:

1. Findings from the historical and future trends analysis and jurisdictional scan
2. Results of the assessment of site specific conversion requests
3. A broader review of the Region's employment areas in the context of the evolving urban structure, infrastructure investments, and the changing nature of employment

The work will also be coordinated with the update to the Economic Development Action Plan.

The Employment Strategy report, scheduled for the first quarter of 2020 will include the following components:

- Local municipal employment forecasts
- Delineation, designation, and density targets for the Region's employment areas
- Finalization of the employment framework including principles, key attributes, and the role of Centres and Corridors, employment areas, and community areas in attracting high quality jobs
- Employment policy recommendations
- Role of local municipalities in implementing the York Region Employment Strategy and recommended tools for implementation
- Framework for monitoring the progress in achieving the Employment Strategy
- How the York Region Employment Strategy conforms to the Growth Plan and PPS

APPENDIX A: Employment Area Density by Employment Area

Employment Area Densities

The following table is a summary of employment area densities in York Region. The employment area density calculation uses built area in net hectares as per the 2017 employment land inventory and 2018 surveyed employment data including major office and estimates for no contact employment.

Municipality	Employment Area	Employment Area Density
Aurora	AURORA 2C	-
Aurora	AURORA EAST	56
Aurora	INDUSTRIAL PARKWAY NORTH	68
Aurora	INDUSTRIAL PARKWAY SOUTH	48
Aurora	MAGNA/PRESERVE	50
Aurora	WELLINGTON/404	78
East Gwillimbury	BALES DRIVE	29
East Gwillimbury	GREEN LANE	47
East Gwillimbury	HIGHWAY 404/QUEENSVILLE	-
East Gwillimbury	HOLLAND LANDING	19
East Gwillimbury	MOUNT ALBERT	26
East Gwillimbury	ROPA 1	-
Georgina	KESWICK BUSINESS PARK	-
Georgina	PEFFERLAW	-
King	NOBLETON	-
King	KING CITY	29
King	SCHOMBERG	26
Markham	ROPA 3	-
Markham	407 LESLIE SOUTHWEST	-
Markham	ALLSTATE	97
Markham	ARMADALE	48
Markham	BOX GROVE	128
Markham	BULLOCK DRIVE	46
Markham	CACHET	72
Markham	CATHEDRAL	-
Markham	COCHRANE	144
Markham	COMMERCE VALLEY/LEITCHCROFT	289
Markham	CORNELL	-
Markham	DENISON STEELES	113
Markham	FOURTEENTH AVENUE	74
Markham	HIGHWAY 404 NORTH	20
Markham	LANGSTAFF - MARKHAM	-
Markham	MOUNT JOY BUSINESS PARK	45
Markham	RISEBOROUGH	93

Municipality	Employment Area	Employment Area Density
Markham	RODICK ROAD	49
Markham	THORNHILL	86
Markham	THORNLEA	41
Markham	TOWN CENTRE	123
Newmarket	BAYVIEW SOUTH	93
Newmarket	LESLIE DAVIS	65
Newmarket	LESLIE MULOCK	50
Newmarket	LESLIE NORTH	56
Newmarket	LESLIE SOUTH	76
Newmarket	MULOCK NORTH	42
Newmarket	MULOCK SOUTH	99
Newmarket	MULOCK SOUTHEAST	68
Richmond Hill	NORTH LESLIE	-
Richmond Hill	BARKER BUSINESS PARK	57
Richmond Hill	BEAVER CREEK	111
Richmond Hill	HEADFORD	84
Richmond Hill	NEWKIRK	70
Vaughan	HIGHWAY 400 NORTH - NORTHWEST	-
Vaughan	HIGHWAY 400 NORTH - TESTON EAST	-
Vaughan	HIGHWAY 400 NORTH - TESTON WEST	-
Vaughan	BEECHWOOD	15
Vaughan	EMERY CREEK	50
Vaughan	HIGHWAY 400 NORTH - NORTHEAST	-
Vaughan	HIGHWAY 427 EAST	60
Vaughan	HIGHWAY 427 WEST	27
Vaughan	JANE NORTH	58
Vaughan	JANE SOUTH	44
Vaughan	KEELE	51
Vaughan	LANGSTAFF - VAUGHAN	62
Vaughan	MAPLE	31
Vaughan	PINE VALLEY	89
Vaughan	STEELES CAMPUS	76
Vaughan	STEELES WEST	91
Vaughan	TUDOR EAST	83
Vaughan	TUDOR WEST	79
Vaughan	VAUGHAN 400	82
Vaughan	VAUGHAN 400 NORTH	85
Vaughan	VAUGHAN MILLS CENTRE	-
Vaughan	WEST VAUGHAN EMPLOYMENT AREA - ELDER MILLS	-

Municipality	Employment Area	Employment Area Density
Vaughan	WEST VAUGHAN EMPLOYMENT AREA - HUNTINGTON EAST	-
Vaughan	WEST VAUGHAN EMPLOYMENT AREA - HUNTINGTON WEST	30
Vaughan	WEST VAUGHAN EMPLOYMENT AREA - NASHVILLE	-
Vaughan	WEST WOODBRIDGE	54
Vaughan	WESTON 400	80
Vaughan	WESTON 400 NORTH	66
Vaughan	WESTON HIGHLANDS	93
Whitchurch-Stouffville	CARDICO DRIVE	26
Whitchurch-Stouffville	GORMLEY	20
Whitchurch-Stouffville	STOUFFVILLE EAST	-
Whitchurch-Stouffville	STOUFFVILLE NORTH	20
Whitchurch-Stouffville	STOUFFVILLE SOUTH	52
Whitchurch-Stouffville	VANDORF	46
York Region Total		71

Source: York Region Planning and Economic Development, 2019.

APPENDIX B: Intensification in Employment Areas

Measuring Intensification in Employment Areas

The Growth Plan requirement to identify opportunities for intensification on employment lands led staff to perform a detailed analysis of intensification trends over the 2011 to 2017 period. The analysis also identified further potential for intensification, for consideration in the development in the Region's draft forecast and land needs assessment.

A - Methodology:

Intensification in employment areas was considered in two main categories: Intensification on existing built parcels and intensification within existing buildings. Parcels containing major office buildings were excluded.

1. Intensification on vacant portions of built parcels refers to the construction of new building space on employment area parcels that are considered built in the Region's employment land inventory. Intensification through new building space can occur through expansion of an existing building or through construction of an entirely new structure on the same parcel.
2. Intensification within existing buildings refers to new jobs that are accommodated within the existing floor space of a building.

1. Intensification on existing parcels:

- I. York Region's Employment Land Inventory has been tracking intensification potential on parcels with a "built" status since 2011. For the purposes of this analysis, criteria was expanded to consider intensification potential for parcels that were identified as "storage" or "parking" in the inventory.
- II. Intensification potential on built parcels was assessed in two ways:
 - i. Through new buildings: Parcels where the vacant portion(s) have road access and vacant portions are >0.5 ha in size parcels that are >50 per cent vacant
 - ii. Through expansion: Parcels where the vacant portion(s) does not have road access and vacant portions are >0.25 ha
- III. An analysis was completed to identify the rate at which intensification on employment parcels was occurring and at what densities.
- IV. Densities were estimated using surveyed employment growth in the year the parcel was considered to be fully occupied.

2. Intensification within existing buildings:

- I. Analysis was conducted at a high-level (Region-wide) and in more detail using a sample employment area in the Region.
- II. Region-wide: Using only parcels that were built as of 2011 (excluding those which had been identified as having intensification potential in the analysis above), on an annual basis, the number of unoccupied parcels and total jobs accommodated by parcels that were built were assessed. The analysis was attempting to assess trends in region-wide employment area density within a fixed built space and the relationship between densities and the number of unoccupied parcels (if any).
- III. Sample employment area - More detailed analysis using parcels built as of 2011 in a specific employment area to measure year-over-year changes and on a parcel by parcel basis, assesses whether changes observed in Region-wide density trends were more likely due to re-occupancy of previously vacant buildings or through higher densities in occupied buildings.

B – Key Findings:

1. Intensification vacant portions of existing parcels:

- Between 2011 and 2017, 51 ha of employment land were intensified on 42 parcels, accommodating an estimated 1,300 jobs
- 29 intensified parcels (45 ha) were through expansion and 14 (6 ha) intensified parcels were through a new development
- Estimated densities for intensification were higher through expansion (38 jobs/ha) than through new development (31 jobs/ha)
- There was no significant re-development of parcels being used for parking or storage
- A further 330 ha of intensification potential was identified beyond 2017

2. Intensification within existing buildings:

Region-wide:

- Density of 2011 built parcels increased from 52 jobs/ha in 2011 to 58 jobs/ha in 2017
- The number of unoccupied parcels declined from 390 in 2011 to 230 in 2017

Sample employment area:

- The number of jobs accommodated through re-occupied parcels peaked in 2013 and has since declined
- An estimated 50 per cent of jobs created in the employment area between 2011 and 2017 were within buildings that were built as of 2011

3. Overall Impact:

- An estimated 60 per cent of jobs created in the employment area between 2011 and 2017 were within buildings that were built as of 2011

APPENDIX C: Local Municipal Employment Area Designations

Municipal Employment Area Use Designations by Regional Employment Category:

Municipality	Traditional Employment	Traditional Employment with Office	Business Park	Mixed Employment – Industrial, Office & Commercial
Aurora		Existing Employment – General Industrial	Business Park Uses	Existing Employment – Light Industrial Service
East Gwillimbury		General Employment Areas Prestige Employment Areas		
Georgina Keswick Business Park Secondary Plan	Business Park III	Business Park I (allows Institutional uses)		Business Park II
Pefferlaw Secondary Plan	Industrial			
King				Employment Area
Markham	General Employment			Business Park Employment* Business Park Office Priority Employment Service Employment (with Commercial uses)
Newmarket		Business Park – General Employment		Business Park – Mixed Employment
Richmond Hill		Employment Area	Employment Corridor	
Vaughan	General Employment	Prestige Employment		Employment Commercial Mixed Use (Industrial uses not permitted)
Whitchurch- Stouffville	Prestige Industrial Industrial			Business Park

*Note that some employment area designations may fit within the definition of more than one regional employment category.

Category Definitions:

Traditional Employment:

- The majority of the permitted uses are industrial, such as: manufacturing, processing, assembly, warehousing, & fabrication
- Ancillary retail & service uses are permitted

Traditional Employment – Office:

- The majority of the permitted uses are industrial, but with office uses also permitted
- Hotels & conference facilities are typically permitted where there is office uses
- Ancillary retail & service uses are permitted

Business Park:

- Office, including high-density in multi-storey buildings, is the primary use
- Hotels and conference centres, and ancillary retail & service uses are permitted

Mixed Employment:

- Wide range of permitted uses including: industrial, commercial, public & private recreational, retail, service, institutional, office & automobile related
- Note that Vaughan 'Employment Commercial Mixed Use' does not permit industrial uses

APPENDIX D: Policy Analysis

Employment Policy Analysis

Provincial Policy Statement, 2014	Growth Plan, 2017	Regional Official Plan, 2010	Preliminary Policy Considerations
Employment Policy Theme: Supporting and Growing a Resilient and Diverse Employment Base			
<p>1.3.1 Planning authorities shall promote economic development and competitiveness by:</p> <p>a) providing for an appropriate mix and range of employment and institutional uses to meet long-term needs;</p> <p>b) providing opportunities for a diversified economic base, including maintaining a range and choice of suitable sites for employment uses which support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses;</p> <p>d) ensuring the necessary infrastructure is provided to support current and projected needs.</p>	<p>2.2.5.1 - Economic development and competitiveness in the GGH will be promoted by:</p> <p>(a) Making more efficient use of existing employment areas</p> <p>(b) ensuring the availability of sufficient land, in appropriate locations, to accommodate forecasted employment growth</p> <p>(c) Planning to better connect areas with high employment densities to transit;</p> <p>(d) aligning land use planning and economic development goals</p> <p>2.2.5.14 - Upper- and single-tier municipalities, in consultation with lower-tier municipalities, the Province, and other appropriate stakeholders, are encouraged to undertake a coordinated approach to planning for large areas with high concentrations of employment that cross municipal boundaries and are major trip generators</p> <p>2.2.5.15 - In recognition of the importance of cross-border trade with the United States, recognize a Gateway Economic Zone and Gateway Economic Centre near the Niagara-United States border and promote opportunities for cross-border trade.</p>	<p>4.1.2 - To create high-quality employment opportunities with the goal of 1 job for every 2 residents.</p> <p>4.1.3 - To create vibrant and healthy communities that attract and retain youth, a highly skilled labour force, and quality employers.</p> <p>4.1.4 - To annually monitor the location, type and characteristics of business and the supply of serviced employment lands.</p> <p>4.1.5 - To create a business friendly environment.</p> <p>4.1.6 - To promote the Region as a location for knowledge-based activities by leveraging existing clusters and the Region's highly diverse workforce, and establishing and maintaining strong links to educational and research institutions and companies.</p> <p>4.1.7 - Continue working with local municipalities and the agricultural community.</p> <p>4.1.8 - Encourage and support the development of a green industry.</p> <p>4.1.9 - To research and analyze the Region's economy, including conducting an annual comprehensive survey of York Region businesses</p> <p>4.1.10 - To work with local municipalities to encourage telecommuting where appropriate</p> <p>4.1.11 - To work with local municipalities to promote work-at-home through the adoption of enabling zoning provisions that allow for live-work units where appropriate.</p> <p>4.1.12 To work with local municipalities, the Province and Federal government to ensure that the Region is a high-priority location for major sporting, trade, and convention facilities.</p> <p>4.1.1 - To invest in infrastructure to support job creation, strengthen the Regional economy and ensure an equal integration between economic vitality, the natural environment and healthy communities.</p>	<ul style="list-style-type: none"> • Continuing to provide York Region residents with access to high quality jobs by maintaining the 2:1 people to jobs target • Continuing to emphasize the development of complete communities with access to transit to facilitate attracting a talent and skilled labour force. • Encouraging partnerships with economic development, local municipalities, and public institutions to improve live-work opportunities and reduce commute times for York Region residents. • Improving coordination with the Region's Economic Development initiatives to develop and implement strategies to better match skills in the Region's labour force. • Maintaining and strengthening partnerships with York Region Boards of Trades, Chambers of Commerce, the Workforce Planning Board of York Region etc. • Strengthening the Region's economic clusters by promoting a built form that enhances the linking of talent to employers. • Continuing to promote high quality business resources like the recent regional broadband strategy <p>Proactively planning for the changing nature of employment by:</p> <ul style="list-style-type: none"> • Encouraging innovation in the manufacturing sector • Encouraging the education of York Region workers about the impacts of automation and promoting the retraining and skills development for those displaced by automation

Provincial Policy Statement, 2014	Growth Plan, 2017	Regional Official Plan, 2010	Preliminary Policy Considerations
Employment Policy Themes: Positioning Centres and Corridors as the primary location for office growth and Fostering Innovation and access to talent			
1.3.1 Planning authorities shall promote economic development and competitiveness by: c) encouraging compact, mixed-use development that incorporates compatible employment uses to support liveable and resilient communities	2.2.5.2 - Major office and appropriate major institutional development will be directed to urban growth centres, major transit station areas or other strategic growth areas with existing or planned frequent transit service.	4.2.1 To recognize Regional Centres and Corridors as hubs of commerce, business and entertainment activities. 4.2.2 To recognize Regional Centres and Corridors as the preferred location for major office uses and to develop incentives to attract major office uses to these locations. 4.2.3 To encourage the Province and Federal government to provide incentives to attract major office, institutional, educational, cultural and entertainment facilities to Regional Centres and Corridors. 4.2.5 That government, educational, institutional, major office, cultural, entertainment and other commercial uses be located and designed to support the Regional Centres and Corridors structure of this Plan.	<ul style="list-style-type: none"> • Developing a policy framework that is tailored to support growth in knowledge-based industries and skills development, investment in business supportive resources • Continuing to plan Regional Centres and Corridors for the highest concentration of major office, mixed-use commercial and high-density residential development • Integrating employment areas in Centres and Corridors with Major Transit Station Areas and other intensification areas • Further exploring the potential for financial incentives to attract new office development • Strengthening relationships with higher education and post-secondary institutions • Prioritizing high quality urban environments that are accessible by transit
	<p>2.2.5.3 - Retail and office uses will be directed to locations that support active transportation and have existing or planned transit.</p> <p>2.2.5.4 - In planning for employment, surface parking will be minimized and the development of active transportation networks and transit-supportive built form will be facilitated.</p>	<p>4.4.4 - To direct a significant amount of mixed-uses, including street-related retail, to Regional Centres and Corridors.</p> <p>4.2.6 - To work with local municipalities to ensure that Regional Centres and Corridors include a significant amount of mixed-use, pedestrian-oriented, and street-related uses, including retail.</p>	<ul style="list-style-type: none"> • Recognizing that multi-modal transportation access is increasingly important • Improving the competitiveness of major office nodes accessible by transit <p>Proactively planning for the changing nature of employment by:</p> <ul style="list-style-type: none"> • Supporting and promoting high quality, transit supportive, urban environments that are attractive to office-type development for knowledge and creative industries

Provincial Policy Statement, 2014	Growth Plan, 2017	Regional Official Plan, 2010	Preliminary Policy Considerations
Employment Policy Themes: Protecting Employment Areas over the long term and Designating employment areas in the Regional Official Plan			
<p>1.3.2.1 Planning authorities shall plan for, protect and preserve employment areas for current and future uses and ensure that the necessary infrastructure is provided to support current and projected needs.</p> <p>1.3.2.3 Planning authorities shall protect employment areas in proximity to major goods movement facilities and corridors for employment uses that require those locations.</p> <p>1.3.2.4 Planning authorities may plan beyond 20 years for the long-term protection of employment areas provided lands are not designated.</p>	<p>2.2.5.6 - Upper- and single-tier municipalities, in consultation with lower-tier municipalities designate all employment areas, in official plans and protect them for appropriate employment uses over the long-term.</p> <p>2.2.5.7 - Municipalities will plan for all employment areas within settlement areas, with the exception of any prime employment areas, by: a) prohibiting residential uses and limiting other sensitive land uses that are not ancillary b) prohibiting major retail uses or establishing a threshold for any major retail uses c) integrating employment areas with adjacent non-employment areas and developing vibrant, mixed use, areas and innovation hubs, where appropriate.</p> <p>2.2.5.8 - Municipalities may identify employment areas near major goods movement corridors, as prime employment areas and plan for their protection over the long-term by: a) prohibiting residential, institutional, other sensitive uses b) prohibiting retail and office uses that are not associated with or ancillary c) planning for freight-supportive land use patterns</p>	<p>4.3.1 - That the employment forecasts be used as the basis for planning for employment lands. 4.3.2 - That a sufficient supply of employment lands based on the applicable municipal comprehensive review will be maintained to accommodate the employment growth forecasts. 4.3.4 - To require local municipalities to designate and protect employment lands in local municipal official plans. 4.3.5 - To protect, maintain and enhance the long term viability of all employment lands designated in local municipal official plans for employment land uses. 4.3.6 - To protect strategic employment lands, including lands identified in Figure 2. These lands are identified based on their proximity to existing or planned 400-series highways and shall be designated for employment land uses in local municipal official plans. 4.3.7 - To require local municipalities to give priority to the strategic employment lands identified in Figure 2 when considering additional employment land designations. 4.3.15 - That employment land development be designed to be both walkable and transit accessible where possible. 4.3.23 - That the employment land designation policies and transportation corridor policies in ROPA 52 continue to apply to these lands. 4.3.24 - Lands located in the vicinity of Highway 48, Donald Cousens Parkway and the GO commuter rail line may have the potential to support future employment uses.</p>	<ul style="list-style-type: none"> • Continuing to protect employment areas over the planning horizon and beyond for businesses with specific locational requirements. • Maintaining a sufficient supply of employment lands to accommodate the employment forecast, including continuing to monitor employment area supply on a regular basis to ensure an adequate supply of sites that provide choice in location, site size etc. • Ensuring servicing and critical infrastructure are available in employment areas to attract investment. • Continuing to support the goods movement network by ensuring protection of employment areas adjacent to existing and future freight rail and highway corridors. • Ensuring an adequate supply of employment land in all three of the Region's major employment land nodes. • Continuing to restrict major retail and limit retail uses in employment areas • Encouraging high quality and sustainable urban design as well as a mix of amenities and open space to serve the workforce • Planning for higher overall densities in employment areas while protecting for low densities uses in appropriate locations • Strengthening policies for intensification in employment areas

Provincial Policy Statement, 2014	Growth Plan, 2017	Regional Official Plan, 2010	Preliminary Policy Considerations
<p>1.3.2.2 Planning authorities may permit conversion of lands within employment areas to non-employment uses through a comprehensive review, only where it has been demonstrated that the land is not required for employment purposes over the long term and that there is a need for the conversion.</p>	<p>2.2.5.9 -The conversion of lands within employment areas or prime employment areas to non-employment uses may be permitted only through a municipal comprehensive review where it is demonstrated that</p> <p>a) there is a need for the conversion;</p> <p>b) the lands are not required over the horizon of this Plan for the employment purposes for which they are designated;</p> <p>c) the municipality will maintain sufficient employment lands to accommodate forecasted employment growth;</p> <p>d) the proposed uses would not adversely affect the overall viability of the employment area or the achievement of targets</p> <p>e) there are existing or planned infrastructure and public service facilities to accommodate the proposed uses</p> <p>2.2.5.10 - The re-designation of an employment area to a designation that permits non-employment uses is considered a conversion and may occur only through a municipal comprehensive review</p> <p>2.2.5.11 - Any change to an official plan to permit new or expanded opportunities for major retail in an employment area may occur only through a municipal comprehensive review</p>	<p>4.3.3 - To recognize that employment lands are strategic and vital to the Regional economy and are major drivers of economic activity in the Region</p> <p>4.3.8 - That the conversion of employment lands to non-employment land uses is not permitted. For the purposes of this policy:</p> <p>a. employment lands are lands that are designated for employment uses including land designated as industrial and business park in local official plans;</p> <p>b. uses not permitted on employment lands include residential, major retail and other retail and commercial non ancillary uses</p> <p>4.3.9 - The conversion of employment lands to non-employment land uses may only be considered, at the time of a municipal comprehensive review in accordance with the applicable policies and population/employment forecasts of the Region.</p> <p>4.3.10 - To require local municipalities to include employment land conversion policies within local official plans and secondary plans that are consistent with the employment land conversion policies of the Province and the Region.</p> <p>4.3.11 - Provided that the proposed uses are intended to primarily service businesses in the employment lands, that ancillary uses collectively do not exceed 15 per cent of an employment area as defined in the local official plan.</p> <p>4.3.12 - To require local municipalities, through local official plan policies, to determine the location, amount and size of ancillary uses on employment lands based on the planned function, size and scale of the overall employment land area.</p> <p>4.3.13 - That local municipalities include official plan and secondary plan policies and zoning provisions to allow only employment and ancillary uses on Local Corridors and major streets within employment lands.</p> <p>4.3.17 - To work with local municipalities to provide a diverse mix of lot sizes on employment lands.</p> <p>4.4.6 - That major retail is not permitted on designated or strategic employment lands.</p>	<p>Proactively planning for the changing nature of employment by:</p> <ul style="list-style-type: none"> • Preserving employment areas for land-extensive uses to support growth in manufacturing and rapid growth in transportation, logistics, and warehouse facilities • Protecting employment areas from conversion to non-employment uses through incorporating employment land conversion criteria into the Regional Official Plan. • Exploring transit solutions for the workforce that address the “last mile” challenge in low density employment areas • Improving the competitiveness of major office nodes accessible by transit • Encouraging a safer, healthier and desirable built environment • Developing implementation plans and guidelines to improve built form, urban structure and public realm. • Increasing flexibility in specific employment area designations, particularly along major arterial roads and nodes. • Encouraging targeted redevelopment and rejuvenation of employment areas through marketing strategies and incentives

Provincial Policy Statement, 2014	Growth Plan, 2017	Regional Official Plan, 2010	Preliminary Policy Considerations
	<p>2.2.5.5 - Upper- and single-tier municipalities, in consultation with lower-tier municipalities, the Province, and other appropriate stakeholders, will each develop an employment strategy that:</p> <ul style="list-style-type: none"> a) establishes a minimum density target for all employment areas, measured in jobs per hectare, that reflects the current and anticipated type and scale of employment that characterizes the employment areas and aligns with policy 2.2.5.1; b) identifies opportunities for the intensification of employment areas on sites that support active transportation and served by existing or planned transit; c) will be implemented through a municipal comprehensive review, including official plan policies and designations and zoning by-laws. 	<p>4.3.14 - That local municipalities, in consultation with York Region, prepare comprehensive secondary plans for new employment lands.</p> <p>4.3.16 - That development on fully serviced employment lands be compact and achieve a region-wide average minimum density of 40 jobs per hectare in the developable area. This target is expected to be higher for lands adjacent to centres and corridors.</p> <p>4.3.18 - To require flexible and adaptable employment lands that include street patterns and building design and siting that allow for redevelopment and intensification.</p> <p>4.3.19 - To work with local municipalities to review and monitor opportunities for employment land intensification.</p> <p>4.3.20 - To require local municipalities to conduct 5-year reviews of employment lands to accommodate employment intensification.</p> <p>4.3.21 - To encourage employment intensification and higher density employment uses in Regional Centres and Corridors.</p>	
	<p>2.2.5.13 - Existing office parks will be supported by:</p> <ul style="list-style-type: none"> a) improving connectivity with transit and active transportation networks; b) providing for an appropriate mix of amenities and open space to serve the workforce; c) planning for intensification of employment uses; d) approaches to transportation demand management that reduce single-occupancy vehicle use 	<p>4.2.4 - To require a mixed-use pedestrian environment in Regional Centres and Corridors that promotes transit use and enhances these areas as destinations for business, entertainment and recreation.</p>	

Provincial Policy Statement, 2014	Growth Plan, 2017	Regional Official Plan, 2010	Preliminary Policy Considerations
Employment Policy Theme: Supporting the retail sector			
	<p>2.2.5.12 - The retail sector will be supported by promoting compact built form and intensification of retail and service uses and areas and encouraging the integration of those uses with other land uses to support the achievement of complete communities</p>	<p>4.4.1 - To require that retail be designed to be walkable, transit-supportive, and integrated into communities and pedestrian and cycling networks, with high-quality urban design.</p> <p>4.4.2 - To work with local municipalities to improve urban design in new retail developments and to identify opportunities for the intensification and revitalization of existing retail.</p> <p>4.4.5 - To require local municipalities to define major retail uses within the context of the local commercial hierarchy.</p> <p>4.4.7 - That major retail sites should be designed to support redevelopment or retrofitting.</p> <p>4.4.8 - To work with local municipalities to plan comprehensively for all retail uses, including major retail uses, that are integrated and provided for within the community. Planning should include the identification and designation of lands to accommodate these uses.</p> <p>4.4.9 - That new retail facilities in excess of 30,000 gross leasable square metres shall require a Regional impact analysis.</p> <p>4.4.10 - To undertake a study of the Region's retail sector.</p>	<ul style="list-style-type: none"> • Continuing to work with local municipalities ensure that retail is designed to be walkable, transit-supportive, and integrated into communities and pedestrian and cycling networks, with high-quality urban design. • Continuing to work with local municipalities to improve urban design in new retail developments and to identify opportunities for the intensification and revitalization of existing retail. <p>Proactively planning for the changing nature of employment by:</p> <ul style="list-style-type: none"> • Planning for the evolving nature of the retail landscape

2019 **PLANNING** FOR **EMPLOYMENT**

EMPLOYMENT AREA PROFILES

MAY 2019

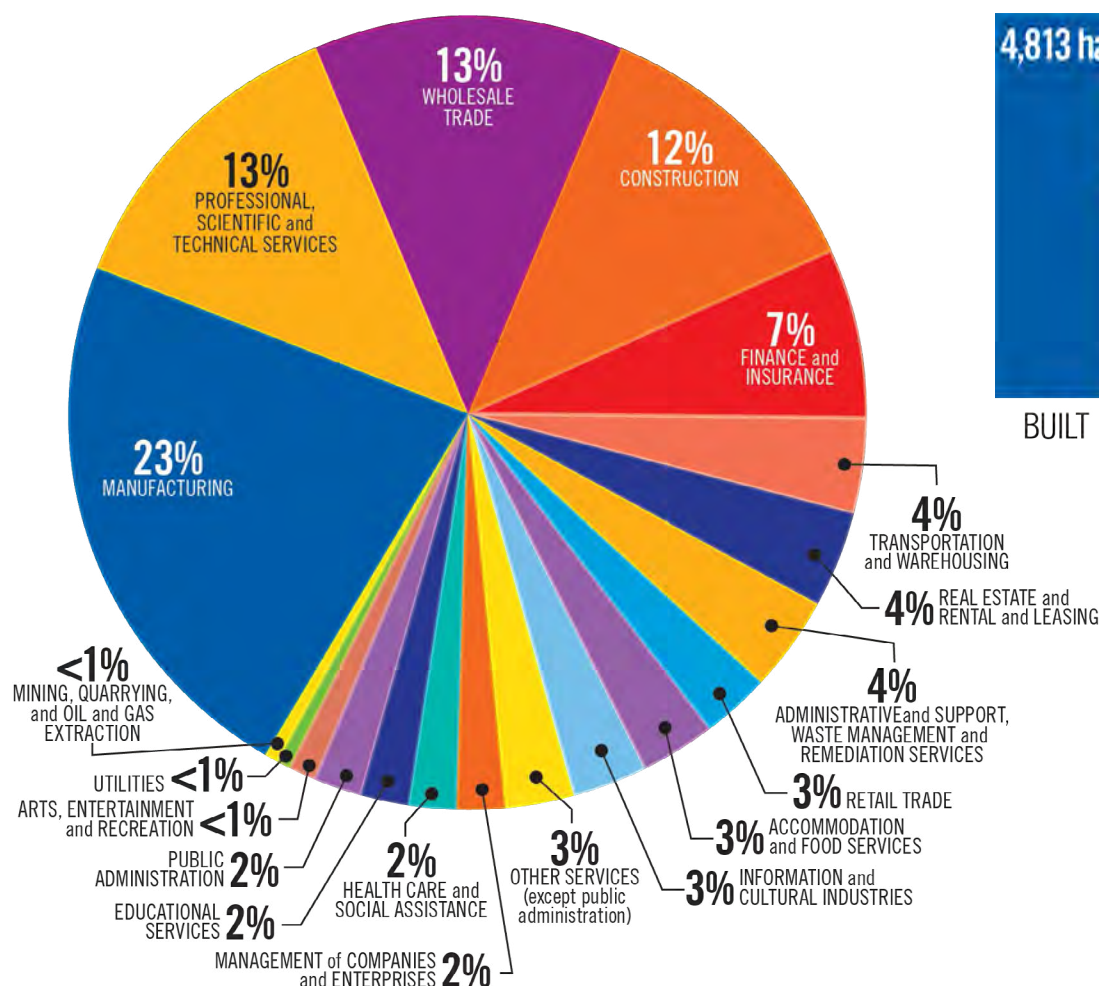


YORK REGION EMPLOYMENT AREAS SUMMARY

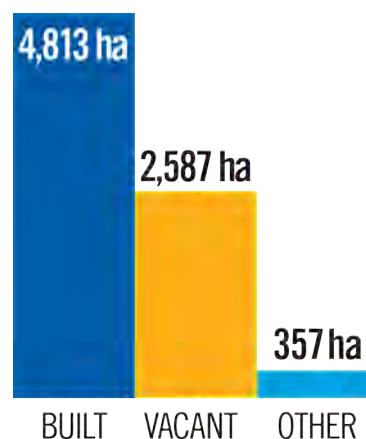
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- ▶ York Region's employment areas are major drivers of economic activity and account for 55 per cent of total surveyed job growth since 2008
- ▶ Their strategic location along highway corridors and close proximity to higher order transit make them attractive places to do business
- ▶ The composition of the Region's employment areas are unique and range from large parcels of land that are well suited for land extensive uses with access to goods movement networks to higher density, transit-supportive business parks
- ▶ The construction, wholesale trade, and finance and insurance sectors accounted for the majority of job growth in employment areas over the past ten years
- ▶ Many of the Region's top employers are located within employment areas including TD Waterhouse Inc., IBM Canada Ltd, and CGI Information Systems

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



7,757 TOTAL HECTARES 2017



340,260 JOBS in 2018

29% INCREASE (76,510 JOBS) SINCE 2008

65% SERVICES PRODUCING 35% GOODS PRODUCING

80% ONSITE 20% OFFSITE

12% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
80,958 JOBS 215 BUILDINGS

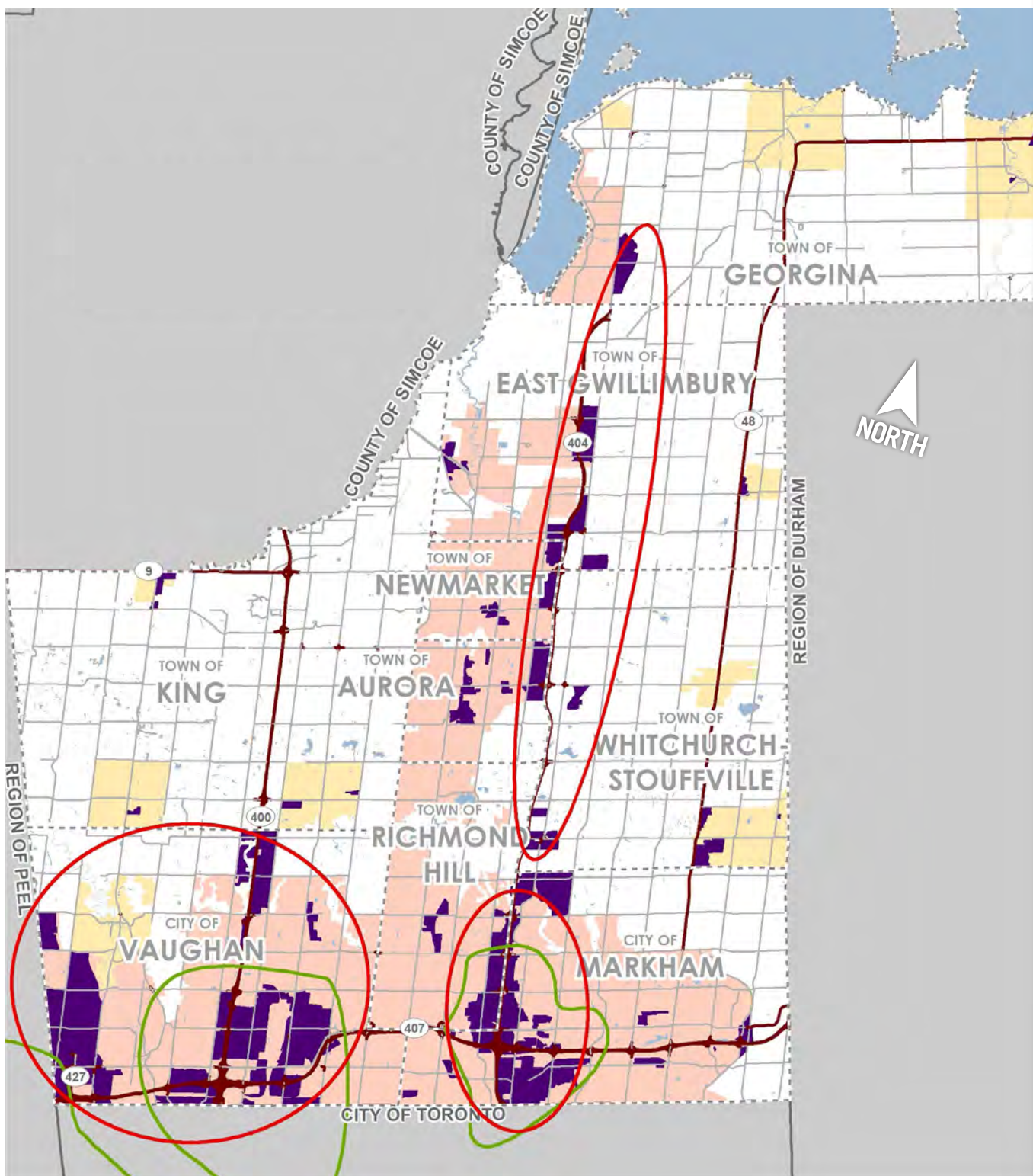
EXISTING EMPLOYMENT AREA DENSITY **71** JOBS per HECTARE












190 SITES [328 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

York Region

YORK REGION

EMPLOYMENT AREAS, 2017



-  EMPLOYMENT AREA BOUNDARY
-  NEPTIS MEGAZONE BOUNDARY
-  YORK REGION EMPLOYMENT NODE
-  TOWNS and VILLAGES
-  URBAN AREA
-  LAKE/RIVER
-  HIGHWAY
-  ROAD
-  RAILWAY
-  MUNICIPAL BOUNDARY
-  REGIONAL BOUNDARY

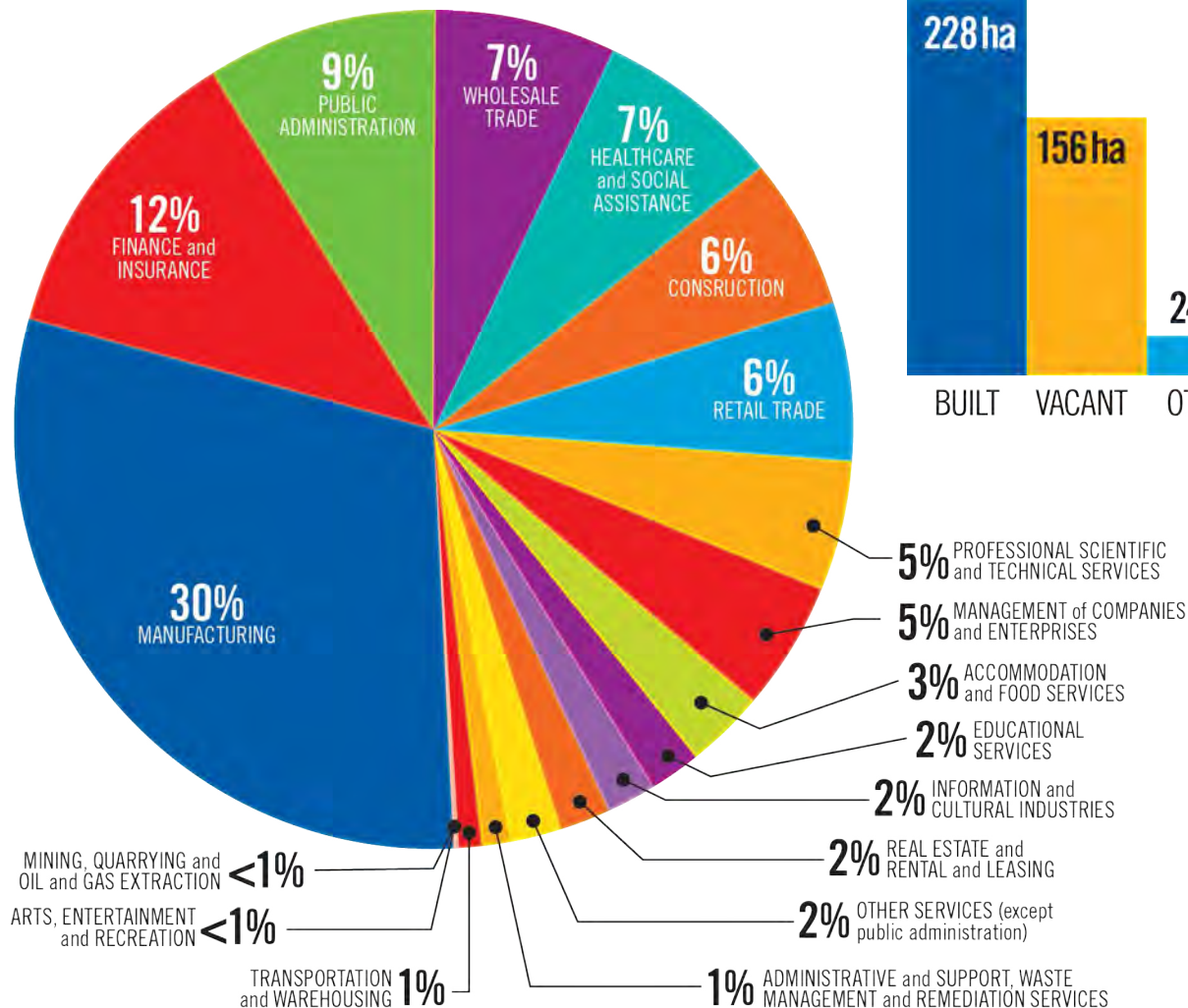
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Produced by: The Regional Municipality of York,
Planning and Economic Development, Corporate Services
April 2019
Data: © Queen's Printer for Ontario 2003-2019

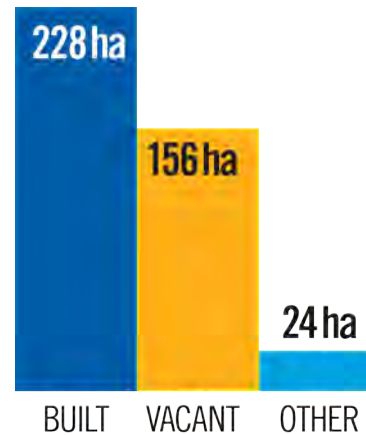
Note: Employment area boundaries are subject to change through the Regional Municipal Comprehensive Review and Land Needs Assessment.

- ▶ Town of Aurora's employment areas account for 54 per cent of the Town's 2018 surveyed employment and are home to some of Region's top employers such as Magna, Desjardins Insurance and TC Transcontinental.
- ▶ Employment area employment in Aurora has grown by 71 per cent since 2008, over two times faster than employment area growth across the Region (29 per cent)
- ▶ Almost a third (30 per cent) of the Town's employment area employment is in the manufacturing sector, however the share of manufacturing jobs has declined since 2008 (44 per cent)
- ▶ Employment areas in the Town are attractive to employers with frontage onto Highway 404 and/or proximity to existing and proposed higher order transit stations and the Aurora Promenade area

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



408 TOTAL HECTARES 2017



13,820 JOBS in 2018

71% INCREASE (5,750 JOBS) SINCE 2008

64% SERVICES PRODUCING **36% GOODS PRODUCING**

93% ONSITE **7% OFFSITE**

13% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
2,720 JOBS 7 BUILDINGS

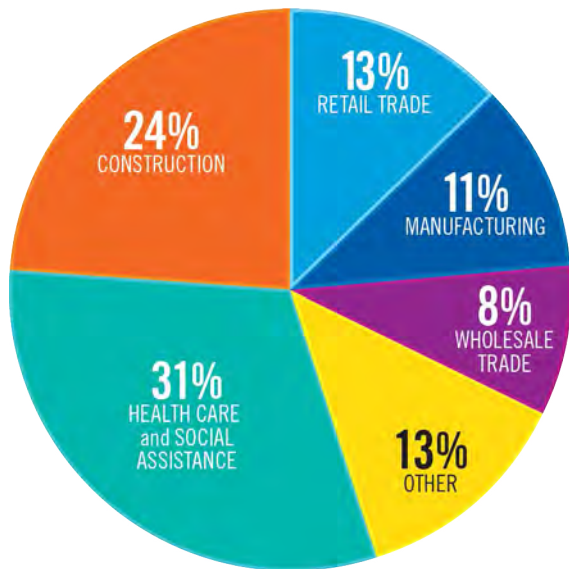
EXISTING EMPLOYMENT AREA DENSITY 61 JOBS per HECTARE

22 SITES [23 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

AURORA EAST TOWN of AURORA

- ▶ Located at the southwest corner of Bayview Avenue and St. John's sideroad, this employment area is bound by existing low rise residential to the north, west and south and retail uses to the east
- ▶ Employment has more than doubled over the last ten years, growing from 230 to 540 jobs
- ▶ The construction and the health care and social assistance sectors were the main drivers of growth, accounting for a 70 per cent share of growth since 2008

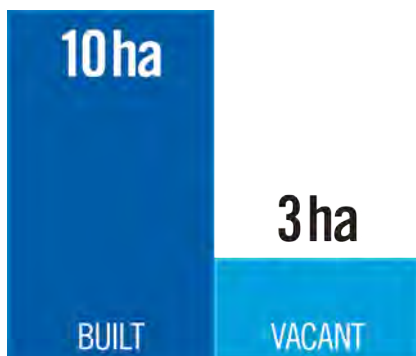
DISTRIBUTION of EMPLOYMENT by SECTOR 2018



540 JOBS in 2018
135% INCREASE (310 JOBS) SINCE 2008

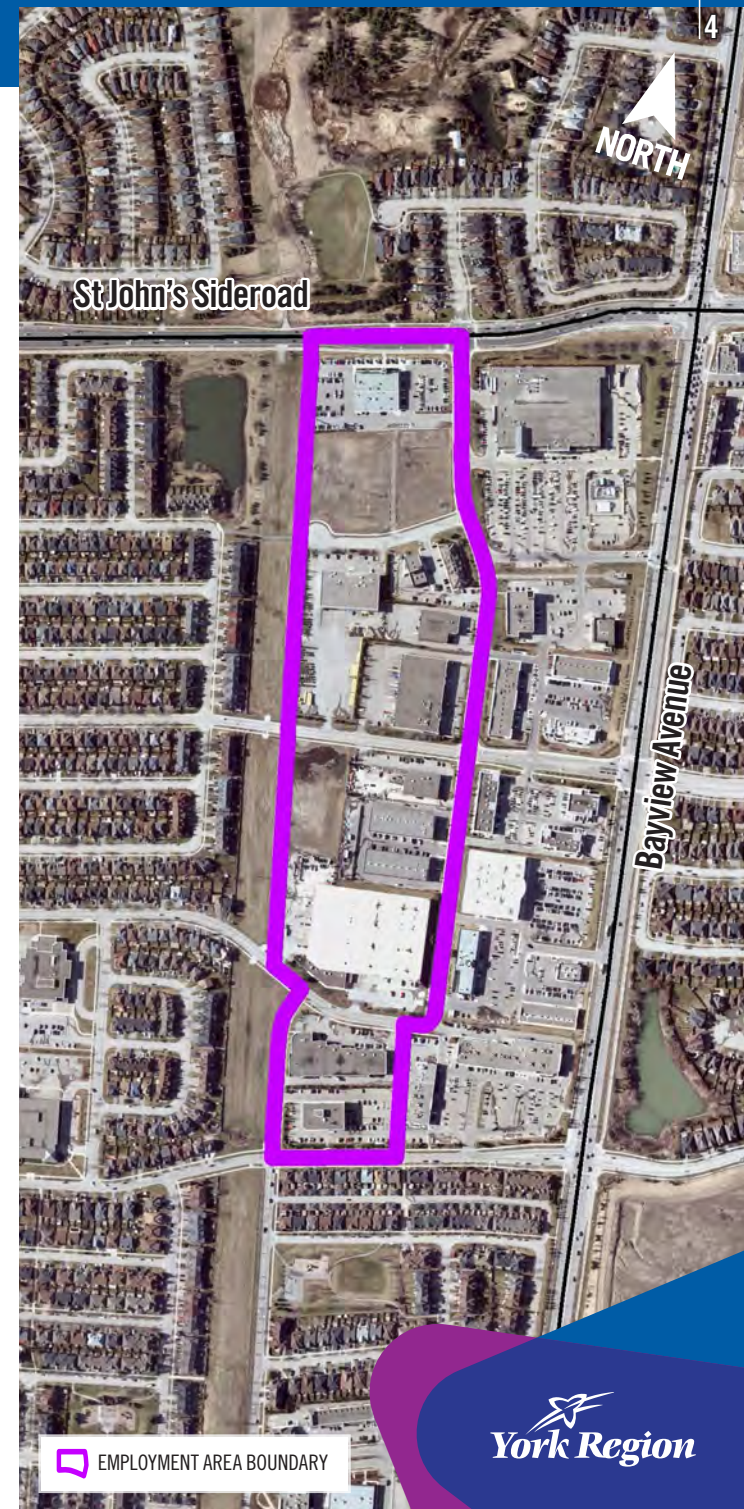
66% SERVICES PRODUCING **34%** GOODS PRODUCING
96% ONSITE **4%** OFFSITE
14% RETAIL and PERSONAL SERVICES

13 TOTAL HECTARES 2017



MAJOR OFFICE
110 JOBS 1 BUILDING

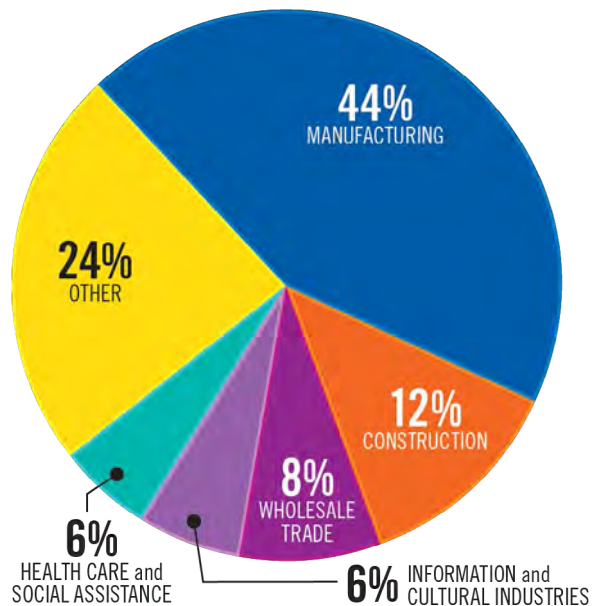
EXISTING EMPLOYMENT AREA
DENSITY 56 JOBS per HECTARE



INDUSTRIAL PARKWAY NORTH AURORA

- ▶ This area is bound by existing residential to the west and environmental features to the east. The southern part of the employment area is located within the Aurora Promenade, an area identified for intensification which includes the Aurora GO station
- ▶ Home to one of the Region's large employers in the manufacturing sector, TC Transcontinental Printing, this employment area continues to have a strong presence in the manufacturing sector
- ▶ The construction and information and cultural sectors accounted for the majority of growth over the past ten years

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



3,700 JOBS in 2018
46% INCREASE (1,170 JOBS) SINCE 2008

43% SERVICES PRODUCING **57%** GOODS PRODUCING

85% ONSITE **15%** OFFSITE

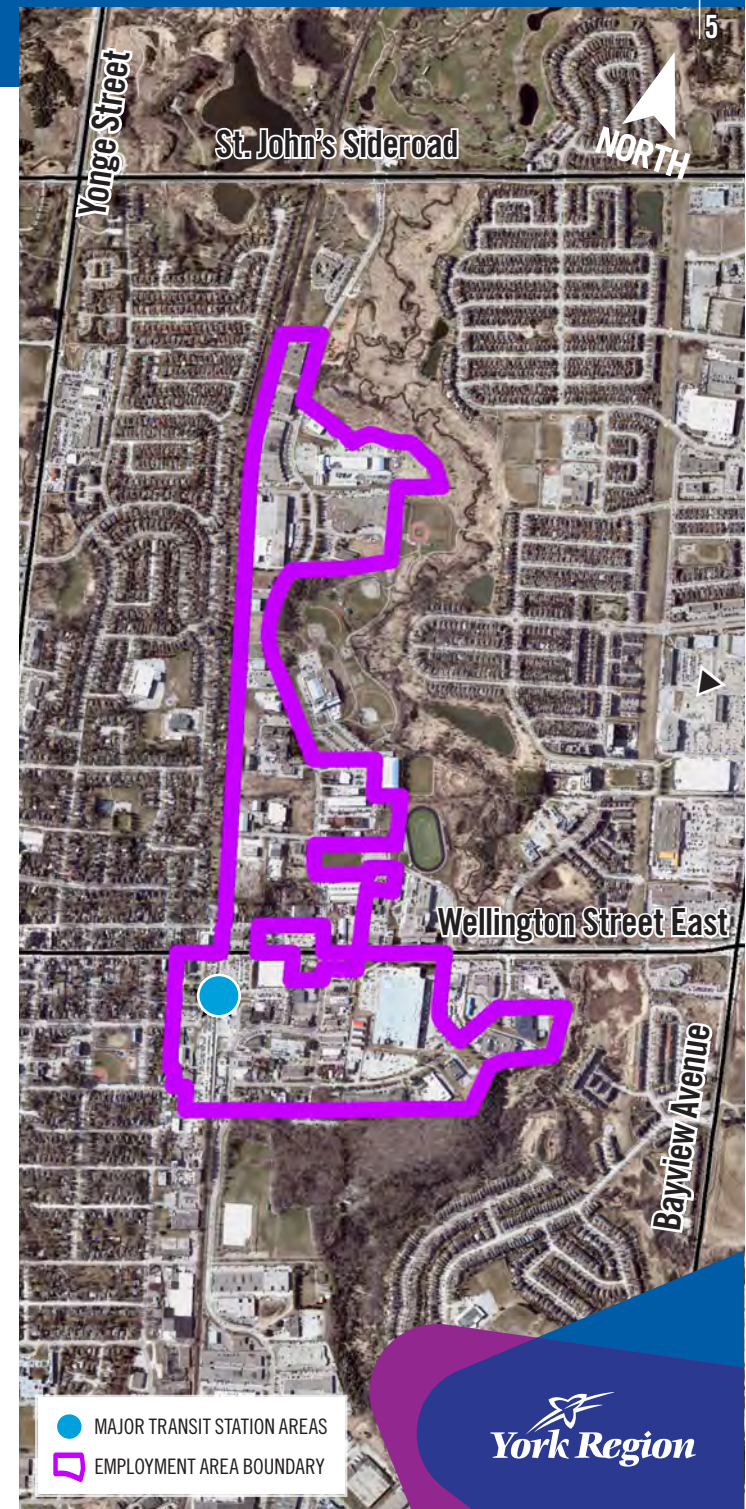
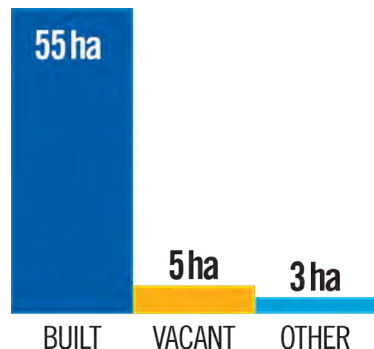
12% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
 210 JOBS 2 BUILDINGS

EXISTING EMPLOYMENT AREA
DENSITY 68 JOBS per HECTARE

6 SITES [4.0ha] TOTAL AREA
 with INTENSIFICATION POTENTIAL

63 TOTAL HECTARES 2017



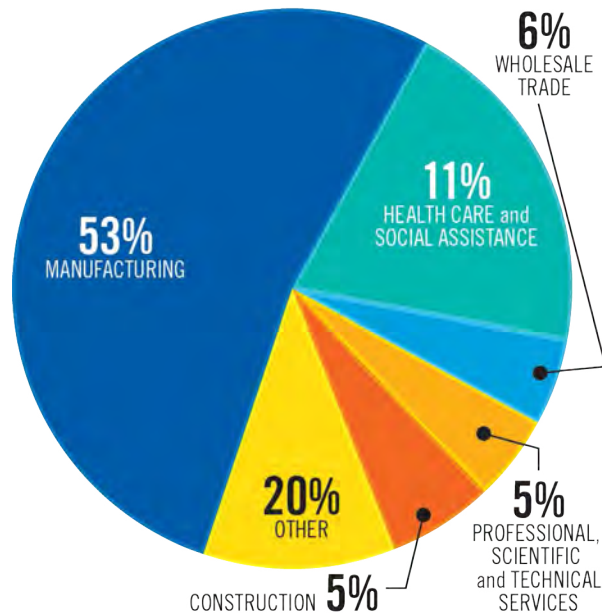
● MAJOR TRANSIT STATION AREAS
 □ EMPLOYMENT AREA BOUNDARY

York Region

INDUSTRIAL PARKWAY SOUTH AURORA

- ▶ This employment area exhibits similar characteristics to Industrial Parkway North with regards to its location and sectoral make-up.
- ▶ Manufacturing accounts for the largest share (53 per cent) of employment in Industrial Parkway South followed by the health care and social assistance sector (11 per cent)
- ▶ Since 2008, 67 per cent of the net employment growth has been in goods-producing sectors

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



4,340 JOBS in 2018

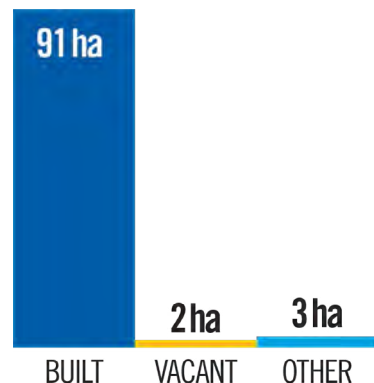
23% INCREASE (800 JOBS) SINCE 2008

42% SERVICES PRODUCING **58% GOODS PRODUCING**

93% ONSITE **7% OFFSITE**

7% RETAIL and PERSONAL SERVICES

96 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA
DENSITY 48 JOBS per HECTARE

11 SITES [13ha TOTAL AREA]
with INTENSIFICATION POTENTIAL



- MAJOR TRANSIT STATION AREAS
- EMPLOYMENT AREA BOUNDARY

MAGNA PRESERVE AURORA

- Magna, a Canadian global automotive supplier operating internationally, has its headquarters located in Aurora and accounts for the large share of management of companies and enterprises employment (72 per cent) located in this employment area
- Professional, scientific and technical services are the second highest employment sector at 23 per cent in 2018

DISTRIBUTION of EMPLOYMENT by SECTOR 2018

840 JOBS in 2018

332% INCREASE (640 JOBS) SINCE 2008

96% SERVICES
PRODUCING

4% GOODS
PRODUCING

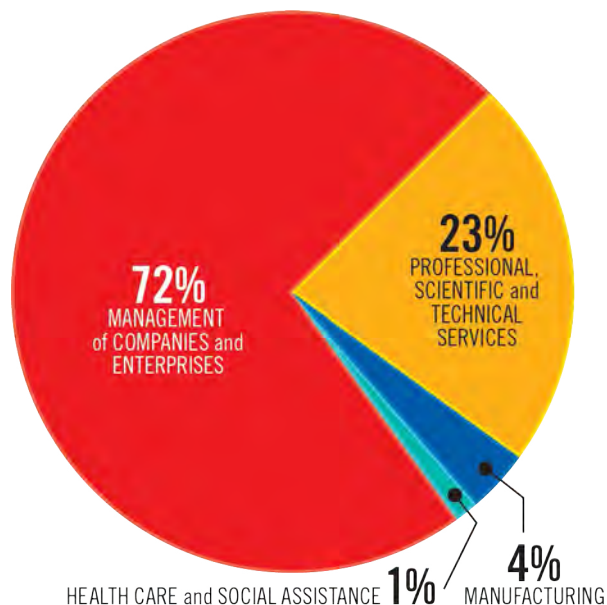
99% ONSITE

1% OFFSITE

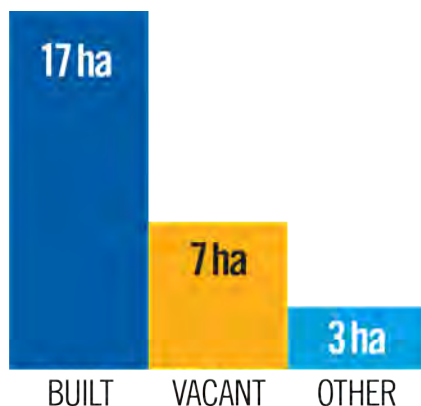
MAJOR OFFICE
740 JOBS 2 BUILDINGS

EXISTING EMPLOYMENT AREA
DENSITY 50 JOBS per
HECTARE

1 SITE [1.0ha]
TOTAL AREA
with INTENSIFICATION POTENTIAL



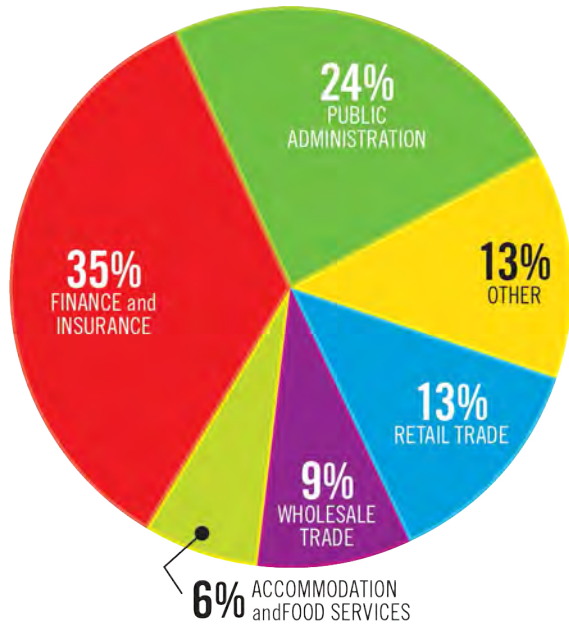
27 TOTAL HECTARES 2017



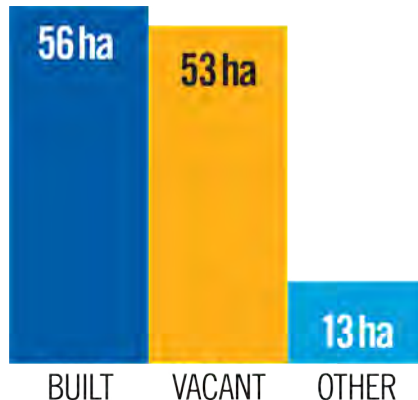
WELLINGTON/HIGHWAY 404 AURORA

- ▶ Employment has more than doubled since 2008 from 1,570 to 4,440 jobs
- ▶ The relocation of York Regional Police Headquarters into this Employment Area resulted in the addition of 1,050 jobs in the Public administration sector
- ▶ The finance and insurance sector accounts for the largest share (35 per cent) of employment, including Desjardins Insurance, one of the Region's top employers

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



122 TOTAL HECTARES 2017



4,400 JOBS in 2018
180% INCREASE (2,820 JOBS) SINCE 2008

96% SERVICES PRODUCING 4% GOODS PRODUCING

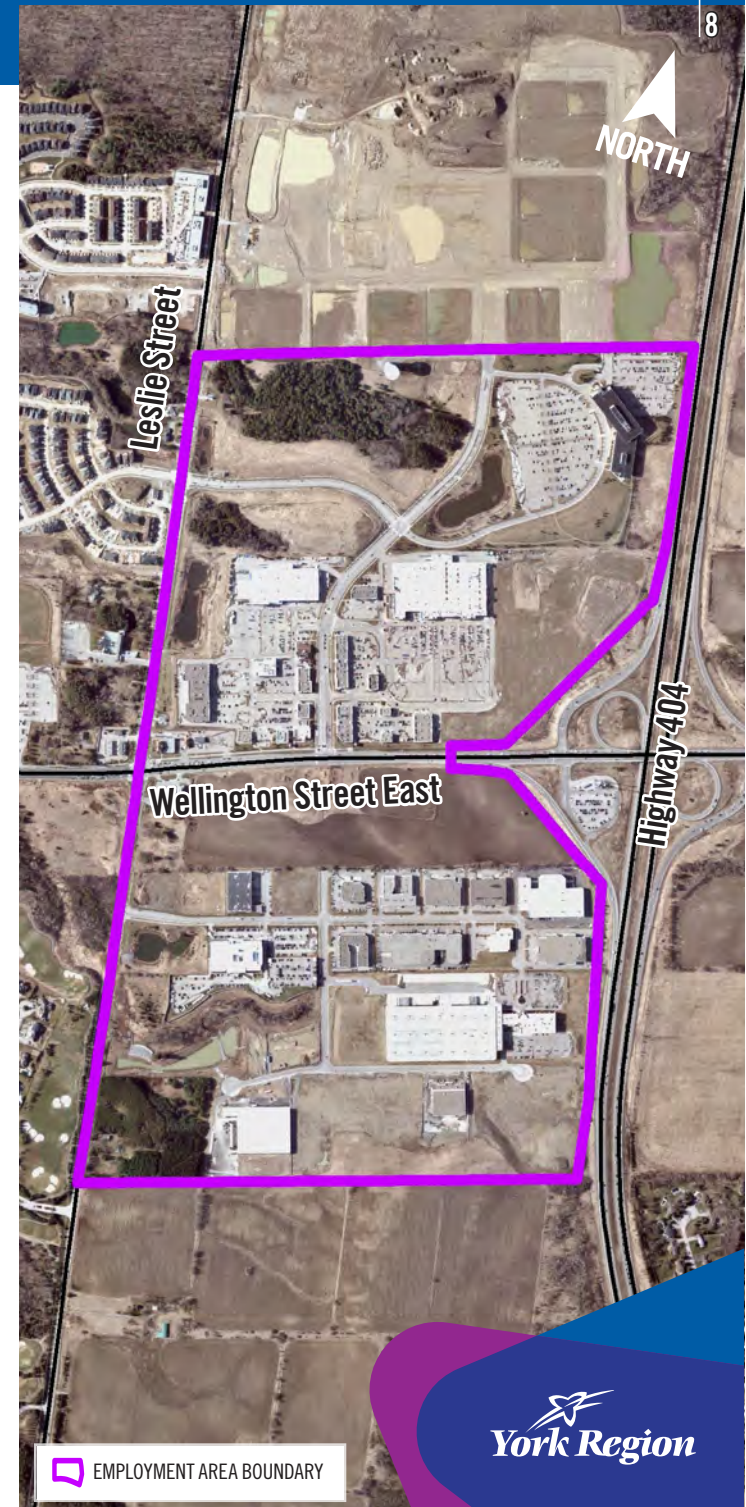
97% ONSITE 3% OFFSITE

21% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
1,670 JOBS 2 BUILDINGS

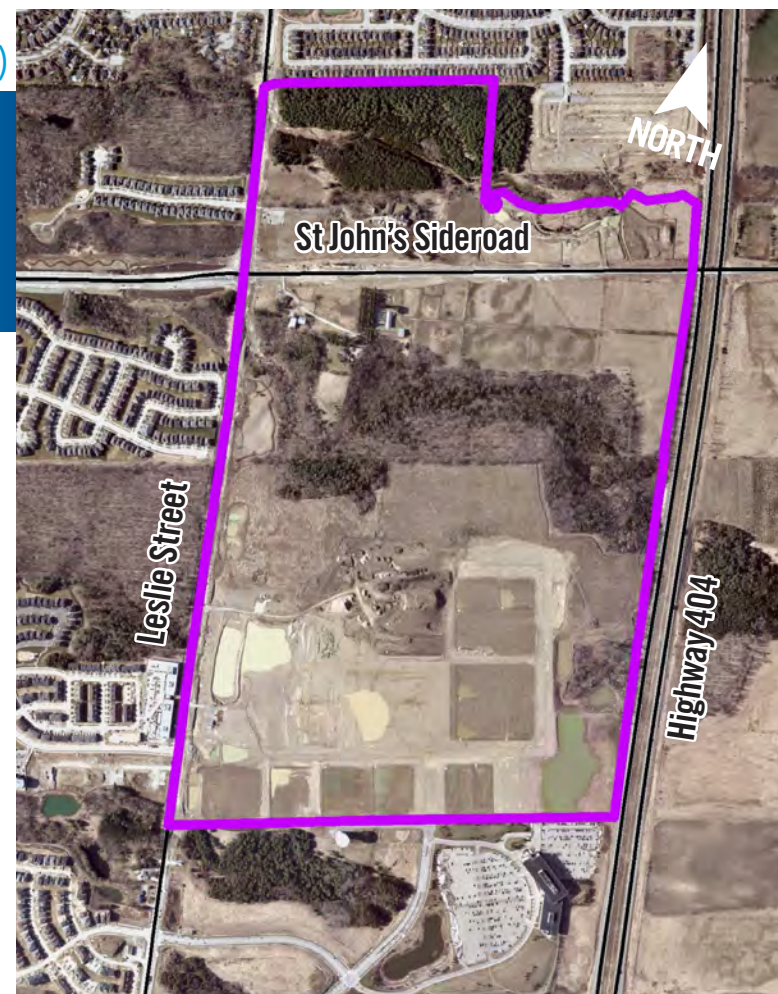
EXISTING EMPLOYMENT AREA
DENSITY 78 JOBS per HECTARE

4 SITES [4.0ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



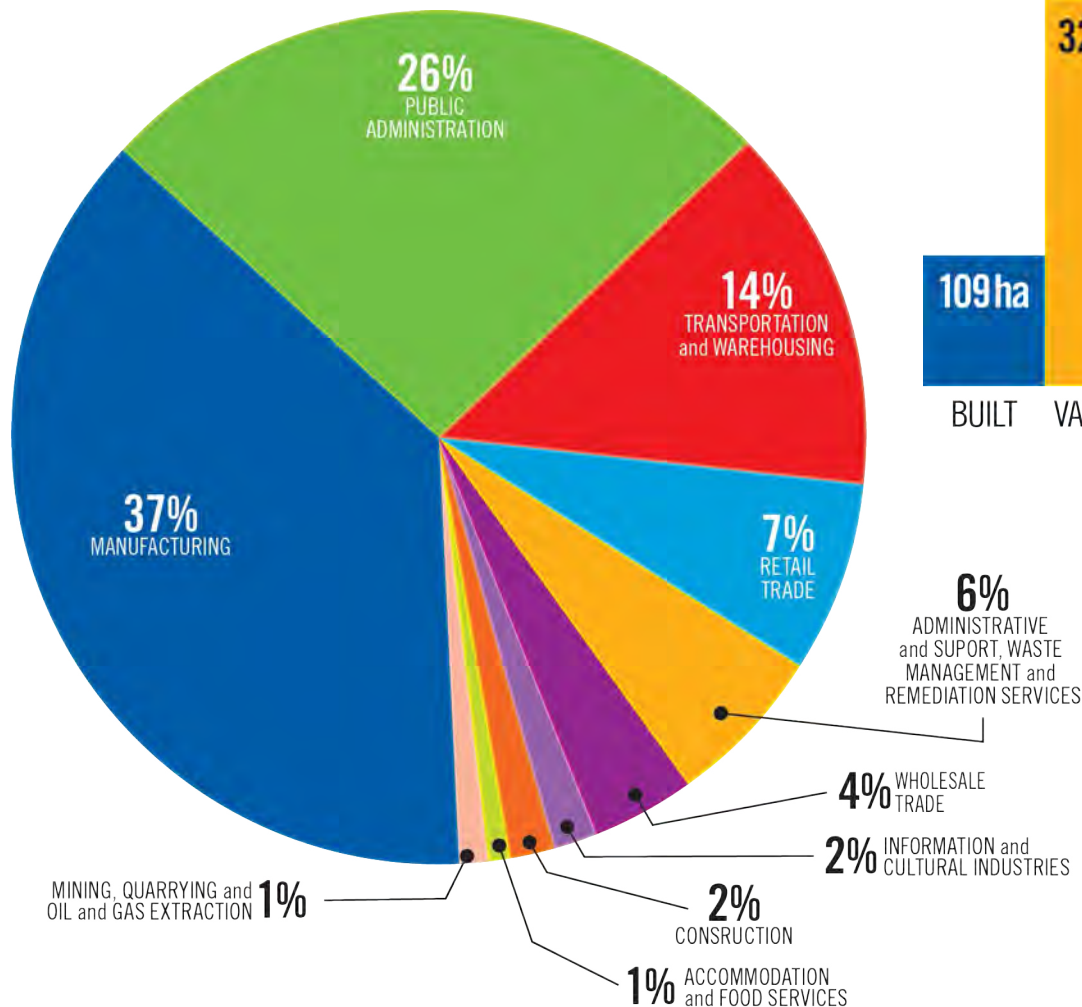
HIGHWAY 404/ST JOHN'S SIDEROAD (AURORA 2C) (VACANT)

- ▶ The Aurora 2C employment area has a total area of 87 net Ha
- all of which were vacant in 2017
- ▶ The employment area is strategically located adjacent to Highway 404,
just north of the Wellington Interchange

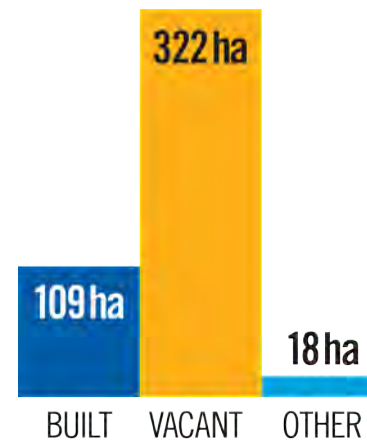


- ▶ 42 per cent of East Gwillimbury's 2018 surveyed employment is located in employment areas
- ▶ Employment in employment areas has more than doubled over the past ten years, adding close to 2,000 jobs
- ▶ Much of the growth experienced was in the public administration, manufacturing and transportation/warehousing sectors
- ▶ The Town's employment areas are strategically located with access to Highway 404 and the East Gwillimbury GO Station
- ▶ The Town provides significant opportunity for future development by offering a large and varied supply of vacant employment land

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



449 TOTAL HECTARES 2017



3,360 JOBS in 2018

146% INCREASE (1,990 JOBS) SINCE 2008

60% SERVICES PRODUCING **40% GOODS PRODUCING**

84% ONSITE **16% OFFSITE**

10% RETAIL and PERSONAL SERVICES

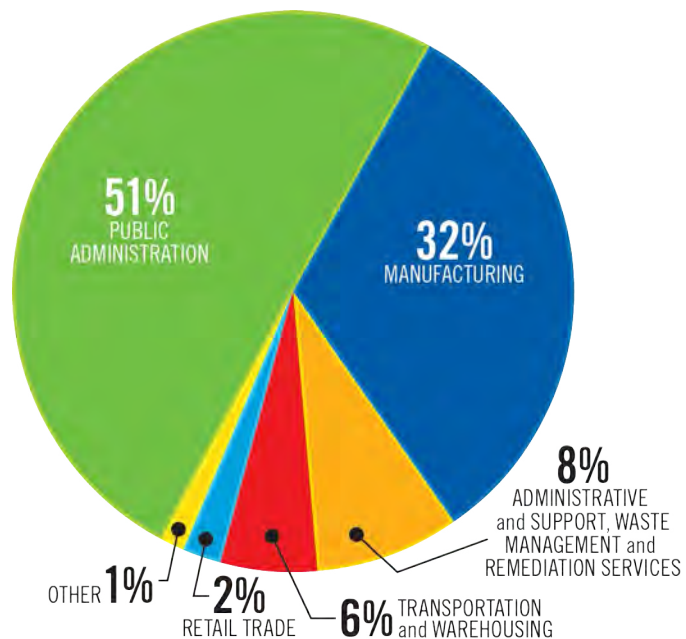
EXISTING EMPLOYMENT AREA DENSITY 31 JOBS per HECTARE

12 SITES [27 ha] TOTAL AREA
with **INTENSIFICATION POTENTIAL**

BALES DRIVE EAST GWILLIMBURY

- ▶ The Bales employment area is located in close proximity to the Highway 404 and Davis Drive interchange and employment in the area has more than tripled in the last ten years
- ▶ Since 2008, the employment distribution has shifted from predominantly manufacturing (61 per cent) in 2008 to 50 per cent Public Administration in 2018 - largely a result of the new York Region Transportation and Works Operations Centre and York Region Paramedic Services Headquarters locating in this employment area

DISTRIBUTION of EMPLOYMENT by SECTOR 2018

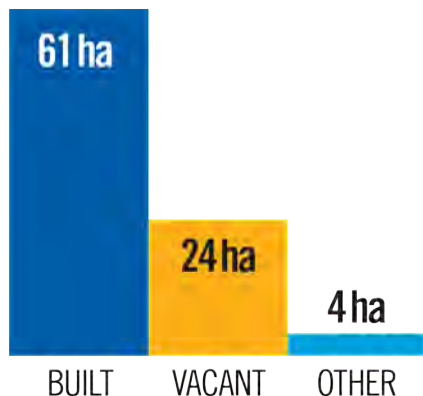


1,750 JOBS in 2018
270% INCREASE (1,270 JOBS) SINCE 2008

68% SERVICES PRODUCING **32% GOODS PRODUCING**
97% ONSITE **3% OFFSITE**

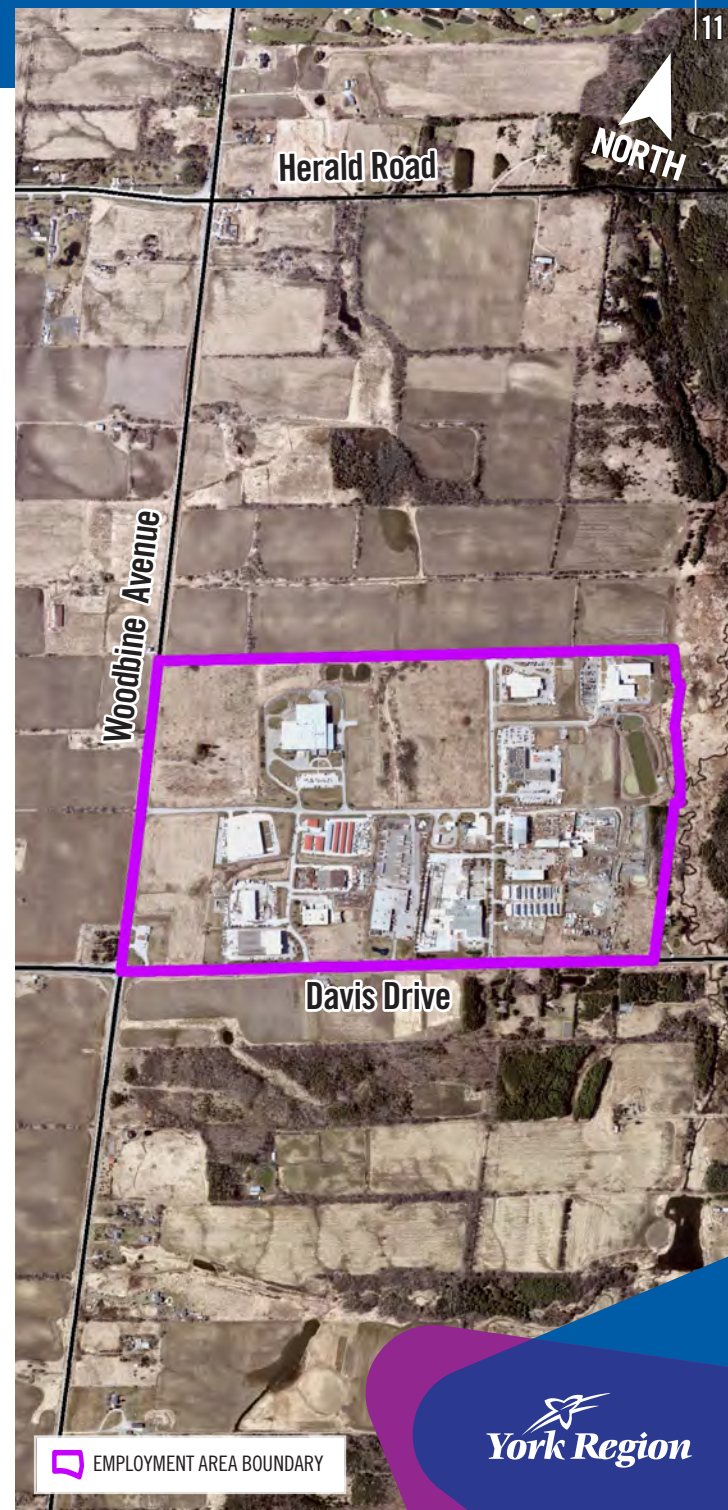
2% RETAIL and PERSONAL SERVICES

89 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY 29 JOBS per HECTARE

6 SITES [21 ha] TOTAL AREA
 with INTENSIFICATION POTENTIAL



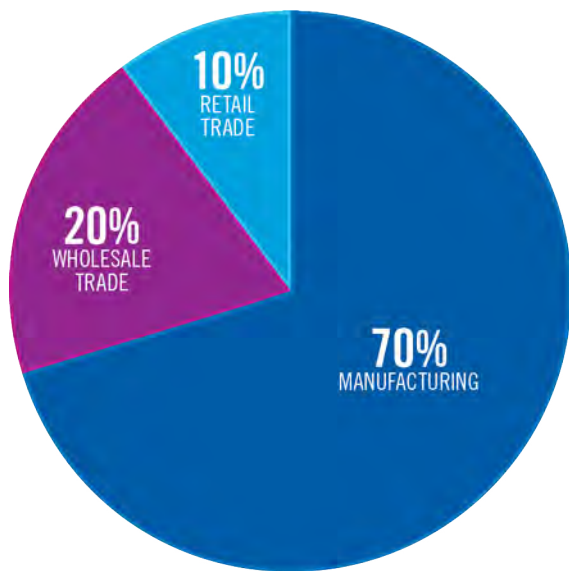
EMPLOYMENT AREA BOUNDARY

York Region

GREEN LANE EAST GWILLIMBURY

- ▶ This employment area offers development opportunities for prospective employers. It offers visibility and immediate access to Highway 404 for businesses that rely on the movement of goods and services. Additionally, it offers access to transit with its close proximity to the East Gwillimbury GO Station
- ▶ Employment is predominantly within the manufacturing sector (70 per cent), which has grown by 230 per cent since 2008

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



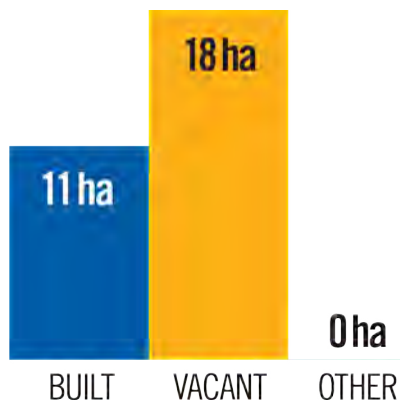
500 JOBS in 2018
261% INCREASE (360 JOBS) SINCE 2008

30% SERVICES PRODUCING **70%** GOODS PRODUCING

95% ONSITE **5%** OFFSITE

 **10%** RETAIL and PERSONAL SERVICES

29 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA
DENSITY 47 JOBS per HECTARE

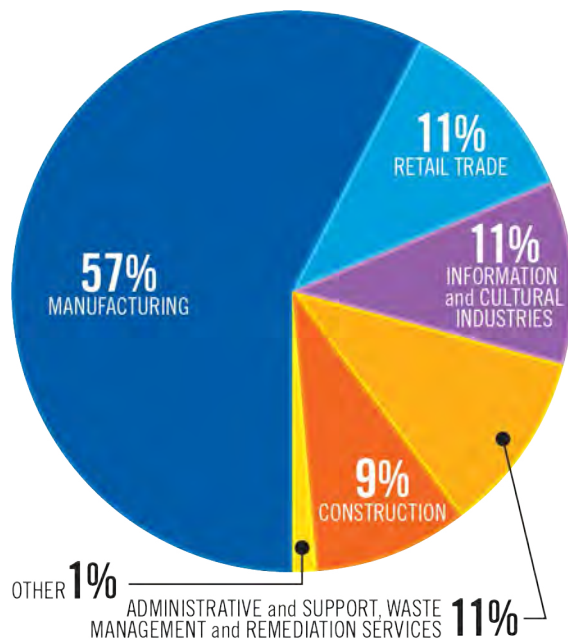
 **1 SITE** [2.0 ha TOTAL AREA]
with INTENSIFICATION POTENTIAL



HOLLAND LANDING EAST GWILLIMBURY

- ▶ The manufacturing sector, although declining in overall employment from 2008 to 2018, accounts for the largest share of employment (57 per cent)
- ▶ Over the past ten years, employment growth in the information and cultural industries and administrative and support, waste management and remediation services sectors has offset job loss in the manufacturing sector by adding 106 jobs to the employment area

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



570 JOBS in 2018

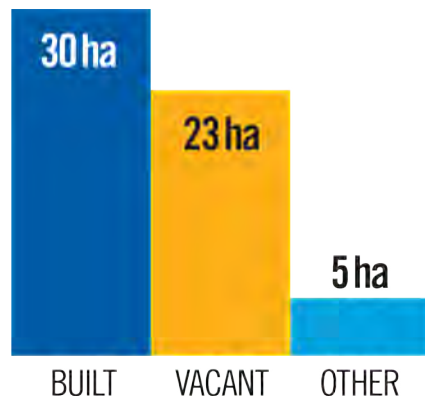
3% DECREASE (-20 JOBS) SINCE 2008

34% SERVICES PRODUCING **66%** GOODS PRODUCING

84% ONSITE **16%** OFFSITE

23% RETAIL and PERSONAL SERVICES

58 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY 19 JOBS per HECTARE

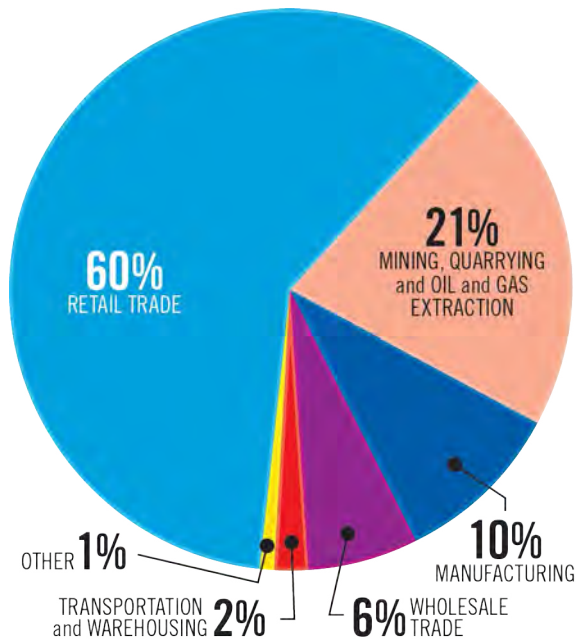
2 SITES [3.0ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



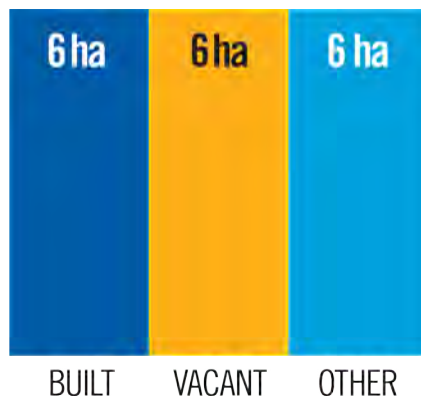
MOUNT ALBERT EAST GWILLIMBURY

- ▶ While there has been minimal change in the overall number of jobs in the Mount Albert employment area since 2008, the distribution of employment has shifted
- ▶ The mining, quarrying, and oil and gas extraction sector has experienced growth in this employment area, making up for jobs lost in the retail trade sector
- ▶ The employment lands are accessible by Highway 48

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



18 TOTAL HECTARES 2017



150 JOBS in 2018

7% DECREASE (-11 JOBS) SINCE 2008

69% SERVICES PRODUCING 31% GOODS PRODUCING

85% ONSITE 15% OFFSITE

60% RETAIL and PERSONAL SERVICES

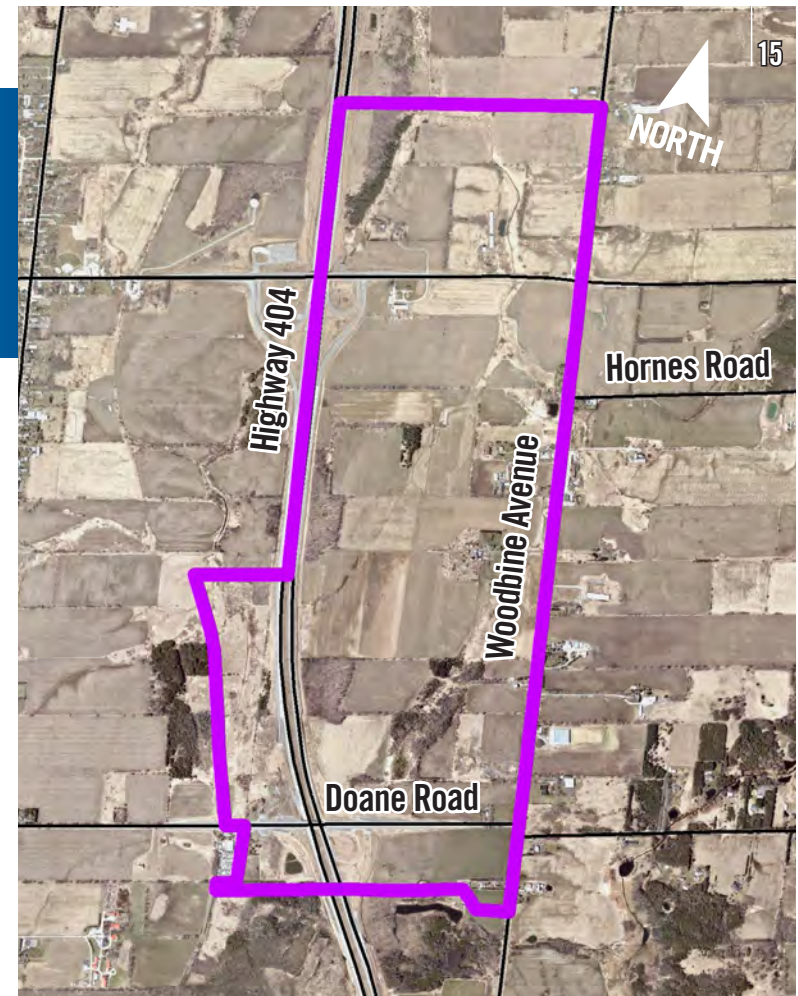
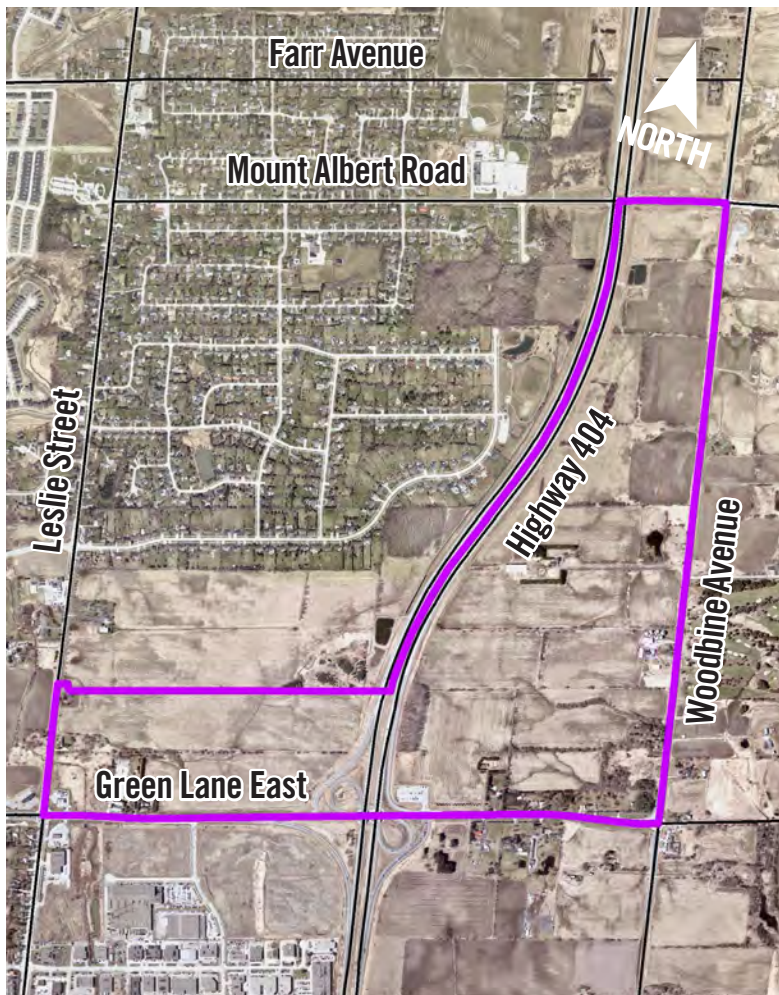
EXISTING EMPLOYMENT AREA DENSITY 26 JOBS per HECTARE

3 SITES [1.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



HIGHWAY 404/QUEENSVILLE (VACANT)

- The Highway 404 Queensville employment area totals 151 net Hectares – 149 of which were vacant in 2017
- Properties in this employment area are either directly fronting or located in close proximity to the Highway 404 extension and interchanges, which opened in fall 2014

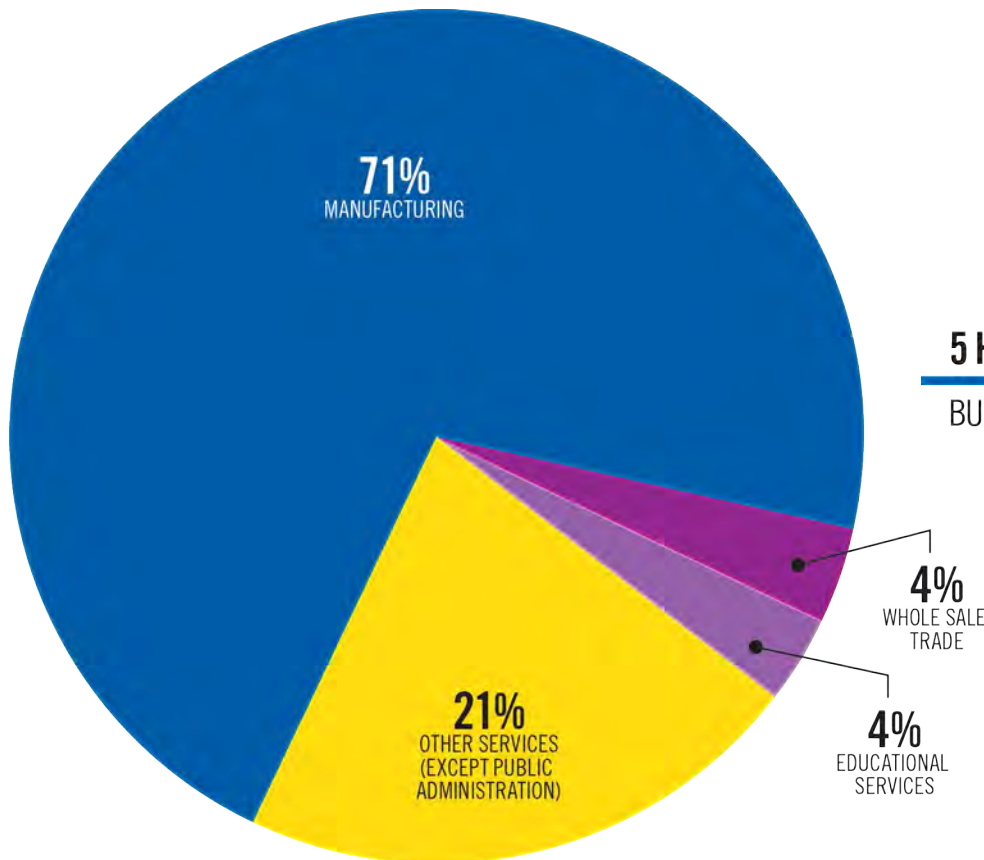


ROPA 1 (VACANT)

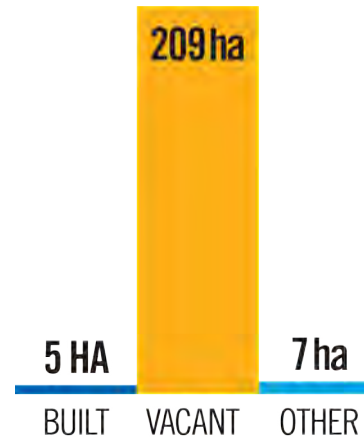
- The ROPA 1 employment area totals 103 Ha of land - 101 net Ha of which were vacant in 2017
- It was established in 2010 as part of the Regional Official Plan update and since then has accommodated close to 400 jobs in the transportation and warehousing sector
- The employment area has frontage on Highway 404 and is in close proximity to the East Gwillimbury GO Station

- ▶ Employment areas in Georgina, including Keswick business park and Pepperlaw, remained largely vacant (94 per cent) in 2018
- ▶ The extension of Highway 404 in 2014 is likely to make Georgina's employment areas more attractive to prospective employers

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



221 TOTAL HECTARES 2017



30 JOBS in 2018

50% INCREASE (10 JOBS) SINCE 2008

29% SERVICES PRODUCING **71%** GOODS PRODUCING

100% ONSITE **0%** OFFSITE

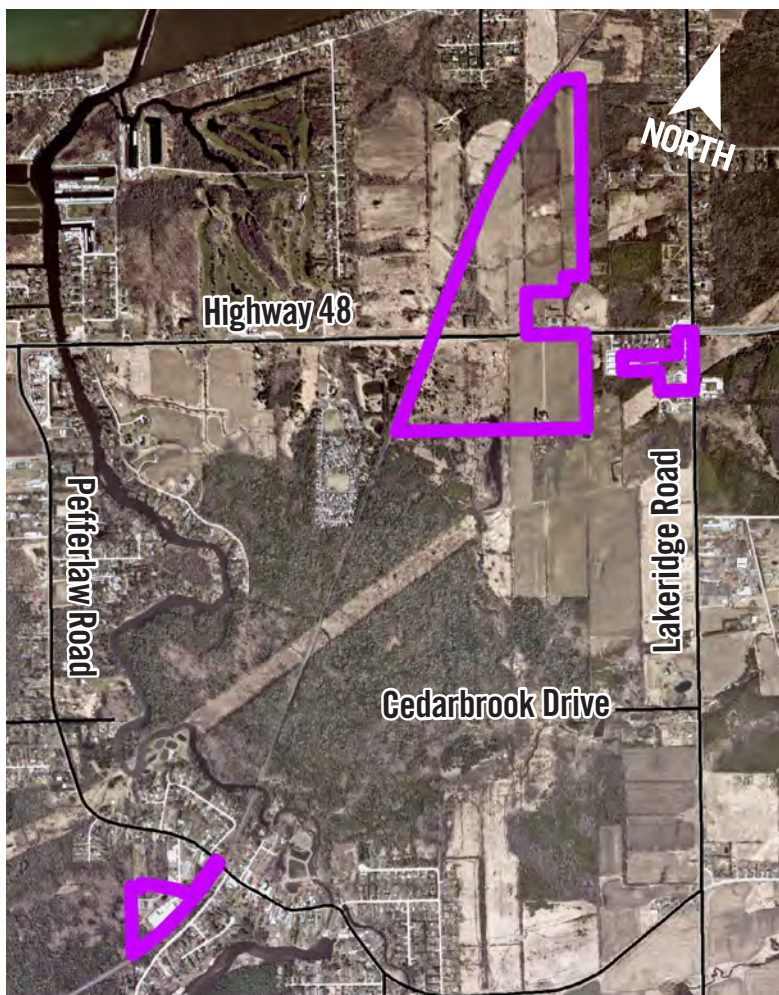
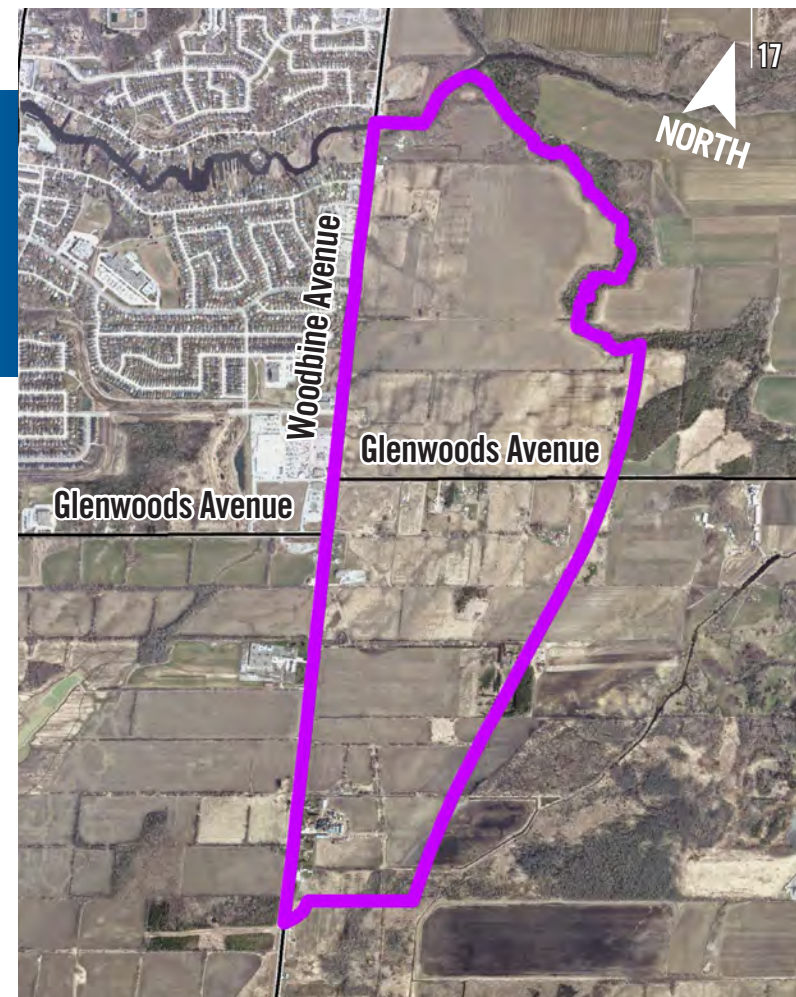
21% RETAIL and PERSONAL SERVICES

EXISTING EMPLOYMENT AREA DENSITY 6 JOBS per HECTARE

3 SITES [2.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

KESWICK BUSINESS PARK (VACANT)

- Keswick Business Park has a total area of 182 net Ha – 175 net Ha of which were vacant in 2017
- The employment area is located in close proximity to Highway 404 due to the recent extension of the highway in 2014
- In 2018 there were only 10 jobs in the business park, all of which were in the retail and personal services sectors

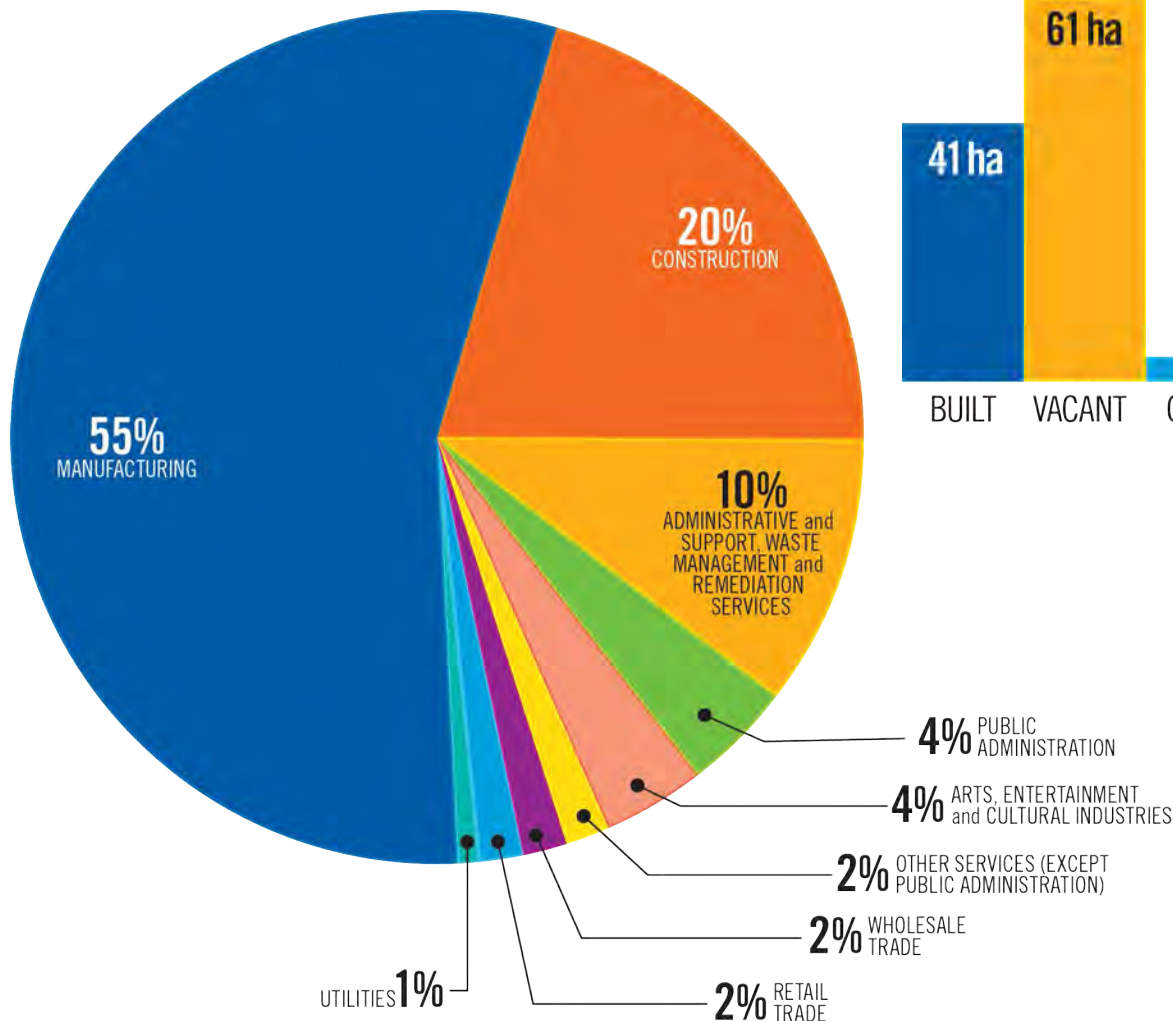


PEFFERLAW (VACANT)

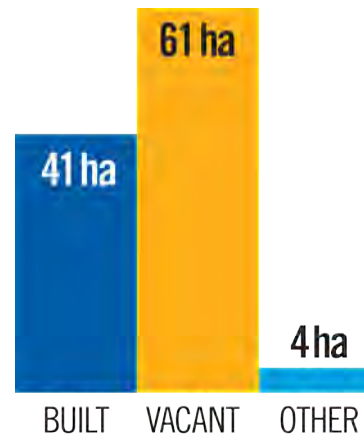
- The Pepperlaw employment area has a total area of 34 net Ha - 30 net Ha were vacant in 2017
- There were 20 jobs in the employment area in 2018, 95% of which were in the manufacturing sector

- ▶ Employment area employment has experienced modest growth since 2008 (12 per cent) relative to the Region (29 per cent)
- ▶ 14 per cent of the Township's employment is located in employment areas
- ▶ The administrative and support, waste management and remediation services, manufacturing, and arts, entertainment and recreation sectors accounted for the largest share of job growth over the past ten years

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



106 TOTAL HECTARES 2017



1,085 JOBS in 2018

12% INCREASE (120 JOBS) SINCE 2008

23% SERVICES PRODUCING 77% GOODS PRODUCING

86% ONSITE 14% OFFSITE

7% RETAIL and PERSONAL SERVICES

EXISTING EMPLOYMENT AREA DENSITY 27 JOBS per HECTARE

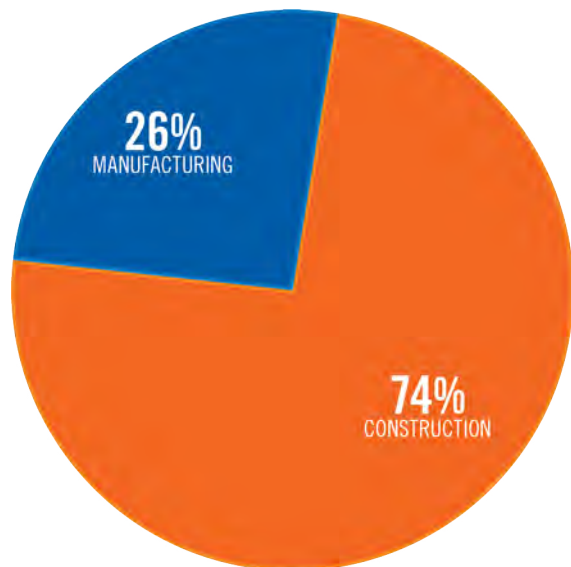
7 SITES [14 ha] TOTAL AREA with INTENSIFICATION POTENTIAL



KING CITY TOWNSHIP of KING

- ▶ All existing employment within the King City employment area is found within the eastern portion which is located at the corner of Dufferin St and King Rd. It is bordered by residential and commercial uses to the south
- ▶ The western portion of the employment area is located at the corner of Jane St and King Rd and is in close proximity to the Highway 400/King road interchange. This 29 hectare plot of vacant employment land is the largest within King Township and offers development opportunities for prospective employers
- ▶ The majority of employment in this area is in the construction sector and is home to one of the Township's large employers, Robert B. Somerville

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



211 JOBS in 2018

36% DECREASE (-120 JOBS) SINCE 2008

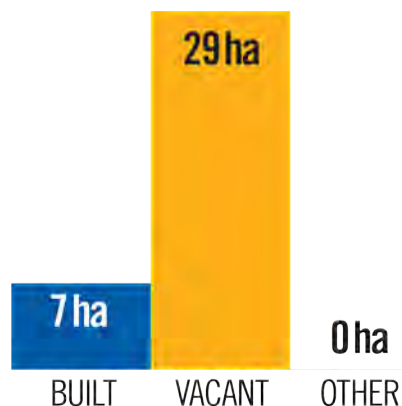
0% SERVICES PRODUCING

100% GOODS PRODUCING

53% ONSITE

47% OFFSITE

36 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA
DENSITY 29 JOBS per HECTARE

1 SITE [1.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



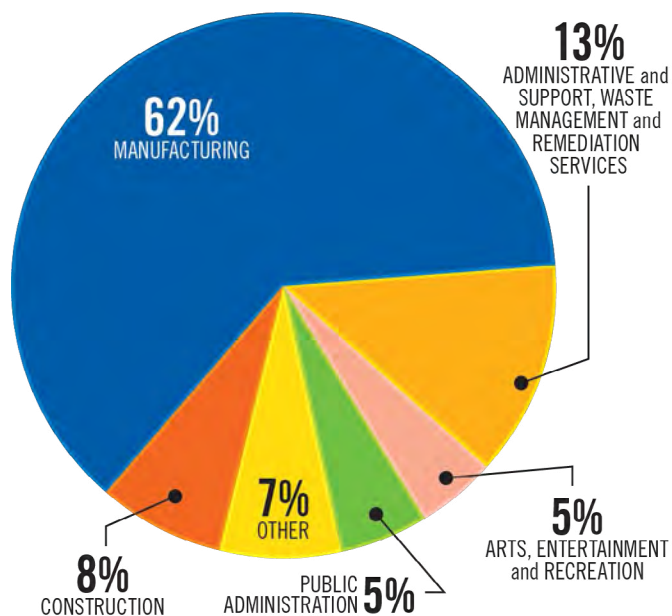
EMPLOYMENT AREA BOUNDARY

York Region

SCHOMBERG TOWNSHIP of KING

- ▶ This employment area is located at the southwest corner of Highway 9 and Highway 27 and is bordered by commercial and residential uses to the west
- ▶ It is the largest employment area in King Township in terms of land area and number of jobs and accounts for over 80 per cent of all employment area employment within King
- ▶ The manufacturing and administrative and support, waste management and remediation services sectors were the two main drivers of growth since 2008
- ▶ Some of the Township's top employers are located here including Showa Canada Inc. and B.C. Instruments

DISTRIBUTION of EMPLOYMENT by SECTOR 2018

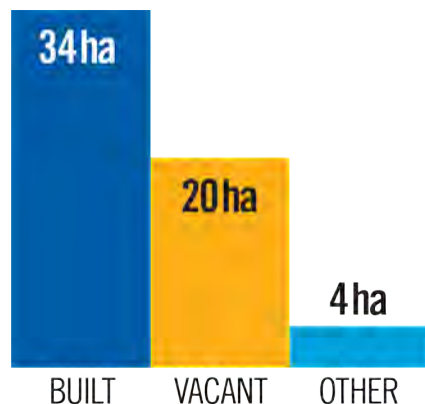


870 JOBS in 2018
38% INCREASE (240 JOBS) SINCE 2008

29% SERVICES PRODUCING **71% GOODS PRODUCING**
93% ONSITE **7% OFFSITE**

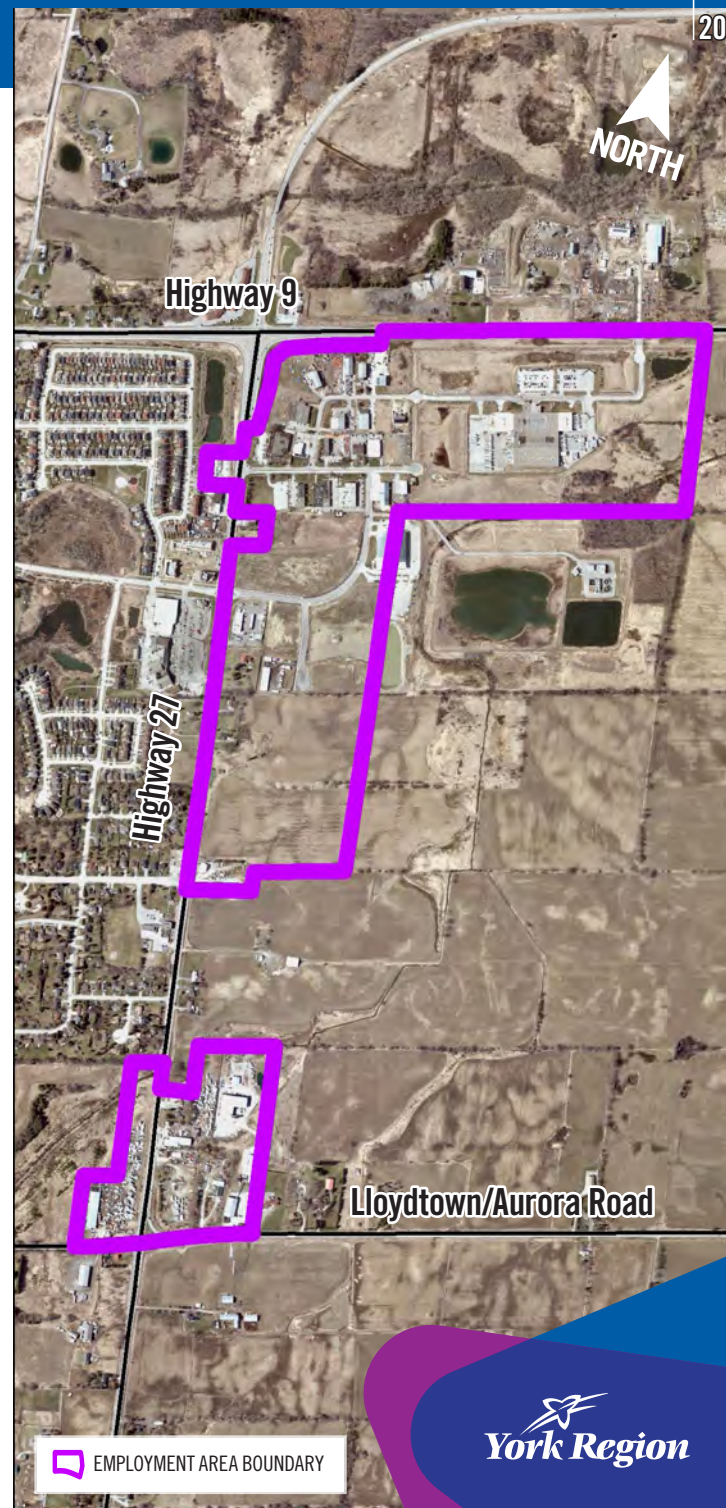
9% RETAIL and PERSONAL SERVICES

58 TOTAL HECTARES 2017



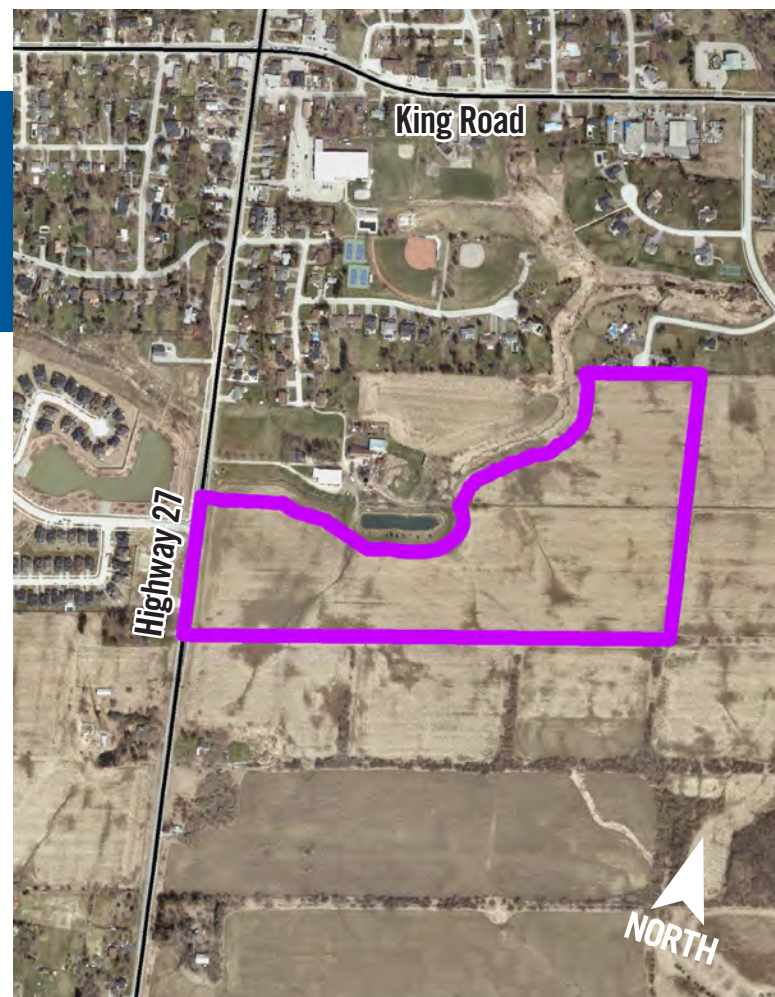
EXISTING EMPLOYMENT AREA DENSITY 26 JOBS per HECTARE

6 SITES [13 ha] TOTAL AREA
 with INTENSIFICATION POTENTIAL



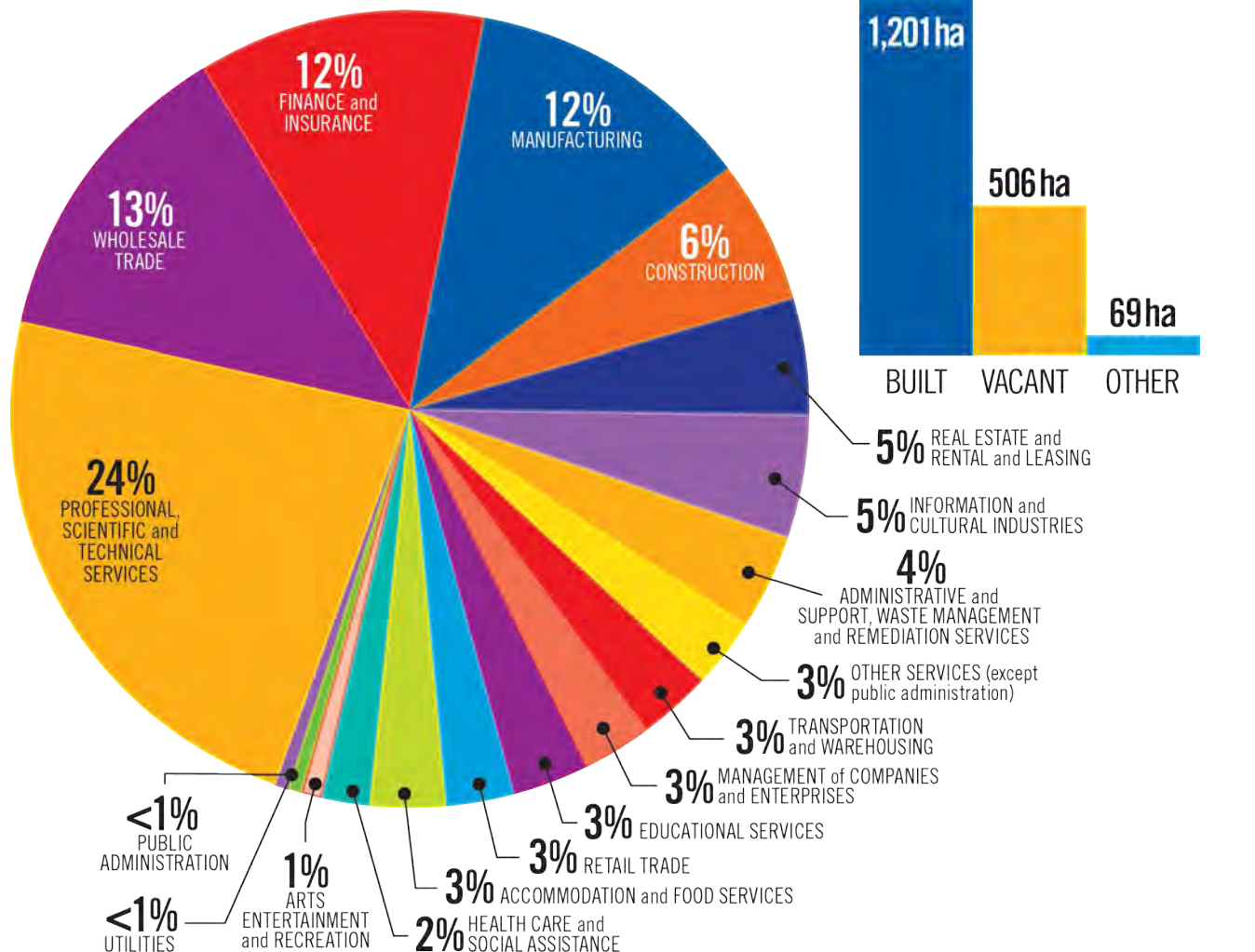
NOBLETON (VACANT)

- The Nobleton employment area has a total area of 12 net Ha - all of which were vacant in 2017



- ▶ The City of Markham's employment areas account for 66 per cent of the City's total surveyed employment
- ▶ Employment areas in the City are an attractive place to do business as they are well located along highway corridors and are in close proximity to higher order transit stations
- ▶ With 506 hectares of vacant employment land available, the City has many competitive development opportunities for prospective employers
- ▶ Markham's employment areas are home to several major employers including: All State Insurance, CAA, Honda, Huawei, IBM, Seneca College, TD Insurance, TD Waterhouse, and WSP Canada

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



116,690 JOBS in 2018

20% INCREASE (19,530 JOBS) SINCE 2008

82% SERVICES PRODUCING **18% GOODS PRODUCING**

80% ONSITE **20% OFFSITE**

14% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
 56,660 JOBS 121 BUILDINGS

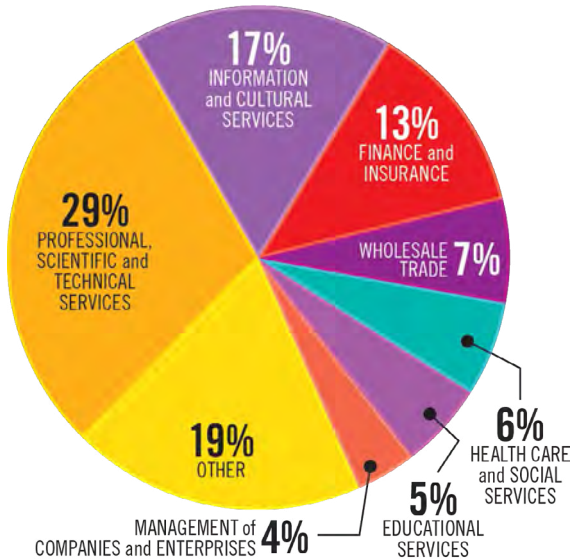
EXISTING EMPLOYMENT AREA DENSITY 97 JOBS per HECTARE

41 SITES [53 ha]
 with INTENSIFICATION POTENTIAL

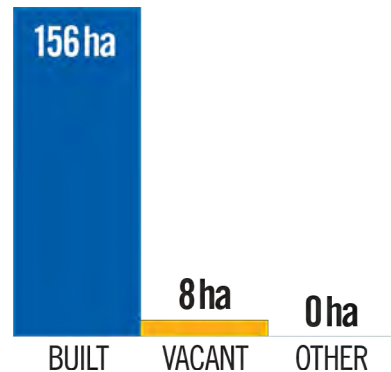
ALLSTATE CITY of MARKHAM

- ▶ The Allstate employment area accounts for the second largest share of employment land employment in the City of Markham and is home to a number of the Region's top employers including Huawei Technologies and Allstate Insurance
- ▶ This business park is home to a number of prestige office and industrial developments. Furthermore, out of all of the City's employment areas, it has the largest number of major office buildings and 72 per cent of all jobs in this area are located within major offices
- ▶ It is home to Buttonville airport and is located adjacent to Highway 404 and the Highway 7 transit corridor
- ▶ Since 2008, over 50 per cent of job growth has been in the ICT cluster, making it a notable contributor to the Region's growing ICT cluster

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



164 TOTAL HECTARES 2017



15,250 JOBS in 2018
27% INCREASE (3,270 JOBS) SINCE 2008

93% SERVICES PRODUCING 7% GOODS PRODUCING

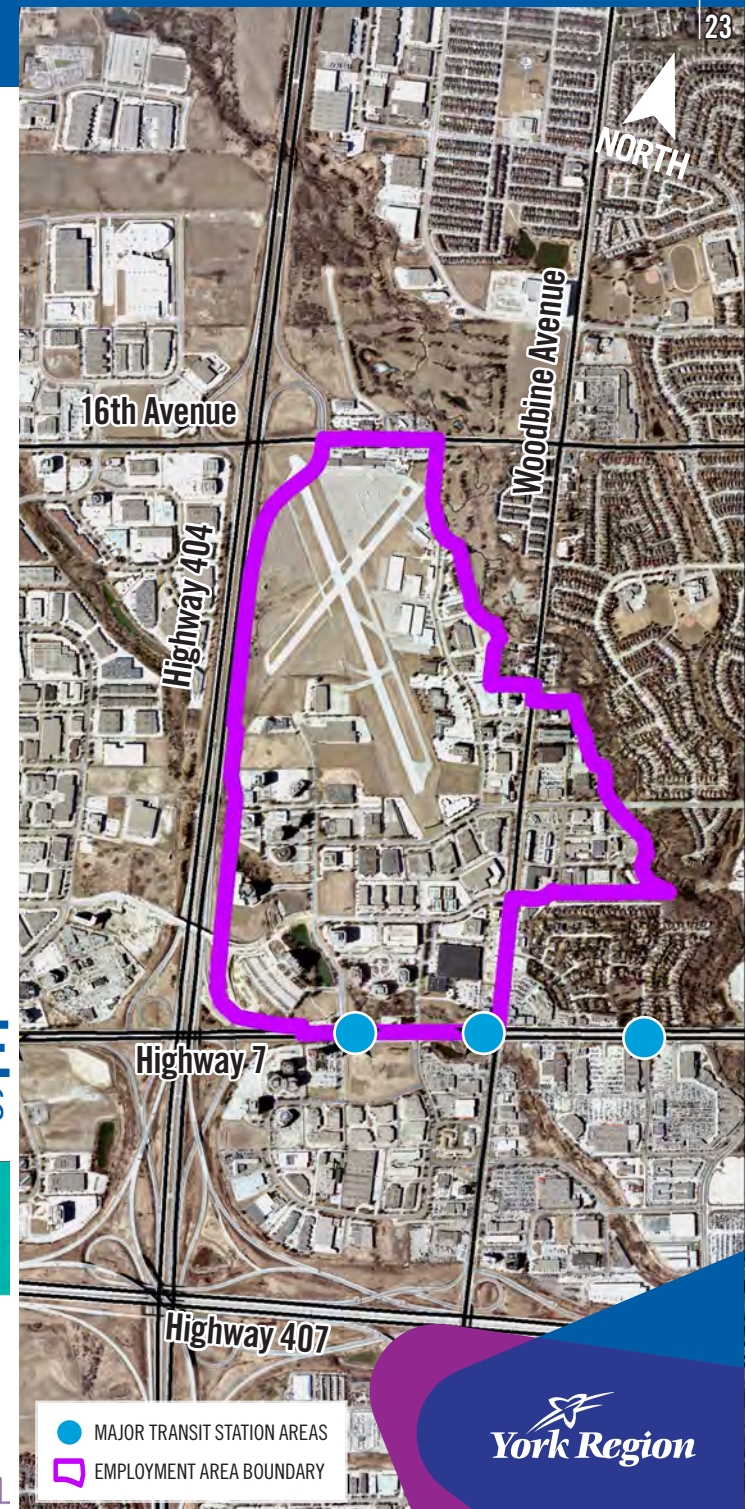
82% ONSITE 18% OFFSITE

22% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
10,790 JOBS 32 BUILDINGS

EXISTING EMPLOYMENT AREA
DENSITY 97 JOBS per HECTARE

9 SITES [14 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



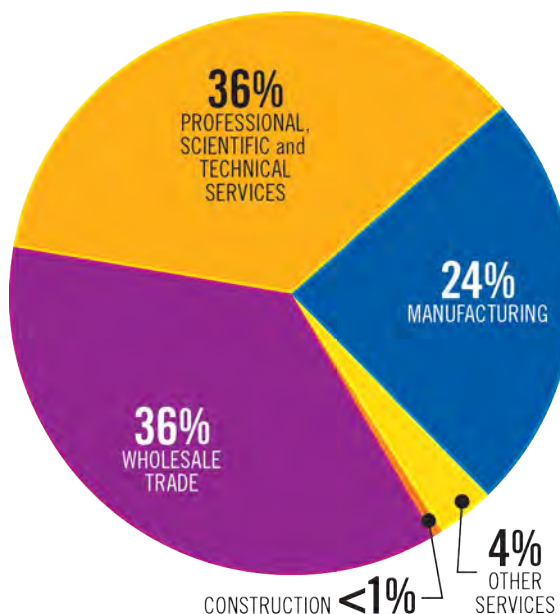
● MAJOR TRANSIT STATION AREAS
□ EMPLOYMENT AREA BOUNDARY

York Region

ARMDALE CITY of MARKHAM

- ▶ This employment area is comprised of a variety of industrial buildings with uses predominantly in the wholesale trade, and manufacturing sectors
- ▶ It is in close proximity to Highway 407 and located along arterial roads with access to nearby residential areas
- ▶ With 33 hectares of vacant employment land available, there are development opportunities for future employers

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



1,070 JOBS in 2018

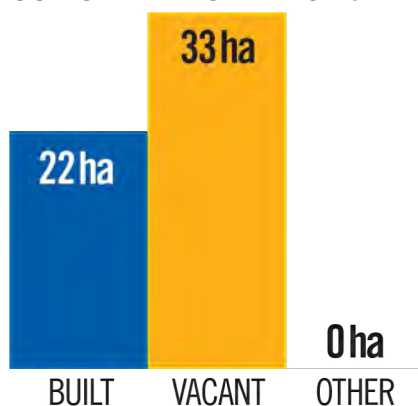
6% INCREASE (60 JOBS) SINCE 2008

76% SERVICES PRODUCING **24% GOODS PRODUCING**

98% ONSITE **2% OFFSITE**

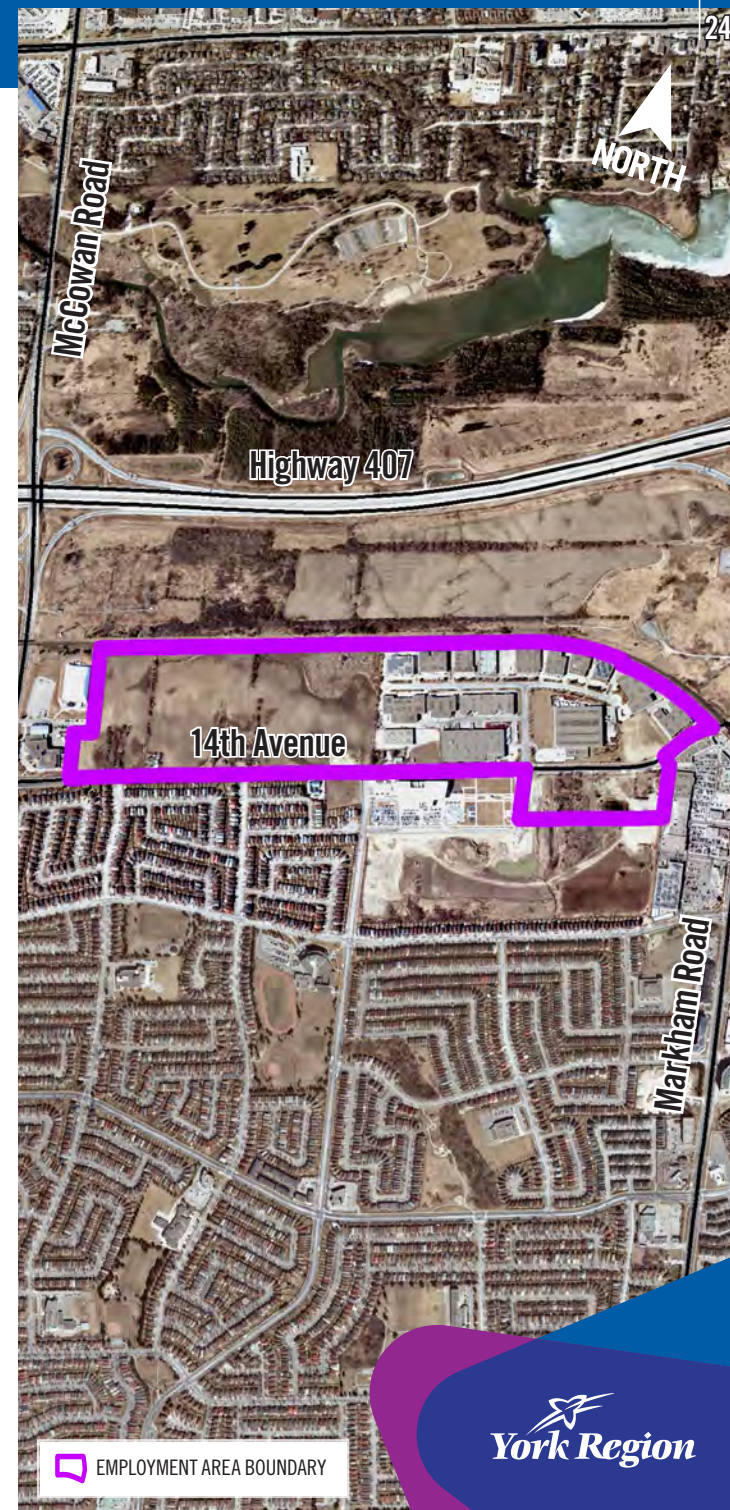
3% RETAIL and PERSONAL SERVICES

55 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY 48 JOBS per HECTARE

2 SITES [2.0ha TOTAL AREA]
with **INTENSIFICATION POTENTIAL**



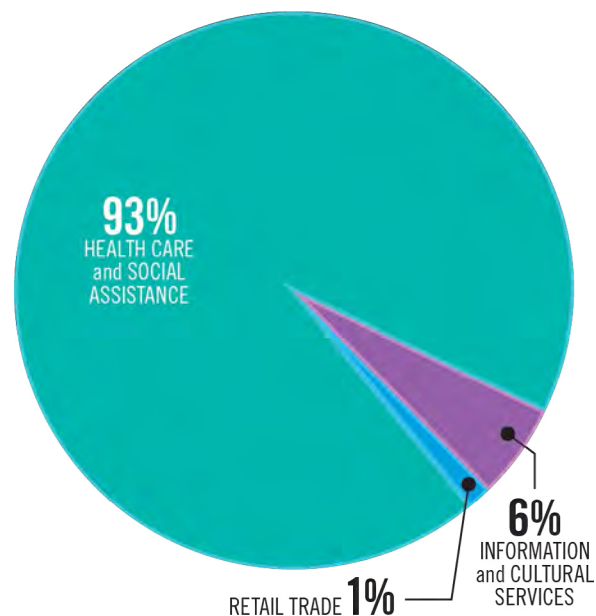
EMPLOYMENT AREA BOUNDARY

York Region

BOX GROVE CITY of MARKHAM

- This employment area is integrated into Markham's Box Grove community. It is adjacent to existing residential neighborhoods, natural heritage features and commercial developments that serve the community
- The majority of lands in this employment area are vacant and can be found in close proximity to the Highway 407 and Donald Cousens Parkway interchange making them ideal locations for freight-supportive businesses to locate

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



160 JOBS in 2018

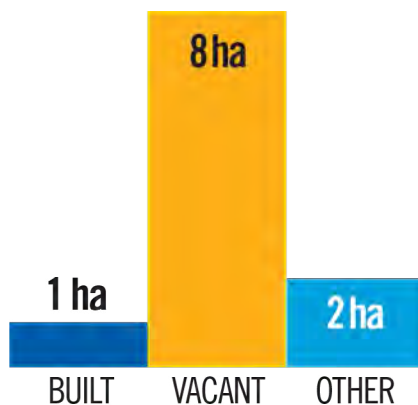
INCREASE of 160 JOBS SINCE 2008

100% SERVICES PRODUCING 0% GOODS PRODUCING

90% ONSITE 10% OFFSITE

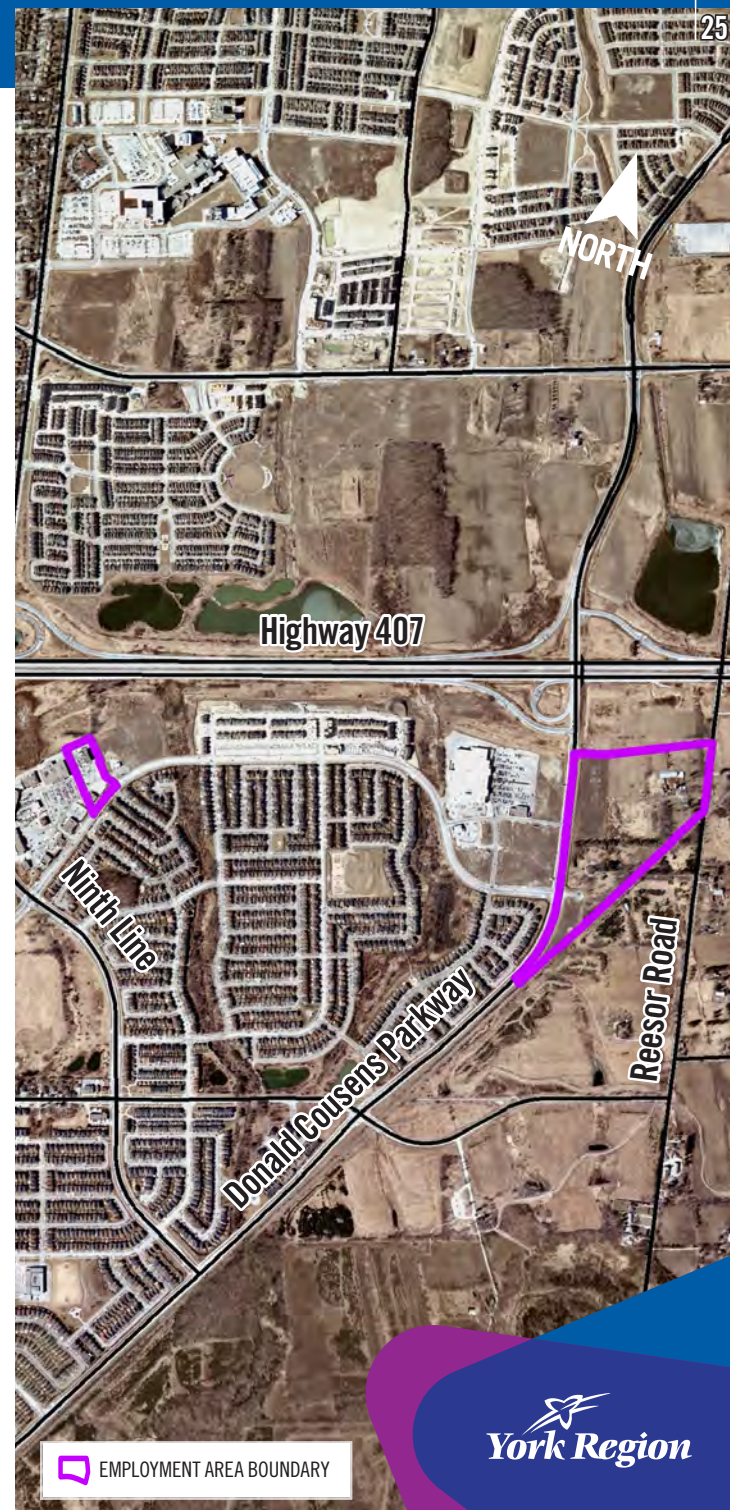
7% RETAIL and PERSONAL SERVICES

11 TOTAL HECTARES 2017



MAJOR OFFICE
160 JOBS 1 BUILDING

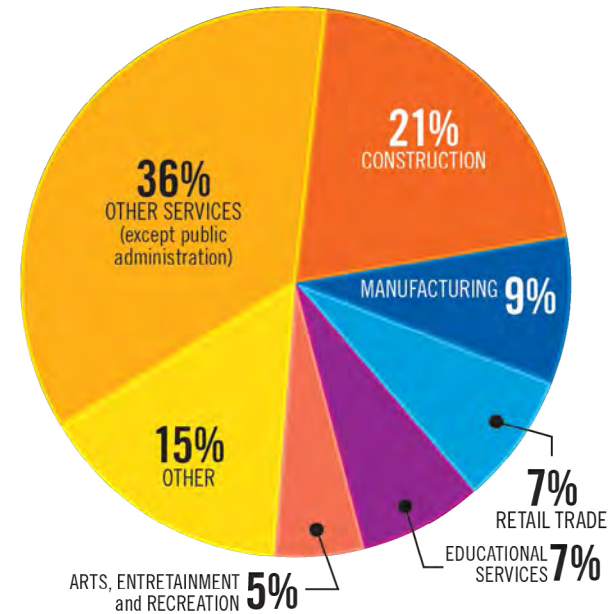
EXISTING EMPLOYMENT AREA DENSITY **128** JOBS per HECTARE



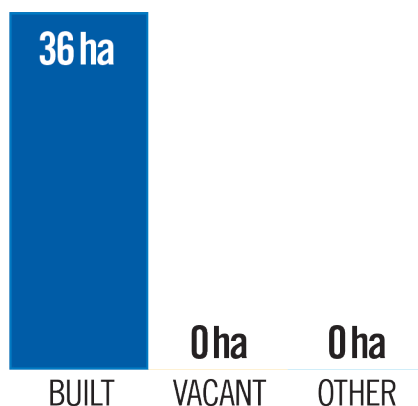
BULLOCK DRIVE CITY of MARKHAM

- ▶ The Bullock drive employment area is comprised of a mix of service, retail, and light industrial uses and is located along arterial roads making it accessible to businesses and surrounding residential communities
- ▶ The western portion of the employment area is bordered by an intensification area and is serviced by rapid transit routes
- ▶ Over the past ten years, the composition of employment in this area has transitioned from traditional industrial and warehouse uses to smaller scale service employment uses

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



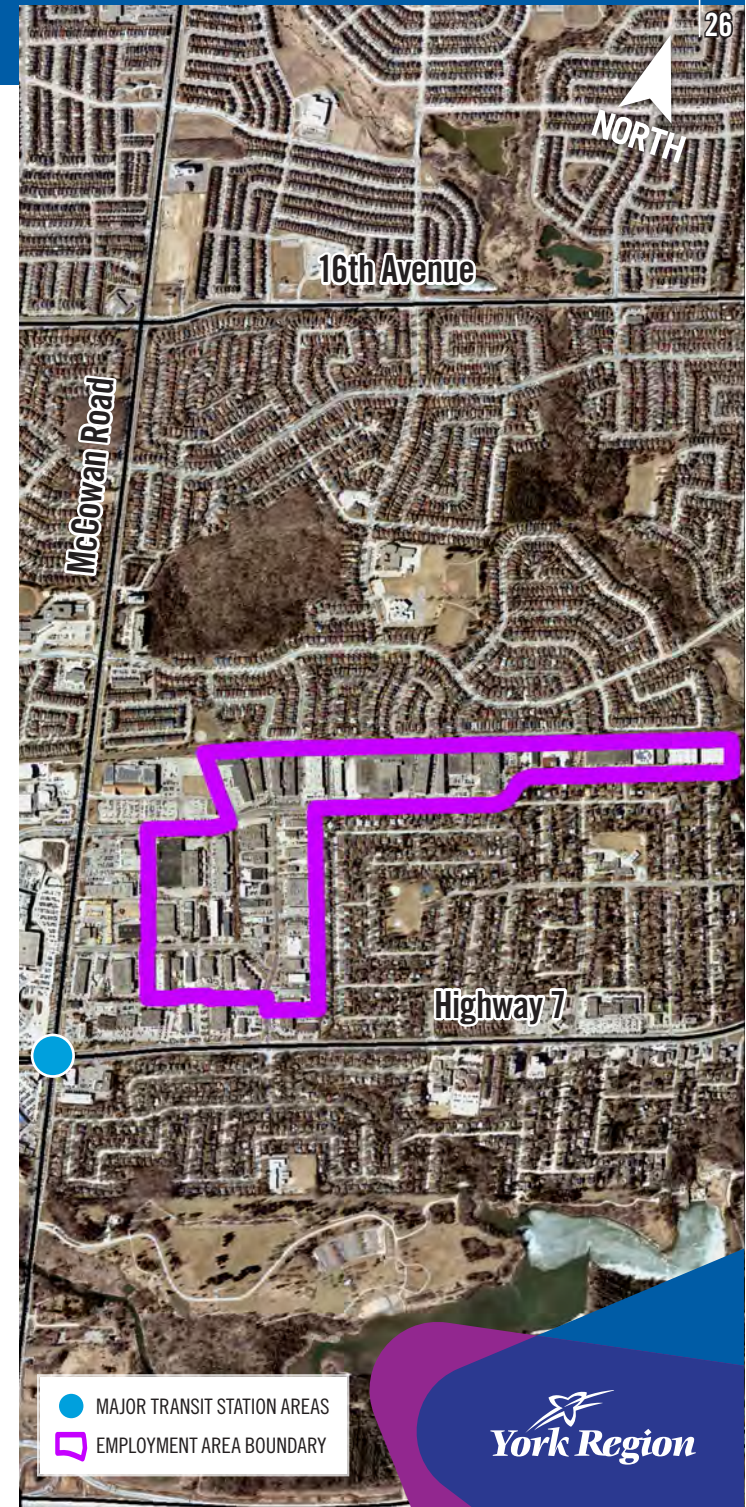
36 TOTAL HECTARES 2017



1,630 JOBS in 2018
27% DECREASE (-590 JOBS) SINCE 2008

71% SERVICES PRODUCING 29% GOODS PRODUCING
81% ONSITE 19% OFFSITE
50% RETAIL and PERSONAL SERVICES

EXISTING EMPLOYMENT AREA DENSITY **46** JOBS per HECTARE

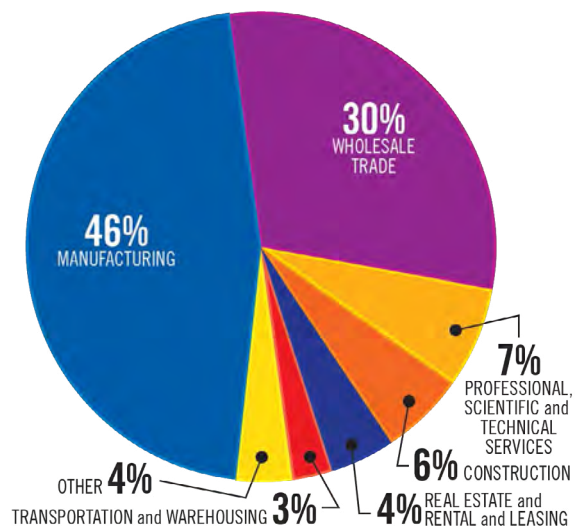


● MAJOR TRANSIT STATION AREAS
□ EMPLOYMENT AREA BOUNDARY

York Region

- ▶ The location of the Cachet employment area offers existing and prospective employers excellent visibility and accessibility to Highway 404 and fosters opportunities for economic synergies with its neighbouring employment areas
- ▶ It is comprised of prestige industrial and office buildings which are home to some of the Region's top employers including GE Grid IQ Innovation centre and Phillips Canada
- ▶ The largest share of employment growth can be attributed to the manufacturing sector, accounting for 86 per cent of job growth since 2008
- ▶ A portion of the employment area contains protected natural features, however with 15 hectares of vacant employment land available there is opportunity available for future development

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



3,050 JOBS in 2018

51% INCREASE (1,030 JOBS) SINCE 2008

48% SERVICES PRODUCING **52% GOODS PRODUCING**

93% ONSITE **7% OFFSITE**

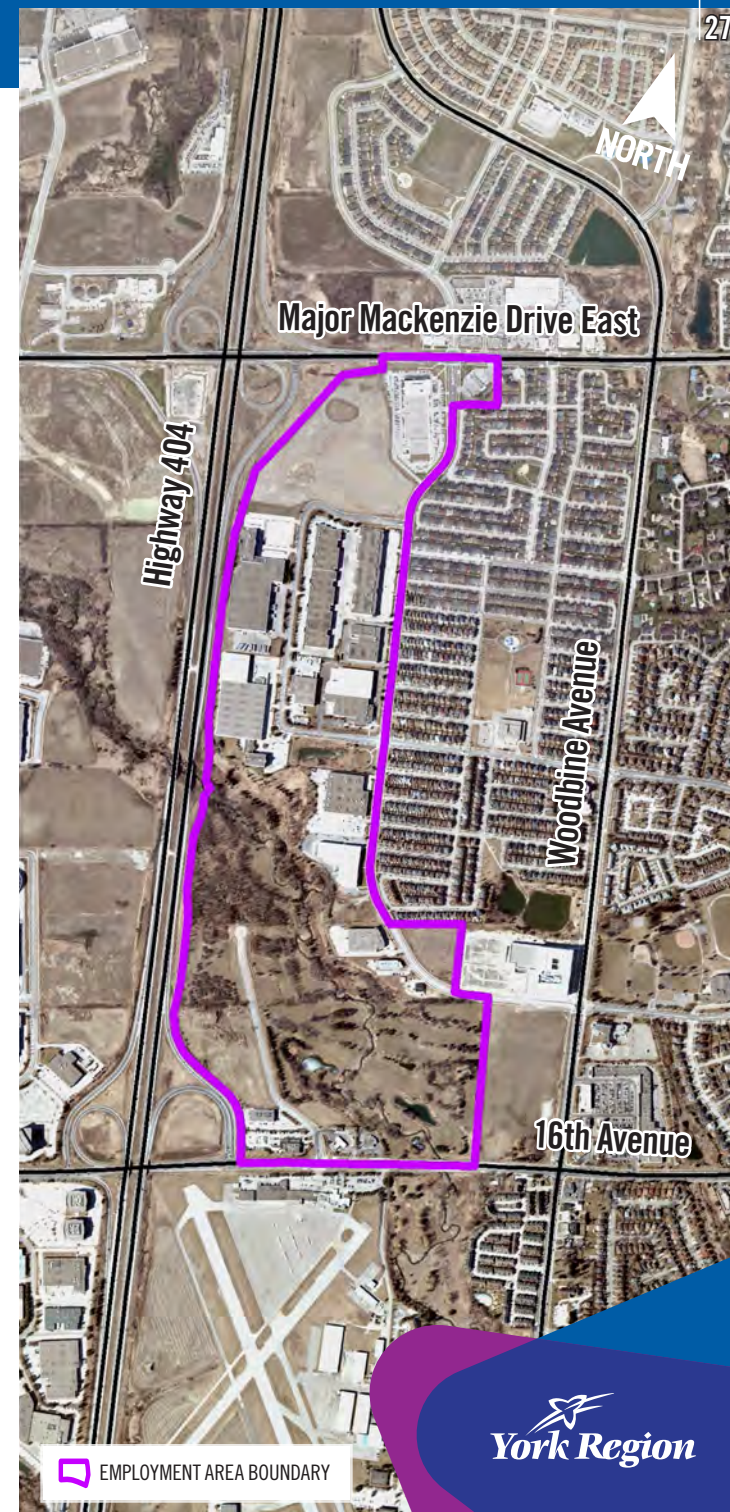
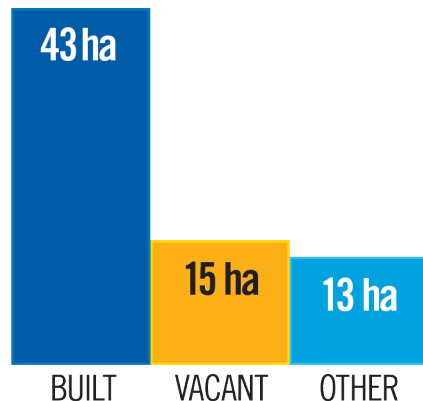
3% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
1,090 JOBS 3 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 72 JOBS per HECTARE

3 SITES [8.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

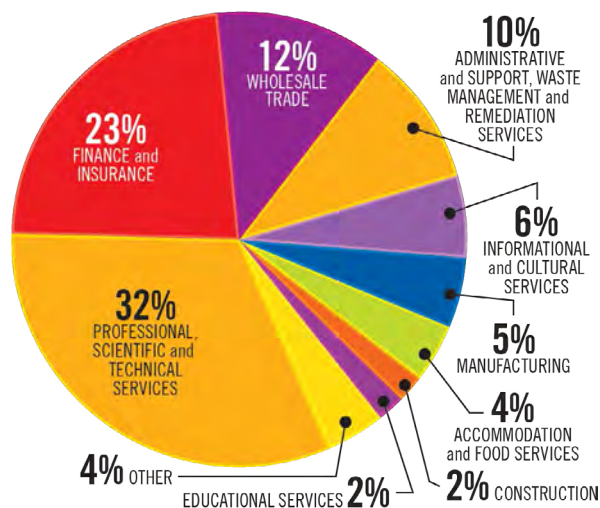
71 TOTAL HECTARES 2017



COCHRANE CITY of MARKHAM

- ▶ This employment area is located within the Highway 7 East corridor and is adjoined to the Highway 404 and Highway 407, offering visibility and access to the Regional Rapid transit corridor
- ▶ The finance and insurance sector experienced the largest share of employment growth, increasing from a 7 per cent share in 2008 to a 23 per cent share in 2018
- ▶ Over 70 per cent of jobs in this employment area are located in major office buildings and are home to some large employers in knowledge-based sectors including Torco Financial Group, Ceridian Canada and WSP Global

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



5,150 JOBS in 2018
7% INCREASE (320 JOBS) SINCE 2008

92% SERVICES PRODUCING 8% GOODS PRODUCING

78% ONSITE 22% OFFSITE

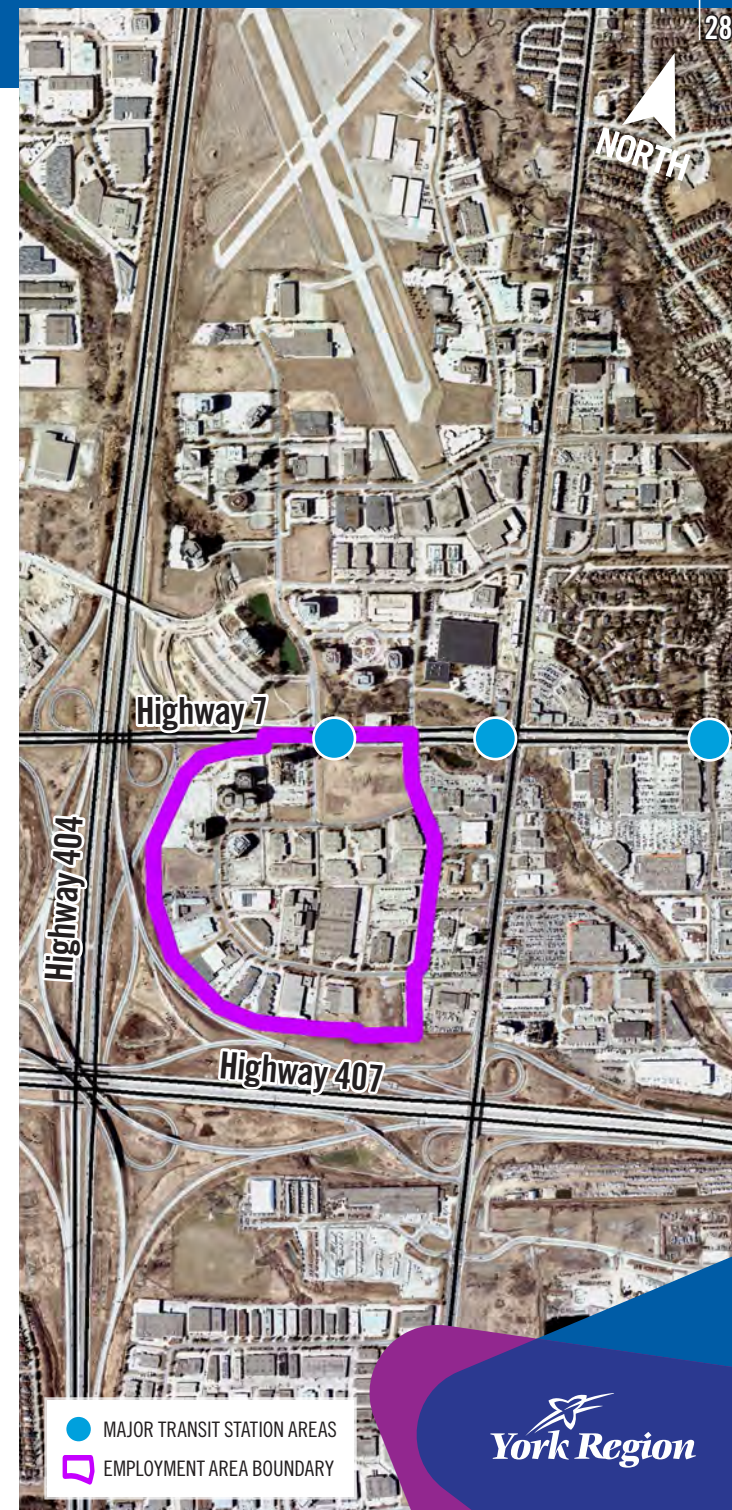
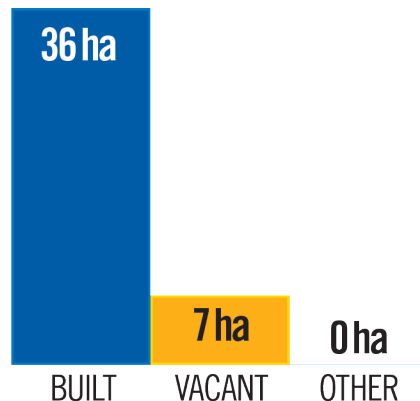
11% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
3,720 JOBS 9 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY **144** JOBS per HECTARE

3 SITES [3.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

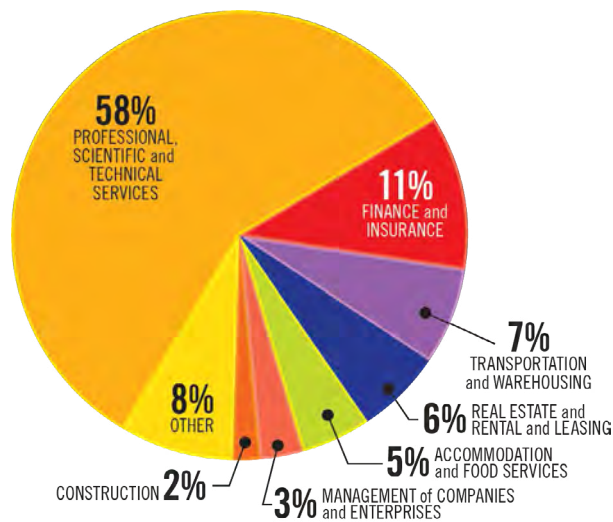
43 TOTAL HECTARES 2017



COMMERCE VALLEY LEITCHCROFT CITY of MARKHAM

- ▶ This employment area is well located within the Highway 7 East corridor and bounded by Highway 407 to the south and Highway 404 to the east
- ▶ This area is comprised of a significant concentration of offices which are home to a number of the Region's top ICT employers including CGI Information Systems and AMD Technologies
- ▶ Over 65 per cent of job growth in the past ten years has been in the finance and insurance and professional, scientific and technical services sectors

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



14,450 JOBS in 2018
28% INCREASE (3,150 JOBS) SINCE 2008

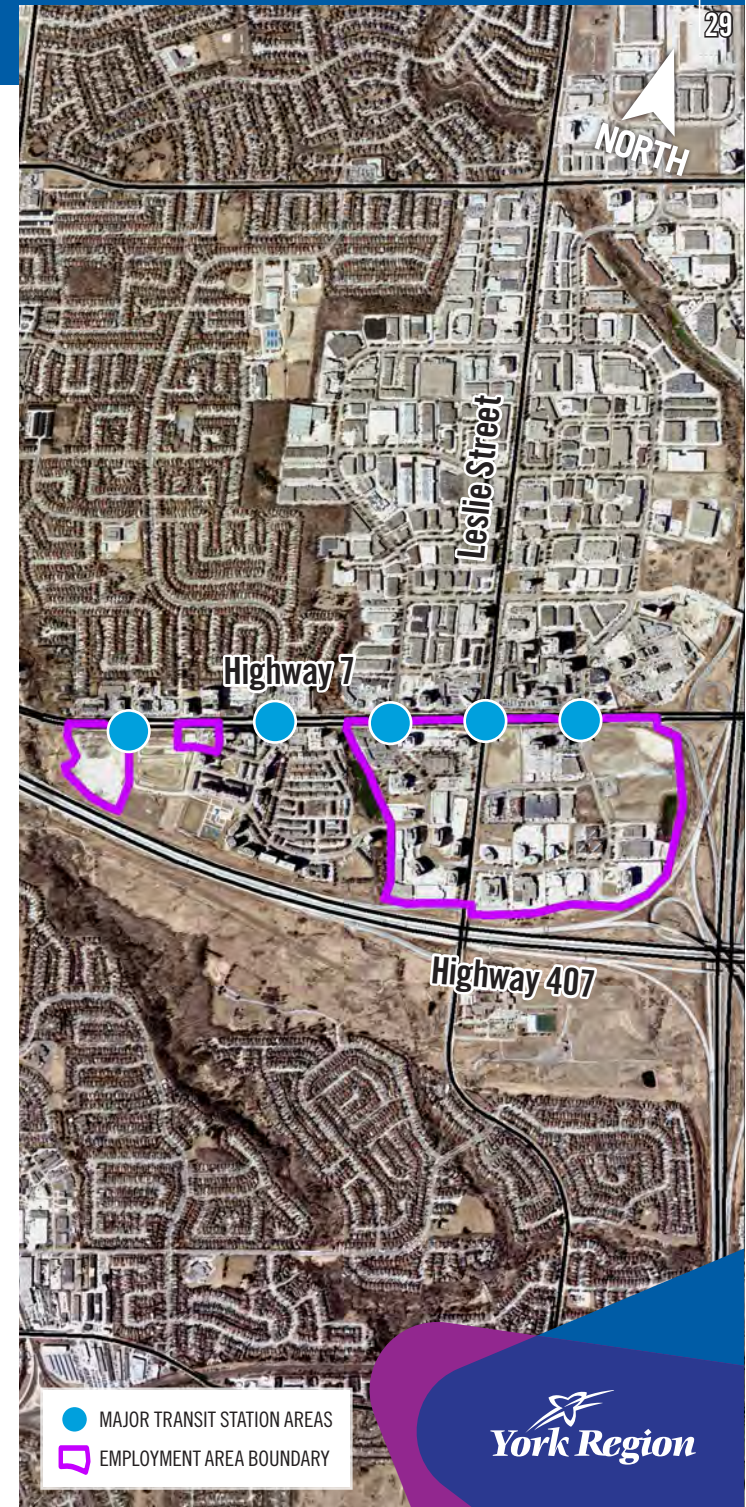
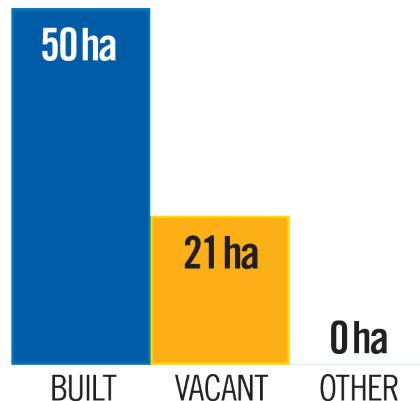
96% SERVICES PRODUCING **4% GOODS PRODUCING**
78% ONSITE **22% OFFSITE**
7% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
13,670 JOBS **19 BUILDINGS**

EXISTING EMPLOYMENT AREA DENSITY 289 JOBS per HECTARE

2 SITES [2.0ha] TOTAL AREA
 with **INTENSIFICATION POTENTIAL**

71 TOTAL HECTARES 2017



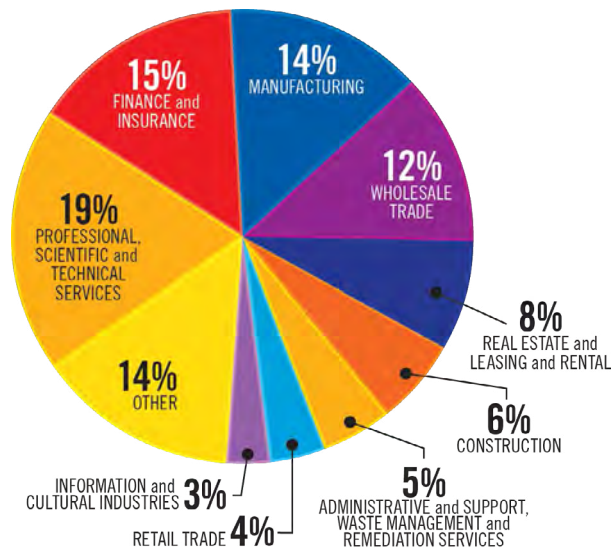
● MAJOR TRANSIT STATION AREAS
 □ EMPLOYMENT AREA BOUNDARY

York Region

DENISON STEELES CITY of MARKHAM

- ▶ This is the largest employment area in terms of the number of jobs and accounts for 34 per cent of all employment area employment in the City of Markham
- ▶ It sits on the municipal border between York Region and the City of Toronto and is easily accessible via Highway 404
- ▶ Over 6,100 jobs have been added to this employment area since 2008. Over 54 per cent of this growth can be attributed to the Finance and Insurance sector
- ▶ Its diverse economic composition includes a mix of traditional industrial/warehousing and office uses. Since 2008, the majority of growth has occurred in office type uses

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



39,600 JOBS in 2018

18% INCREASE (6,160 JOBS) SINCE 2008

80% SERVICES PRODUCING **20% GOODS PRODUCING**

76% ONSITE **24% OFFSITE**

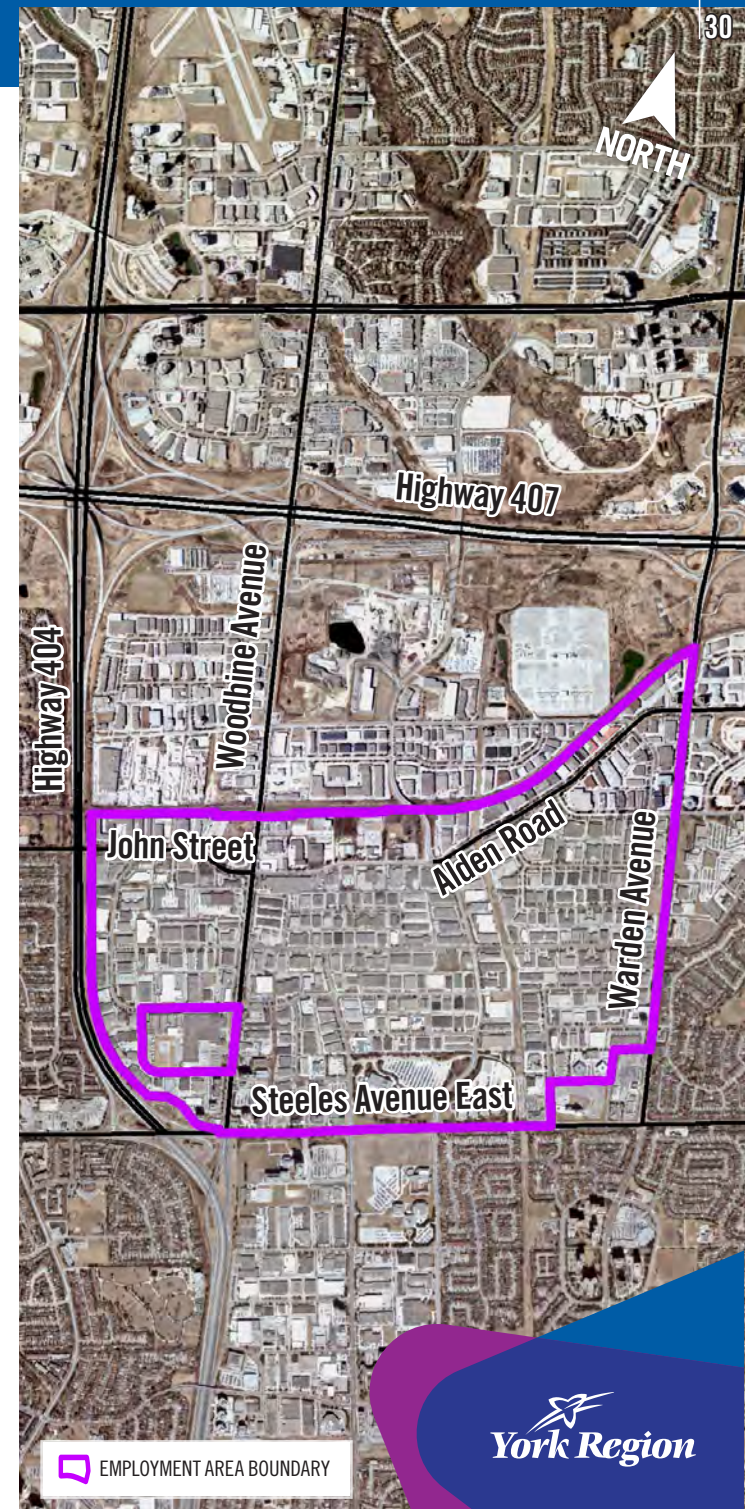
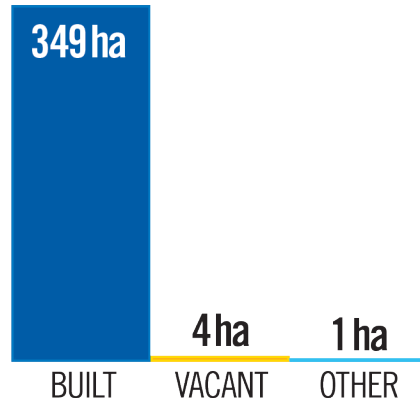
14% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
14,420 JOBS 21 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 113 JOBS per HECTARE

4 SITES [3.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

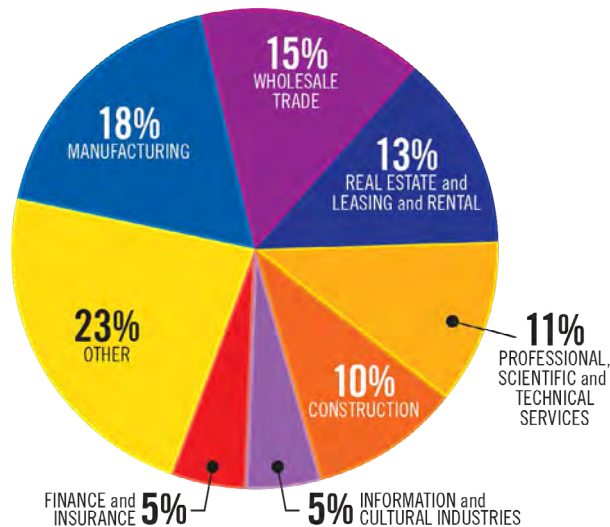
354 TOTAL HECTARES 2017



FOURTEENTH AVENUE CITY of MARKHAM

- ▶ This established employment area is situated southeast of Highway 404 and Highway 407
- ▶ Despite experiencing declines in the manufacturing and transportation/warehousing sectors in the past ten years, it can still be characterized as a traditional employment area with industrial and warehousing uses
- ▶ The real estate and rental and leasing and construction sectors accounted for the largest share of employment growth since 2008

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



8,200 JOBS in 2018
9% INCREASE (700 JOBS) SINCE 2008

71% SERVICES PRODUCING **29% GOODS PRODUCING**

86% ONSITE **14% OFFSITE**

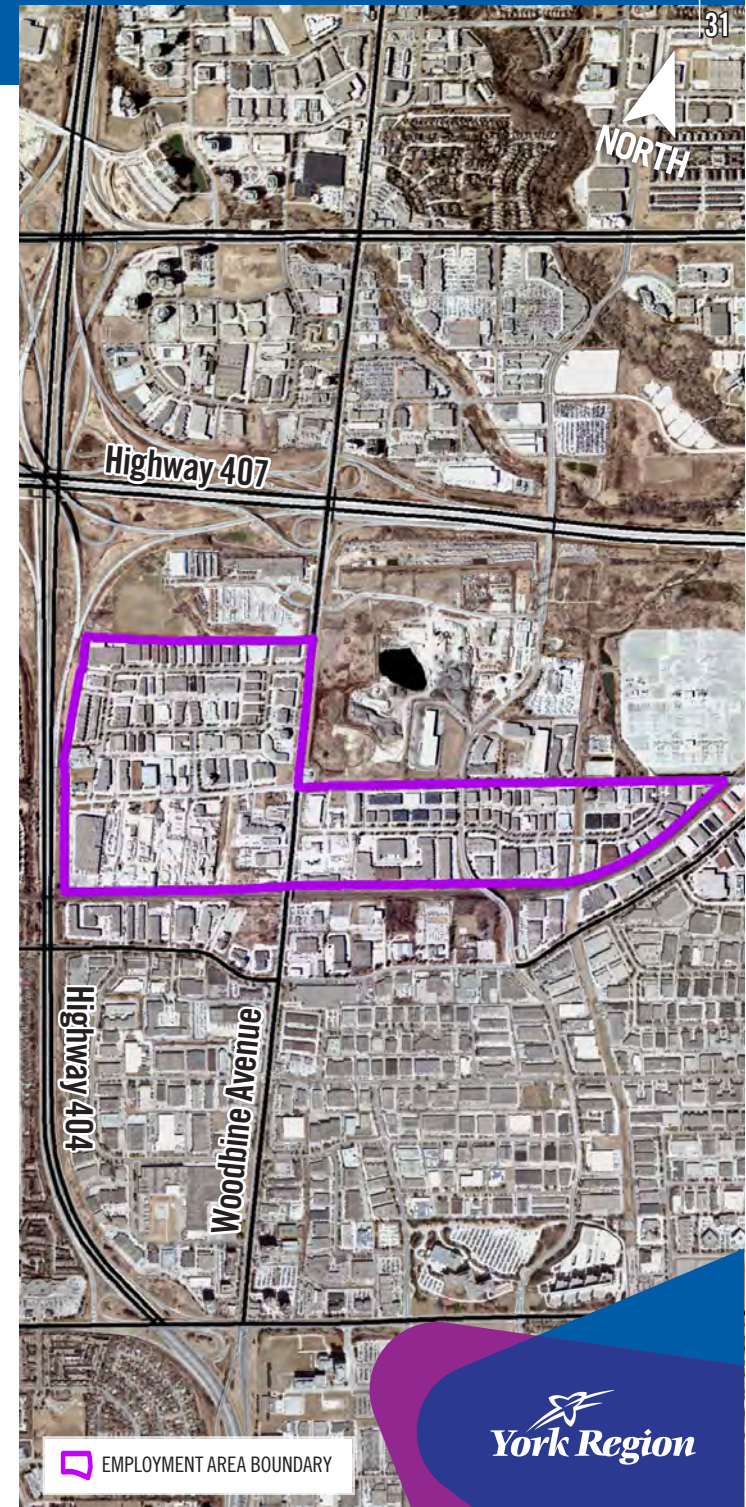
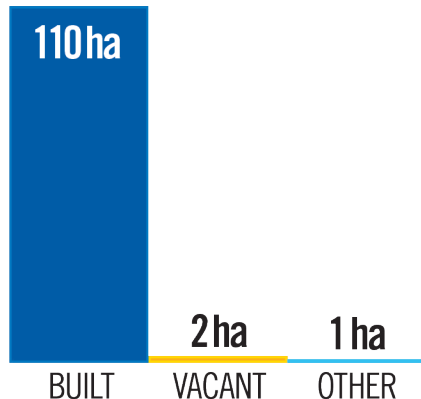
13% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
 1,660 JOBS 4 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 74 JOBS per HECTARE

3 SITES [2.0ha TOTAL AREA]
 with **INTENSIFICATION POTENTIAL**

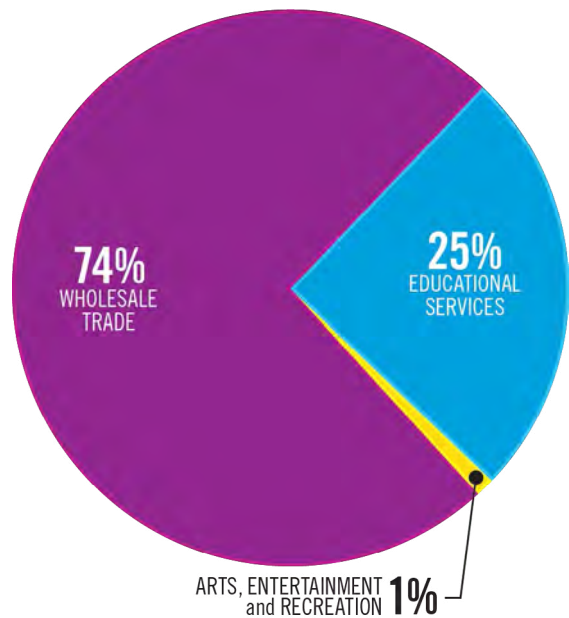
113 TOTAL HECTARES 2017



HIGHWAY 404 NORTH CITY of MARKHAM

- ▶ This employment area offers excellent visibility and accessibility from the adjoining 400 series highway and has further development potential with 48 hectares of vacant land
- ▶ Honda Canada, Enbridge Gas and Mobis Parts Canada have located their operations here over the past ten years. All three employers feature prestige industrial and office uses and account for all 1,220 jobs in this employment area

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



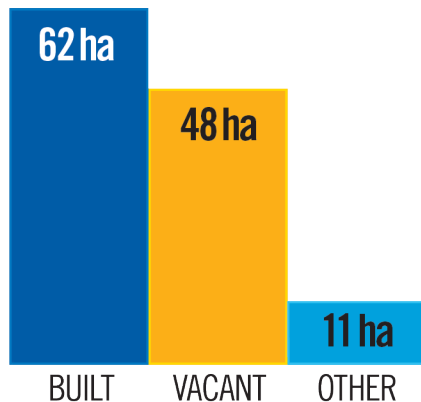
1,220 JOBS in 2018
10,083% INCREASE (1,210 JOBS) SINCE 2008

100% SERVICES PRODUCING **0%** GOODS PRODUCING

84% ONSITE **16%** OFFSITE

 **1%** RETAIL and PERSONAL SERVICES

121 TOTAL HECTARES 2017



 **MAJOR OFFICE**
1,040 JOBS 2 BUILDINGS

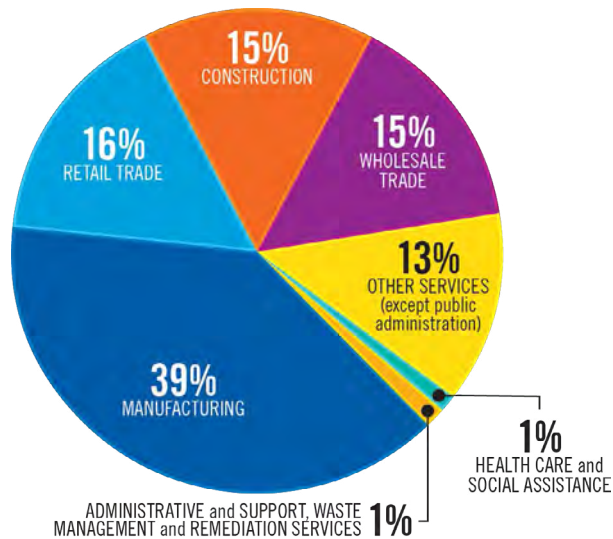
EXISTING EMPLOYMENT AREA **DENSITY** **20** JOBS per HECTARE



MOUNT JOY BUSINESS PARK CITY of MARKHAM

- ▶ The Mount Joy business park is located within the mixed-use Markham Rd/Mount Joy corridor
- ▶ This area is adjacent to the Mount Joy GO station and is well integrated into the surrounding communities of Berczy Village, Wismer Commons and Greensborough
- ▶ Employment growth has remained relatively steady since 2008. The area is mainly comprised of small scale multi-unit industrial buildings used for light manufacturing and wholesale businesses

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



160 JOBS in 2018

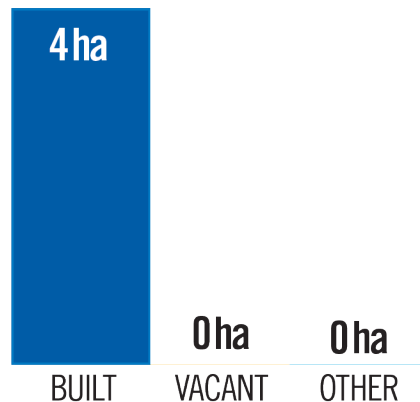
14% INCREASE (20 JOBS) SINCE 2008

46% SERVICES PRODUCING 54% GOODS PRODUCING

93% ONSITE 7% OFFSITE

29% RETAIL and PERSONAL SERVICES

4 TOTAL HECTARES 2017



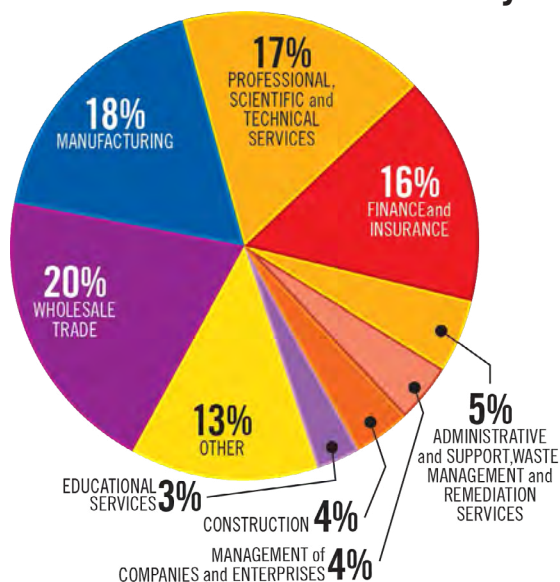
EXISTING EMPLOYMENT AREA DENSITY **45** JOBS per HECTARE



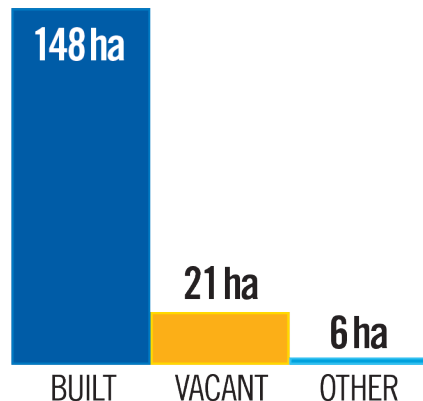
RISEBOROUGH CITY of MARKHAM

- ▶ This employment area is conveniently located at the southeast corner of Highway 407 and Warden Avenue and with access to frequent transit service on the surrounding arterial roads. It is comprised of a range of prestige office and industrial buildings and is home to a number of top employers including TD Insurance, Veoneer Canada, Enercare Home Services and GM Canada
- ▶ The wholesale trade, administrative and support, waste management and remediation services and manufacturing sectors all experienced notable growth over the past ten years despite an overall net decline in employment in this area
- ▶ 29 of the 511 businesses located in this area employ over 100 employees and account for 60 per cent of all jobs in the business park

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



175 TOTAL HECTARES 2017



13,740 JOBS in 2018

6% DECREASE (-950 JOBS) SINCE 2008

78% SERVICES PRODUCING 22% GOODS PRODUCING

86% ONSITE 14% OFFSITE

6% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
5,870 JOBS 18 BUILDINGS

EXISTING EMPLOYMENT AREA
DENSITY 93 JOBS per HECTARE

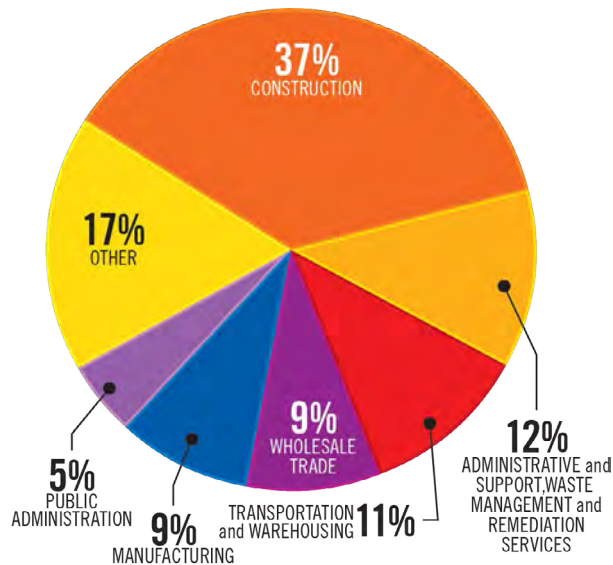
5 SITES [5.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



RODICK ROAD CITY of MARKHAM

- ▶ The northern part of this employment area is located close to the Highway 7 east corridor and Markham Centre and is comprised of mainly industrial standalone and industrial condo buildings in the Administrative and support, waste management and remediation services, wholesale trade and manufacturing sectors
- ▶ The employment lands south of Highway 407 are home to The Miller Group, one of the Region's top employers. This business alone accounts for nearly all of the construction sectors jobs within this employment area and accounted for 51 per cent of job growth in this area over the past ten years
- ▶ Both the northern and southern parts of this employment area are easily accessed via Highway 407

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



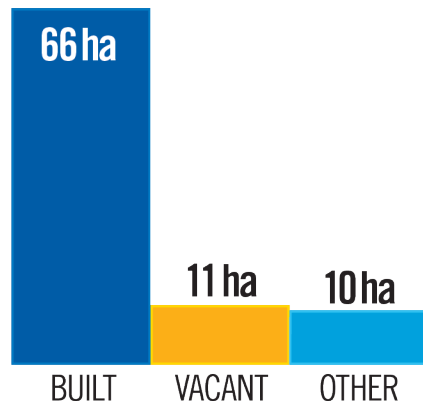
3,210 JOBS in 2018
180% INCREASE (2,060 JOBS) SINCE 2008

50% SERVICES PRODUCING 50% GOODS PRODUCING

55% ONSITE 45% OFFSITE

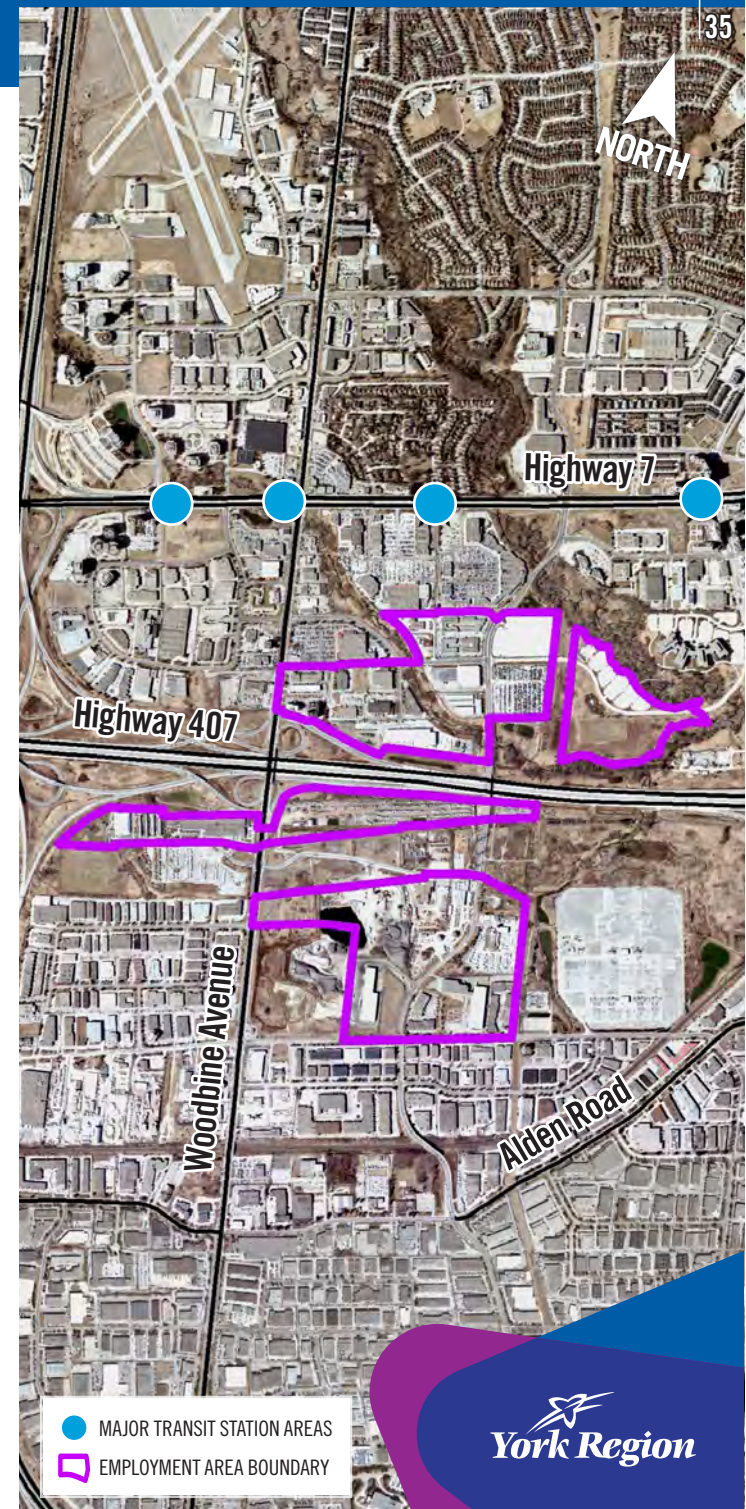
10% RETAIL and PERSONAL SERVICES

87 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY **49** JOBS per HECTARE

5 SITES [8.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



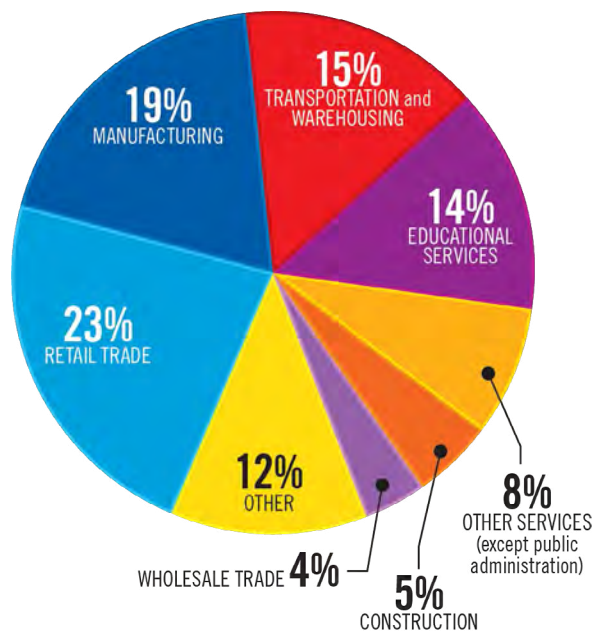
● MAJOR TRANSIT STATION AREAS
□ EMPLOYMENT AREA BOUNDARY

York Region

THORNHILL CITY of MARKHAM

- ▶ The Thornhill employment area is located adjacent to the Yonge Steeles Corridor mixed-use area and is transit supportive with existing York Region Transit/VIVA bus routes and the future Yonge subway extension
- ▶ Employment in this area has remained relatively stable over the past ten years
- ▶ Employment uses in the area are comprised of light industrial, small office and retail uses that primarily serve the surrounding community and businesses

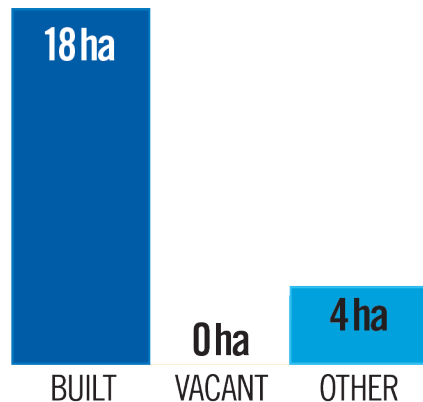
DISTRIBUTION of EMPLOYMENT by SECTOR 2018



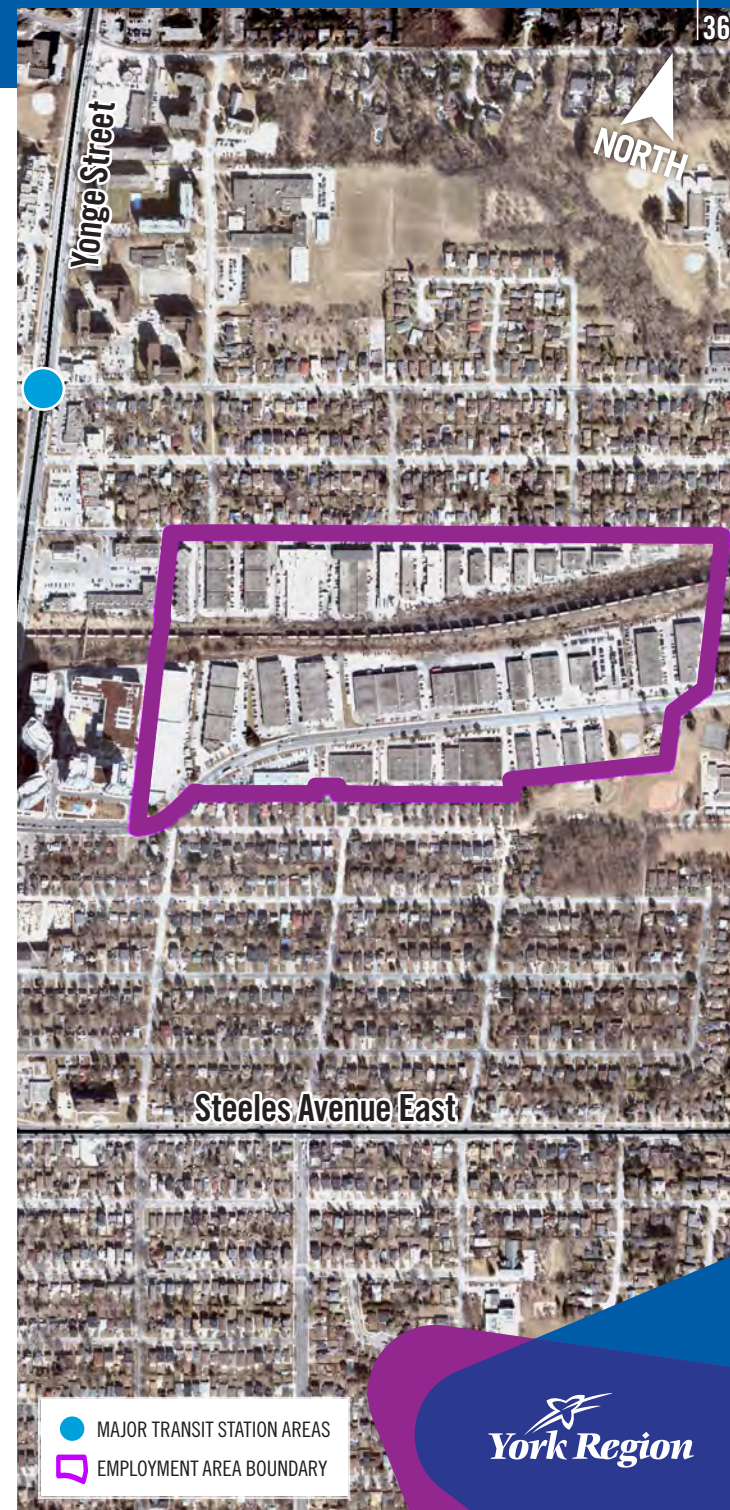
1,530 JOBS in 2018
6% INCREASE (80 JOBS) SINCE 2008

76% SERVICES PRODUCING **24%** GOODS PRODUCING
74% ONSITE **26%** OFFSITE
35% RETAIL and PERSONAL SERVICES

22 TOTAL HECTARES 2017



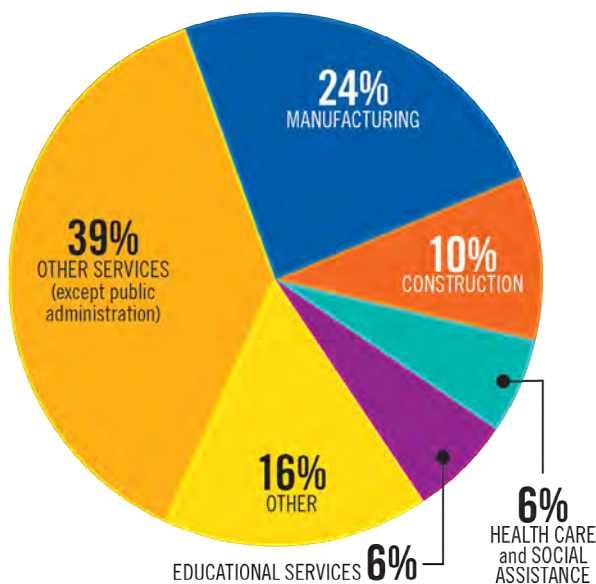
EXISTING EMPLOYMENT AREA
DENSITY 86 JOBS per HECTARE



THORNLEA CITY of MARKHAM

- ▶ The Thornlea employment area is situated in the community of Thornhill
- ▶ This area is comprised of a mix of multi-unit buildings that provide light industrial uses and services to businesses and residents
- ▶ The other services and manufacturing sectors account for the largest shares of employment in this area. These businesses are primarily in automotive repair and light manufacturing including millwork and food production
- ▶ Despite an overall decline in employment due to job losses in the manufacturing sector in the past ten years, growth in the other services sector was able to recover the majority of jobs lost

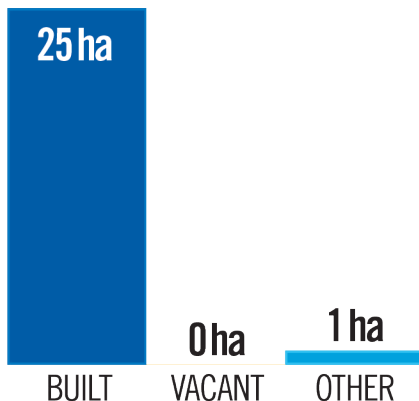
DISTRIBUTION of EMPLOYMENT by SECTOR 2018



1,020 JOBS in 2018
6% DECREASE (-60 JOBS) SINCE 2008

66% SERVICES PRODUCING **34% GOODS PRODUCING**
88% ONSITE **12% OFFSITE**
43% RETAIL and PERSONAL SERVICES

26 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA
DENSITY 41 JOBS per HECTARE

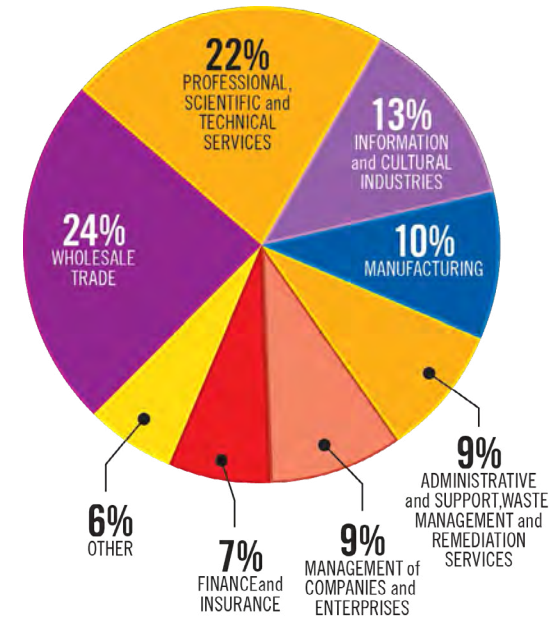
1 SITE [1.0 ha] TOTAL AREA
 with **INTENSIFICATION POTENTIAL**



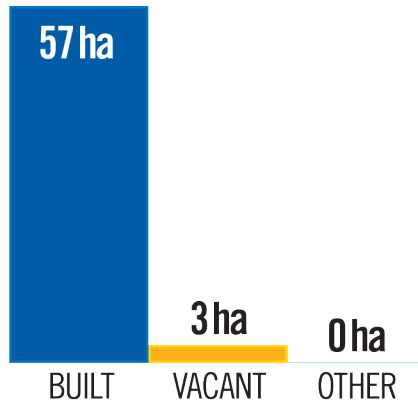
TOWN CENTRE CITY of MARKHAM

- ▶ The Town Centre employment area is located within Markham Centre and is strategically located along the Highway 7 rapid transit corridor and is adjacent to Highway 407
- ▶ The area is primarily comprised of major office and office/industrial developments and is home to some of the Region's large employers including Hydro One, Jonas Software and Allergan Inc.
- ▶ Over the past ten years, a number of companies in the wholesale trade, information and cultural industries and the management of companies and enterprises sectors have located their operations here and significantly contributed to the City and Region's knowledge based clusters

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



60 TOTAL HECTARES 2017



7,040 JOBS in 2018
70% INCREASE (2,890 JOBS) SINCE 2008

89% SERVICES PRODUCING 11% GOODS PRODUCING

86% ONSITE 14% OFFSITE

14% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
4,250 JOBS 12 BUILDINGS

EXISTING EMPLOYMENT AREA
DENSITY 123 JOBS per HECTARE

3 SITES [2.0ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



CATHEDRAL (VACANT)

- The Cathedral employment area has a total area of 45 net Ha – 37 of which were vacant and available for future development as of 2017
- This employment area is strategically located along Highway 404, offering excellent visibility and access to the goods movement corridor



CORNELL (VACANT)

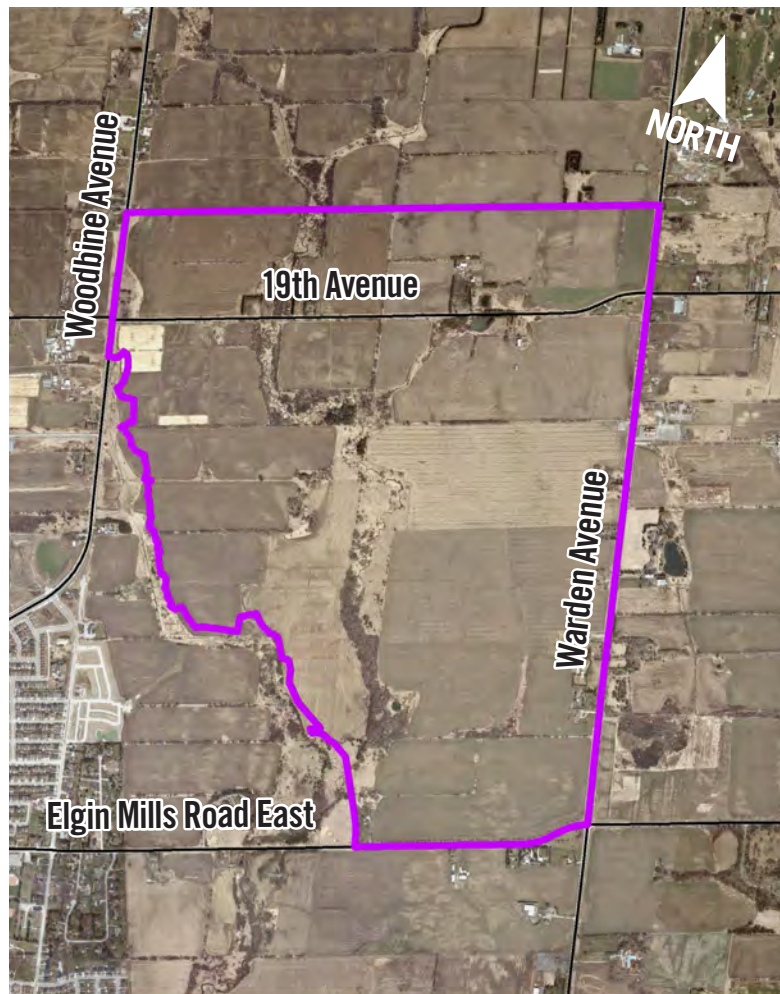
- The Cornell employment area has a total area of 52 net Ha – 37 of which were vacant in 2017
- Cornell is strategically located adjacent to Highway 407

LANGSTAFF (VACANT)

- The Langstaff employment area is located within the Richmond Hill/Langstaff Gateway Urban Growth Centre (UGC). The UGC is situated at the crossroads of numerous existing and planned transportation corridors and is anticipated to accommodate up to 32,000 people and 15,000 jobs
- The two hectares of employment land, which are currently home to approximately 50 jobs, are slated for future redevelopment in the gateway's master plan with employment uses being focused at the transit nodes and bordering Highway 407 granting greater access and exposure to prospective employers



40



ROPA 3 (VACANT)

- ROPA 3 was brought into the Region's urban boundary through the 2010 ROP as part of the 2031 Growth Plan conformity exercise
- There is a total of 248 ha in this employment area with 246 ha vacant in 2017
- The employment area is located in close proximity to Highway 404 and Elgin Mills Road East

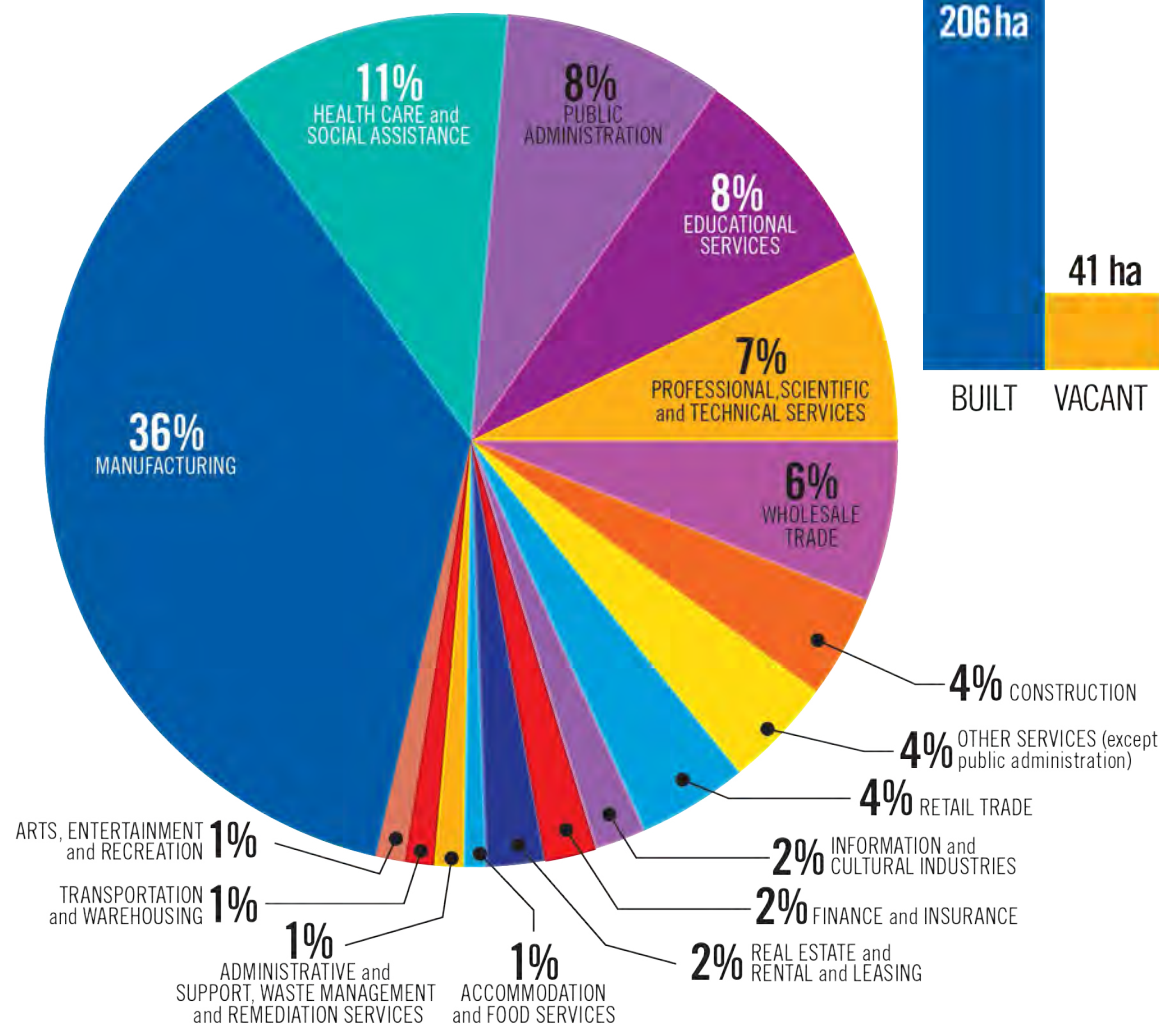
HIGHWAY 407 LESLIE SOUTHWEST (VACANT)

- 100 per cent of the employment in this employment area is in the Education services sector
- There is a total of 14Ha in the 407 Leslie Southwest employment area with 6 Ha vacant in 2017
- The employment area is located adjacent to Highway 407

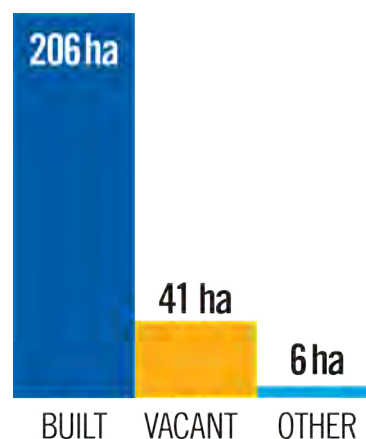


- ▶ The Town of Newmarket's employment areas account for 33 per cent of the Town's total surveyed employment and are well situated along highway 404
- ▶ Over the past ten years, job growth has been driven by the health care and social assistance, educational services and professional, scientific and technical services sectors
- ▶ Manufacturing accounts for over one third of employment area employment, with just over 5,000 jobs. Nearly 50 per cent of these jobs are in the automotive manufacturing subsector
- ▶ These areas are home to some of the Region's top employers including subsidiaries of Magna International

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



253 TOTAL HECTARES 2017



14,100 JOBS in 2018

12% INCREASE (1,510 JOBS) SINCE 2008

59% SERVICES PRODUCING

41% GOODS PRODUCING

90% ONSITE

10% OFFSITE

11% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
780 JOBS 4 BUILDINGS

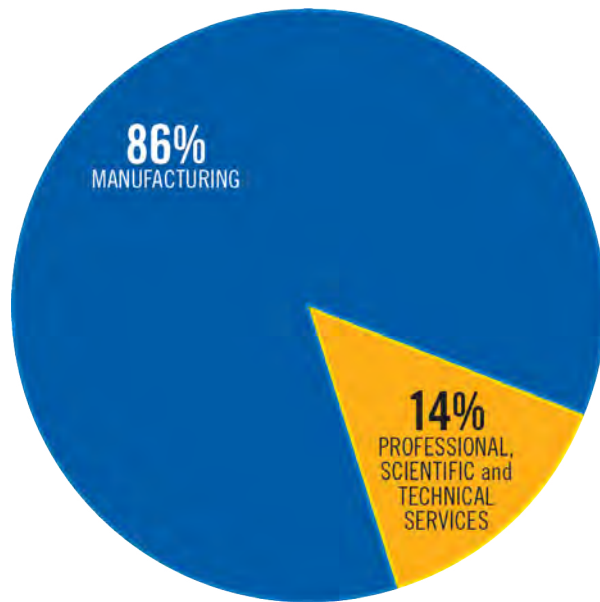
EXISTING EMPLOYMENT AREA DENSITY **67** JOBS per HECTARE

14 SITES [22 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

BAYVIEW SOUTH TOWN of NEWMARKET

- ▶ Located at the southeast corner of Mulock Drive and Bayview Avenue, the area is serviced by numerous YRT stops and is within close proximity to the Mulock Southeast employment area
- ▶ It is predominantly comprised of large scale industrial buildings which house top employers in the automotive manufacturing sector including Dortec industries and Cam-Slide manufacturing
- ▶ Job growth in this area has been driven by the manufacturing sector, adding 446 jobs since 2008

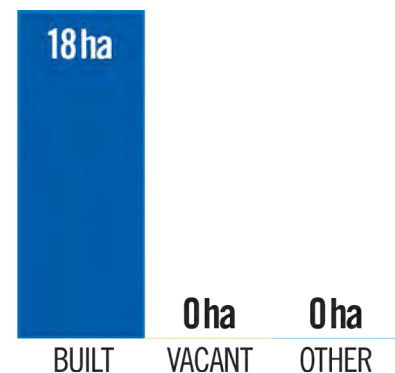
DISTRIBUTION of EMPLOYMENT by SECTOR 2018



1,760 JOBS in 2018
42% INCREASE (520 JOBS) SINCE 2008

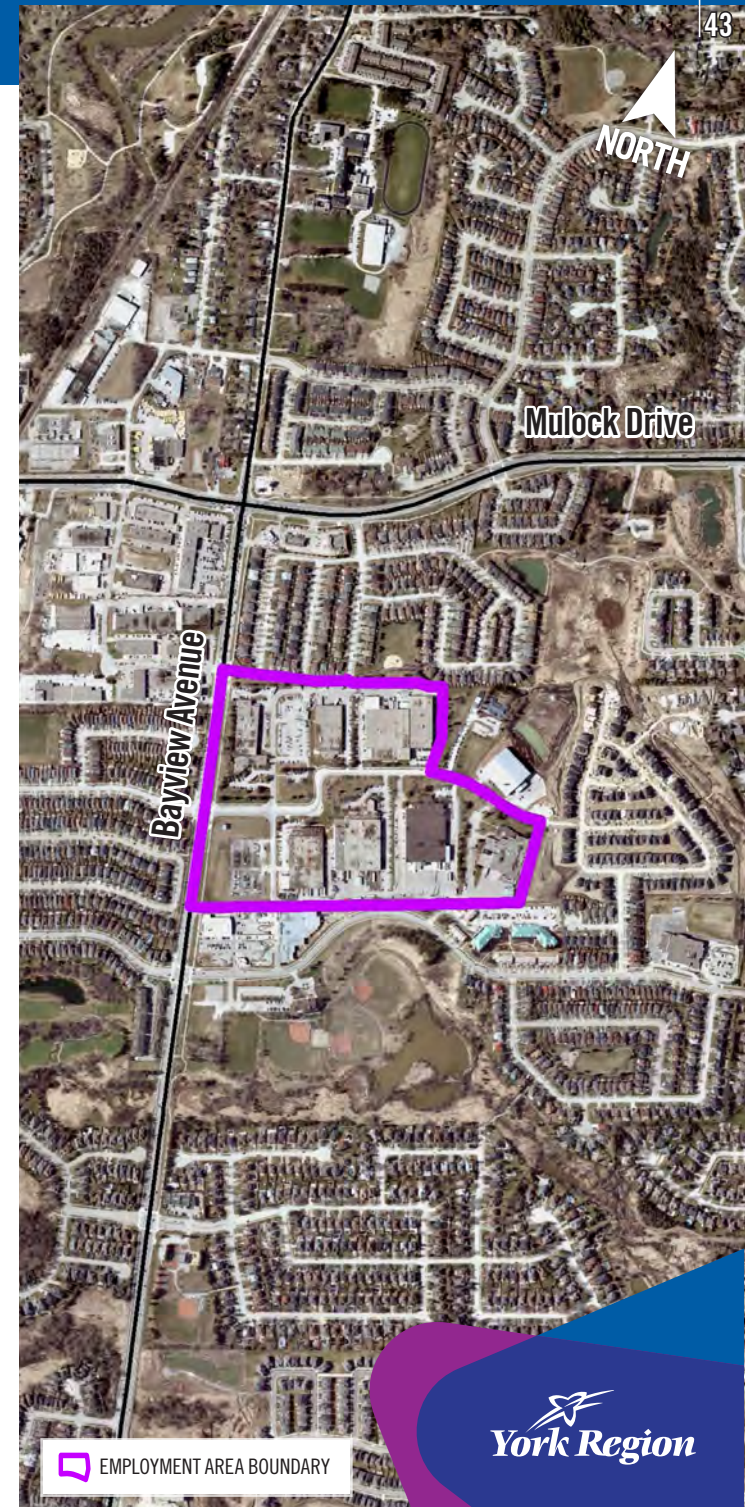
14% SERVICES PRODUCING 86% GOODS PRODUCING
96% ONSITE 4% OFFSITE
0% RETAIL and PERSONAL SERVICES

18 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY **93** JOBS per HECTARE

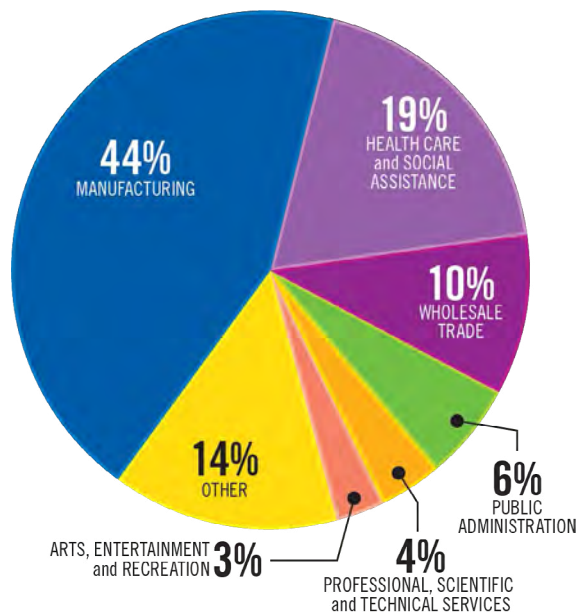
3 SITES [2.0ha TOTAL AREA]
with INTENSIFICATION POTENTIAL



LESLIE DAVIS TOWN of NEWMARKET

- ▶ Manufacturing is the predominant sector within Leslie Davis employment area, representing 44 per cent of all employment
- ▶ The health care and social assistance sector experienced the largest increase in employment since 2008, and represents the second largest share of employment in this area at 19 per cent
- ▶ The close proximity of the employment area to the Davis and 404 interchange makes this area attractive for goods movement, as 46 per cent of employment is within goods-producing sectors

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



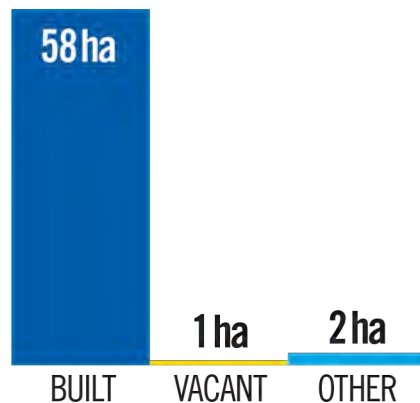
3,790 JOBS in 2018
11% INCREASE (380 JOBS) SINCE 2008

54% SERVICES PRODUCING **46% GOODS PRODUCING**

85% ONSITE **15% OFFSITE**

6% RETAIL and PERSONAL SERVICES

61 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY 65 JOBS per HECTARE

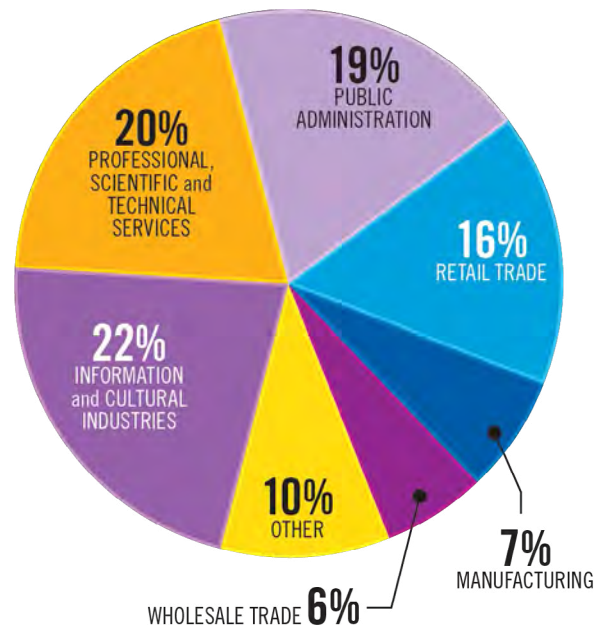
2 SITES [7.0ha TOTAL AREA]
 with **INTENSIFICATION POTENTIAL**



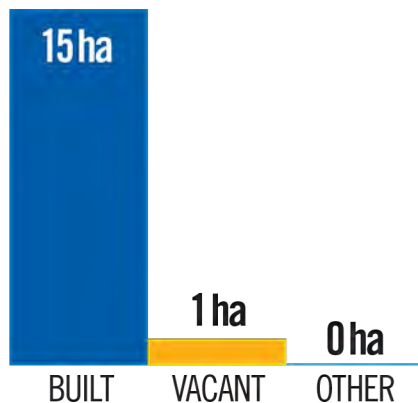
LESLIE MULOCK TOWN of NEWMARKET

- ▶ Located in the northwest quadrant of the highway 404 and Mulock drive interchange, this employment area offers excellent accessibility for goods movement activities
- ▶ While only 17 ha in size, between 2008-2018 employment grew by 615 jobs, representing the largest growth in that time period amongst all Newmarket employment areas
- ▶ The information and cultural industries and professional, scientific and technical services sectors accounted for over 50 per cent of job growth since 2008

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



16 TOTAL HECTARES 2017



800 JOBS in 2018

333% INCREASE (620 JOBS) SINCE 2008

90% SERVICES PRODUCING **10% GOODS PRODUCING**

94% ONSITE **6% OFFSITE**

40% RETAIL and PERSONAL SERVICES

EXISTING EMPLOYMENT AREA **DENSITY 50** JOBS per HECTARE

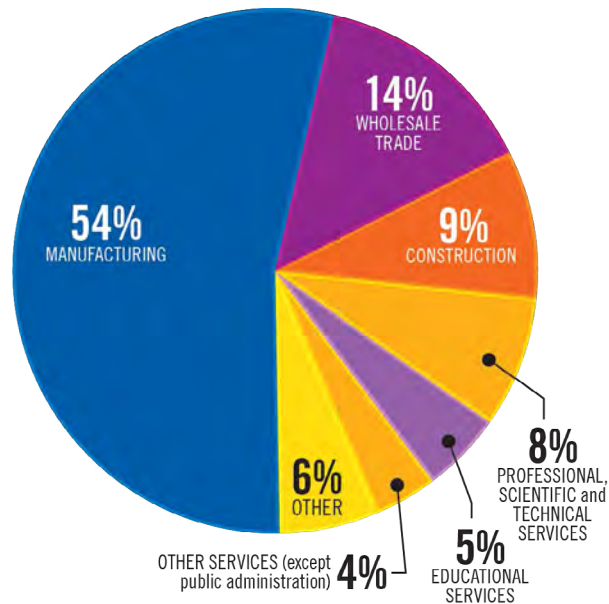
1 SITE [3.0ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



LESLIE NORTH TOWN of NEWMARKET

- ▶ The employment area is in proximity to the Green Lane and highway 404 interchange as well as the East Gwillimbury GO station
- ▶ It is made up of multi-unit industrial buildings with industrial and office uses primarily in the manufacturing and wholesale trade sectors
- ▶ Over the past ten years, the manufacturing sector has added 250 jobs to the areas employment base

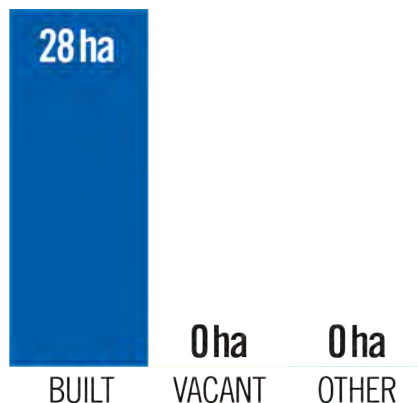
DISTRIBUTION of EMPLOYMENT by SECTOR 2018



1,610 JOBS in 2018
29% INCREASE (360 JOBS) SINCE 2008

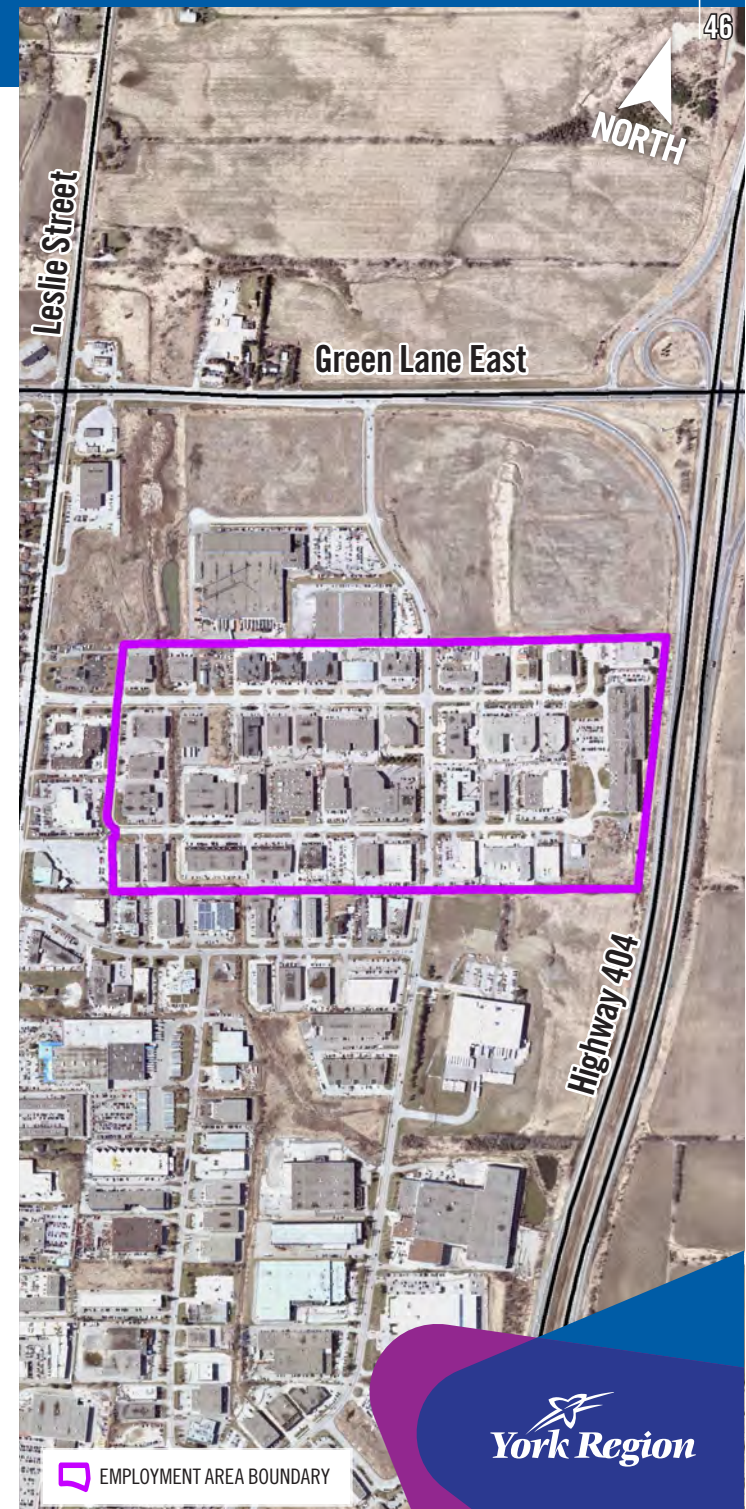
37% SERVICES PRODUCING **63%** GOODS PRODUCING
90% ONSITE **10%** OFFSITE
8% RETAIL and PERSONAL SERVICES

28 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY **56** JOBS per HECTARE

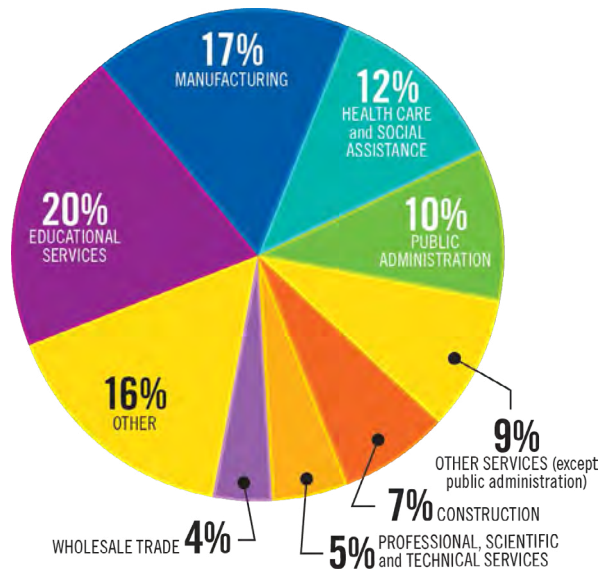
1 SITE [1.0 ha] TOTAL AREA
 with INTENSIFICATION POTENTIAL



LESLIE SOUTH TOWN of NEWMARKET

- ▶ This is the largest employment area within Newmarket with over 4,700 jobs (33 per cent of total employment in Newmarket)
- ▶ Its strategic location offers excellent accessibility and exposure to highway 404
- ▶ The area's economic composition has diversified over the past ten years. The job losses in the manufacturing sector over the past ten years have been offset by growth in the educational services and health care and social assistance sectors

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



4,700 JOBS in 2018

7% INCREASE (320 JOBS) SINCE 2008

77% SERVICES PRODUCING **23% GOODS PRODUCING**

90% ONSITE **10% OFFSITE**

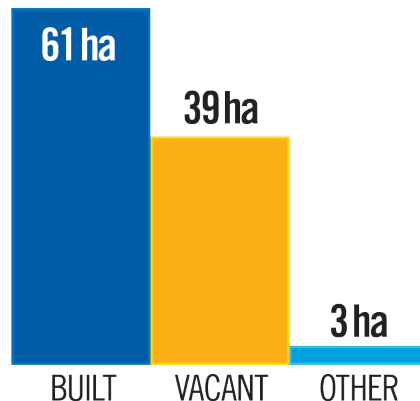
14% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
710 JOBS 3 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 76 JOBS per HECTARE

3 SITES [8.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

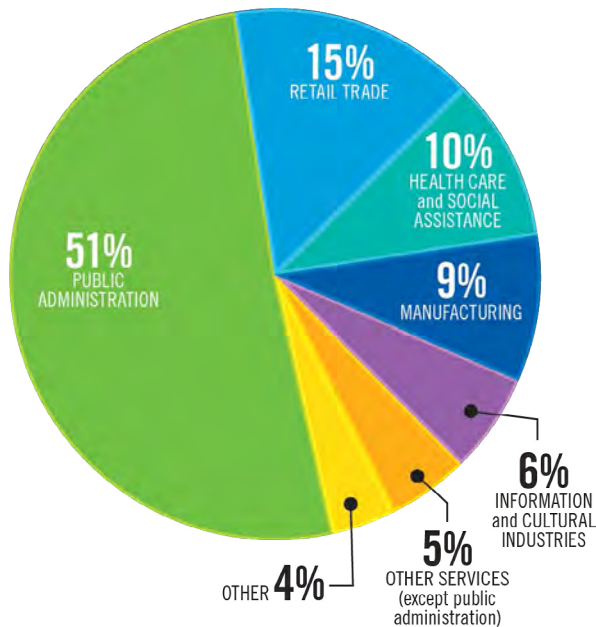
103 TOTAL HECTARES 2017



MULOCK NORTH TOWN of NEWMARKET

- ▶ This employment area has experienced a 29 per cent decrease in employment since 2008
- ▶ One in every two jobs in this employment area are in the public administration sector
- ▶ Located in the Northwest corner of Mulock and Bayview this area is serviced by York Region Transit and is located in proximity to the proposed Mulock GO station

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



590 JOBS in 2018

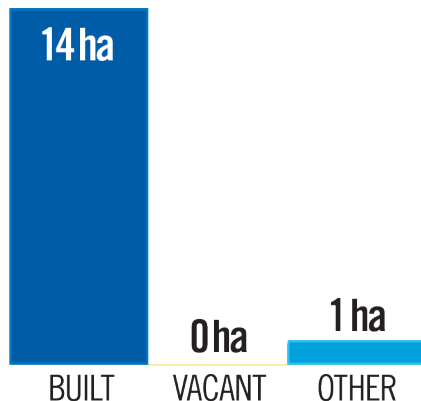
29% DECREASE (-240 JOBS) SINCE 2008

89% SERVICES PRODUCING **11%** GOODS PRODUCING

99% ONSITE **1%** OFFSITE

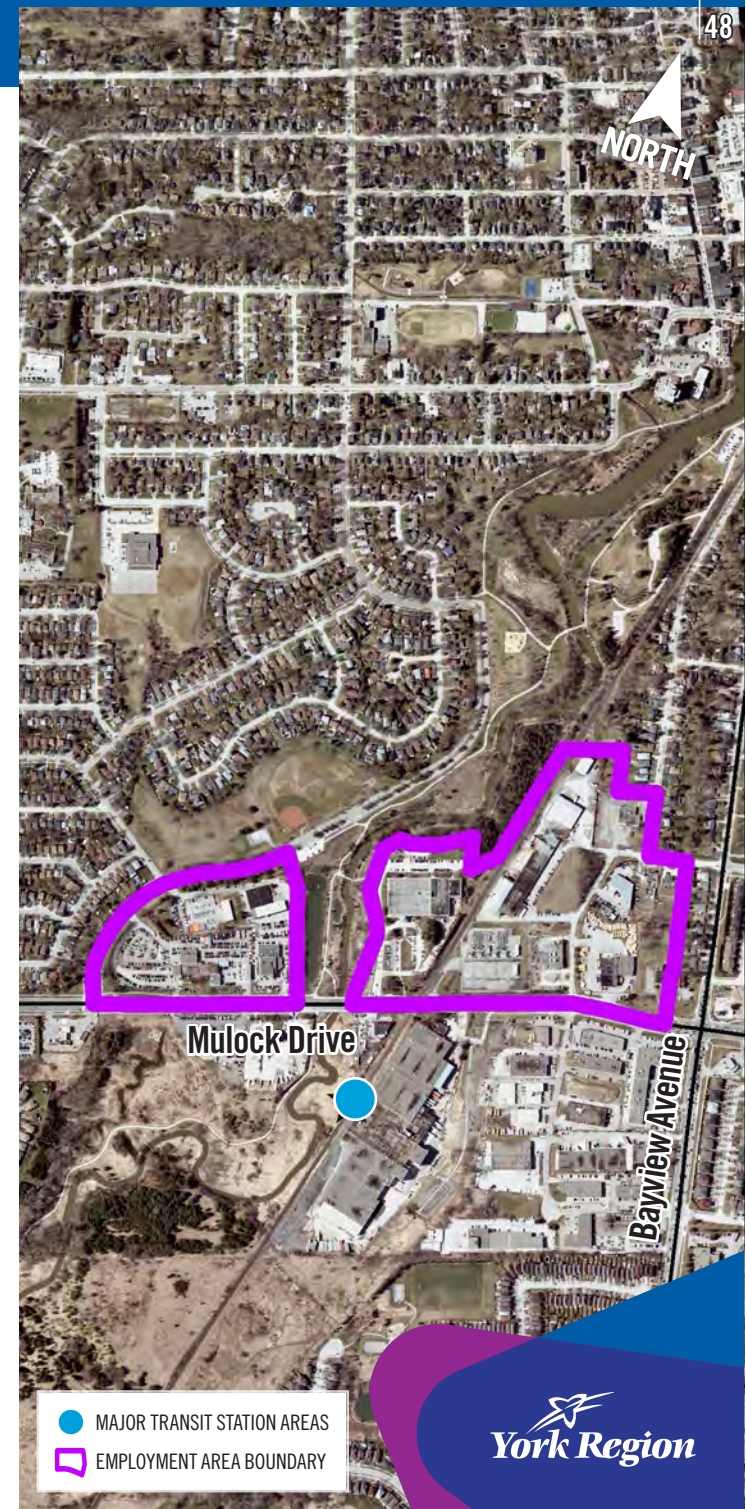
26% RETAIL and PERSONAL SERVICES

15 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY **42** JOBS per HECTARE

2 SITES [1.0ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



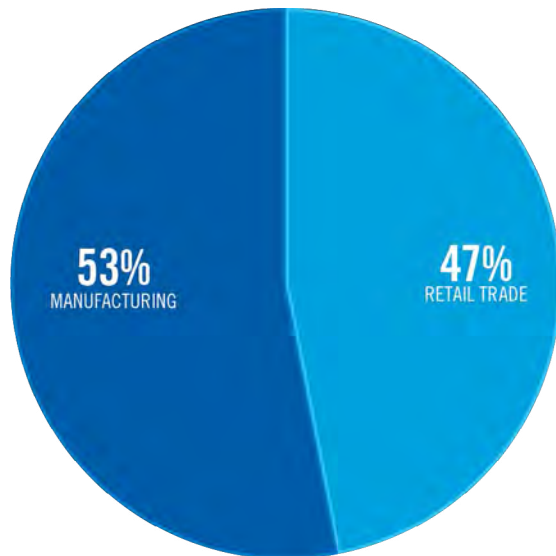
● MAJOR TRANSIT STATION AREAS
□ EMPLOYMENT AREA BOUNDARY

York Region

MULOCK SOUTH TOWN of NEWMARKET

- Mulock South is the smallest employment area within Newmarket in terms of land size at 0.3 Ha and total employment (30 jobs)
- The employment area is located directly next to Bailey Ecological Park, a protected area and is in close proximity to the proposed Mulock GO station

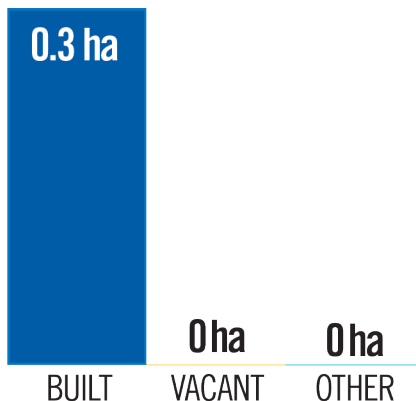
DISTRIBUTION of EMPLOYMENT by SECTOR 2018



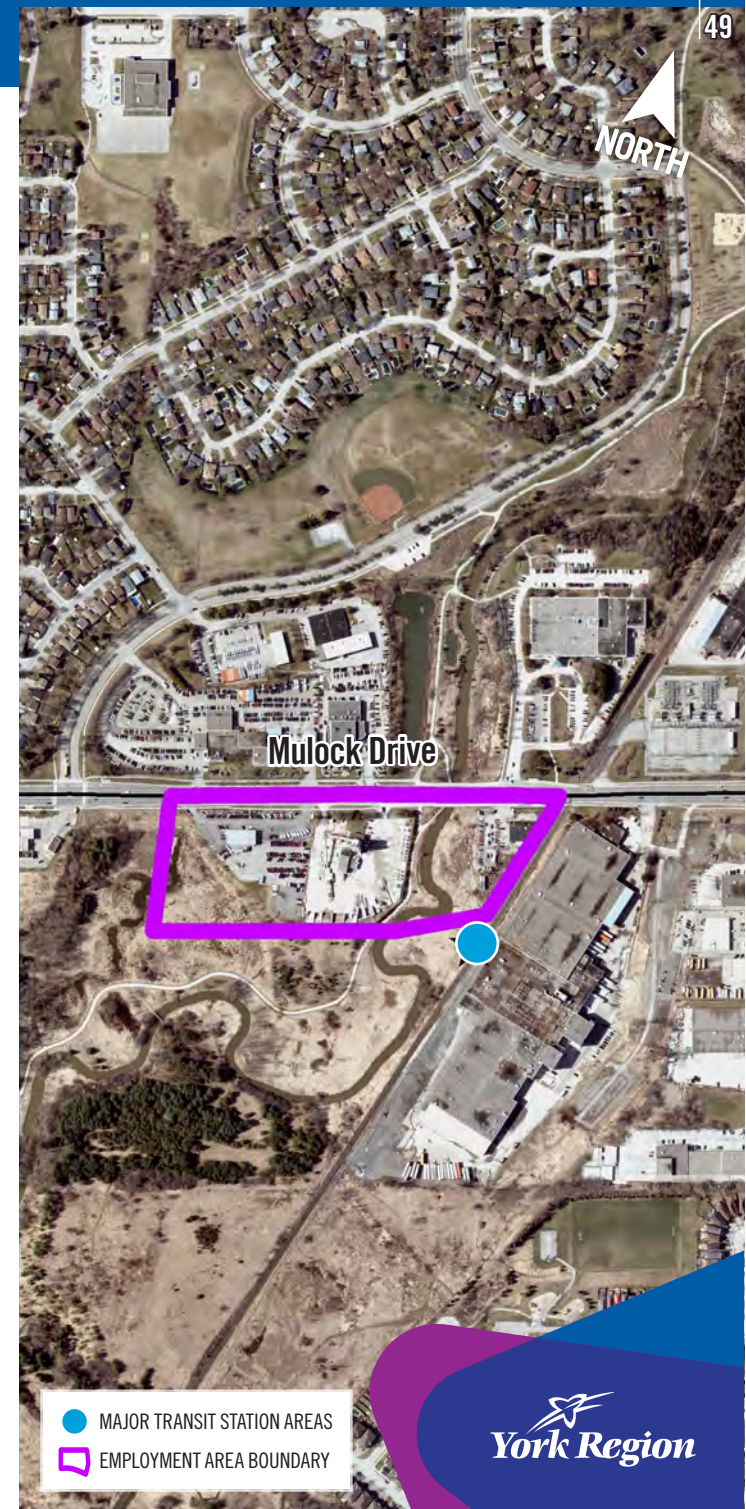
30 JOBS in 2018
53% INCREASE (10 JOBS) SINCE 2008

47% SERVICES PRODUCING 53% GOODS PRODUCING
67% ONSITE 33% OFFSITE
47% RETAIL and PERSONAL SERVICES

0.3 TOTAL HECTARES 2017



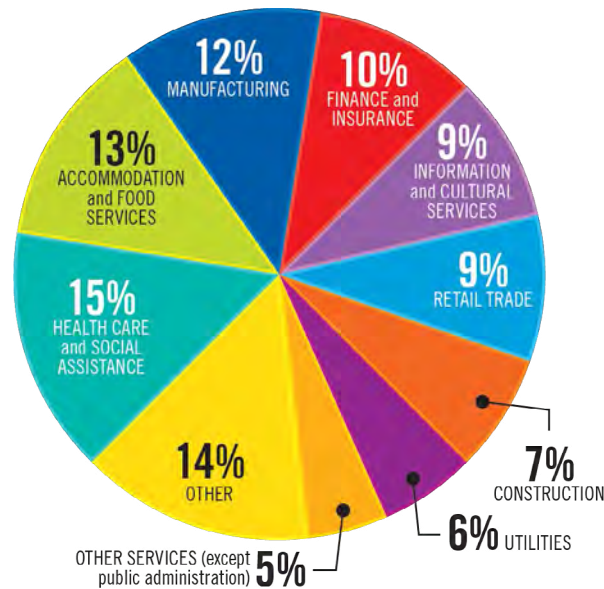
EXISTING EMPLOYMENT AREA
DENSITY 99 JOBS per HECTARE



MULOCK SOUTHEAST TOWN of NEWMARKET

- ▶ Located in the southwest corner of Mulock and Bayview, this area is located in proximity to the proposed Mulock GO station
- ▶ The majority of the job losses in the past ten years can be attributed to the manufacturing sector. Employment in service-producing sectors have experienced a small amount of job growth (+108 jobs), primarily in the finance and insurance, accommodation and food services and health care and social assistance sectors

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



820 JOBS in 2018

35% DECREASE (-450 JOBS) SINCE 2008

75% SERVICES PRODUCING **25%** GOODS PRODUCING

91% ONSITE **9%** OFFSITE

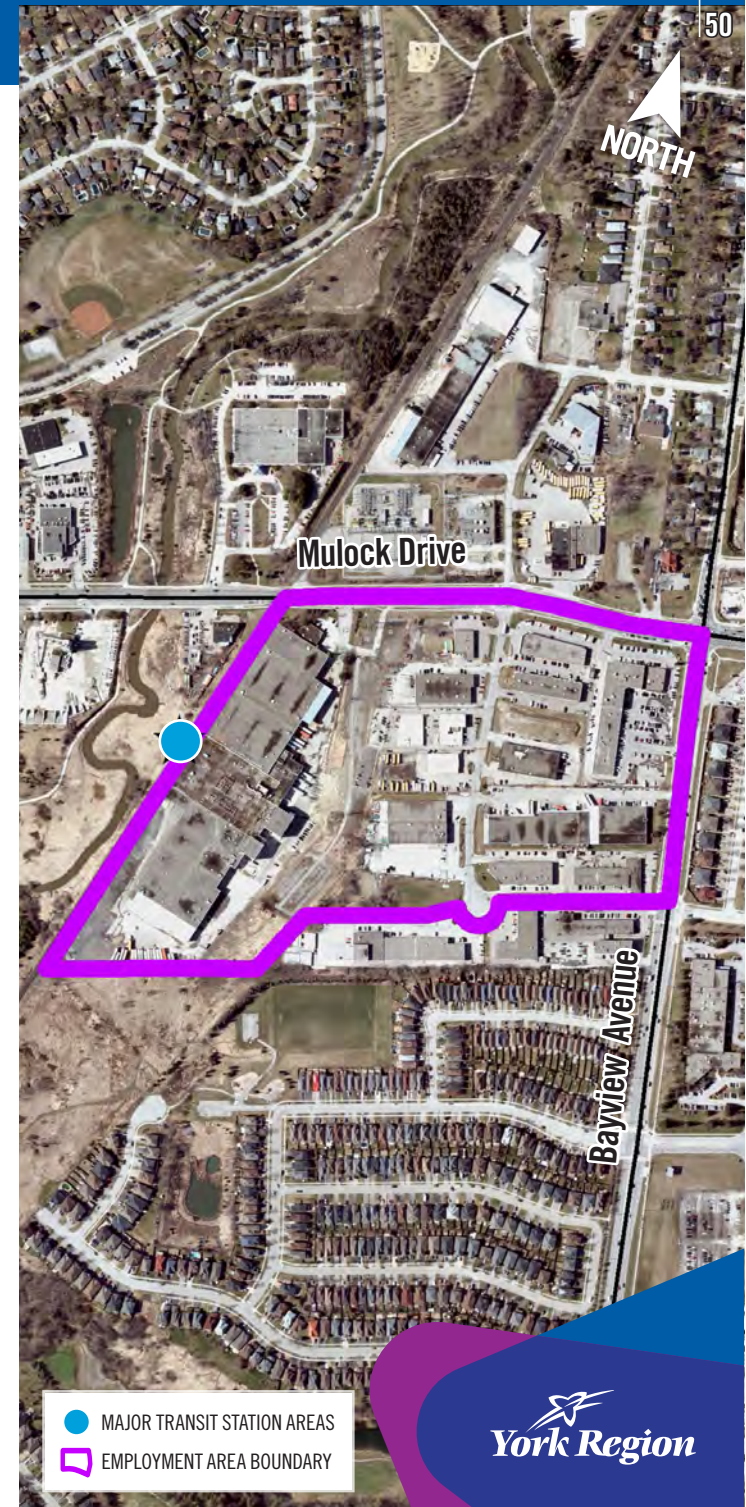
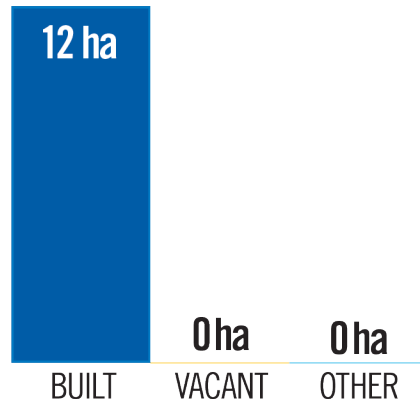
39% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
70 JOBS 1 BUILDING

EXISTING EMPLOYMENT AREA DENSITY 68 JOBS per HECTARE

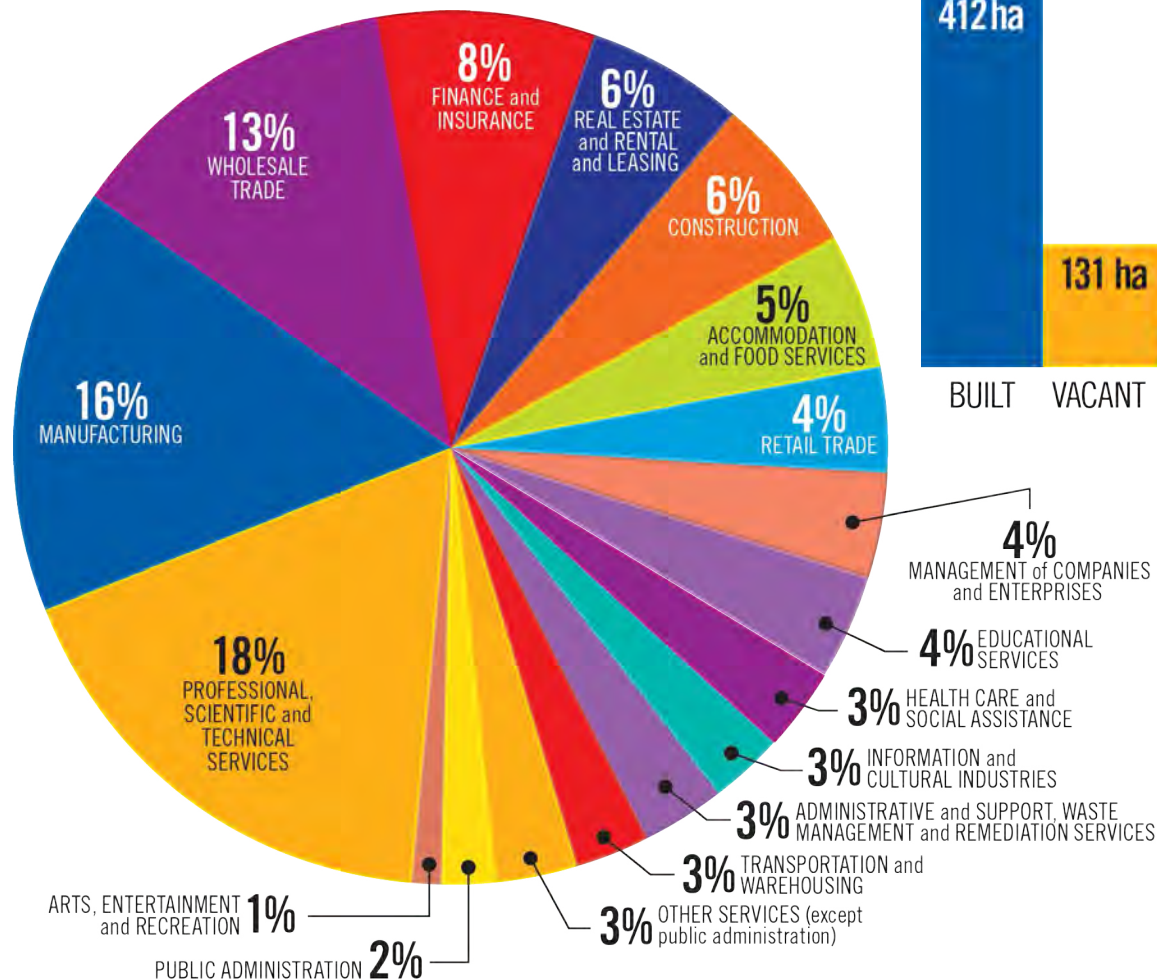
2 SITES [1.0ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

12 TOTAL HECTARES 2017

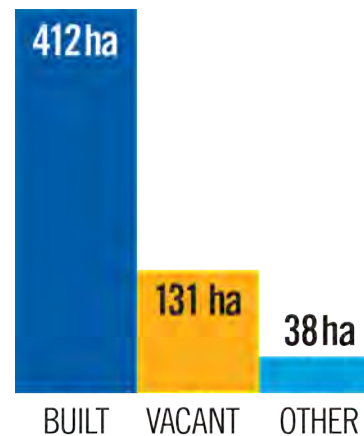


- ▶ Employment areas within Richmond Hill are located favorably along Regional Corridors and 400-series highways
- ▶ All employment areas have experienced job growth with the majority of growth occurring within services-producing sectors
- ▶ A total of four major employers are located in employment areas, totaling over 2,600 jobs
- ▶ Major office jobs account for 18 per cent total employment
- ▶ With 20 hectares of vacant employment lands, the employment areas within Richmond Hill have potential for future employment growth

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



581 TOTAL HECTARES 2017



38,290 JOBS in 2018

28% INCREASE (8,290 JOBS) SINCE 2008

78% SERVICES PRODUCING **22% GOODS PRODUCING**

81% ONSITE **19% OFFSITE**

15% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
8,020 JOBS 29 BUILDINGS

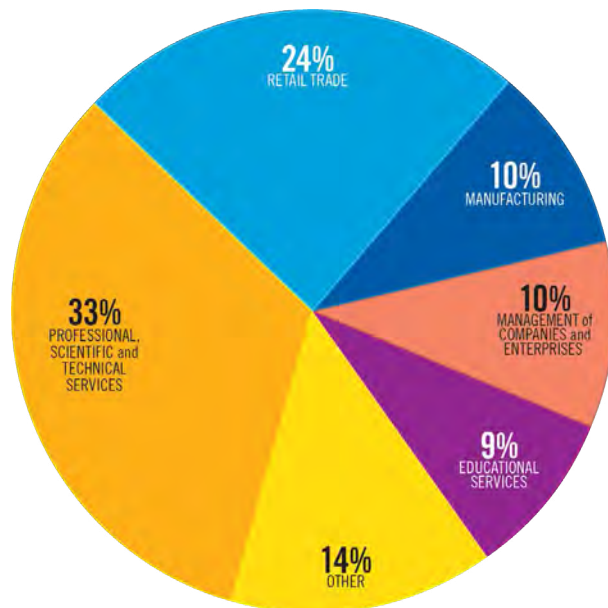
EXISTING EMPLOYMENT AREA DENSITY 93 JOBS per HECTARE

14 SITES [20 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

BARKER BUSINESS PARK CITY of RICHMOND HILL

- ▶ This employment area has experienced the highest growth in Richmond Hill over the last ten years, tripling its employment numbers since 2008, adding over 1,900 jobs
- ▶ It is home to one of the Region's major employers, Compugen, with over 500 employees
- ▶ Located along highway 404, it has easy access to both the Elgin Mills Road and Major Mackenzie Drive interchanges and is well-served by York Region Transit
- ▶ Employment in the services-producing sectors accounts for 89 per cent of the total employment, with a heavy presence in professional and scientific services (970 jobs) as well as retail (700 jobs)

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



106 TOTAL HECTARES 2017



2,920 JOBS in 2018

196% INCREASE (1,930 JOBS) SINCE 2008

89% SERVICES PRODUCING **11% GOODS PRODUCING**

95% ONSITE **5% OFFSITE**

28% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
450 JOBS 3 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 57 JOBS per HECTARE

2 SITES [12 ha TOTAL AREA]
with INTENSIFICATION POTENTIAL



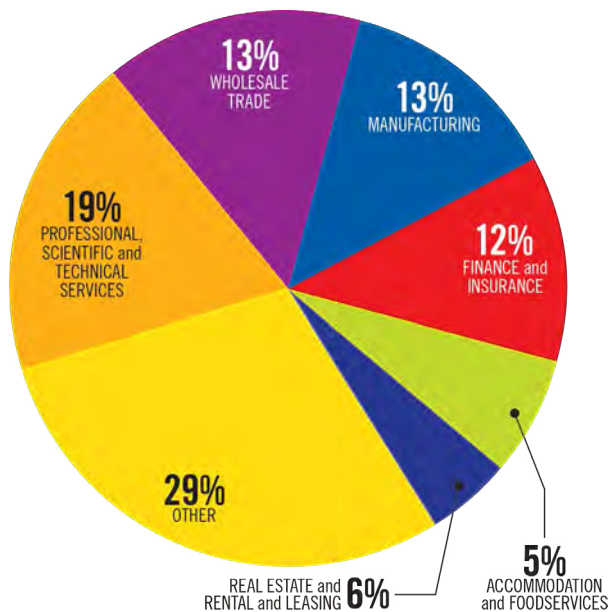
EMPLOYMENT AREA BOUNDARY

York Region

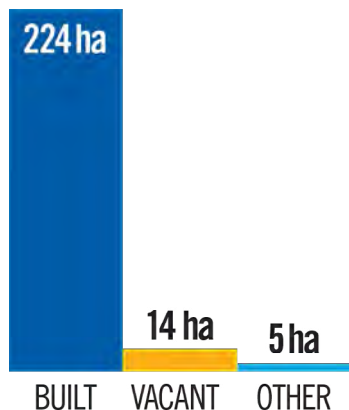
BEAVER CREEK CITY of RICHMOND HILL

- ▶ This is Richmond Hill's largest employment area in both land size (243 Ha) and employment with almost 25,000 jobs
- ▶ It has a desirable location along Highway 7, with access to Bus Rapid Transit, as well as easy access to both the 407 and 404 highways
- ▶ 22 major office buildings are in this area, making up most of the major office in Richmond Hill
- ▶ The services producing sectors are predominant here with a share of 81 per cent of total jobs. Professional, scientific services (19 per cent) and wholesale trade (15 per cent) hold the top shares of employment

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



243 TOTAL HECTARES 2017



24,970 JOBS in 2018

17% INCREASE (3,700 JOBS) SINCE 2008

81% SERVICES PRODUCING 19% GOODS PRODUCING

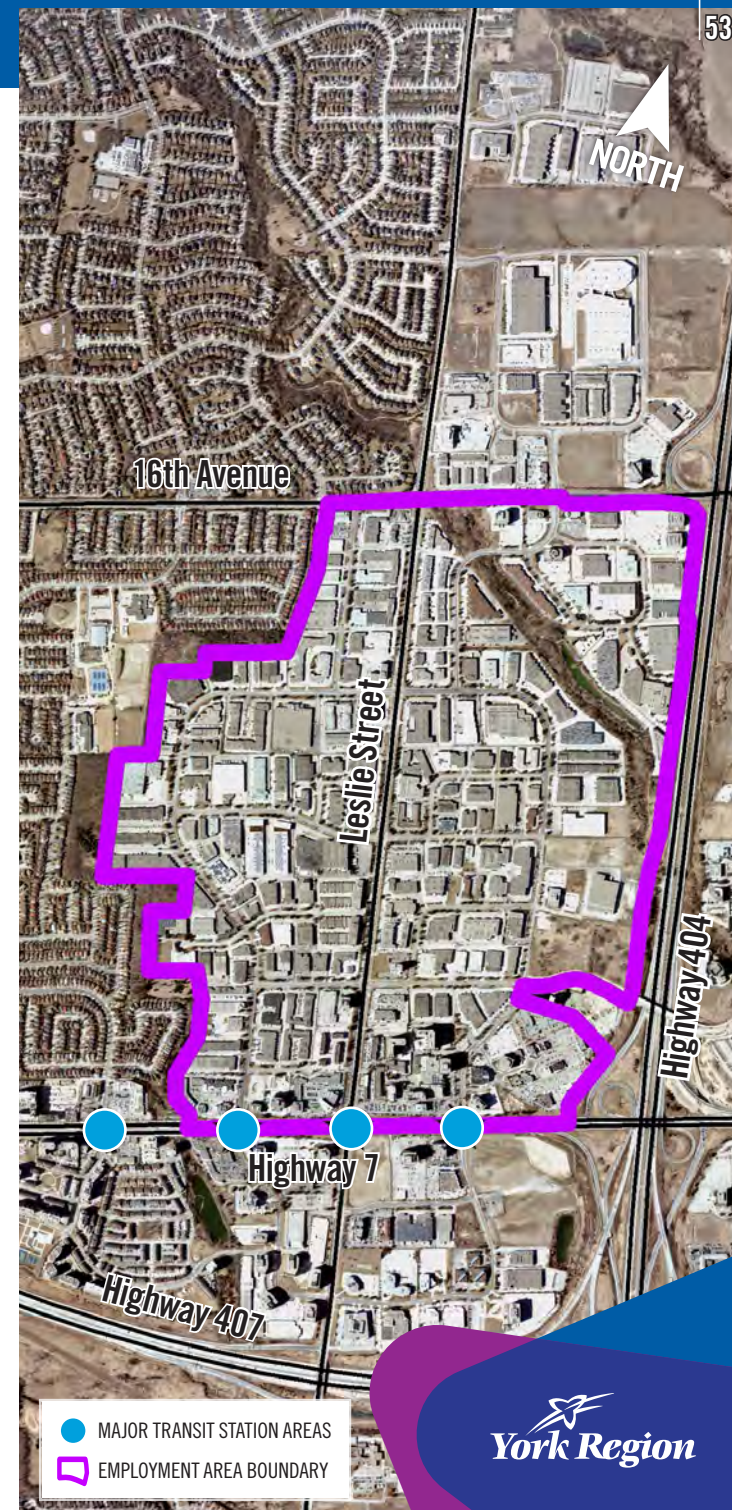
84% ONSITE 16% OFFSITE

15% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
6,510 JOBS 22 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY **111** JOBS per HECTARE

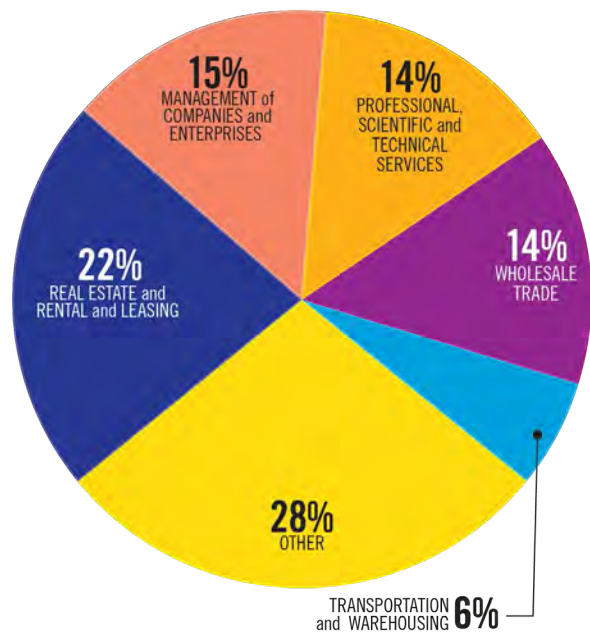
5 SITES [4.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



HEADFORD CITY of RICHMOND HILL

- ▶ This is Richmond Hill's second largest employment area in land size and has direct access to both the 16th Avenue/404 and Major Mackenzie Drive/404 interchanges
- ▶ It is home to many large employers including the Staples head office
- ▶ Job growth in this area has doubled since 2008, adding over 2,400 jobs in ten years

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



4,920 JOBS in 2018

99% INCREASE (2,450 JOBS) SINCE 2008

94% SERVICES PRODUCING **6% GOODS PRODUCING**

69% ONSITE **31% OFFSITE**

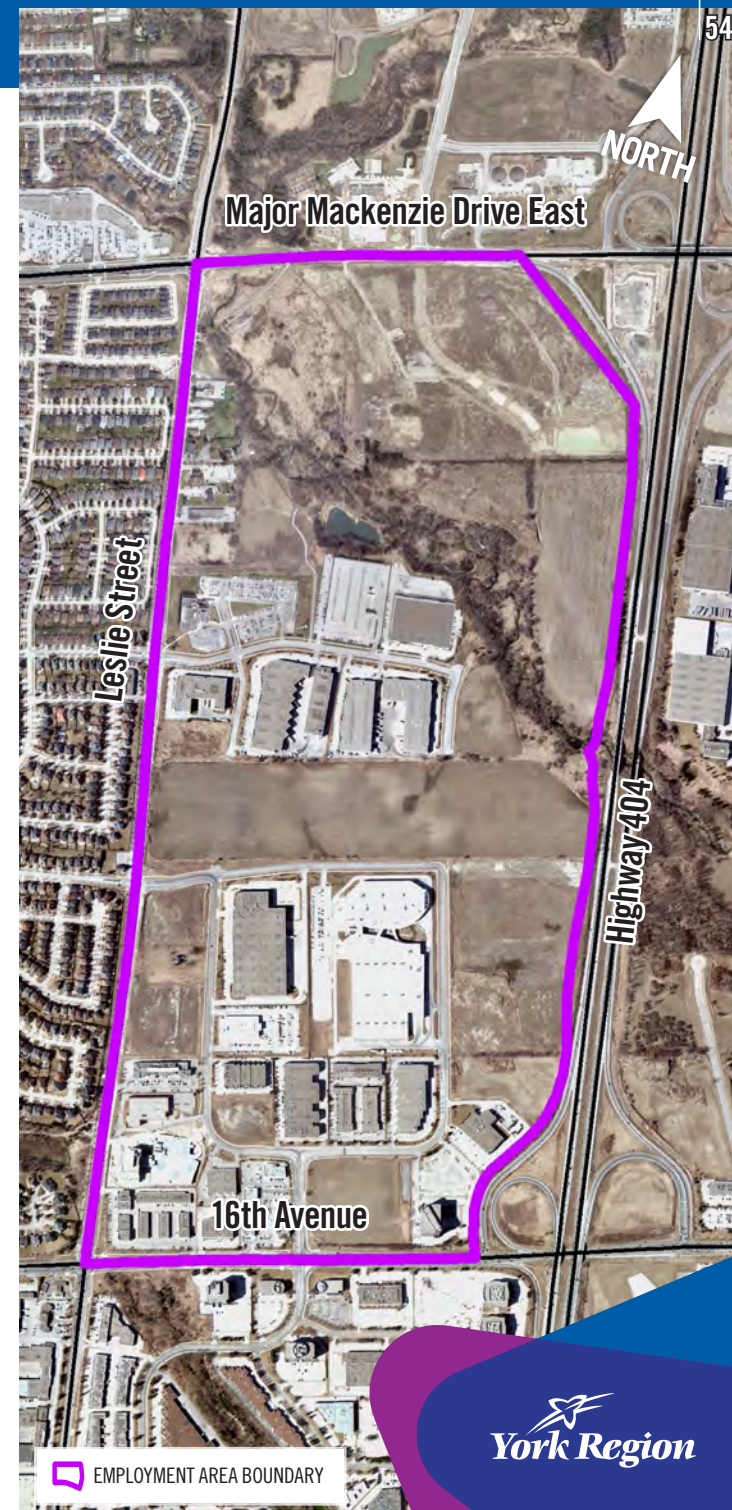
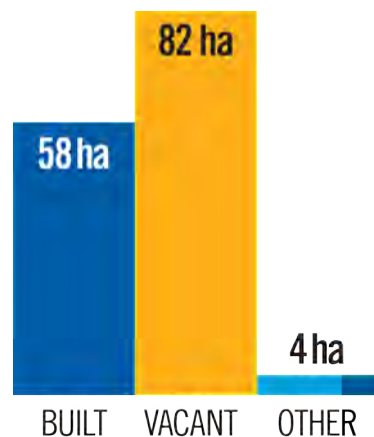
10% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
1,060 JOBS 4 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 84 JOBS per HECTARE

1 SITE [1.0 ha] TOTAL AREA
with **INTENSIFICATION POTENTIAL**

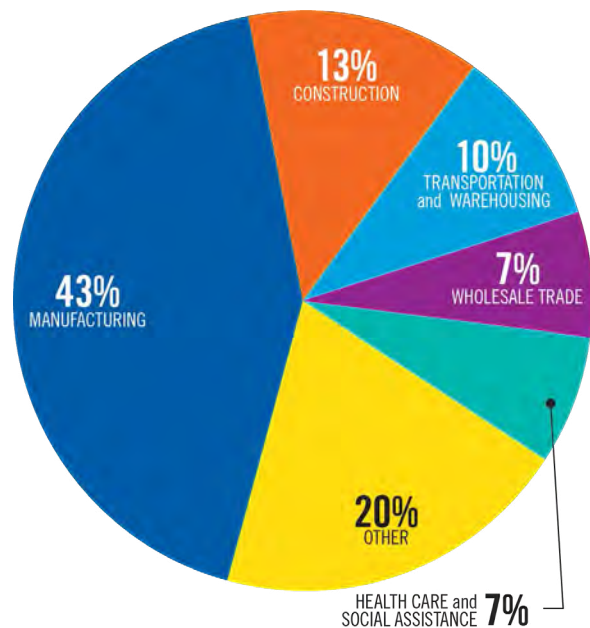
144 TOTAL HECTARES 2017



NEWKIRK CITY of RICHMOND HILL

- ▶ The employment area is located along Yonge Street, a Regional Corridor, and is bisected by Elgin Mills Road to the North
- ▶ It is serviced by multiple public transit operators including York Region Transit, Viva and the Richmond Hill GO station and is surrounded by predominantly low-density residential
- ▶ The manufacturing sector holds the largest share of total employment with 43 per cent (2,350 jobs). Contributing to this is one of the Region's major employers, Apotex, with over 500 jobs

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



5,490 JOBS in 2018

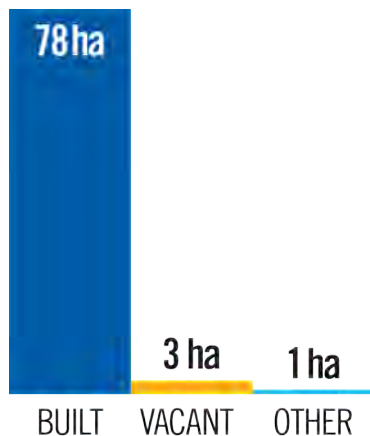
4% INCREASE (210 JOBS) SINCE 2008

45% SERVICES PRODUCING **55% GOODS PRODUCING**

73% ONSITE **27% OFFSITE**

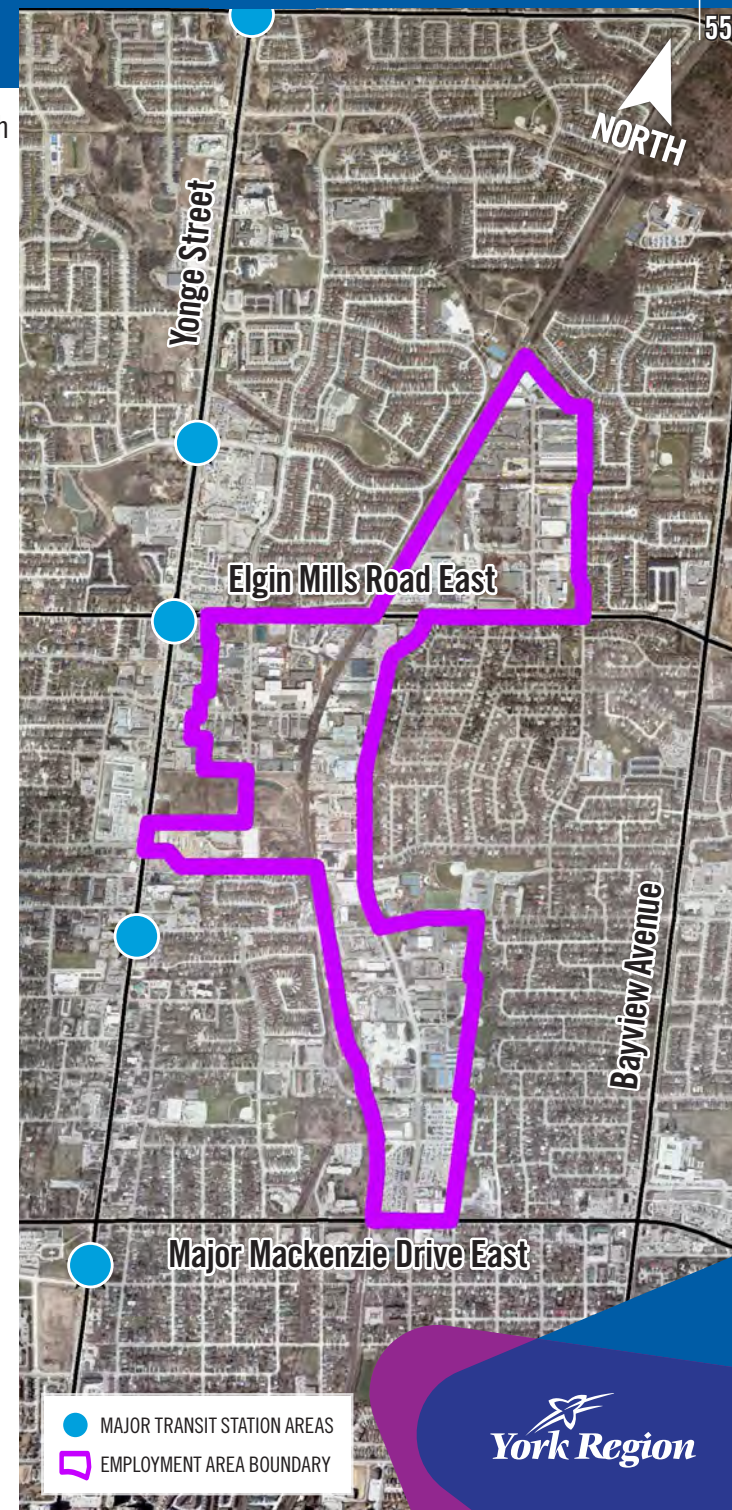
12% RETAIL and PERSONAL SERVICES

82 TOTAL HECTARES 2017



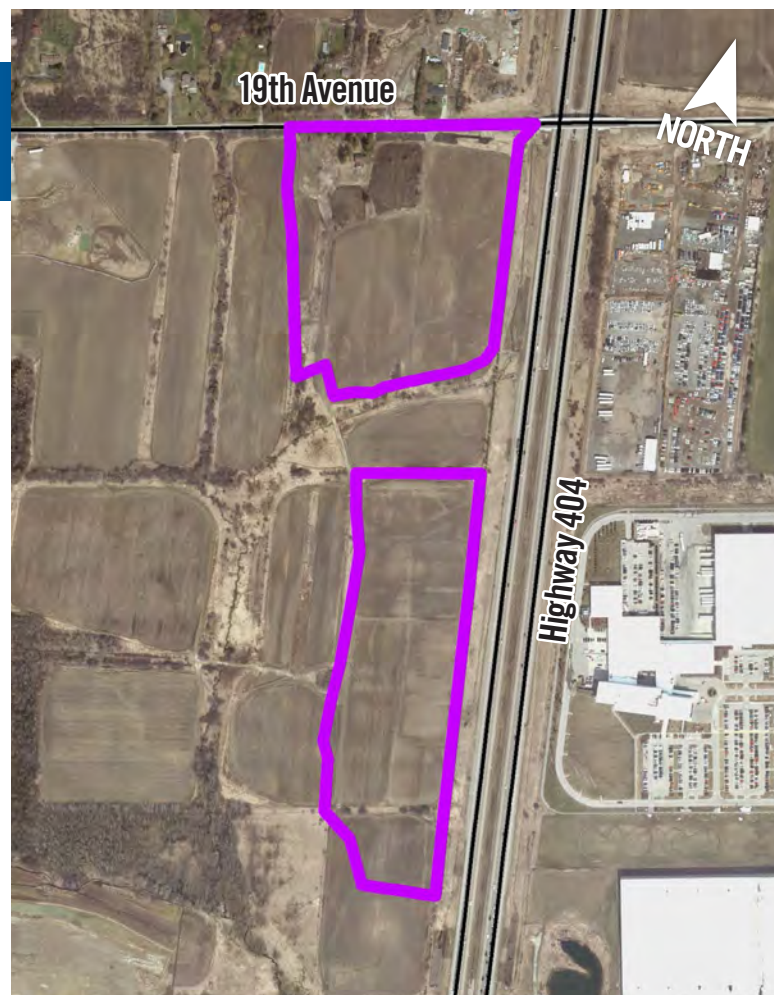
EXISTING EMPLOYMENT AREA DENSITY 70 JOBS per HECTARE

6 SITES [3.0 ha] TOTAL AREA
with **INTENSIFICATION POTENTIAL**



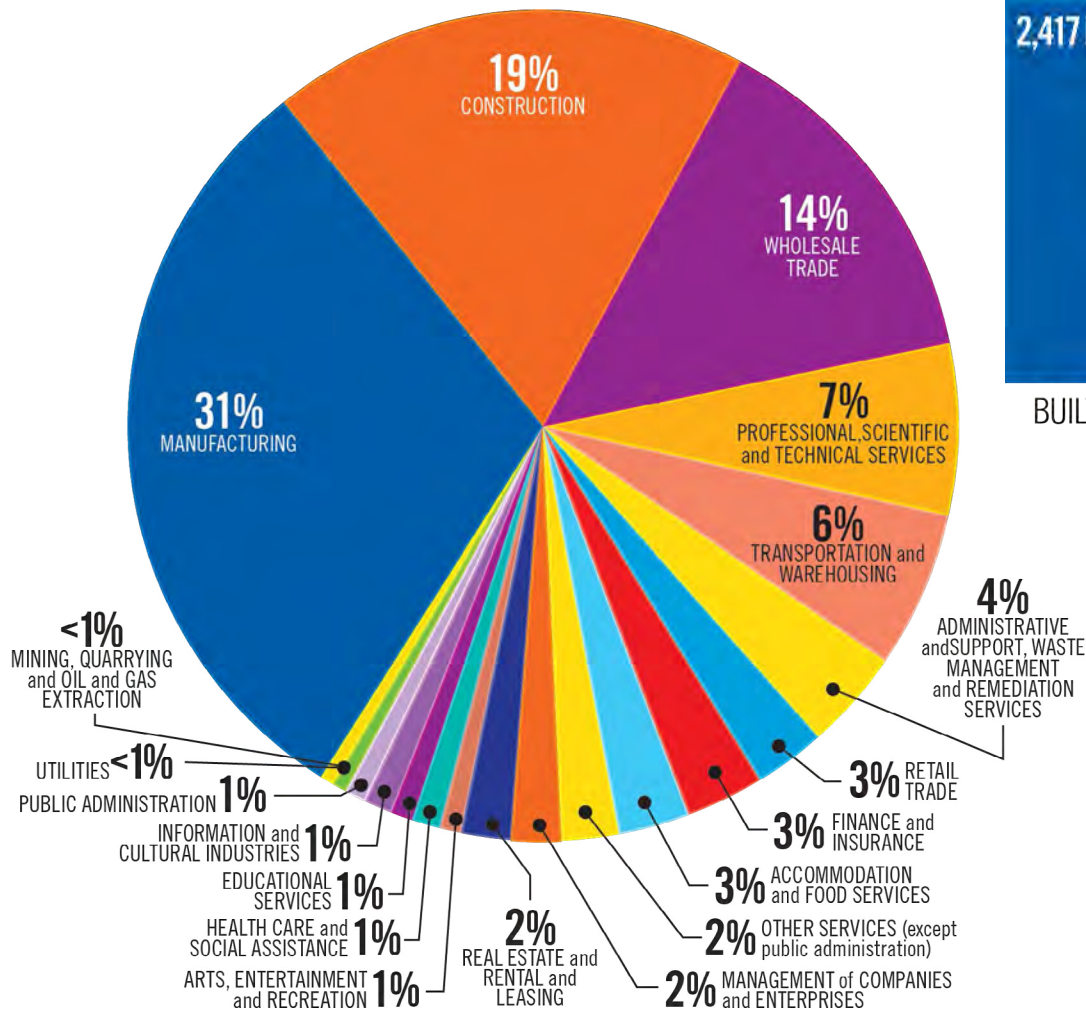
NORTH LESLIE (VACANT)

- Part of the North Leslie secondary plan, this employment area is located adjacent to Highway 404 and includes six hectares of vacant land

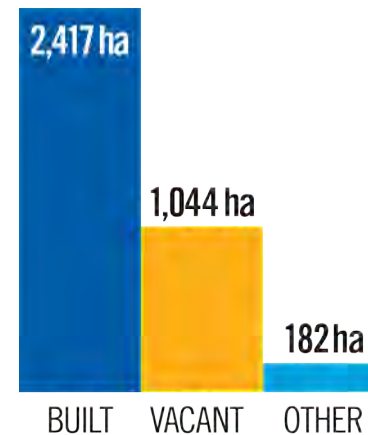


- ▶ The City of Vaughan's 3,643 ha of employment areas account for 66 per cent of the City's total surveyed employment
- ▶ Employment areas in the City are well situated with access and exposure to transportation corridors and gateways including two national rail networks, the TTC subway, 400-series highways, GO train and bus rapid transit service
- ▶ The construction, wholesale trade and professional, scientific and technical services sectors accounted for 55 per cent of job growth over the past ten years
- ▶ Vaughan's employment areas are home to many top employers including UPS Canada Ltd, Bondfield Construction and subsidiaries of Magna International

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



3,643 TOTAL HECTARES 2017



146,590 JOBS in 2018

34% INCREASE (37,270 JOBS) SINCE 2008

50% SERVICES PRODUCING

50% GOODS PRODUCING

78% ONSITE

22% OFFSITE



10% RETAIL and PERSONAL SERVICES



MAJOR OFFICE
12,370 JOBS 52 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 61 JOBS per HECTARE



62 SITES [135 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

BEECHWOOD CITY of VAUGHAN

- ▶ The Beechwood employment area is located at the southeast corner of Highway 407 and Jane Street and is in close proximity to other employment lands in the Concord community
- ▶ It is bounded by undevelopable lands including the Parkway Belt West utility corridor to the south, the rail corridor to the east, the Beechwood cemetery to the northwest
- ▶ Over the past ten years, jobs in this employment area have transitioned from the manufacturing and construction sectors to the wholesale trade sector

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



340 JOBS in 2018

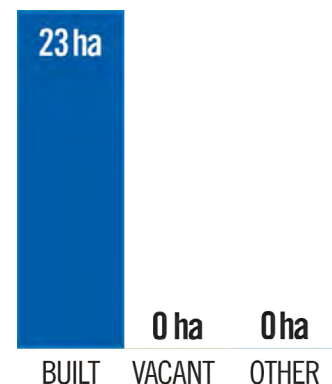
128% INCREASE (190 JOBS) SINCE 2008

100% SERVICES PRODUCING **0% GOODS PRODUCING**

100% ONSITE **0% OFFSITE**

 **0% RETAIL and PERSONAL SERVICES**

23 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY 15 JOBS per HECTARE

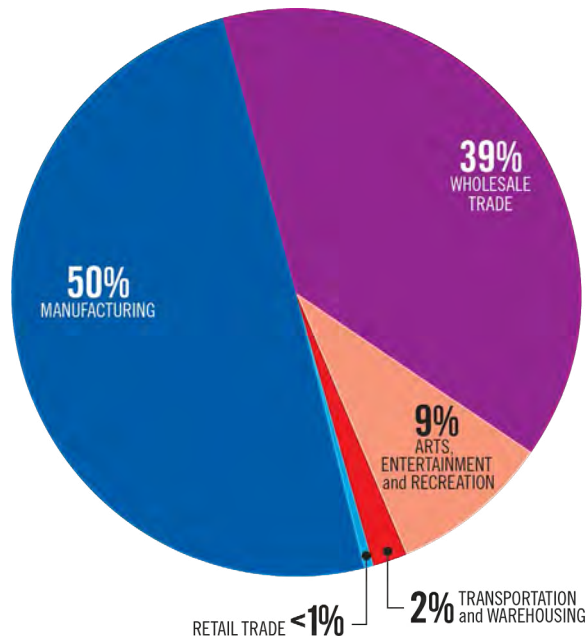
 **1 SITE** [8.0 ha] TOTAL AREA
with **INTENSIFICATION POTENTIAL**



EMERY CREEK CITY of VAUGHAN

- ▶ The Emery Creek employment area is strategically located at the southwest corner of the highway 400 and 407 interchange
- ▶ It is comprised of primarily large scale industrial buildings with some retail ancillary uses which house large employers including Alfield Industries, Mytox Manufacturing and Grand & Toy Ltd.
- ▶ The wholesale trade sector has been the biggest contributor to employment growth over the past ten years, and combined with the manufacturing sector, both account for over 80 per cent of employment in this area

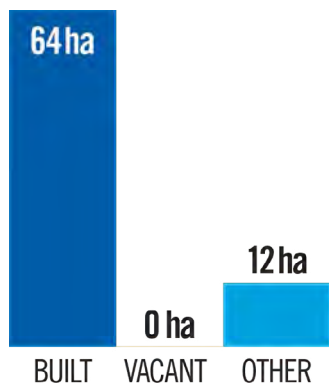
DISTRIBUTION of EMPLOYMENT by SECTOR 2018



3,160 JOBS in 2018
6% INCREASE (180 JOBS) SINCE 2008

50% SERVICES PRODUCING **50% GOODS PRODUCING**
96% ONSITE **4% OFFSITE**
10% RETAIL and PERSONAL SERVICES

76 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY 50 JOBS per HECTARE

0 SITES [2.0 ha TOTAL AREA]
 with **INTENSIFICATION POTENTIAL**



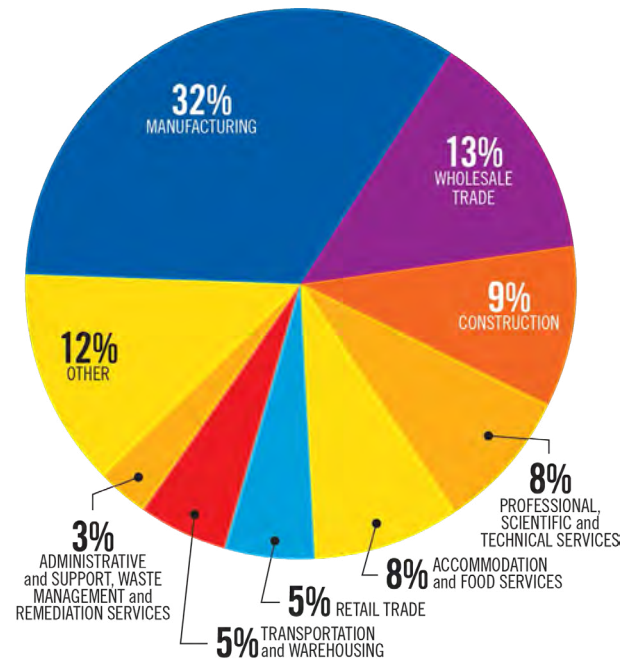
EMPLOYMENT AREA BOUNDARY

York Region

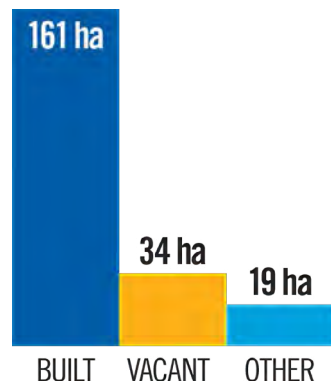
HIGHWAY 427 EAST CITY of VAUGHAN

- ▶ Since 2008, employment has more than doubled, giving it the largest share of employment area growth in Vaughan
- ▶ Over 300 businesses have moved to this area since 2008, having attracted top employers such as Saputo Dairy Products Canada, Adidas Canada Ltd and Vision Extrusions
- ▶ Despite having experienced job growth, the manufacturing sector's share of employment has declined from 70 per cent in 2008 to 32 per cent in 2018. This is due to significant growth in all sectors which has diversified the area's economic base

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



214 TOTAL HECTARES 2017



9,610 JOBS in 2018

143% INCREASE (5,660 JOBS) SINCE 2008

59% SERVICES PRODUCING **41% GOODS PRODUCING**

86% ONSITE **14% OFFSITE**

18% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
510 JOBS 4 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 60 JOBS per HECTARE

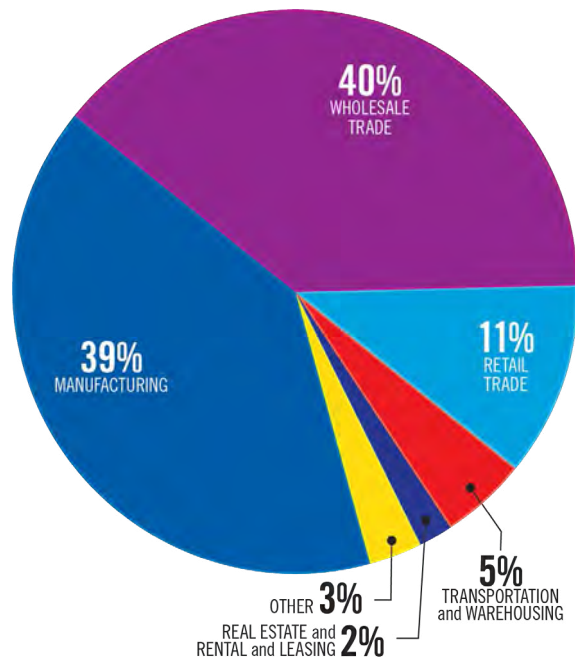
9 SITES [14 ha TOTAL AREA]
with **INTENSIFICATION POTENTIAL**



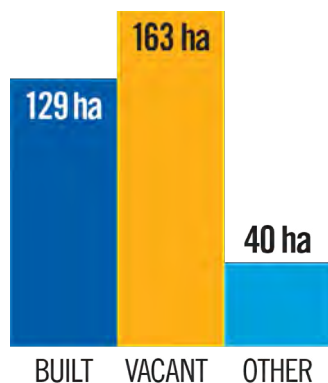
HIGHWAY 427 WEST CITY of VAUGHAN

- It is the second largest employment area in Vaughan in terms of land area and its prime location in the Vaughan Enterprise Zone offers excellent access to the Highway 427 and 407 goods movement corridors and the CP Intermodal facility
- It is home to many land extensive uses, primarily in the manufacturing and wholesale trade sectors
- The significant job growth over the past ten years has attracted many top employers including the Sobeys Vaughan Support Center, Sunview Patio Doors and Anatolia Tile and Stone Inc.

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



332 TOTAL HECTARES 2017

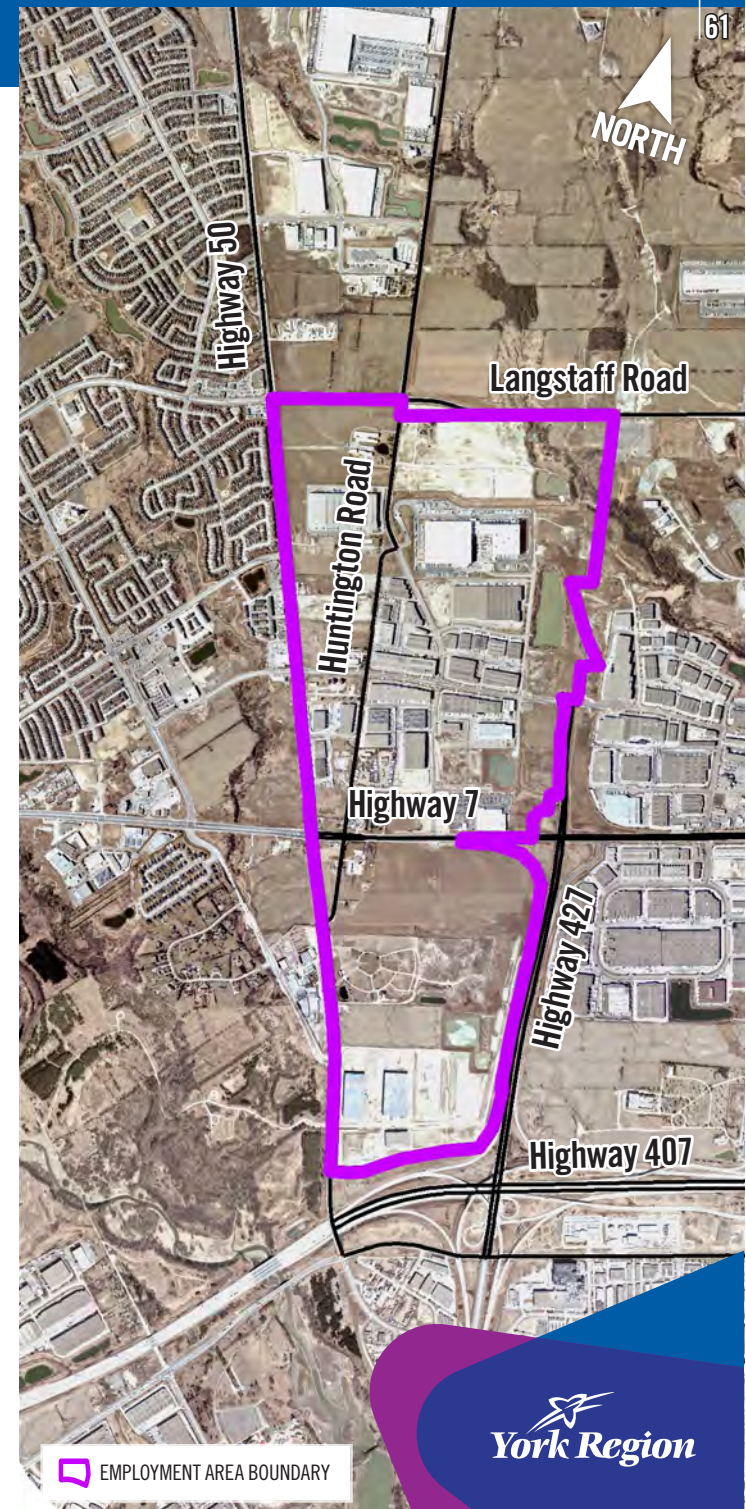


3,530 JOBS in 2018
1,429% INCREASE (3,300 JOBS) SINCE 2008

59% SERVICES PRODUCING **41% GOODS PRODUCING**
94% ONSITE **6% OFFSITE**
12% RETAIL and PERSONAL SERVICES

EXISTING EMPLOYMENT AREA
DENSITY 27 JOBS per HECTARE

8 SITES [23 ha TOTAL AREA]
 with INTENSIFICATION POTENTIAL



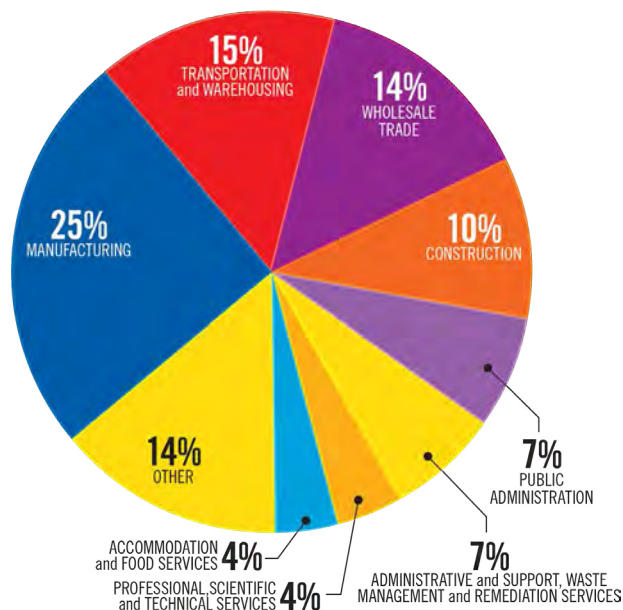
EMPLOYMENT AREA BOUNDARY

York Region

JANE NORTH CITY of VAUGHAN

- ▶ This employment area is in close proximity to highway 400 and is bordered by the CN Rail yard to the east
- ▶ The area is primarily comprised of single-storey and multi-unit industrial building with a mix of industrial and office uses
- ▶ Nearly 50 per cent of growth in the area has been driven by the wholesale trade and transportation and warehousing sectors

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



8,900 JOBS in 2018

23% INCREASE (1,680 JOBS) SINCE 2008

66% SERVICES PRODUCING **34% GOODS PRODUCING**

82% ONSITE **18% OFFSITE**

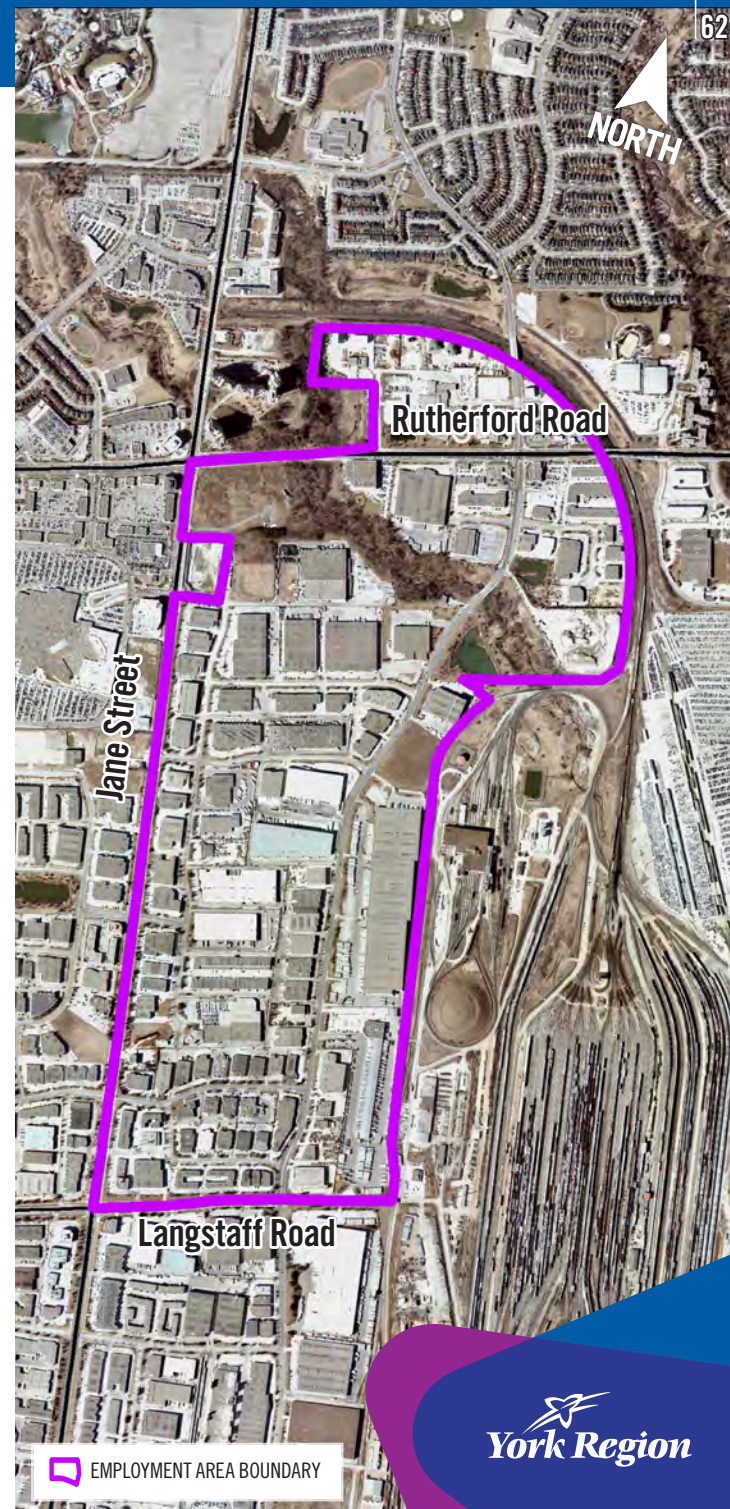
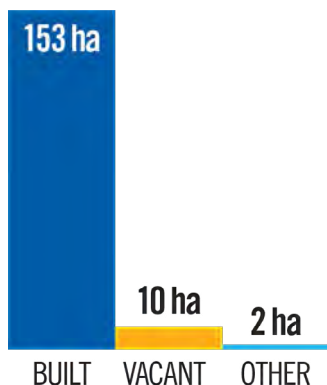
10% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
280 JOBS 1 BUILDING

EXISTING EMPLOYMENT AREA DENSITY 58 JOBS per HECTARE

2 SITES [1.0 ha TOTAL AREA]
with **INTENSIFICATION POTENTIAL**

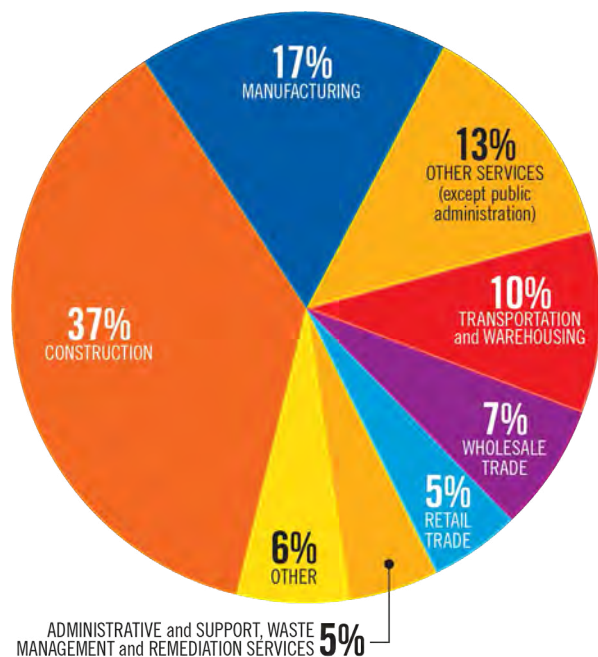
165 TOTAL HECTARES 2017



JANE SOUTH CITY of VAUGHAN

- ▶ The Jane South employment area is located along the Highway 7 rapid transit corridor and is bordered by the Vaughan Metropolitan Centre. It is also in close proximity to the VMC Subway station and to the Highway 400 and 407 interchange
- ▶ Manufacturing and construction sectors have accounted for the majority of employment in this area over the past ten years. The manufacturing sector has experienced job loss due to the relocation of a large employer, however the construction sector saw some growth, adding 136 jobs since 2008

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



2,300 JOBS in 2018

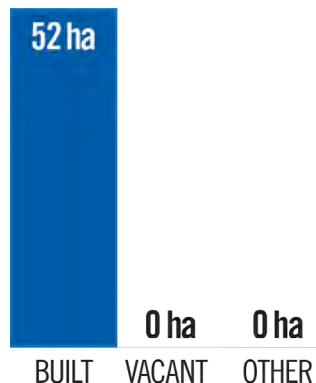
1% DECREASE (-20 JOBS) SINCE 2008

47% SERVICES PRODUCING **53% GOODS PRODUCING**

75% ONSITE **25% OFFSITE**

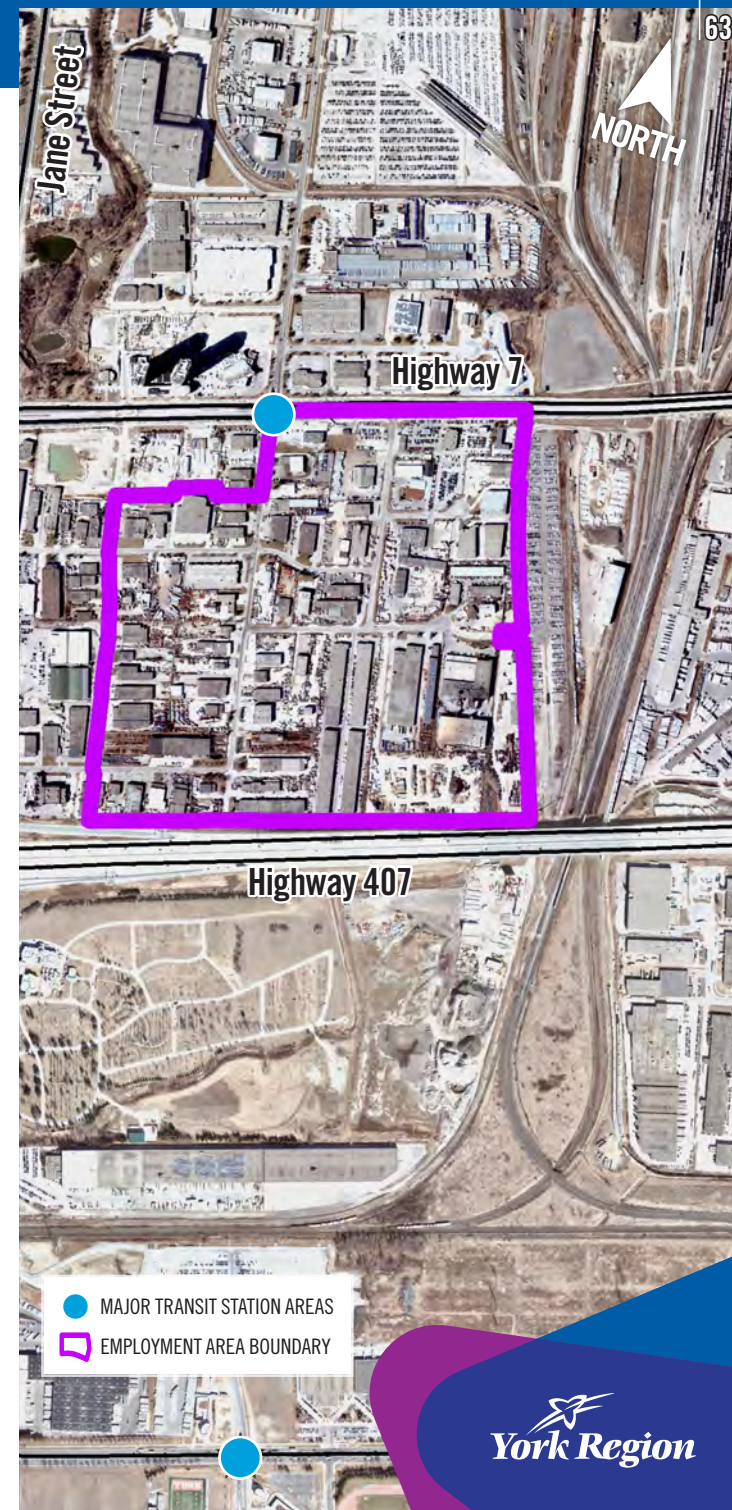
19% RETAIL and PERSONAL SERVICES

52 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY 44 JOBS per HECTARE

0 SITES [1.0 ha TOTAL AREA] with **INTENSIFICATION POTENTIAL**

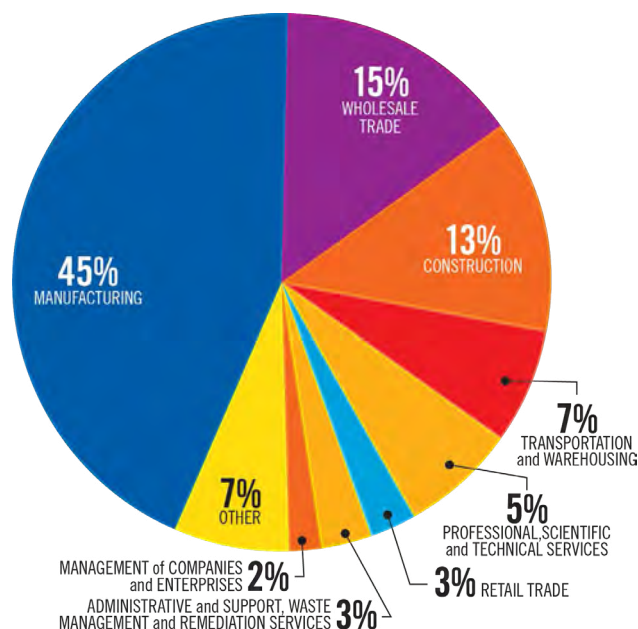


- MAJOR TRANSIT STATION AREAS
- EMPLOYMENT AREA BOUNDARY

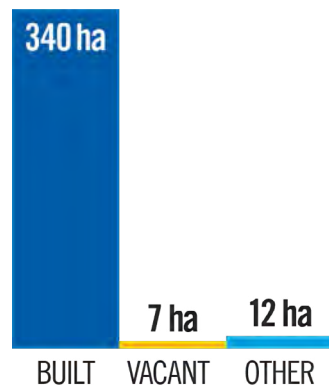
KEELE CITY of VAUGHAN

- ▶ This is the largest employment area in terms of land area and second largest in terms of employment area employment in the City of Vaughan
- ▶ It is bounded by the highway 7 corridor to the south, employment lands to the east, Rutherford road to the north and the CN Rail yard to the west
- ▶ Employment uses in this area are predominately industrial with some office uses and are composed of single storey buildings, industrial condominiums and some office buildings. The area is home to major employers including Rollstamp manufacturing, Fileco Inc. and Magna Powertrain systems

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



359 TOTAL HECTARES 2017



17,410 JOBS in 2018

15% INCREASE (2,230 JOBS) SINCE 2008

42% SERVICES PRODUCING 58% GOODS PRODUCING

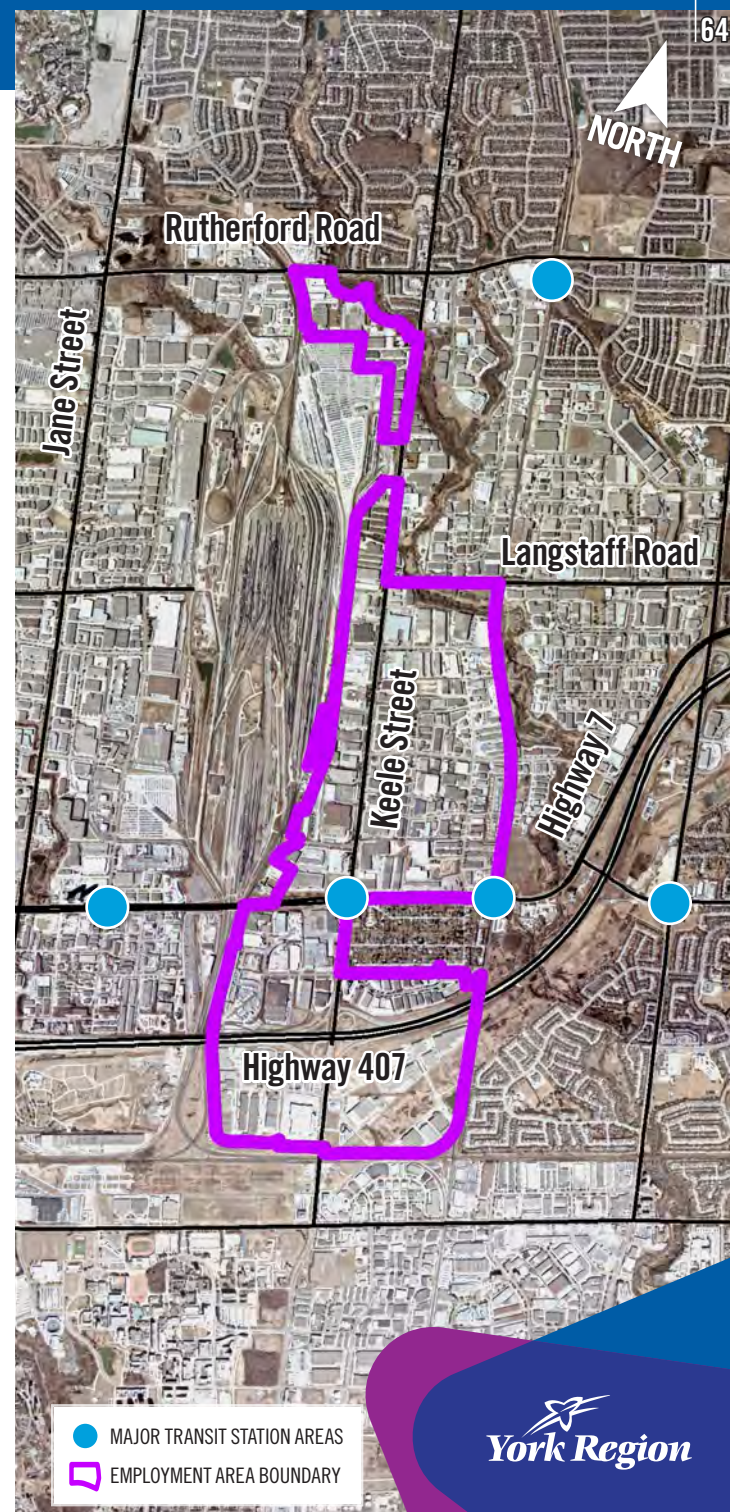
88% ONSITE 12% OFFSITE

7% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
1,340 JOBS 6 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 51 JOBS per HECTARE

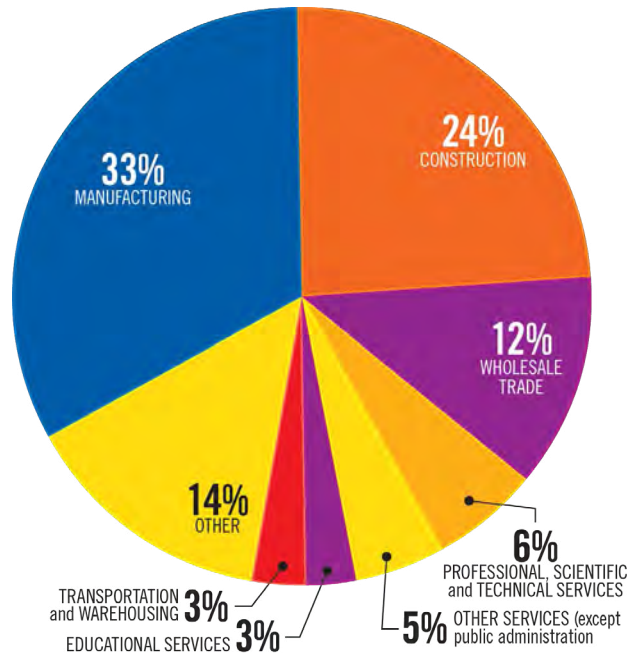
6 SITES [5.0 ha TOTAL AREA]
with INTENSIFICATION POTENTIAL



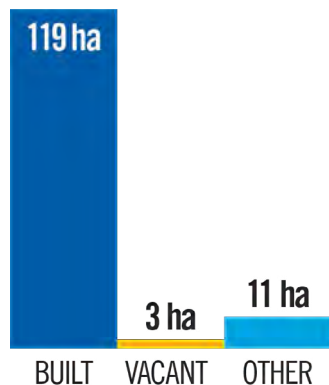
LANGSTAFF-VAUGHAN CITY of VAUGHAN

- ▶ This employment area is surrounded by employment lands to the north, west and south and offers employers excellent visibility to Highway 407
- ▶ The area is primarily comprised of multi-unit industrial buildings with a mix of industrial and office uses
- ▶ The educational services, professional, scientific and technical services and transportation and warehousing sectors accounted for nearly 50 per cent of employment growth since 2008

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



133 TOTAL HECTARES 2017



7,410 JOBS in 2018

26% INCREASE (1,540 JOBS) SINCE 2008

43% SERVICES PRODUCING 57% GOODS PRODUCING

78% ONSITE 22% OFFSITE

12% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
280 JOBS 2 BUILDINGS

EXISTING EMPLOYMENT AREA
DENSITY 62 JOBS per HECTARE

3 SITES [3.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



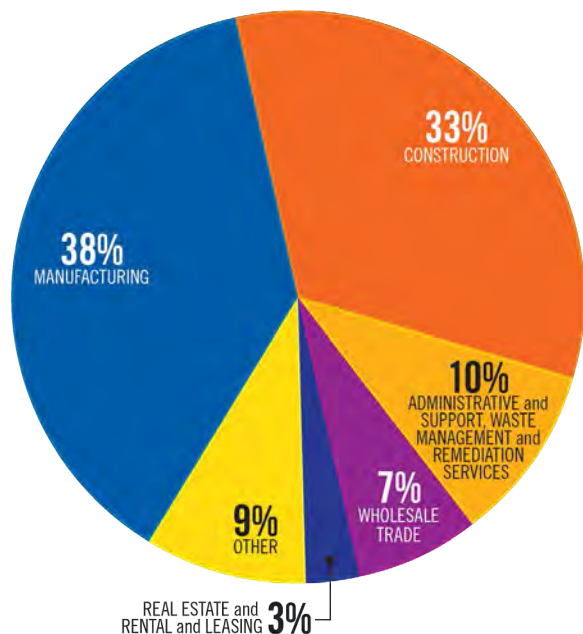
● MAJOR TRANSIT STATION AREAS

□ EMPLOYMENT AREA BOUNDARY

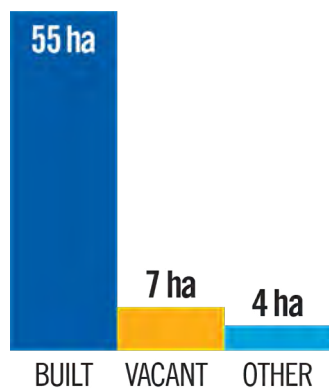
York Region

- ▶ This employment area is located in the community of Maple and is adjacent to the Maple GO station, offering transit accessibility to employers
- ▶ The area is comprised of industrial standalone buildings and multi-unit industrial buildings which are occupied by businesses primarily in the construction and manufacturing sectors
- ▶ The construction sector has been the main driver of growth, adding 420 jobs to the employment base since 2008. This is followed by the manufacturing sector with 184 jobs and the administrative and support, waste management and remediation services sector with 153 jobs

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



66 TOTAL HECTARES 2017

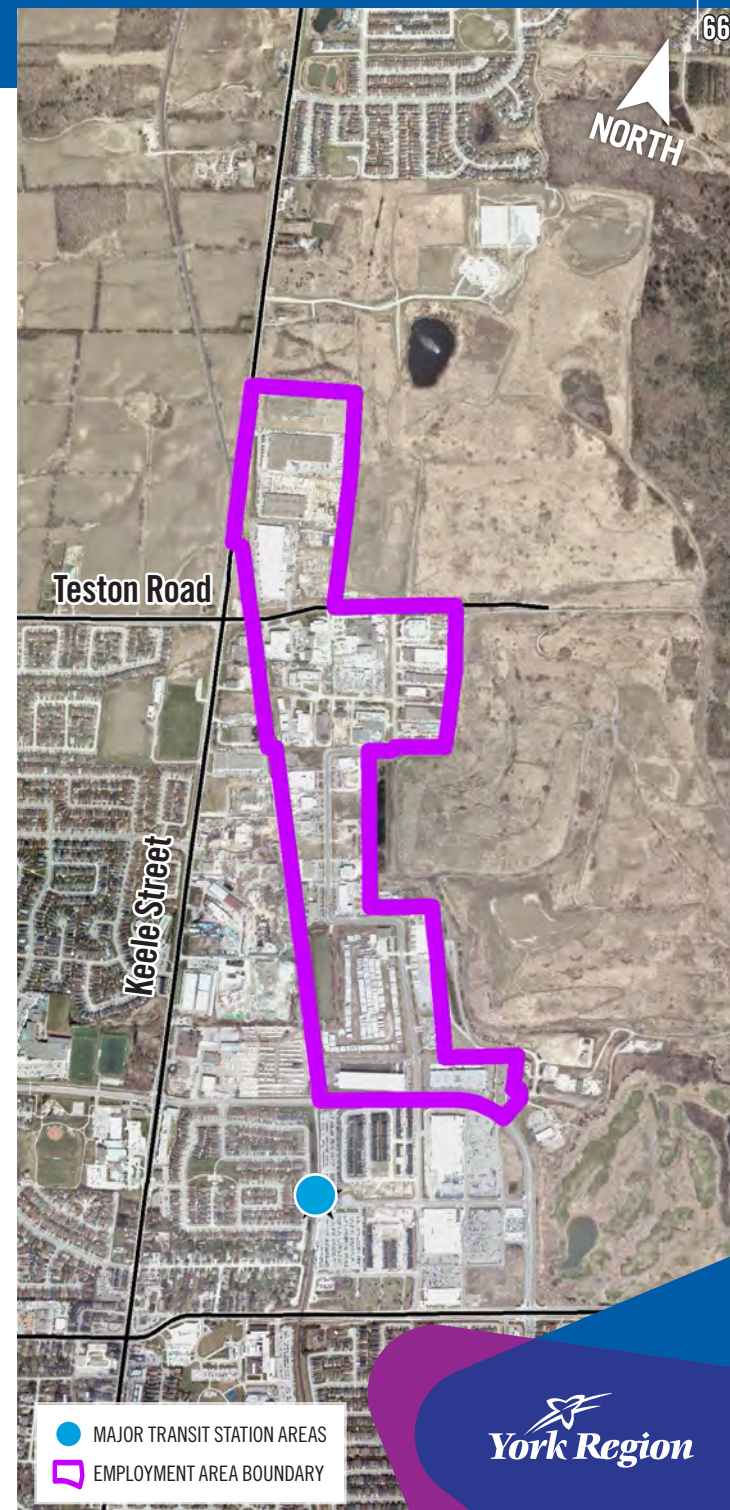


1,730 JOBS in 2018
140% INCREASE (1,010 JOBS) SINCE 2008

29% SERVICES PRODUCING **71% GOODS PRODUCING**
67% ONSITE **33% OFFSITE**
2% RETAIL and PERSONAL SERVICES

EXISTING EMPLOYMENT AREA DENSITY 31 JOBS per HECTARE

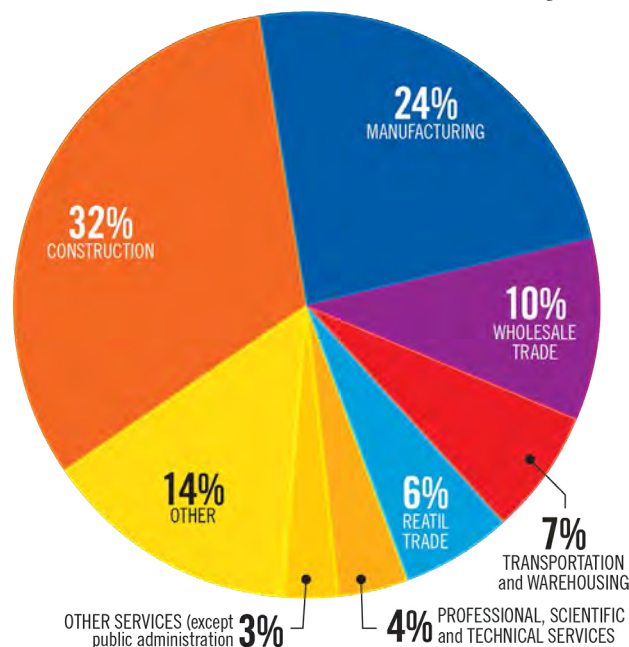
1 SITE [3.0 ha TOTAL AREA]
 with **INTENSIFICATION POTENTIAL**



PINE VALLEY CITY of VAUGHAN

- ▶ Pine Valley employment area provides convenient accessibility and attractive live/work opportunities to residents in the surrounding area as it is located along the highway 7 rapid transit corridor and is in close proximity to the Highway 400 and 407 interchange. It is comprised of a mix of employment uses in multi-unit industrial buildings
- ▶ The construction sector accounted for 66 per cent of growth in this area since 2008, significantly contributing to the Region and City's growing consulting, engineering, building & construction cluster
- ▶ Due to the nature of work in the construction sector, nearly 2,700 jobs reported in this area are offsite employees

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



10,450 JOBS in 2018

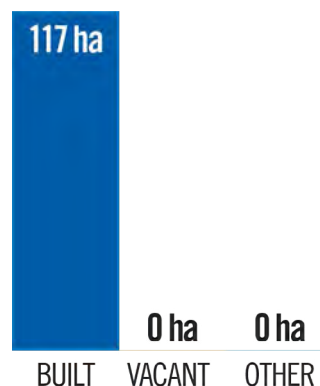
57% INCREASE (3,800 JOBS) SINCE 2008

44% SERVICES PRODUCING **56% GOODS PRODUCING**

63% ONSITE **37% OFFSITE**

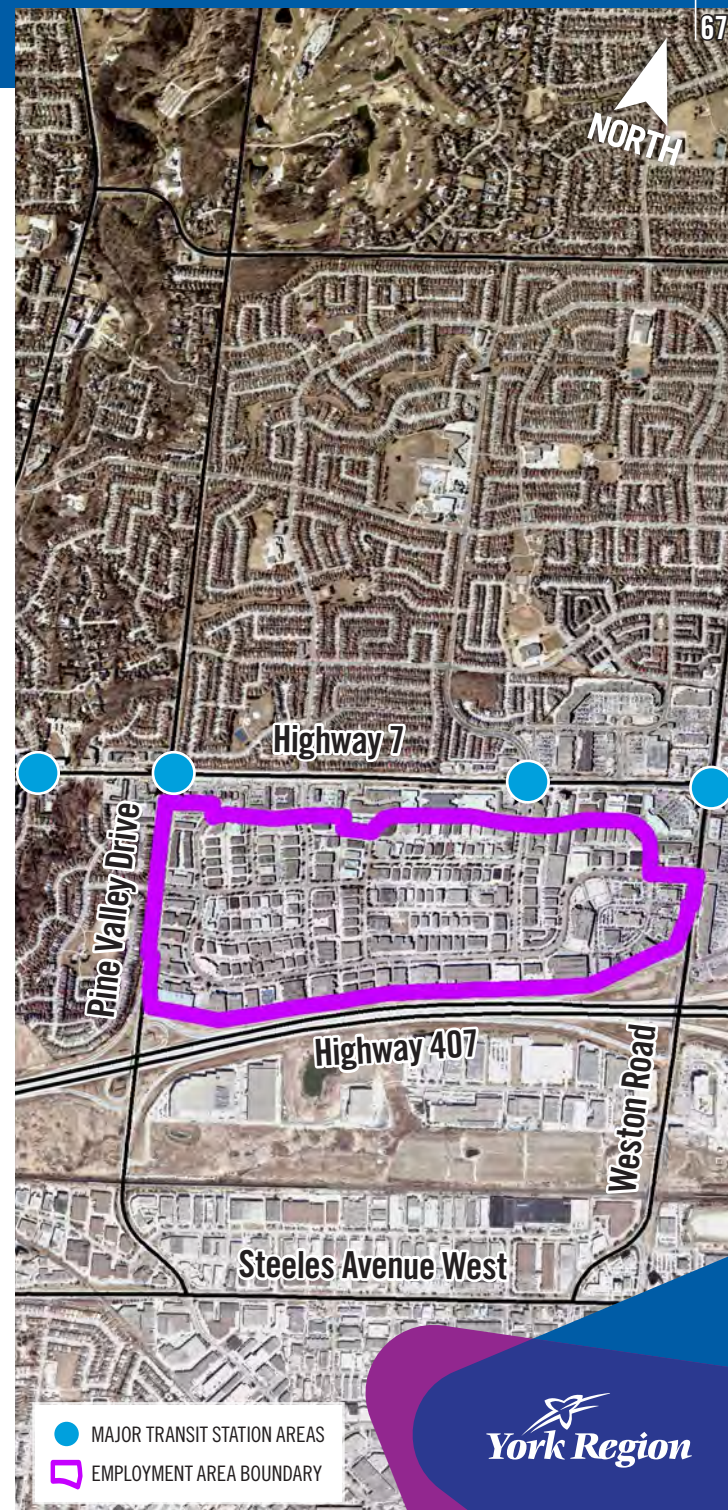
13% RETAIL and PERSONAL SERVICES

117 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY 89 JOBS per HECTARE

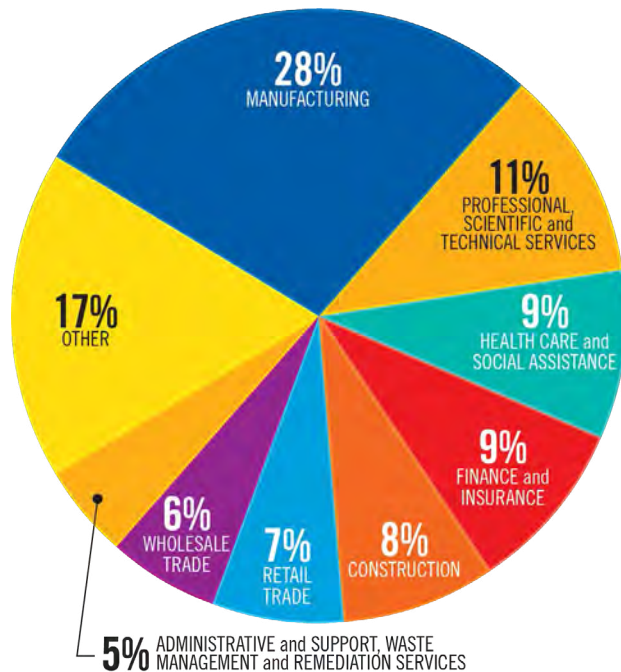
1 SITE [1.0 ha TOTAL AREA]
with **INTENSIFICATION POTENTIAL**



STEELES CAMPUS CITY of VAUGHAN

- ▶ This established employment area is located at the most southern part of Vaughan bordering the City of Toronto
- ▶ It is comprised of a mix of industrial, commercial and offices uses located within multi-unit industrial buildings and offices
- ▶ Job losses in the manufacturing and professional, scientific and technical services sectors were offset by growth in the finance and insurance and health care and social assistance sectors

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



4,690 JOBS in 2018

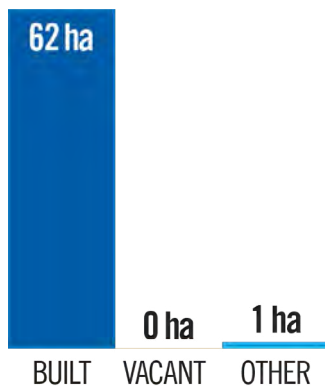
5% INCREASE (240 JOBS) SINCE 2008

63% SERVICES PRODUCING **37% GOODS PRODUCING**

84% ONSITE **16% OFFSITE**

14% RETAIL and PERSONAL SERVICES

63 TOTAL HECTARES 2017



MAJOR OFFICE
1,350 JOBS 4 BUILDINGS

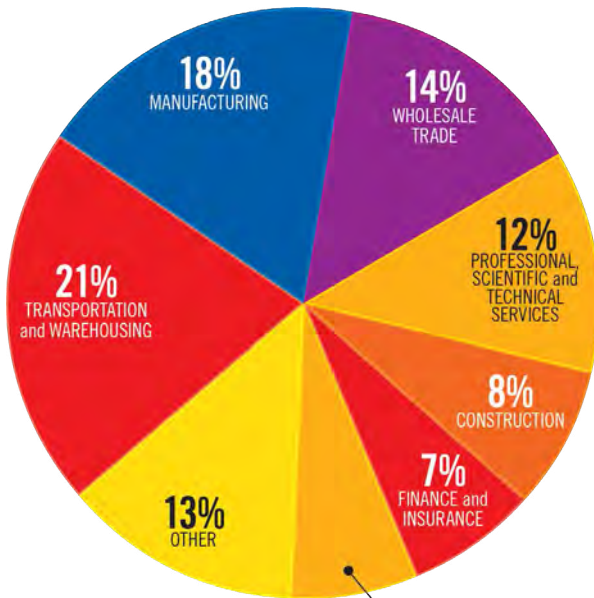
EXISTING EMPLOYMENT AREA DENSITY 76 JOBS per HECTARE



STEELES WEST CITY of VAUGHAN

- ▶ This well established employment area is located at the northwest corner of Steeles Avenue West and the Highway 400 interchange and borders the City of Toronto. The eastern portion of this area is adjacent to the Pioneer Village subway station
- ▶ It is comprised primarily of standalone and multi-unit industrial buildings with a small cluster of office buildings located to the east. It is home to UPS Canada and Ganz, which are two of the Region's top employers
- ▶ Over the past ten years, job growth has been driven by the administrative and support, waste management and remediation services, professional, scientific and technical services and transportation and warehousing sectors

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



10,830 JOBS in 2018

7% INCREASE (690 JOBS) SINCE 2008

74% SERVICES PRODUCING **26% GOODS PRODUCING**

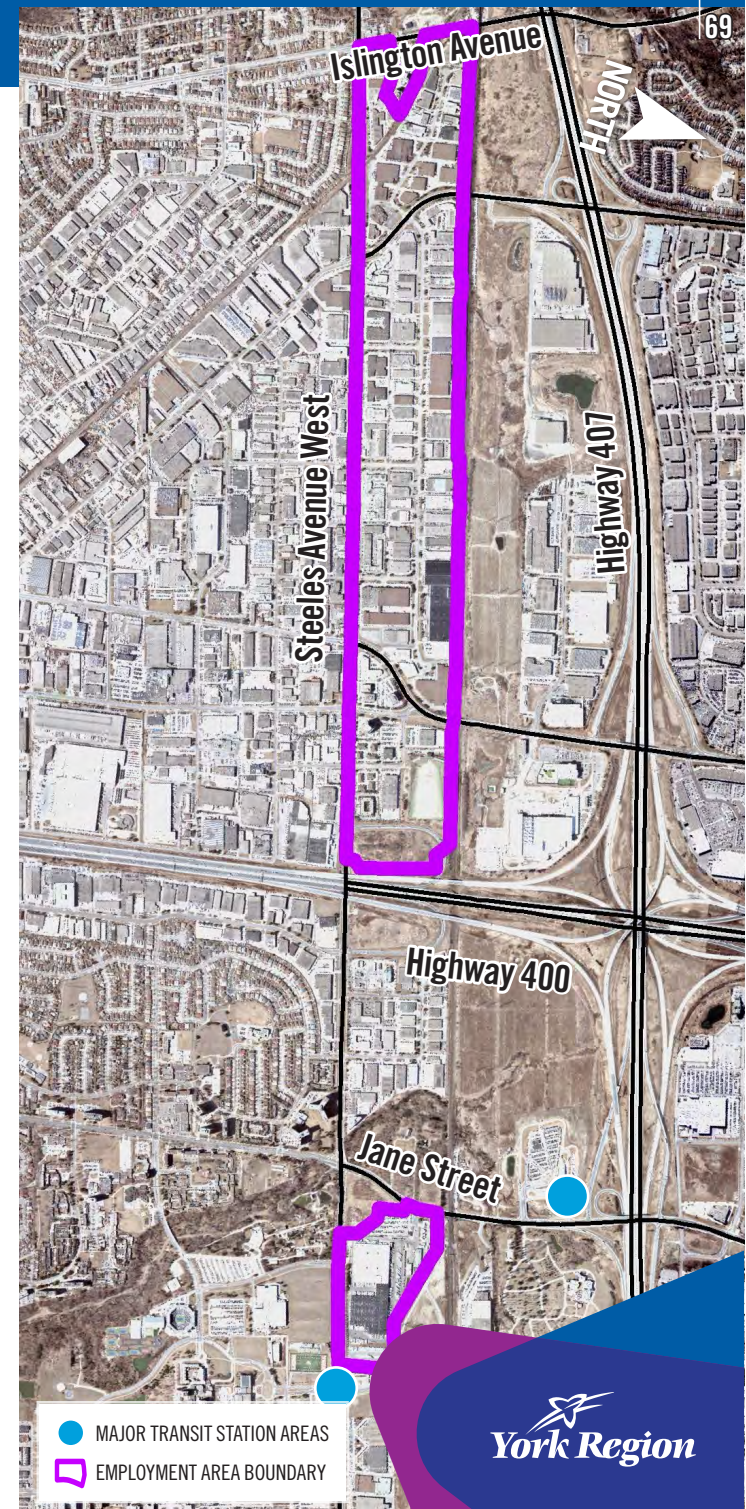
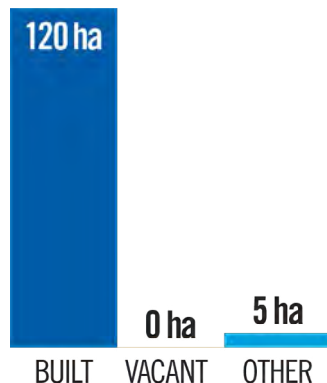
80% ONSITE **20% OFFSITE**

8% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
1,730 JOBS 5 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 91 JOBS per HECTARE

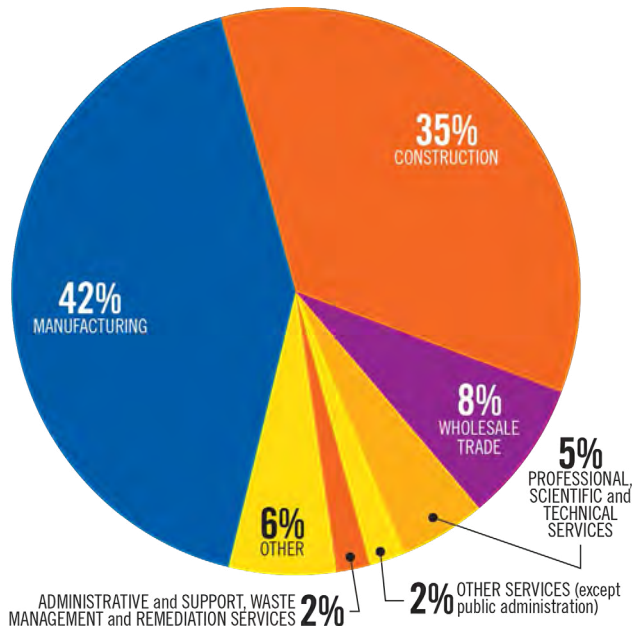
125 TOTAL HECTARES 2017



TUDOR EAST CITY of VAUGHAN

- ▶ The area is bounded by employment lands to the south and west and existing low rise residential uses to the northeast. It is located in close proximity to the Highway 407 interchange. Made up of mainly industrial buildings with some standalone office buildings located on the fringe
- ▶ It is home to some of the Region's large employers in the manufacturing and construction sectors including Condrain Ltd, Ozz Electric and Magna international
- ▶ Nearly 40 per cent of jobs in this area are found in the consulting, engineering, building and construction cluster and have also been the main drivers of growth in the past ten years

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



10,740 JOBS in 2018

11% INCREASE (1,090 JOBS) SINCE 2008

24% SERVICES PRODUCING

76% GOODS PRODUCING

69% ONSITE

31% OFFSITE



4% RETAIL and PERSONAL SERVICES



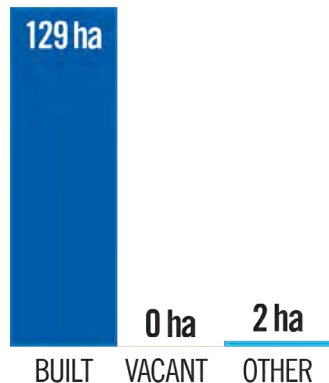
MAJOR OFFICE
1,630 JOBS 5 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 83 JOBS per HECTARE



2 SITES [3.0 ha TOTAL AREA]
with INTENSIFICATION POTENTIAL

131 TOTAL HECTARES 2017



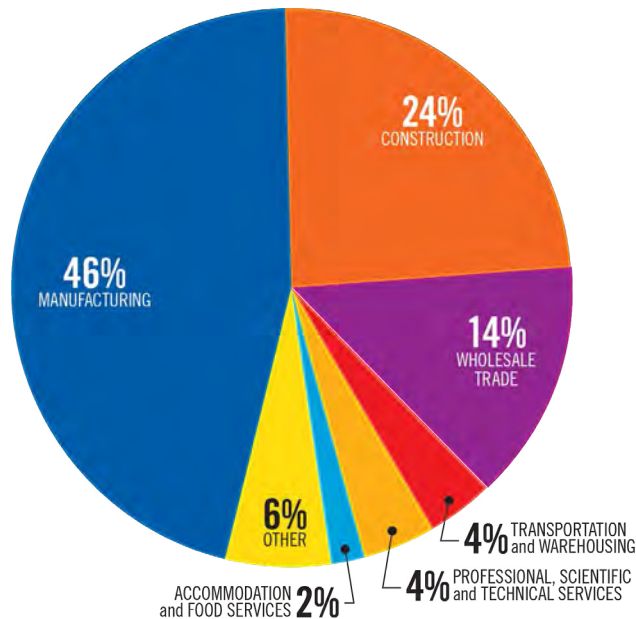
EMPLOYMENT AREA BOUNDARY

York Region

TUDOR WEST CITY of VAUGHAN

- ▶ The proximity of this employment area to surrounding employment lands as well as the CN railyard and Highway 407 promotes strong economic synergies
- ▶ Low-rise, industrial buildings primarily house businesses in typical industrial uses including manufacturing, warehousing, and construction
- ▶ Employment growth in the area has primarily been driven by the construction, manufacturing and professional, scientific and technical services sectors

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



6,430 JOBS in 2018

16% INCREASE (900 JOBS) SINCE 2008

30% SERVICES PRODUCING **70% GOODS PRODUCING**

74% ONSITE **26% OFFSITE**

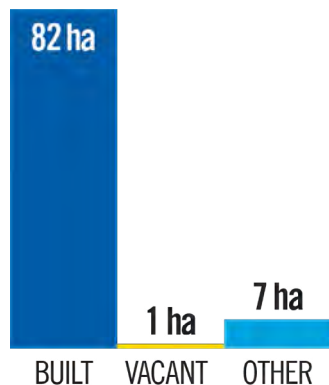
5% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
170 JOBS 2 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 79 JOBS per HECTARE

5 SITES [3.0 ha TOTAL AREA]
with **INTENSIFICATION POTENTIAL**

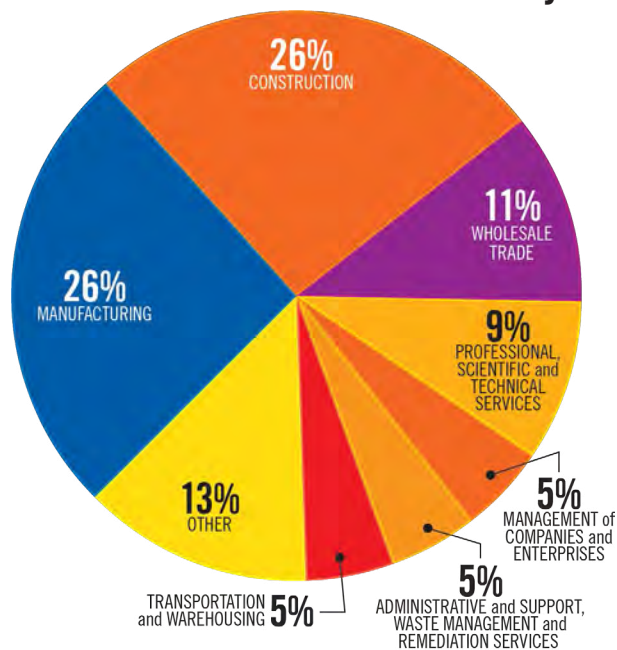
90 TOTAL HECTARES 2017



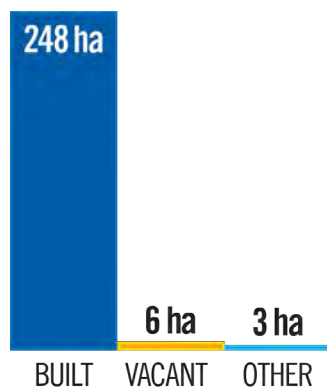
VAUGHAN 400 CITY of VAUGHAN

- ▶ This is Vaughan's largest employment area in terms of jobs and is the fastest growing in terms of absolute growth. Its strategic location offers employers excellent accessibility to the highway 400 and 407 interchange as well as the Vaughan Metropolitan Centre, Highway 7 rapid transit corridor and VMC subway station
- ▶ The buildings accommodate a diverse range of industrial, office and retail uses and are home to top employers including St. Joseph Communications, Toro Aluminum, Deloitte and SmartCentres
- ▶ 33 per cent of job growth since 2008 occurred in major office buildings. The majority of which are located along Highway 400

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



257 TOTAL HECTARES 2017



20,380 JOBSⁱⁿ 2018

29% INCREASE (4,540 JOBS) SINCE 2008

49% SERVICES PRODUCING 51% GOODS PRODUCING

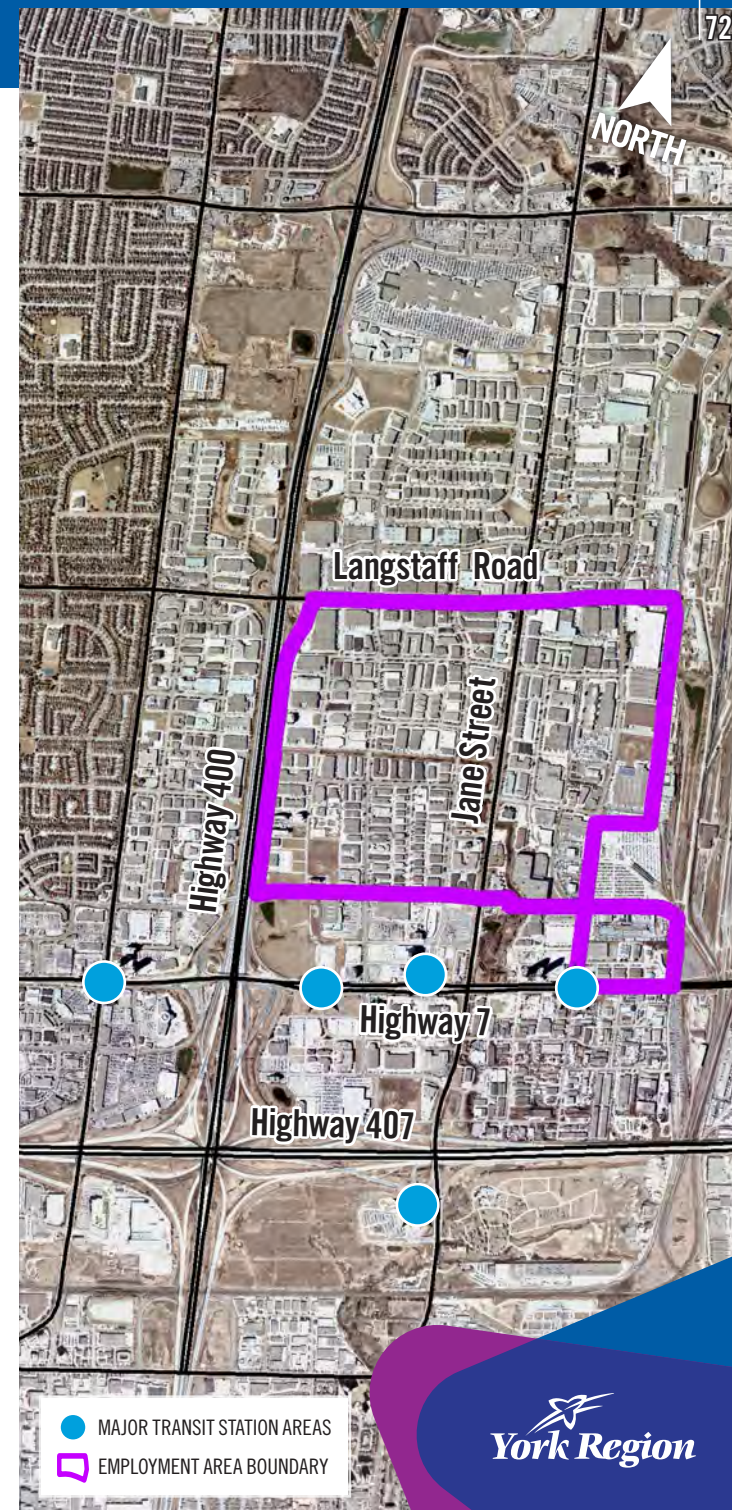
76% ONSITE 24% OFFSITE

8% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
2,120 JOBS 8 BUILDINGS

EXISTING EMPLOYMENT AREA
DENSITY 82 JOBS per HECTARE

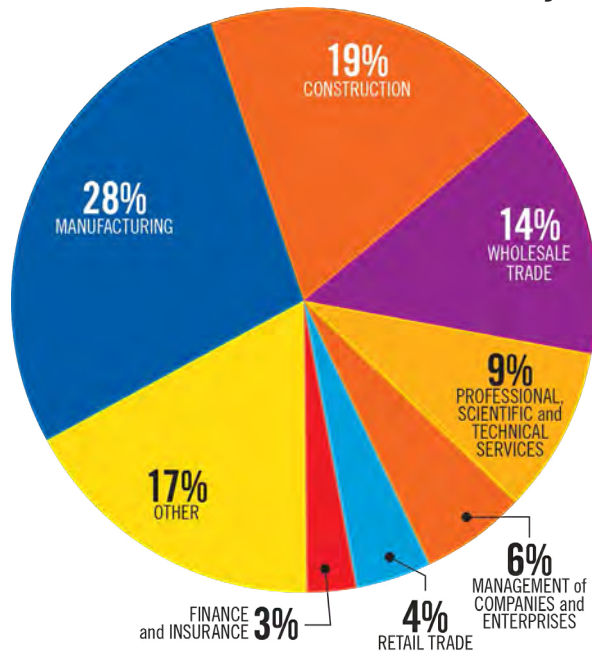
3 SITES [4.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



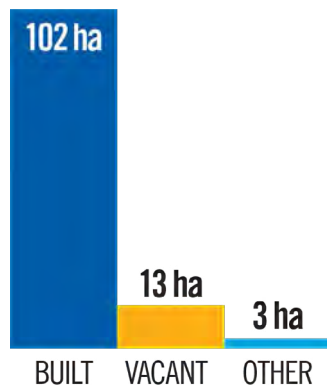
VAUGHAN 400 NORTH CITY of VAUGHAN

- ▶ The Vaughan 400 North employment area is surrounded by employment lands to the south, east and west. It is bordered by the Vaughan Mills Centre to the north which is a shopping destination of regional significance and has the potential for residential intensification with proposals for mixed-use and mid to high rise residential developments
- ▶ The economic composition of the area continues to diversify. Over the past ten years, growth in traditional industrial sectors has been outpaced by services and knowledge based sectors such as the professional, scientific and technical services sector, retail trade and management of companies and enterprises

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



118 TOTAL HECTARES 2017



8,710 JOBS in 2018

39% INCREASE (2,460 JOBS) SINCE 2008

53% SERVICES PRODUCING 47% GOODS PRODUCING

75% ONSITE 25% OFFSITE

11% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
1,500 JOBS 8 BUILDINGS

EXISTING EMPLOYMENT AREA
DENSITY 85 JOBS per HECTARE

1 SITE [0.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



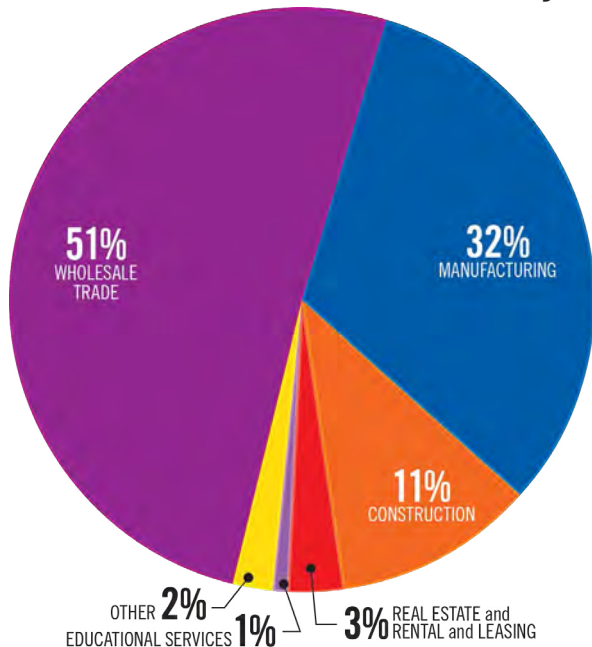
EMPLOYMENT AREA BOUNDARY

York Region

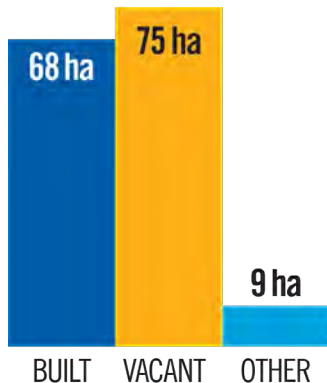
WEST VAUGHAN-HUNTINGTON WEST CITY of VAUGHAN

- ▶ Located within the Vaughan Enterprise zone, this employment area is bordered by the Region of Peel to the west, the CP intermodal terminal to the north and employment lands to the south and east
- ▶ Over 50 per cent of employment growth in the past ten years was in the wholesale trade and manufacturing sectors
- ▶ It offers a variety of large parcel sizes that are occupied by large employers with land extensive business activities such as Home Depot Canada's shipping facility and Longo's Canadian head office and central distribution center
- ▶ The 75 hectares of vacant land with goods access to highways and the intermodal terminal offer many development opportunities for prospective employers

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



152 TOTAL HECTARES 2017



2,030 JOBS in 2018
3,177% INCREASE (1,970 JOBS) SINCE 2008

57% SERVICES PRODUCING **43%** GOODS PRODUCING
93% ONSITE **7%** OFFSITE
1% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
 470 JOBS 1 BUILDING

EXISTING EMPLOYMENT AREA
DENSITY 30 JOBS per HECTARE

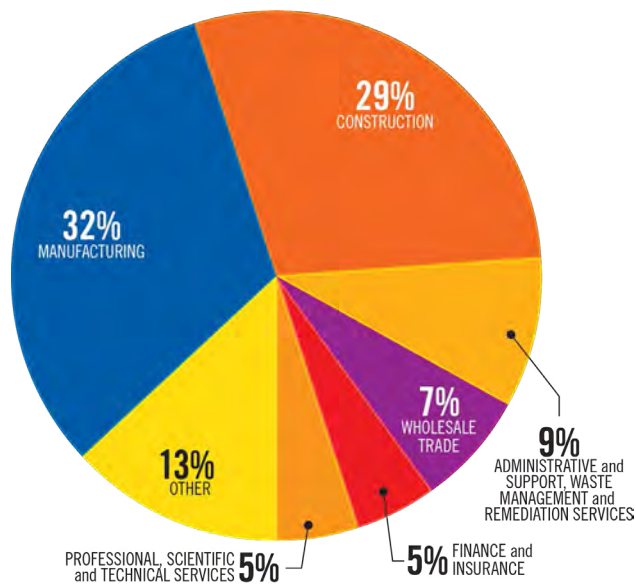
4 SITES [8.0 ha] TOTAL AREA
 with INTENSIFICATION POTENTIAL



WEST WOODBRIDGE CITY of VAUGHAN

- Located at the northeast corner of the Highway 407 and 427 interchange and includes part of the Highway 7 corridor
- The area is comprised of a mix of commercial and industrial uses which can be found in either more traditional industrial buildings concentrated along Highway 27 and Highway 407 or multi-unit buildings concentrated along Martin Grove Road
- Employment growth in the area has been driven by the construction sector which has added over 500 jobs, the majority of which were offsite employees. Other sectors that have experienced growth include the administrative and support, waste management and remediation services and manufacturing sectors

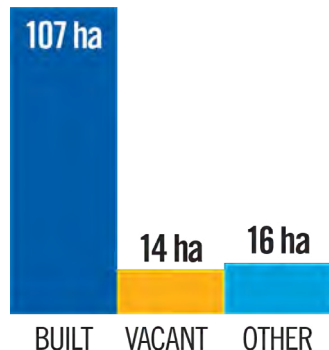
DISTRIBUTION of EMPLOYMENT by SECTOR 2018



5,700 JOBS in 2018
47% INCREASE (1,820 JOBS) SINCE 2008

38% SERVICES PRODUCING **62% GOODS PRODUCING**
64% ONSITE **36% OFFSITE**
10% RETAIL and PERSONAL SERVICES

137 TOTAL HECTARES 2017



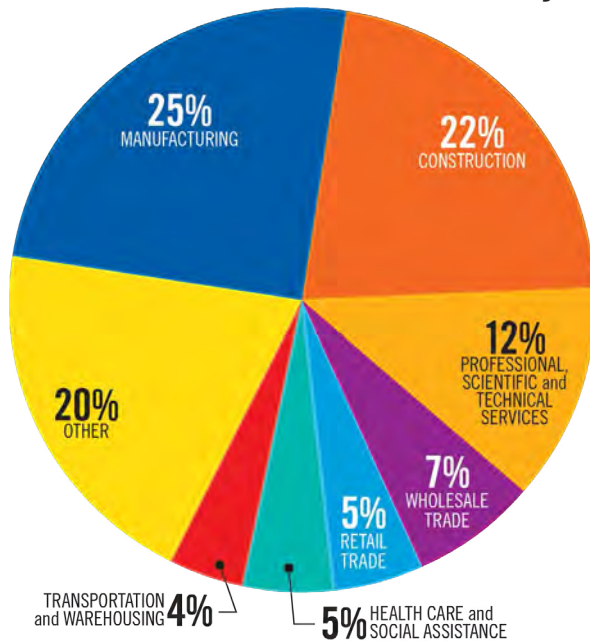
EXISTING EMPLOYMENT AREA DENSITY 54 JOBS per HECTARE



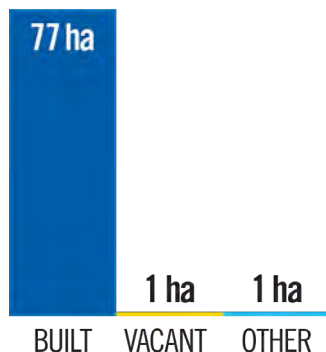
WESTON 400 CITY of VAUGHAN

- ▶ This employment area is well situated with accessibility to Highway 400 and the Highway 7 rapid transit corridor
- ▶ It is made up of multi-unit and standalone industrial uses which are located primarily in the interior and along Highway 400 and retail and office buildings located on the fringe
- ▶ The construction, professional, scientific and technical services and management of companies and enterprises sectors were the main drivers of growth accounting for 65 per cent of employment growth since 2008
- ▶ It is home to large employers including Soroc Technology Inc. and Tacc Construction Ltd

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



79 TOTAL HECTARES 2017



6,090 JOBS in 2018
23% INCREASE (1,150 JOBS) SINCE 2008

53% SERVICES PRODUCING 47% GOODS PRODUCING

78% ONSITE 22% OFFSITE

14% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
470 JOBS 3 BUILDINGS

EXISTING EMPLOYMENT AREA
DENSITY 80 JOBS per HECTARE

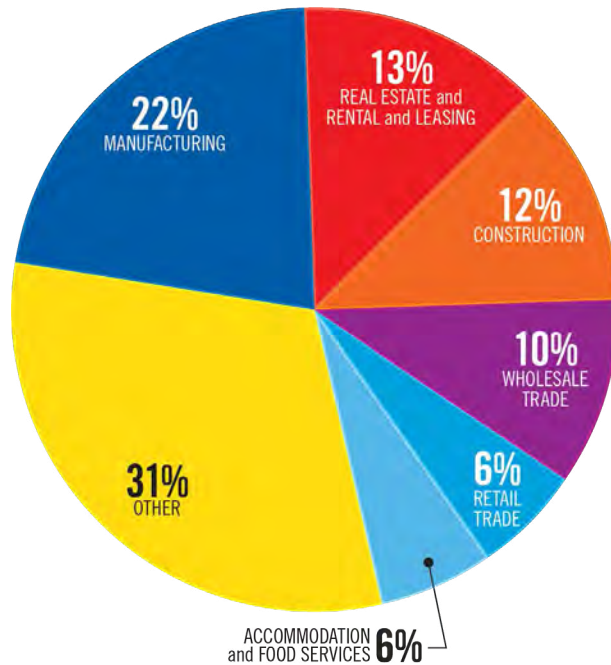
2 SITES [1.0 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



WESTON 400 NORTH CITY of VAUGHAN

- ▶ The north, east and southern boundaries of this employment area are surrounded by other employment areas. The western portion is bordered by an existing low residential neighborhood. Its location alongside Highway 400 offers employers excellent exposure and access
- ▶ While more traditional industrial uses still hold a significant share of employment, over the past ten years there has been a shift towards more office type uses specifically in the finance and insurance, real estate and rental and leasing and management of companies and enterprises sectors

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



3,380 JOBS in 2018

47% INCREASE (1,080 JOBS) SINCE 2008

64% SERVICES PRODUCING **36% GOODS PRODUCING**

71% ONSITE **29% OFFSITE**

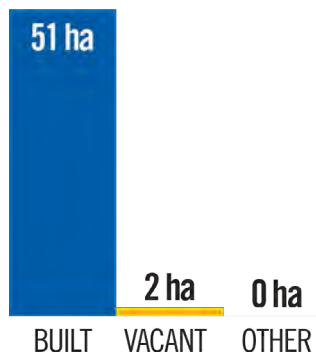
19% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
190 JOBS 1 BUILDING

EXISTING EMPLOYMENT AREA DENSITY 66 JOBS per HECTARE

5 SITES [31 ha TOTAL AREA]
with **INTENSIFICATION POTENTIAL**

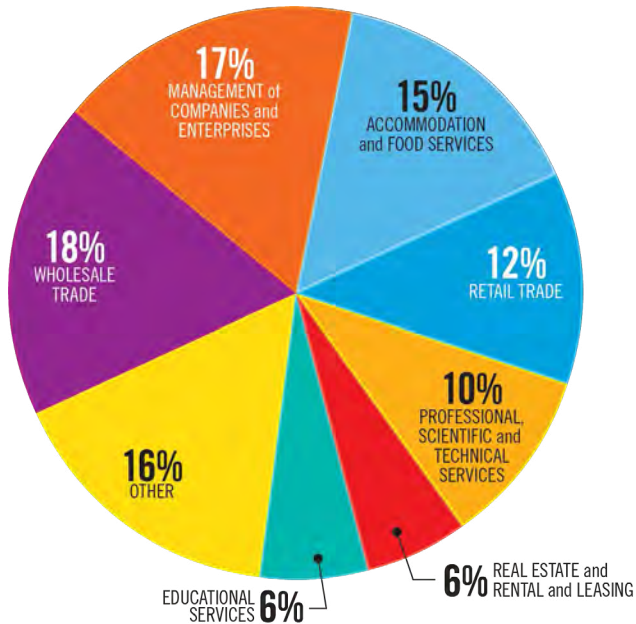
53 TOTAL HECTARES 2017



WESTON HIGHLANDS CITY of VAUGHAN

- ▶ This employment area has excellent visibility and accessibility from Highway 400. It is integrated into the communities of Woodbridge and Maple, is adjacent to existing low rise residential to the southwest and is bordered by Highway 400 to the east
- ▶ It is comprised of light industrial, office and retail uses that serve both the business and residential community
- ▶ Since 2008, the majority of growth has been driven by the retail and personal service sectors, followed by wholesale trade and professional, scientific and technical services

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



1,640 JOBS in 2018
253% INCREASE (1,170 JOBS) SINCE 2008

94% SERVICES PRODUCING

6% GOODS PRODUCING

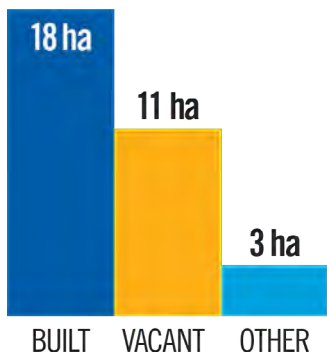
79% ONSITE

21% OFFSITE



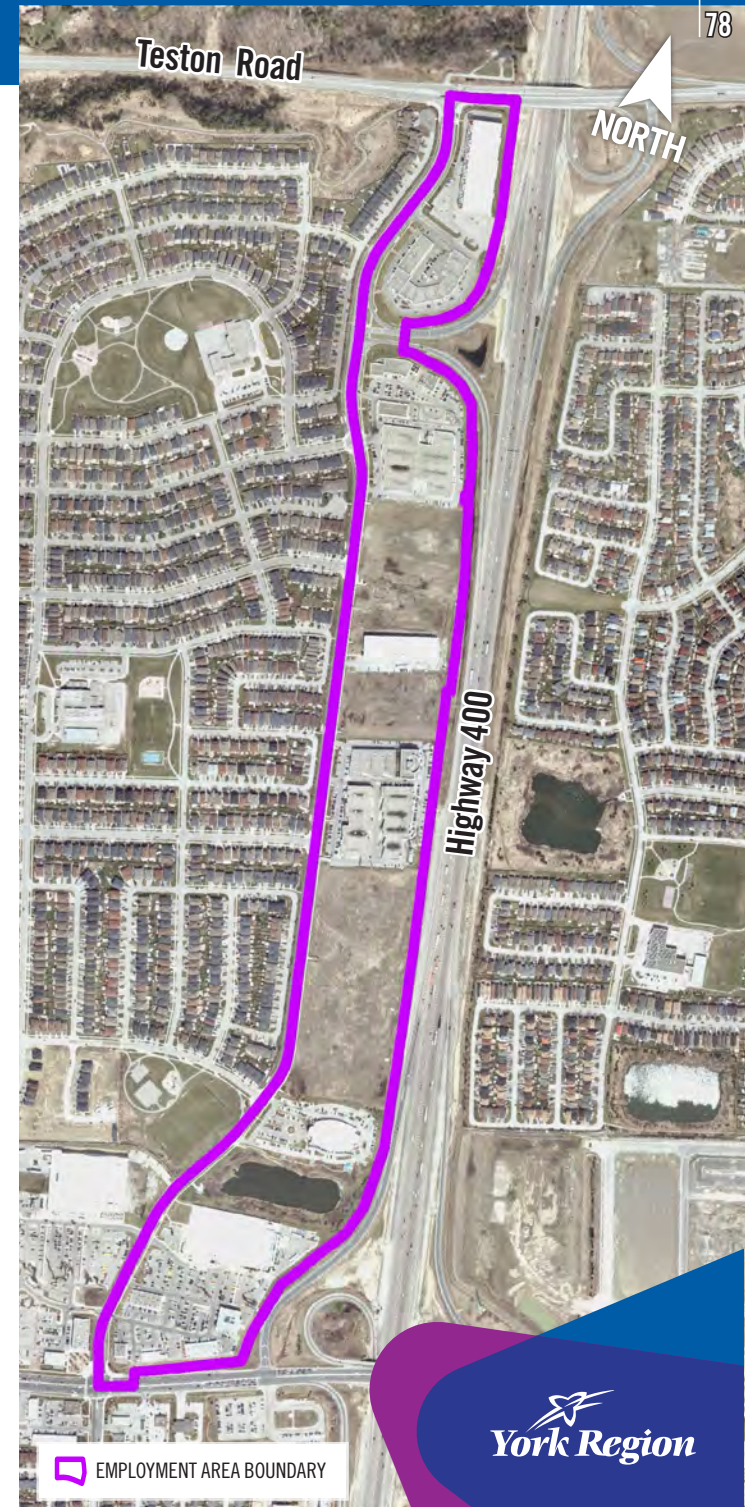
33% RETAIL and PERSONAL SERVICES

32 TOTAL HECTARES 2017



MAJOR OFFICE
 330 JOBS 2 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 93 JOBS per HECTARE

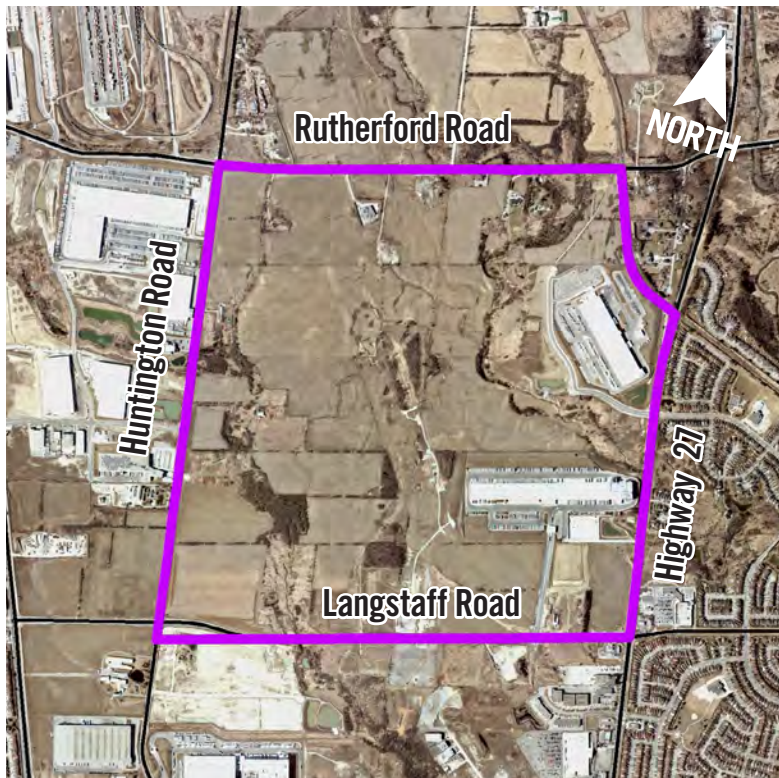


EMPLOYMENT AREA BOUNDARY

York Region

VAUGHAN MILLS CENTRE (VACANT)

- ▶ These lands, referred to as the Vaughan Mills business district, have been identified as an integral part to the future development of the City of Vaughan's urban structure through the Vaughan Mills secondary plan. They are envisioned to develop with a mix of prestige office uses, attracting knowledge-based businesses in the technology, research and development and service-oriented businesses
- ▶ It is surrounded by existing low residential to the north and west and employment areas to the south. Its high exposure and excellent accessibility to Highway 400 makes it a desirable location for prospective employers to locate
- ▶ It is currently home to jobs in the retail and personal services sectors that primarily serve local residents however this area offers many intensification and redevelopment opportunities with the potential to accommodate 7,590 jobs by 2031 in the 28ha of vacant land

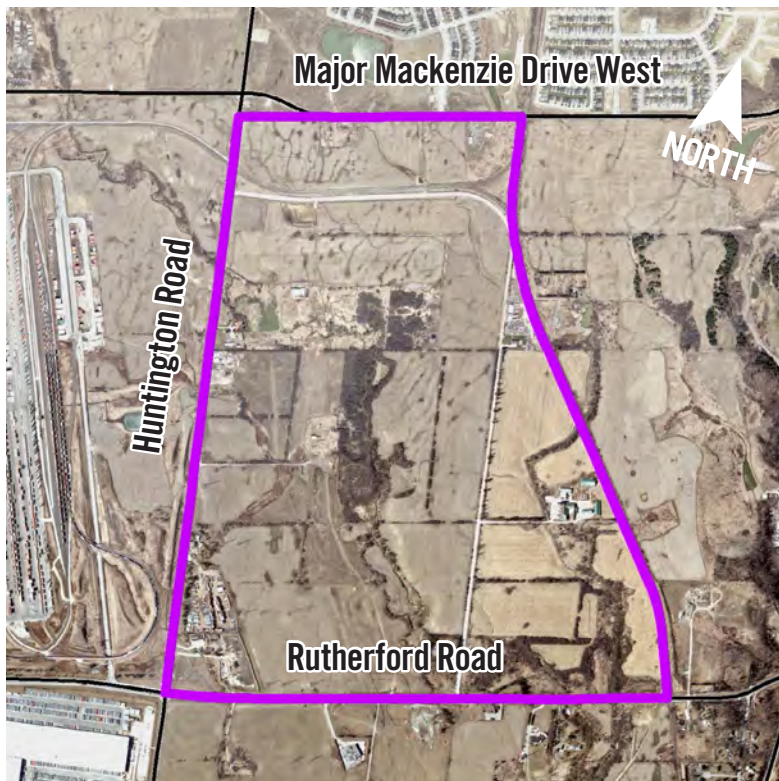
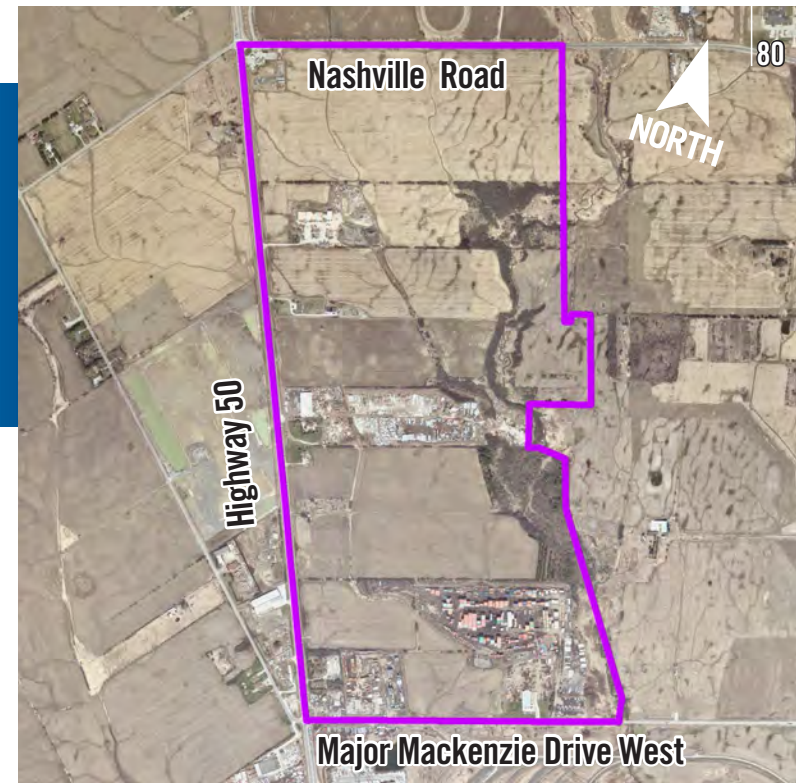


WEST VAUGHAN-HUNTINGTON EAST (VACANT)

- ▶ This employment area can be found within the northeast quadrant of the Vaughan enterprise zone and is strategically located in proximity to the Highway 427 interchange and the CP intermodal yard. The future extension of Highway 427 to Major Mackenzie will further strengthen accessibility for goods movement activities
- ▶ Due to its location and the variety of parcel sizes, the 165ha of vacant land is well suited for the future development of manufacturing, warehousing and limited office uses
- ▶ Fedex and Costco are two large employers in the Region who have recently located their distribution centers on these lands in the past three years. These businesses combined have added over 500 jobs to the Region's warehousing and logistics cluster

WEST VAUGHAN-NASHVILLE (VACANT)

- ▶ Located at the northwest portion of the Vaughan enterprise zone, this employment area offers close proximity to the CP intermodal rail terminal and the future Highway 427 extension
- ▶ There are a total of 104 ha in this employment area, 59 ha of which were vacant as of 2017
- ▶ As of 2018, the 210 jobs located in this area were primarily in the transportation and warehousing sector

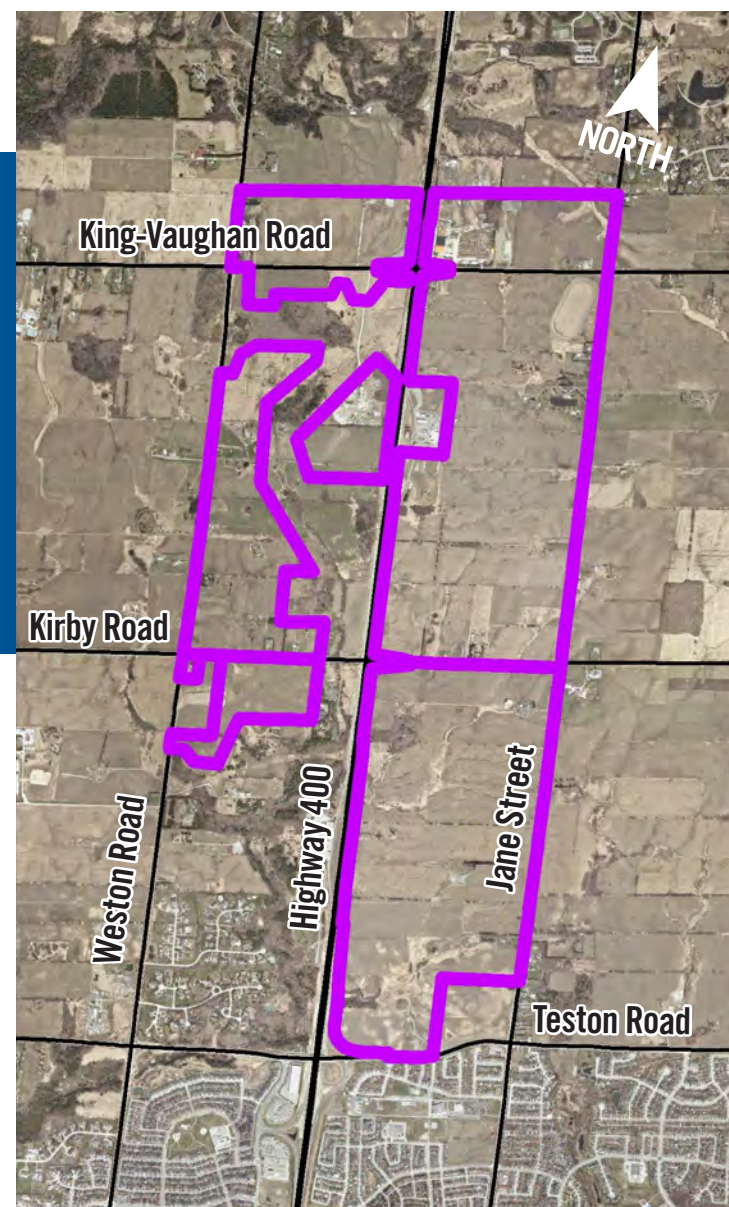


WEST VAUGHAN-ELDER MILLS (VACANT)

- ▶ This employment area is located in the northeast portion of the Vaughan enterprise zone. It is bound by other employment lands, also part of the zone, along the southern and western boundary
- ▶ It offers accessibility to the CP intermodal rail facility and will be home to the future highway 427 extension which will make the 116 hectares of vacant land very appealing to prospective employers that require goods movement access
- ▶ As of 2018, there were 37 jobs on these lands. All of which are in the construction and administrative and support, waste management and remediation services sectors

HIGHWAY 400 NORTH-NORTHEAST, NORTHWEST, TESTON EAST, TESTON WEST (VACANT)

- ▶ The Highway 400 north employment areas are strategically located in north Vaughan with direct access and exposure to Highway 400
- ▶ The lands were brought into the urban area through the 2010 York Region Official Plan to accommodate the long term employment needs of the Region and the City of Vaughan
- ▶ The 329 hectares of vacant land provide future opportunities for the development of prestige offices, campus style employment uses and ancillary retail uses to serve the employment area
- ▶ The lands between Kirby Road and King-Vaughan road are located within the GTA West Transportation Corridor protection area and interchange study area. Which if developed would be a key goods movement transportation corridor that would grow local and regional economies

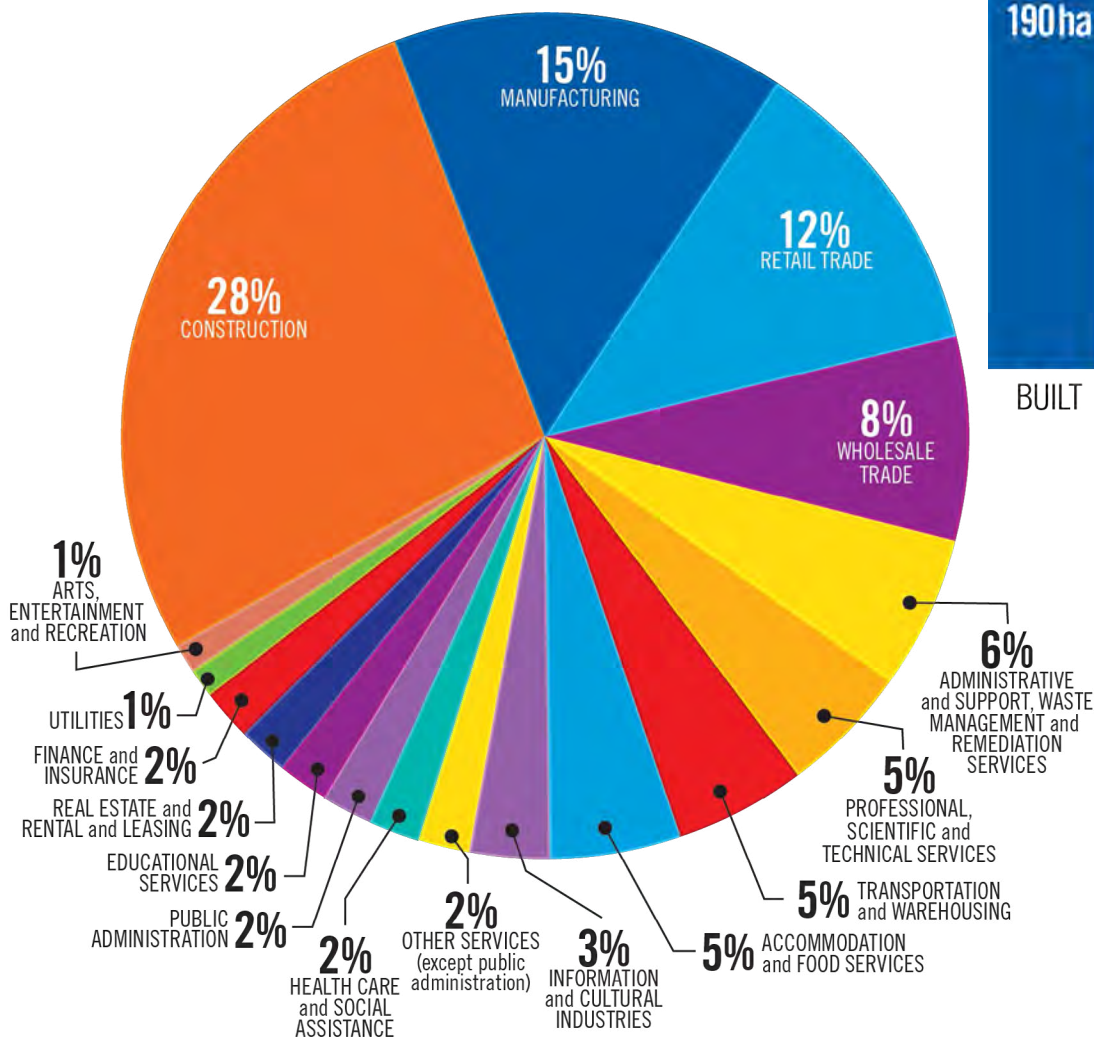


WHITCHURCH-STOUFFVILLE EMPLOYMENT AREAS SUMMARY

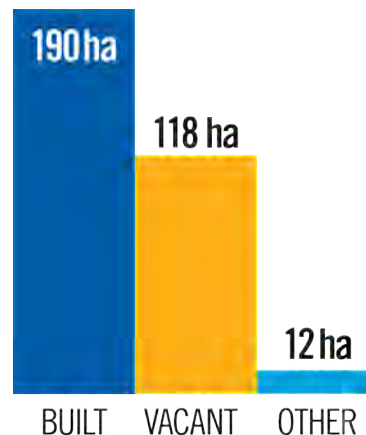
82

- ▶ Nearly 50 per cent of total job growth in the Town of Whitchurch-Stouffville occurred in employment areas over the past ten years
- ▶ The share of jobs in the Town's employment areas remains predominately in the goods producing sectors, however there has been some modest growth in the services producing sectors (+1,296 jobs)
- ▶ Since 2008, the construction, retail trade and wholesale trade sectors accounted for nearly all growth in employment areas

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



320 TOTAL HECTARES 2017



6,310 JOBS in 2018

48% INCREASE (2,050 JOBS) SINCE 2008

56% SERVICES PRODUCING **44%** GOODS PRODUCING

78% ONSITE **22%** OFFSITE

23% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
410 JOBS 2 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 33 JOBS per HECTARE

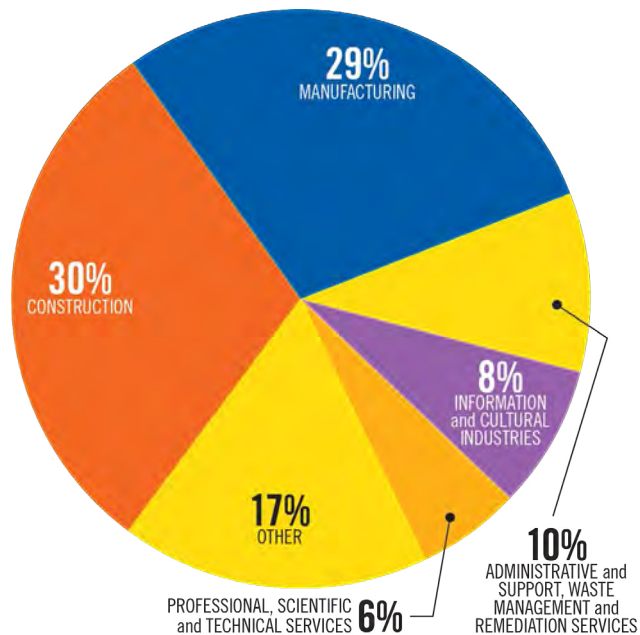
14 SITES [15 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

York Region

CARDICO DRIVE TOWN of WHITCHURCH-STOUFFVILLE

- ▶ Located within the Oak Ridges Moraine (ORM) protected countryside this longstanding industrial employment area was established well before the ORM plan came into effect in the early 2000's
- ▶ It can be accessed via the Highway 404 and Stouffville Road interchange to the south
- ▶ Since 2008, the decline in employment can be attributed to the transportation and warehousing sector which lost over 300 jobs

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



790 JOBS in 2018

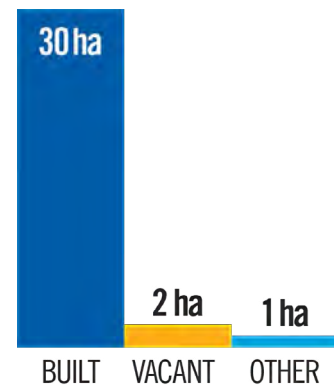
29% DECREASE (-320 JOBS) SINCE 2008

41% SERVICES PRODUCING **59% GOODS PRODUCING**

59% ONSITE **41% OFFSITE**

12% RETAIL and PERSONAL SERVICES

33 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY 26 JOBS per HECTARE

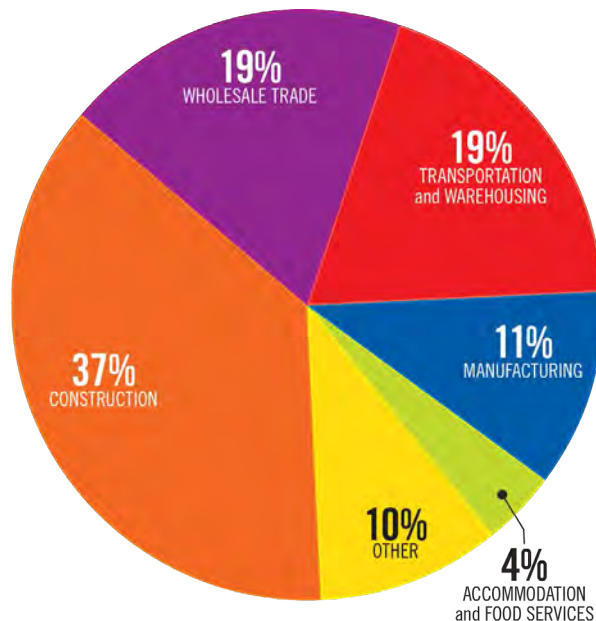
1 SITE [0.3 ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



GORMLEY TOWN of WHITCHURCH-STOUFFVILLE

- ▶ Located in the hamlet of Gormley, this industrial employment area is situated east of the Highway 404 and Stouffville Road interchange
- ▶ It is comprised of a mix of industrial buildings primarily located on the eastern portion of the lands and is surrounded by protected countryside. Additionally, an established low residential neighborhood is located in the southwest corner of Stouffville Road and Woodbine Avenue
- ▶ Since 2008, employment has more than doubled. Much of this growth has been driven by the construction sector which has added 340 jobs to the area's economic base

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



1,090 JOBS in 2018

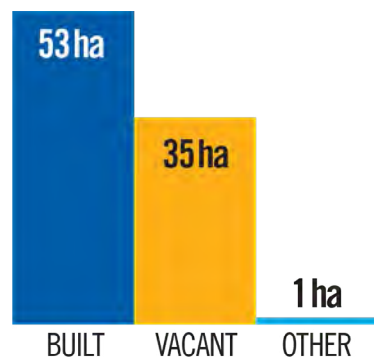
118% INCREASE (590 JOBS) SINCE 2008

52% SERVICES PRODUCING **48% GOODS PRODUCING**

62% ONSITE **38% OFFSITE**

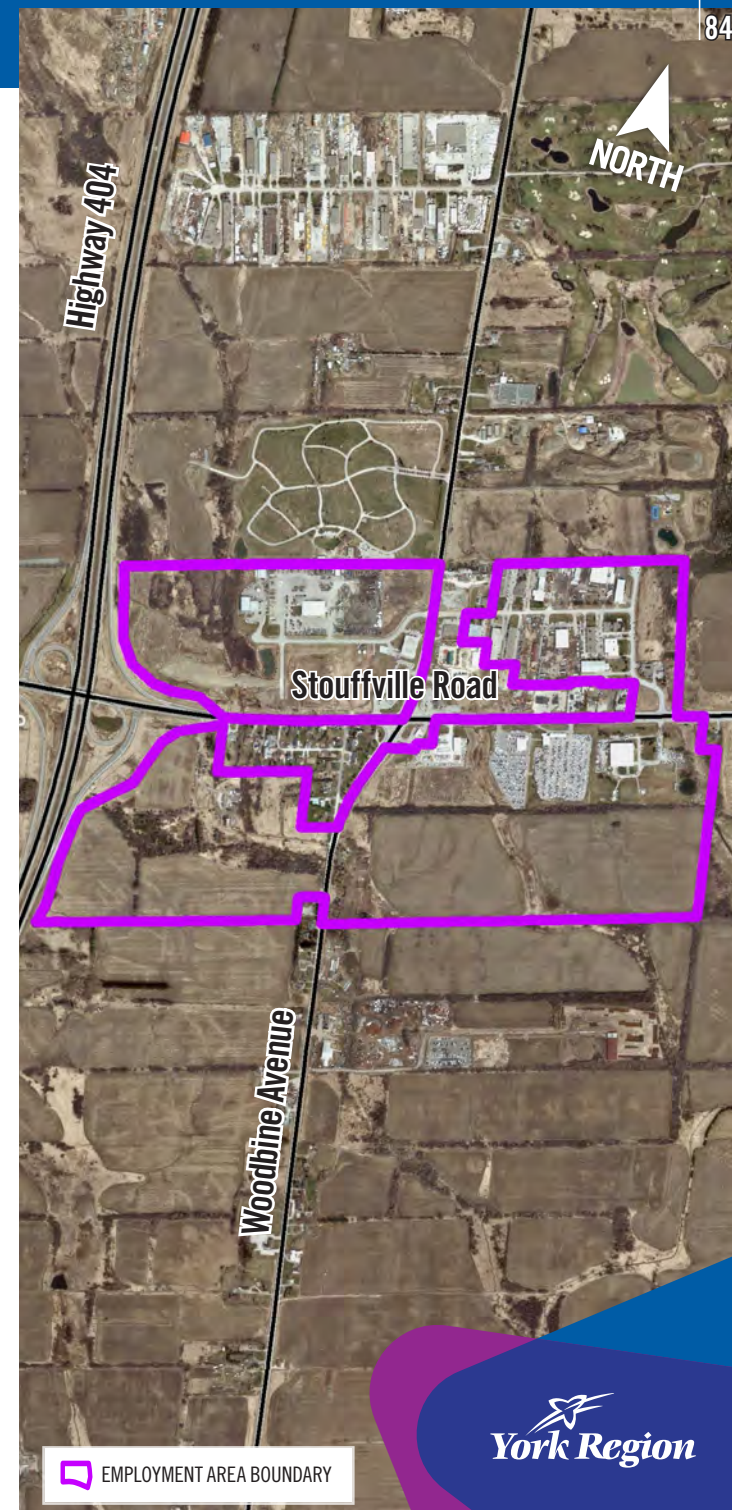
11% RETAIL and PERSONAL SERVICES

89 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY 20 JOBS per HECTARE

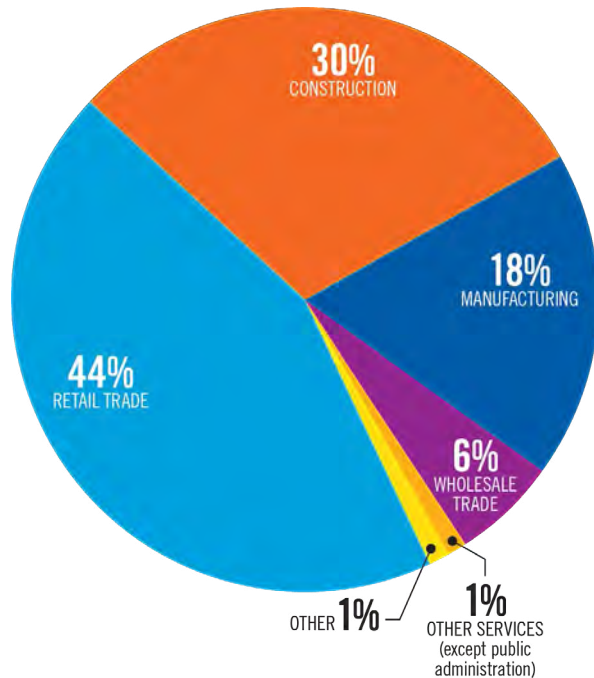
2 SITES [4.0 ha TOTAL AREA] with INTENSIFICATION POTENTIAL



STOUFFVILLE NORTH TOWN of WHITCHURCH-STOUFFVILLE

- Located in the southeast corner of Highway 48 and Bethesda Sideroad, this employment area is comprised of industrial uses to the north and retail uses to the south
- Much of the job growth in the area can be attributed to the retail trade sector, having added 217 jobs since 2008
- The construction, manufacturing and wholesale trade sectors also experienced modest growth over the past ten years, adding a combined 95 jobs

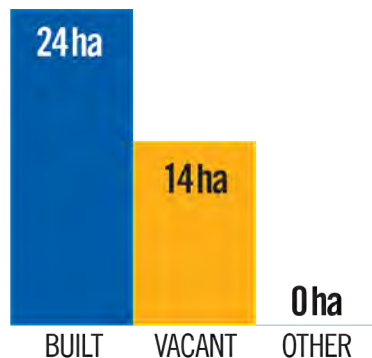
DISTRIBUTION of EMPLOYMENT by SECTOR 2018



500 JOBS in 2018
184% INCREASE (320 JOBS) SINCE 2008

52% SERVICES PRODUCING **48%** GOODS PRODUCING
80% ONSITE **20%** OFFSITE
45% RETAIL and PERSONAL SERVICES

38 TOTAL HECTARES 2017



EXISTING EMPLOYMENT AREA DENSITY **20** JOBS per HECTARE

2 SITES [2.0ha] TOTAL AREA
 with INTENSIFICATION POTENTIAL

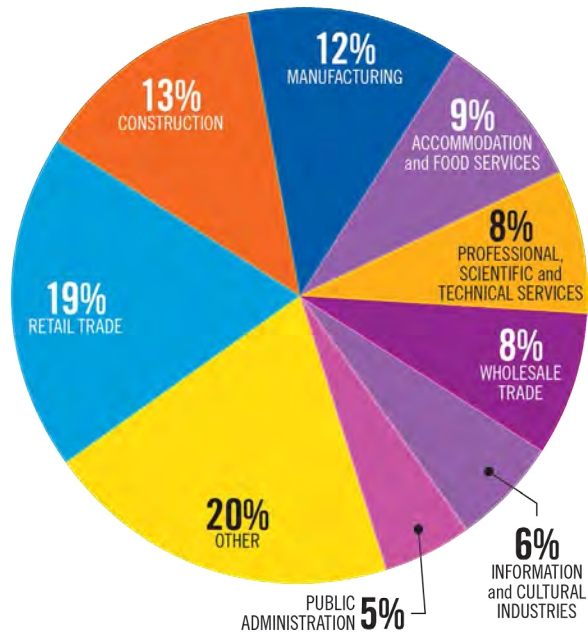


EMPLOYMENT AREA BOUNDARY

STOUFFVILLE SOUTH TOWN of WHITCHURCH-STOUFFVILLE

- ▶ Within the Town of Whitchurch-Stouffville, this is the largest employment area in terms of land area. It is comprised of a mix of diverse employment uses ranging from heavy to light industrial, office and retail
- ▶ The construction, retail trade and accommodation and food services sectors were the main drivers of growth over the past ten years, adding 551 jobs to the employment base
- ▶ It is home to Teva Canada Ltd, which is a large employer in the pharmaceutical manufacturing sector

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



2,600 JOBS in 2018

40% INCREASE (740 JOBS) SINCE 2008

75% SERVICES PRODUCING **25%** GOODS PRODUCING

88% ONSITE **12%** OFFSITE

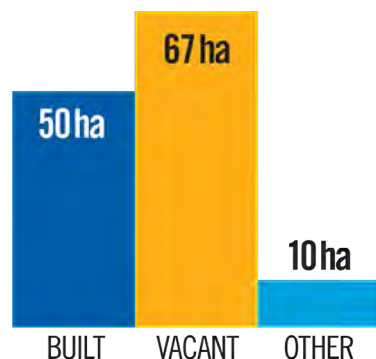
38% RETAIL and PERSONAL SERVICES

MAJOR OFFICE
410 JOBS 2 BUILDINGS

EXISTING EMPLOYMENT AREA DENSITY 52 JOBS per HECTARE

6 SITES [8.0ha] TOTAL AREA
with INTENSIFICATION POTENTIAL

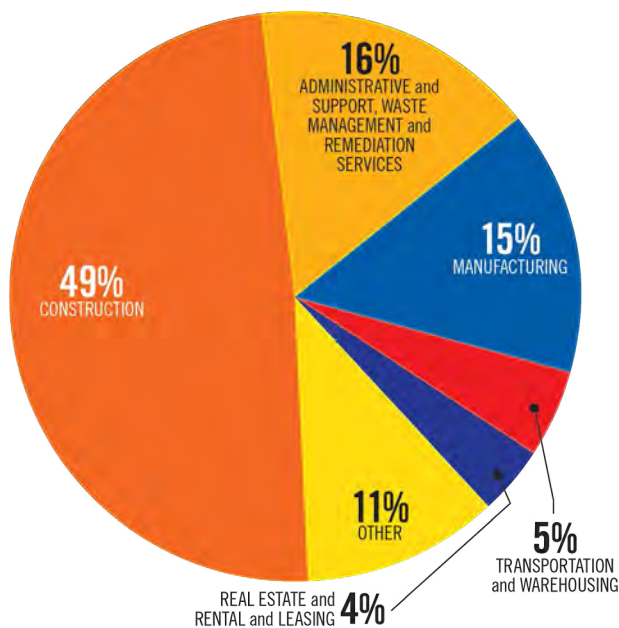
127 TOTAL HECTARES 2017



VANDORF TOWN of WHITCHURCH-STOUFFVILLE

- ▶ Located at the southeast corner of Aurora Road and Woodbine Avenue, this established industrial employment area can be accessed via the Highway 404 interchange to the west
- ▶ It is primarily comprised of standalone industrial buildings with some ancillary office uses
- ▶ Employment in the area has more than doubled since 2008, with the construction and administrative and support, waste management and remediation services sectors driving this growth

DISTRIBUTION of EMPLOYMENT by SECTOR 2018



1,310 JOBS in 2018

160% INCREASE (810 JOBS) SINCE 2008

33% SERVICES PRODUCING

67% GOODS PRODUCING

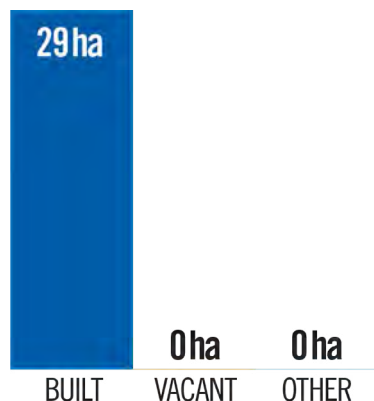
80% ONSITE

20% OFFSITE



2% RETAIL and PERSONAL SERVICES

29 TOTAL HECTARES 2017



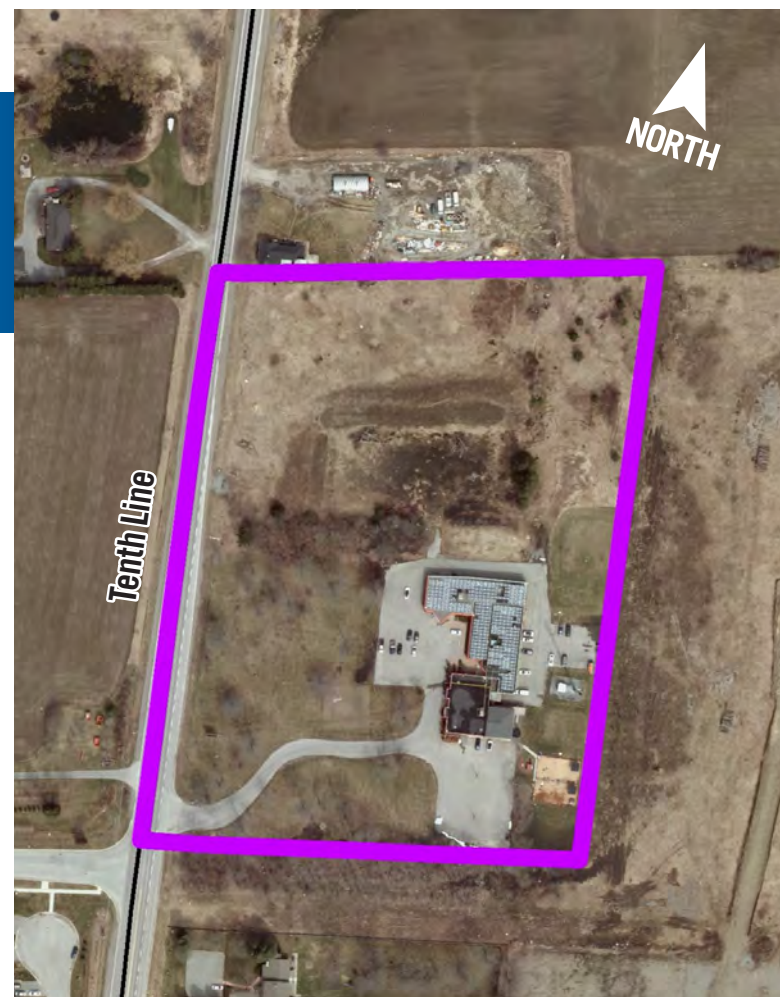
EXISTING EMPLOYMENT AREA
DENSITY 46 JOBS per HECTARE

2 SITES [1.0ha] TOTAL AREA
with INTENSIFICATION POTENTIAL



STOUFFVILLE EAST (VACANT)

- Located adjacent to tenth line, there is a total of 4ha in this employment area, 2ha of which are vacant
- As of 2018 there were 26 jobs in this employment area, the majority of which were in the health care and social assistance sector



York Region Employment Area Profiles

Data Sources and Definitions

The information contained in the York Region Employment Area profiles was derived from the York Region Planning and Economic Development Branch, 2018 and is based on the most up-to-date available data. The following table provides data sources and definitions for the information presented.

Data	Sources and Definitions
Distribution of employment by Sector and employment growth	<ul style="list-style-type: none"> • Employment data is based on the Region's 2008 and 2018 Employment Survey. It is based on surveyed employment only and does not include estimates for home-based, farm-based or no contact businesses. • Employment data has been classified using the 2012 North American Industrial Classification (NAIC) system
Services and Goods Producing	<ul style="list-style-type: none"> • Based on 2018 York Region Employment Survey Data • Goods Producing Industries are comprised of the following sectors: Mining, Oil and Utilities Sector (NAIC 21, 22), Construction Sector (NAIC 23), Manufacturing Sector (NAIC 31-33). • Services Producing Industries are comprised of the following sectors: Wholesale Trade Sector (NAIC 41), Retail Trade Sector (NAIC 44-45), Transportation/Warehousing Sector (NAIC 48-49), Information and Cultural Studies Sector (NAIC 51), Finance and Insurance Sector (NAIC 52), Real Estate and Rental and Leasing Sector (NAIC 53), Professional, Scientific and Technical Services Sector (NAIC 54), Management of Companies and Enterprises Sector (NAIC 55), Administrative and Support, Waste Management and Remediation Services Sector (NAIC 56), Education Sector (NAIC 61), Health and Social Services Sector (NAIC 62), Arts, Entertainment and Recreation Sector (NAIC 71), Accommodation and Food Services Sector (NAIC 72), Other Services Sector (except public administration) (NAIC 81), Public Administration Sector (NAIC 91).
Onsite and Offsite Employment	<ul style="list-style-type: none"> • Based on 2018 York Region Employment Survey Data • Onsite Employment includes permanent fulltime, permanent part-time and Contract/Seasonal/Temporary employees that typically work 30 hours or more per week at the

Data	Sources and Definitions
	<p>surveyed business location.</p> <ul style="list-style-type: none"> • Offsite Employment includes permanent fulltime, permanent part-time and Contract/Seasonal/Temporary employees that typically work 30 hours or more per week however work is done at various and changing locations away from the surveyed business location
Retail and Personal Services Sectors	<ul style="list-style-type: none"> • Based on 2018 York Region Employment Survey Data • The Retail and Personal Services sectoral grouping includes NAICS 44-45, 51,71,72 and 81
Major Office Employment and Locations	<ul style="list-style-type: none"> • A Major office is generally defined as a freestanding office building greater than 20,000 square feet. Institutional offices such as municipal buildings, school boards or police stations are not included. • The count of major office buildings is based on York Region's Major Office Inventory 2018 and the major office employment is based on the York Region employment survey 2018.
Total Land Area by Category	<ul style="list-style-type: none"> • Based on the 2017 Employment Land inventory • All area calculations are reported in net hectares • Net Area can be defined as developable area, with a 20% reduction to parcels greater than or equal to 25 developable hectares to account for future local roads and stormwater management facilities. For parcels less than 25 developable hectares, there is no reduction in developable area, with the assumption that local roads and stormwater management facilities already exist in the area. If an employment area was 60% vacant or greater, the 20% reduction was applied to all vacant parcels in the employment area. • The employment land inventory includes three vacant/built status categories: <ul style="list-style-type: none"> ○ Vacant – parcels that are currently vacant. This includes parcels that are not in use as well as parcels currently under construction or being used for agricultural purposes. ○ Built – parcels that are currently in use. This includes parcels that support industrial, major office, parking, and storage uses. Although parking and storage uses may have some redevelopment potential, they have not been included in the vacant analysis. ○ Other – parcels that are being used for non-employment uses such as road right of-ways, storm water management ponds, natural heritage features, legal nonconforming residential, and other infrastructure such as water towers and hydro corridors.
Existing Employment Area Density	<ul style="list-style-type: none"> • Employment area density calculation uses built area in net hectares as per the 2017 employment land inventory and 2018 surveyed employment data including major office and estimates for no contact employment.
Intensification Potential	<ul style="list-style-type: none"> • Intensification on existing built parcels refers to the construction of new building space on employment area parcels that are considered built in the Region's employment land inventory.

Data	Sources and Definitions
	Intensification through new building space can occur through expansion of an existing building or through construction of an entirely new structure on the same parcel.
Spatial Data - Employment Area Boundary	<ul style="list-style-type: none"> • Employment areas can be defined as “areas designated in an official plan for clusters of business and economic activities, including but not limited to, manufacturing, warehousing, offices and associated retail and ancillary facilities” (PPS, 2014) • The delineation of the employment area boundaries are based on the 2017 York Region employment land inventory which was updated with input from the local municipalities.
Spatial Data - Major Transit Station Area	<ul style="list-style-type: none"> • MTSA locations are based on the 2019 draft intensification strategy and MTSA report. All identified MTSA locations are pending final approval through the Region’s municipal comprehensive review. • Major Transit Station Areas (MTSAs) are defined by the 2017 Growth Plan as “the area including and around any existing or planned higher order transit station or stop within a settlement area; or the area including and around a major bus depot in an urban core. Major transit station areas generally are defined as the area within an approximate 500 metre radius of a transit station, representing about a 10-minute walk.” • The Growth Plan requires that MTSAs located in priority transit corridors be delineated and have minimum density targets. The Growth Plan also encourages municipalities to identify, delineate, and set density targets for additional MTSAs outside of priority transit corridors. Additional higher order transit stations and stops were identified as MTSAs, in consultation with local municipalities, based on the following considerations: <ul style="list-style-type: none"> • Their location within a Regional intensification corridor; • The level of anticipated intensification or the potential for intensification; and • The potential to become a required MTSA through a future extension of a priority transit corridor.
Spatial Data - Ortho photography	<ul style="list-style-type: none"> • 2018 York Region Orthophotography provided by © First Base Solutions Inc.

Summary of employment areas policy scan

The purpose of this scan is to gather information on current employment planning practices in both a national and international context. The challenge of planning for the future of employment areas is similar in both contexts. Preserving employment lands, accessibility, providing critical infrastructure, access to a skilled labour force, remaining competitive and integrating employment areas into communities are global challenges. Attachment 3 summarizes the findings from the jurisdictional scan into key themes and provides linkages to the Regional Official Plan (ROP) as well as identifies opportunities for consideration for the ROP review. The jurisdictions examined were:

- City of Toronto, Ontario
- Town of Milton, Ontario
- City of Waterloo, Ontario
- City of Montreal, Quebec
- North Okanagan Region, British Columbia
- Chester County, Pennsylvania
- City of Victoria, British Columbia
- Anaheim, California USA
- Sydney, Australia
- London, UK
- Stockholm, Sweden

Theme	Detail	Regional Examples	Policy Consideration
1. Protect and preserve employment areas, specifically inner and core areas, for traditional employment uses such as manufacturing and industrial uses	<p>Protect and preserve inner employment areas (lands that are furthest from residential uses and adjacent to highways) for industrial type businesses that are land intensive (lower employment densities) and that have more disruptive activities (e.g. manufacturing).</p> <p>These areas have specific locational requirements and potential to create land use conflicts.</p>	<ul style="list-style-type: none"> • Town of Milton identified these areas as “historical industrial areas” and has provisions in their Official Plan (OP) to preserve them • City of Waterloo preserves employment areas that the city owns with a land holdings company • The City of Toronto OP provides provisions to “preserve core areas for industrial uses” • London, UK designates key industrial sites to retain land for industrial uses. To supplement this, tighter policies have been introduced to limit the release (conversions) of key industrial areas 	<p>The ROP has several policies related to the protection of employment lands including 4.3.3 and 4.3.5</p> <p>Planning staff, through the Employment Area Conversion work, have developed a set of criterion to evaluate employment area conversion requests.</p> <p>Policies that reduce land use conflicts by identifying and maintaining areas for traditional employment uses for the long term will attract and provide for a variety of employment uses, creating opportunity for residents.</p>

Theme	Detail	Regional Examples	Policy Consideration
<p>2. Allow and encourage a mix of land uses, increased density and a broader range of employment uses along fringe* and strategic areas</p> <p><i>*While the definition of 'Fringe Areas' varies, it is most commonly defined as the outermost areas or border surrounding the perimeter of an employment area.</i></p>	<p>Allow flexibility for increases in density and mixed uses in areas most accessible by public transportation (along major arterials, nodes, corridors).</p> <p>More flexibility creates integration of employment areas with adjacent non-employment uses and attracts high density employment uses that benefit from mixed-use and amenity rich environments.</p>	<ul style="list-style-type: none"> Sydney, Australia permits affordable housing on the fringe of employment areas, furthest away from disruptive activities (such as industrial uses). This more flexible approach to land-uses in employment areas creates a mix of land uses. Additionally, Sydney changed their strategic plan employment designations from "industrial" to "employment" to emphasize design rather than specific use The Town of Milton has a Residential/Employment designation in their OP applying to lands where a mix of uses is appropriate based on specific locational considerations. The main permitted use within this designation is residential and gives consideration to integrating employment uses such as office, light industrial and institutional uses. 	<p>The ROP includes policies to allow for flexibility and mixed uses. It directs mixed-use to Regional Centres and Corridors as a component of City Building.</p> <p>Major Transit Station Areas (MTSA) are being identified through the MCR. MTSA work will identify areas with existing high densities or potential for higher densities and will encourage intensification and a mix of land uses, where appropriate, within these areas.</p>
<p>3. Develop implementation plans and guidelines to improve built form, urban structure and public realm within and adjacent to employment areas</p>	<p>Aging built-form has commonly been listed as a weakness of employment areas. By improving the built-form and therefore the public realm, employment areas become more attractive to employers and also help businesses attract talent.</p>	<ul style="list-style-type: none"> The City of Waterloo through their Employment Area Implementation Plan, listed five characteristics of what was considered a successful employment area including character, walkability, transit, amenities, flexibility and safety. Additionally, a master plan was created for each employment area. Anaheim, CA created landscape design guidelines to beautify the built form, and created a mobility and connectivity plan to 	<p>ROP includes objectives for planning for employment lands to ensure the long term supply and effective planning and design of employment lands.</p> <p>Specifically, policies 4.3.15 and 7.2.5 speak to the design of employment lands to be</p>

Theme	Detail	Regional Examples	Policy Consideration
	Implementation plans and guidelines set standards to guide development and policy implementation by creating desirable built-form standards.	<p>encourage bike share program and bus shuttle programs to run to train stations as part of a 'multifaceted approach' to update employment areas</p> <ul style="list-style-type: none"> • Chester County, PA identified its weaknesses with its employment areas / office parks included limited connectivity to transit, ageing office buildings, limited affordable housing within a reasonable commuting distance, and previously segregating office parks from other office uses. • Montreal's Master Plan aims to improve architectural and urban quality of employment areas by implementing measures that reinforce the urban character and favour the reconfiguration of these areas in accordance with the architectural and public space improvement principles, increase the multifunctional roles of business and retail areas and through a detailed planning process define the means for redeveloping identified business and retail areas 	<p>transit accessible, walkable and provide safe pedestrian facilities.</p> <p>Further opportunities exist at the Regional and Local Municipal level to develop built form standards or guidelines to improve ageing/existing employment areas that will attract new businesses and highly skilled workforce.</p>
4. Encourage redevelopment and rejuvenation through marketing strategies and incentives	Encouraging redevelopment and rejuvenation of older or in-transition employment areas by implementing strategies and policies addressing these areas to support their redevelopment and attract prospective investors.	<ul style="list-style-type: none"> • Anaheim, CA uses development agreements as incentives for developers who include plazas and open public space as part of their development plan to, "continue to provide special incentives and improvement programs (e.g., density bonuses) to revitalize major business corridors and employment centers." 	York Region's Economic Development Action Plan sets strategic actions each term of Council. The next iteration of the Plan will be done in conjunction with the MCR to align policy with

Theme	Detail	Regional Examples	Policy Consideration
		<ul style="list-style-type: none"> • City of Waterloo emphasizes creative solutions to rejuvenate employment areas including eco-industrial parks, marketing strategies, incentives through Community Improvement Plans • Town of Milton included an objective in their Official Plan to revitalize employment areas, by encouraging ‘revitalization and conversion of older employment and industrial areas, where appropriate’ • Victoria developed responses such as Business Improvement Areas (BIAs), incubation and acceleration programs, financial incentives and by creating innovation / creative districts in their Official Community Plan (OCP) • Montreal Master Plan supports the revitalization and redevelopment of sites previously occupied by heavy industry or railyards. The rehabilitation of these sites will contribute to the renewal of the City as well as create added value for its economy. • Chester County, PA identified the threats to its employment areas / office parks which were: outdated buildings responsive to today’s employment market, the overbuilding of specific uses during redevelopment, difficulty of attracting employees and the tech / collaborative economy with shared space, and changes in millennial behaviour. 	<p>implementation.</p> <p>An opportunity exists to examine a Regional or Local approach to identifying existing older or in-transition employment areas and supporting their redevelopment through policy or incentive-based programs.</p>

Theme	Detail	Regional Examples	Policy Consideration
5. Increasing densities in underutilized employment areas	<p>Realizing the potential of other employment areas to create new and vibrant areas that add value to the economy.</p> <p>Identify underutilized employment areas for redevelopment to increase densities and address traffic congestion into existing employment areas.</p>	<ul style="list-style-type: none"> London, UK mapped areas of intensification that can support redevelopment at higher densities. The London Plan includes minimum guidelines for employment capacity as well as a set of policies that include taking into consideration locational characteristics and the integration of existing uses in the surrounding areas. Stockholm's Master Plan identifies expanding job creation outside the downtown area to ease traffic congestion. This includes the identification of sites outside the downtown that could be re-purposed for employment uses Montreal intends to support the conversion of large brownfields by defining and implementing a development strategy for each site that would promote the intensification of employment in those areas 	<p>ROP requires that employment lands are flexible and adaptable for future redevelopment and intensification opportunities such as 4.3.18 and 4.3.19</p> <p>Analysis (Planning for Employment Background Report, Attachment 1) has been completed through the MCR process identifying employment areas for intensification potential, noting that since 2011, 60% of employment area employment growth has been accommodated in existing spaces.</p>
6. Ensuring servicing and critical infrastructure are available in employment areas to attract investment	<p>Investing in critical and sought after infrastructure such as broadband, transit and water/wastewater facilities, that will attract new businesses,</p>	<ul style="list-style-type: none"> North Okanagan, BC promotes regional employment land growth by focusing on transportation connections and prioritizing parcels of land that will yield the most benefit in terms of employment lands development by dividing them into 'Investment Zones' to ensure each zone has sufficient infrastructure, visibility and market attractiveness 	<p>The ROP includes policies related to infrastructure investment including 4.1.1 and 4.1.5. Further, the Region has made considerable investments in transit infrastructure to support job create and strengthen the Regional economy.</p>

Theme	Detail	Regional Examples	Policy Consideration
		<ul style="list-style-type: none"> City of Waterloo Section 7.2 (employment areas) of the Waterloo OP states, “Make strategic investments, or provide support to other public agencies and/or private entities, to provide key competitive infrastructure that supports sustainable business development and activity” 	York Region’s 2019 Capital Budget includes \$949 million in transportation investments.
7. Provide employers with a skilled workforce by ensuring access to housing options and quality education	A skilled workforce is an essential component to business attraction and retention.	<ul style="list-style-type: none"> Stockholm relates the importance of remaining attractive for businesses by continuing to offer access to a skilled workforce, high-quality educational institutions and a fully functioning housing market with a wide choice of tenure types 	<p>The Economic Development Action Plan addresses key components of access to a skilled workforce for business attraction. Staff continues to support the York University Markham campus that aims to develop programming that will connect students to the local business community.</p> <p>The ROP includes a comprehensive set of policies related to affordable housing to promote, encourage and provide housing options in York.</p>

Theme	Detail	Regional Examples	Policy Consideration
8. Provide amenities for businesses and employees within employment areas and within close proximity to employment areas or business parks	<p>Amenity rich areas and accessible work environments are increasingly important in attracting businesses and workers.</p> <p>Permit a wide range of employment uses adjacent to major road arteries, or broader community nodes, to attract high density employment.</p>	<ul style="list-style-type: none"> City of Toronto OP includes “uses that support the prime economic function of employment areas, such as parks, small scale retail stores and services to meet the daily needs of business and employees, workplace daycare and restaurants, must also be readily accessible within employment areas.” Stockholm promotes a mix of functions that create vibrant and safe environments with people moving around and encountering others virtually round the clock. This benefits the streetscape and local cohesion and creates a thriving climate for businesses. 	<p>The ROP limits ancillary uses on employment lands to protect them for employment uses (4.3.11)</p> <p>Future opportunities include adding flexibility to this policy to encourage uses that create vibrant multi-functional employment areas without compromising their primary function.</p>