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<b>SUBJECT:</b>	Monitoring Growth in the City of Markham - Performance Indicators
<b>PREPARED BY:</b>	Chun Nam Law, MES, Senior Planner, Policy & Research – ext.3685
<b>REVIEWED BY:</b>	John Yeh, MCIP, RPP, Manager, Strategy & Innovation – ext.7922 Marg Wouters, MCIP, RPP, Senior Manager, Policy & Research – ext.2909

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**RECOMMENDATION:**

- 1) That the staff report entitled, “Monitoring Growth in the City of Markham - Performance Indicators” dated July 13, 2020, be received;
- 2) And that staff be authorized and directed to do all things necessary to give effect to this resolution.

**PURPOSE:**

The Monitoring Growth in the City of Markham – Performance Indicators report (**Appendix ‘A’**) provides the results of an analysis of performance indicators that measure and track the progress of policy objectives in the City’s Official Plan. It provides input to further policy review and development and assists in monitoring growth targets.

**BACKGROUND:**

The City of Markham’s Official Plan 2014 (Official Plan) provides a long-term framework for guiding sustainable growth and land use planning decisions in Markham. The Official Plan reflects the goals, policies, and targets set out in Markham’s endorsed Growth Alternative to 2031, Building Markham’s Future Together Strategic Plan, Greenprint Community Sustainability Plan, York Region’s Official Plan, and the Provincial Growth Plan and Greenbelt Plan. The Official Plan was adopted by Council on December 10, 2013 and approved by York Region Council on June 12, 2014. The majority of the Official Plan is currently in effect.

Chapter 10.12 Monitoring of the Official Plan provides for the development of a framework for monitoring growth and to measure progress towards achieving policy outcomes.

A key component of the Official Plan is to monitor progress towards the achievement of the Official Plan’s policy objectives and targets. **Appendix ‘A’** contains the results of the Official Plan Performance Indicators and is a first step of an effort to monitor growth and

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development in the City and to provide input for future policy development through the review of the Official Plan.

Where available, monitoring results were sourced from York Region to limit duplication of efforts and maintain methodological consistency since the City's Official Plan targets are aligned with the Region's. This report coincides with recent York Region reports in June 2020 related to Growth & Development and Measuring & Monitoring Affordable Housing.

Staff will be continuing to monitor the performance of these indicators and are working to identify additional metrics that could be tracked using available data sources. Staff will be reporting to Development Services Committee on an annual basis with respect to monitoring growth in the City.

### **Official Plan Performance Indicators**

Indicators have been identified based on a combination of data availability, practicality for tracking, and relevance toward Official Plan objectives and targets. These indicators are arranged according to thematic areas of the Official Plan:

- Sustainable Growth - Directing growth to well-planned, centres and corridors and compact development within the urban area
  - Population and Employment Growth
  - Residential Intensification Rate
  - Regional Centre Density
  - Designated Greenfield Density - Future Urban Area
- Building Complete Communities - Compact urban development, accommodating a mix and range of housing and jobs based on walking, cycling and convenient access to public transportation, while preserving and enhancing the natural environment and cultural heritage
  - New Housing Supply by Type
  - New Housing Affordability
  - Protection of Cultural Heritage Resources
- Increasing Mobility Options - Pursuing transit supportive development and implementing transportation demand management strategies for a more balanced choice of mobility options
  - Modal Split
  - Residents Within 800 Metre Walking Distance of Higher Order Transit

Future reports will identify additional indicators from other thematic areas of the Official Plan.

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**OPTIONS/ DISCUSSION:**

Generally, the indicators demonstrate the City of Markham is on the right track to meeting the objectives of the Official Plan in the thematic areas covered in Sustainable Growth, Building Healthy Complete Neighbourhoods, and Increasing Mobility Options. The Residential Intensification Rate and Regional Centre Density indicators for the Sustainable Growth theme shows that Markham's growth management framework of directing the majority of its growth to centres and corridors in the urban area are contributing to compact and efficient communities served by public transit and amenities. Areas of improvement are noted for New Housing Affordability and specifically more affordable family sized apartment units. A summary of the results is provided below (See **Appendix 'A'** for the Official Plan Performance Indicators report).

**Population and employment growth likely to lag behind 2021 forecasts**

Table 2.3 of the City's Official Plan contains Markham's population and employment forecast to 2031 in five year increments. This forecast serves as the basis to plan for population and employment growth. The City of Markham's population has increased by approximately 66,000 residents to approximately 338,800 from 2006 to 2016 which is in line with Markham's forecasted population of 337,800 in 2016. The 2019 population of 347,800 residents in Markham is about 22,500 less than the 2021 forecasted population of 370,300. To meet the 2021 forecast, Markham would have to experience annual growth of over 11,000 residents per year for the next two years, which is well above the 6,500 person annual population growth seen between 2006 and 2016. Based on the 2021 estimate Markham's population will likely be at least 15,000 residents less than the 2021 forecast as a result of the recent annual average growth of 3,000 residents from 2016 to 2019.

Markham's total employment has increased by 41,000 jobs to approximately 167,100 jobs from 2006 to 2016. The number of jobs in 2016 was about 33,200 lower than forecasted at 200,300 jobs. This trend is expected to continue into the near future as there were 179,900 jobs in 2019 and with the 2021 forecast of 221,500 jobs, an annual growth of about 21,000 would have to occur the next two years which is significantly greater than the 4,100 annual jobs growth from 2006 to 2016. Based on an annual average growth of 4,300 jobs from 2016 to 2019, Markham's employment in 2021 could be at least 30,000 jobs less than the 2021 forecast. The City has achieved a balance of approximately 1 job for every 2 residents since 2016 which is in line with Official Plan objectives.

It should be noted that York Region's forecasts is being reviewed through the Regional Municipal Comprehensive Review (MCR). The Province has recently released Proposed Amendment 1 to the Growth Plan that introduces new 2051 population and employment forecasts. A separate staff report for the July 13, 2020 Development Services Committee agenda provides staff comments on Proposed Amendment 1. The Markham Official Plan will be updated to conform to York Region's Official Plan once the MCR is completed.

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**Markham is continuing to intensify along its Centres and Corridors**

Residential intensification rate is the annual percent of all residential units built within the Provincial built boundary, which was established by the original Growth Plan for the Greater Golden Horseshoe in 2006. The City's intensification strategy targets an intensification rate of 60 percent. This target is measured annually to optimize the use of existing land and infrastructure, which contributes to creating compact, walkable and complete communities. Over the last 10 years (2009-2018), the City's intensification rate has been averaging 58 percent and this rate is anticipated to increase as more development occurs within the City's Centres and Corridors including Markham Centre, Langstaff Gateway and Cornell Centre, all of which are within the built boundary.

**Markham Centre is growing as the City's focus area for employment and population growth**

Markham Centre and Langstaff Gateway Regional Centres are a focal point for intensive development in Markham, with a concentration of residential, employment, live-work, mobility, investment, cultural, sports and entertainment. Regional Centre densities are measured in residents and jobs per hectare across the entire Regional Centre and a minimum target of 200 was set in the Official Plan. Currently, Markham Centre has a density of 71 residents and jobs per hectare across the entire Regional Centre or 180 residents and jobs per hectare across lands developed to date. There is significant development potential remaining in Markham Centre to help achieve the target over time. Development in Langstaff Gateway has yet to proceed but the secondary plan provides for a 47 hectare high density Centre of 30,000 residents and 15,000 jobs.

**Markham's Future Urban Area is planned for higher density compared to earlier subdivisions**

The Future Urban Area (FUA) lands are designated greenfield area lands, outside of the City's built boundary for which densities are measured based on number of residents and jobs per developable hectare. Markham's Official Plan has an assigned target of 70 residents and jobs per hectare, and 20 units per hectare for the residential areas of the FUA in order to create transit supportive and pedestrian oriented communities. The approved Secondary Plans for the Berczy Glen and Robinson Glen communities of the FUA are planned to achieve both density targets.

**New housing supply trends indicate higher densities being achieved**

New Housing Supply by type tracks the amount of new housing units completed annually by unit type. The Official Plan has policies to encourage a mix of housing units to meet the diverse housing needs of the City's residents. For the period between 2015 and 2019 there were 7,444 higher density new units (apartments and townhouses) which made up 80% of all new units in that period. The period of 2010 to 2014 had a similar number of 7,457 higher density new units but made up only 57% of all new units over that period.

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**Affordability of annual new ownership housing units continues to be driven by studio and 1 bedroom units**

The housing affordability indicator tracks the proportion of new ownership units created annually that are affordable to low and moderate income households below 60 percent of the income threshold. Markham's Official Plan policies aim to promote affordable housing choices to accommodate residents. In 2018, 1,480 new ownership units were created and 358 of those units were affordable. Studios and 1 bedroom apartment units combined at 353 units made up the majority of the affordable units. There were only 5 family sized units such as apartments with 2 or more bedrooms and ground related units that met the affordability criteria. Recent results have shown that ownership units, regardless of type, are becoming increasingly unaffordable to households with incomes in the lowest 60<sup>th</sup> percentile or below.

There were a small number of affordable new rental units built in the past 5 years, averaging less than 7 units a year between 2014 and 2018.

**Cultural heritage resources continue to be protected through additions to the register, designations, and heritage easement agreements**

Cultural heritage resources are protected through properties listed on the Markham Register of Property of Cultural Heritage Value or Interest, individually designated properties and heritage easement agreements. The protection and conservation of our cultural heritage is essential to the character of our community and contributes to other social, cultural, economic and environmental objectives of the City. There are currently 327 listed properties on the Markham Register of Property of Cultural Heritage Value or Interest, not including individually designated or non-heritage properties within in a heritage conservation district. There were 247 individual Property Designations in 2019, with 7 added during 2019 and 143 Heritage Easement Agreements in 2019, with 2 added during 2019.

**An increasing percentage of Markham residents are using sustainable modes of transportation**

Modal split is the percentage of travelers by mode of transportation, and is typically measured using the AM peak hours which are the busiest time of the day. The Official Plan has policies to promote effective use of the existing transportation system by reducing automobile dependency and encouraging a greater proportion of trips to be undertaken by walking, cycling and transit. Walking, cycling and transit's share of the modal split has increased from 22.6% in 2006 to 25% in 2016 while auto use has decreased from 77.3% in 2006 to 74.6% in 2016.

**A greater proportion of higher density developments are located within walking distance of higher order transit stations**

Higher density development and residents living within an 800 metre walking distance of Higher Order Transit Stations along Highway 7 and the Stouffville GO Train line supports Official Plan policies to provide for transit-supportive development where there

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is a mix of land uses close to transit. Approximately 55,400 residents or 16% of the City's residents currently live within 800 metres of higher order transit stations along the VIVA Bus Rapid Transit Line on Highway 7 and Stouffville GO Train line. The majority of housing unit types within 800 metres of all Higher Order Transit Stations are apartment units at 58% and this proportion is expected to increase over time.

## **NEXT STEPS**

This report is the first step of an on-going effort to monitor growth as directed by the Official Plan. Future reports will occur on an annual basis where information can be obtained more regularly and may include additional indicators covering other thematic areas of the Official Plan such Protecting the Natural Environment and Agricultural Lands and Maintaining a Vibrant and Competitive Economy.

## **FINANCIAL CONSIDERATIONS**

Not applicable.

## **HUMAN RESOURCES CONSIDERATIONS**

Not applicable.

## **ALIGNMENT WITH STRATEGIC PRIORITIES:**

Official Plan performance indicators were identified and monitored in the context of the Strategic Plan Priority of Goal 3 Vibrant City and Safe, Sustainable and Complete Community.

## **BUSINESS UNITS CONSULTED AND AFFECTED:**

The Planning and Urban Design Department and Engineering Department were consulted in the preparation of this report.

## **RECOMMENDED BY:**

Arvin Prasad, MCIP, RPP  
Commissioner of Development Services

## **ATTACHMENTS:**

Appendix 'A' – Markham Official Plan 2014, Performance Indicators