



York Region Proposed Growth Forecast to 2051

**Special Meeting of Development Services Committee
May 11, 2021**



YORK REGION REGIONAL MAP

Available Whitebelt Lands

- Community
- Employment

Land Use Category

- Built-up Area
- Designated Greenfield Area
- Greenbelt
- UnBUA-Rural
- Urban Expansion
- Designated Greenfield Area - Agriculture

Base Map

- Municipal Boundary
- Other Municipal Boundaries
- Roads
- 400-Series Highways
- Waterbodies

*Areas are draft and are awaiting approval through the Municipal Comprehensive Review and are subject to change.



Produced by:
The Regional Municipality of York
Planning and Economic
Development, Corporate Services
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2003-2021

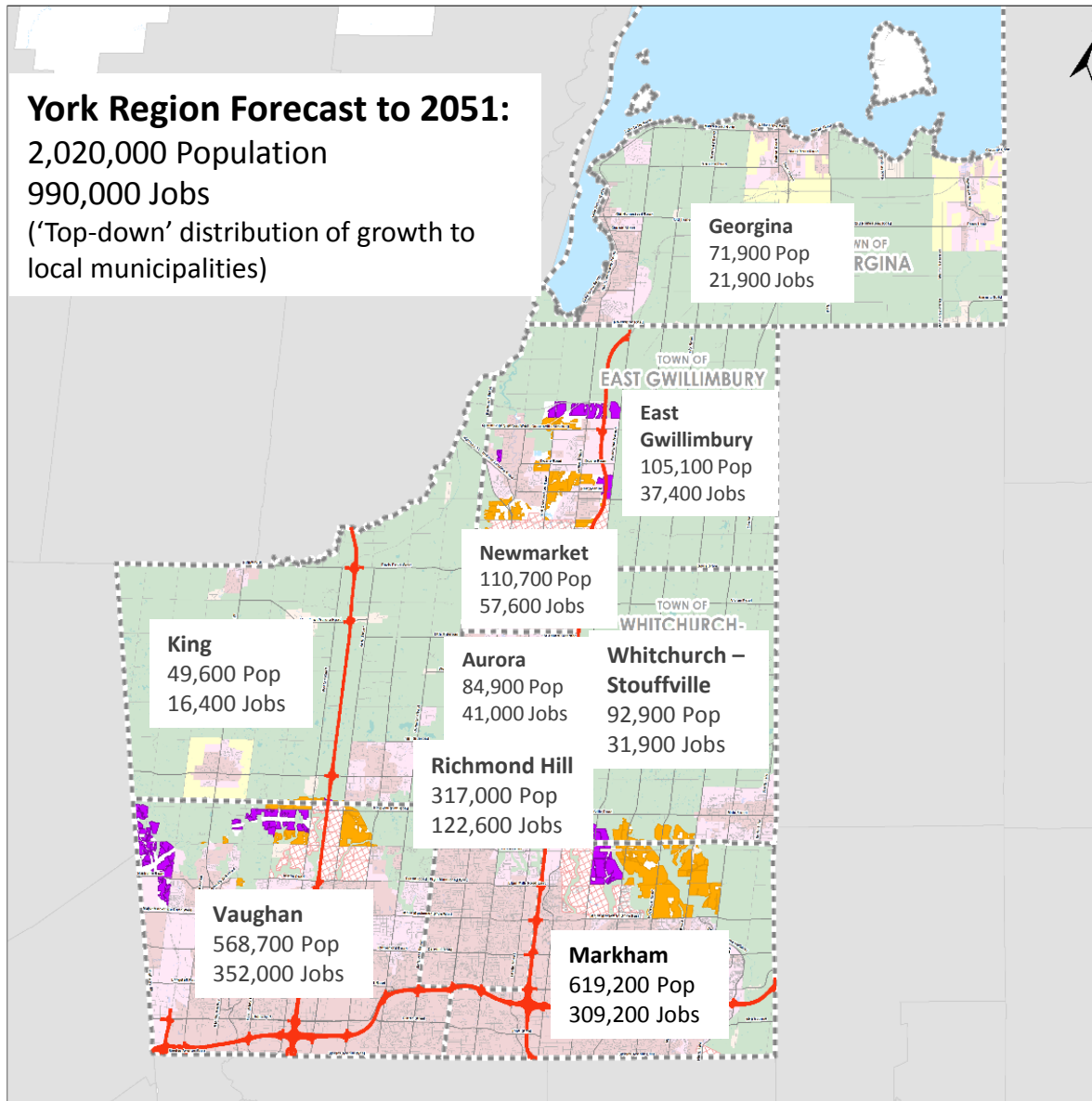
0 1.25 2.5 5 7.5 10
Kilometers

York Region Forecast to 2051:

2,020,000 Population

990,000 Jobs

('Top-down' distribution of growth to local municipalities)





York Region 2051 Forecast Assumptions

- The forecast distributes the population and employment growth to 2051 identified for York Region in the Provincial Growth Plan to the nine local municipalities (i.e., a minimum population of 2.02 million and 990,000 jobs by 2051).
- In distributing this growth to the local municipalities, the Region must take into account a number of minimum targets and other factors prescribed in the Growth Plan and the Province's land needs assessment methodology, including:
 - A minimum intensification rate of 50% Region-wide
 - A minimum density for greenfield areas (min 50 residents+jobs/ha)
 - A minimum employment area density, and
 - Consideration of market demand i.e., providing a range of housing types including ground-oriented housing for families
- The Region has placed a strong emphasis on distributing growth in a manner that efficiently uses existing Regional infrastructure (transit, roads and pipes), and minimizes new infrastructure costs. Markham has relatively lower infrastructure costs and higher certainty than the other local municipalities.



Report Table 6: Summary of Forecast Assumptions for Markham

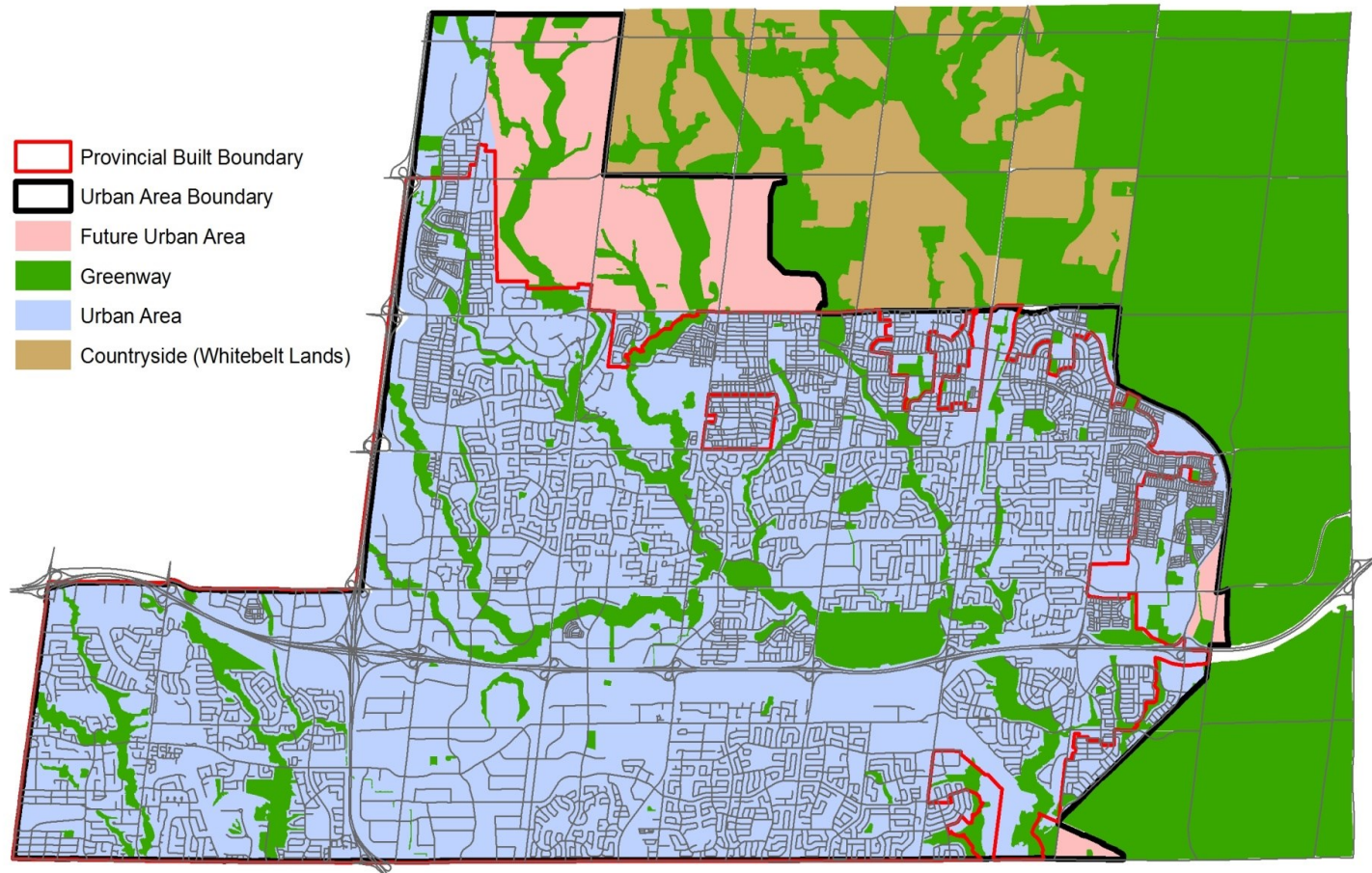
	2016	2051	2016-2051 (35 yrs)		2006-2019 (Actual)
			Total Growth	Average Annual	Average Annual
Population	339,100	619,200	280,100	8,000	4,150
Employment	182,000	309,200	127,200	4,200	2,990
Jobs/Population	54%	50%			
					2010-2019 (Actual)
Total Units*			97,000	2,760	2,240
Intensification Units			50,300	1,440	1,280
Intensification Rate			52%		57%
Proposed Expansion Lands	Total	Community	Employment		
Hectares (acres)	1,490 (3,680)	1,270 (3,140)	220 (540)		
DGA Target (residents + jobs/ha)		70			

Source: York Region March 18, 2021 report, various tables.

* Markham Policy & Research calculation.



Markham's Built Boundary and Designated Greenfield Area



Designated Greenfield Area in 2051 = All of the lands outside of the Provincial Built Boundary that are not in the Greenway designation (i.e., some Urban Area lands, all Future Urban Area lands, and all Countryside lands shown above).



Preliminary Markham Staff Comments

Areas identified for further analysis and discussion:

1. Population and employment forecasts for Markham appear optimistic given recent growth trends.
2. The proposed intensification target of 52% (1,400 units/yr) appears to be achievable.
3. The designated greenfield area (DGA) minimum density target of 70 residents + jobs/ha for Markham expansion lands requires review.
4. Viability of the proposed employment land expansion east of Warden Avenue needs to be confirmed.
5. Markham will need to ensure appropriate opportunities for major office development along the Yonge North Subway corridor and in the Langstaff Gateway.
6. Strong phasing policies are critical for development of remaining whitebelt lands.



Preliminary DSC Comments

Main areas of discussion at April 19 DSC meeting:

- Markham's average growth rate over time;
- Changes in the Growth Plan forecasts over time;
- The implications of Markham achieving a higher intensification rate than the 52% proposed by York Region;
- The desire to retain some of Markham's whitebelt lands and intensify other areas to reach York Region's targeted growth for Markham;
- The need for the Region to consider a number of intensification scenarios not just 50%;
- Transportation improvements needed to support full build-out of whitebelt;
- The impact the pandemic and carbon tax could have on growth forecasts;
- The lands north of Elgin Mills Rd between Warden Ave and Kennedy Rd being proposed for employment rather than residential uses;
- The impact the extension of the Yonge subway will have on intensification, and the impact if it is not extended;
- How to account for changing household preferences over a 35-year horizon.



1. Proposed Population and Employment Growth for Markham Appears Optimistic Given Recent Growth Trends

Population and Employment Growth:

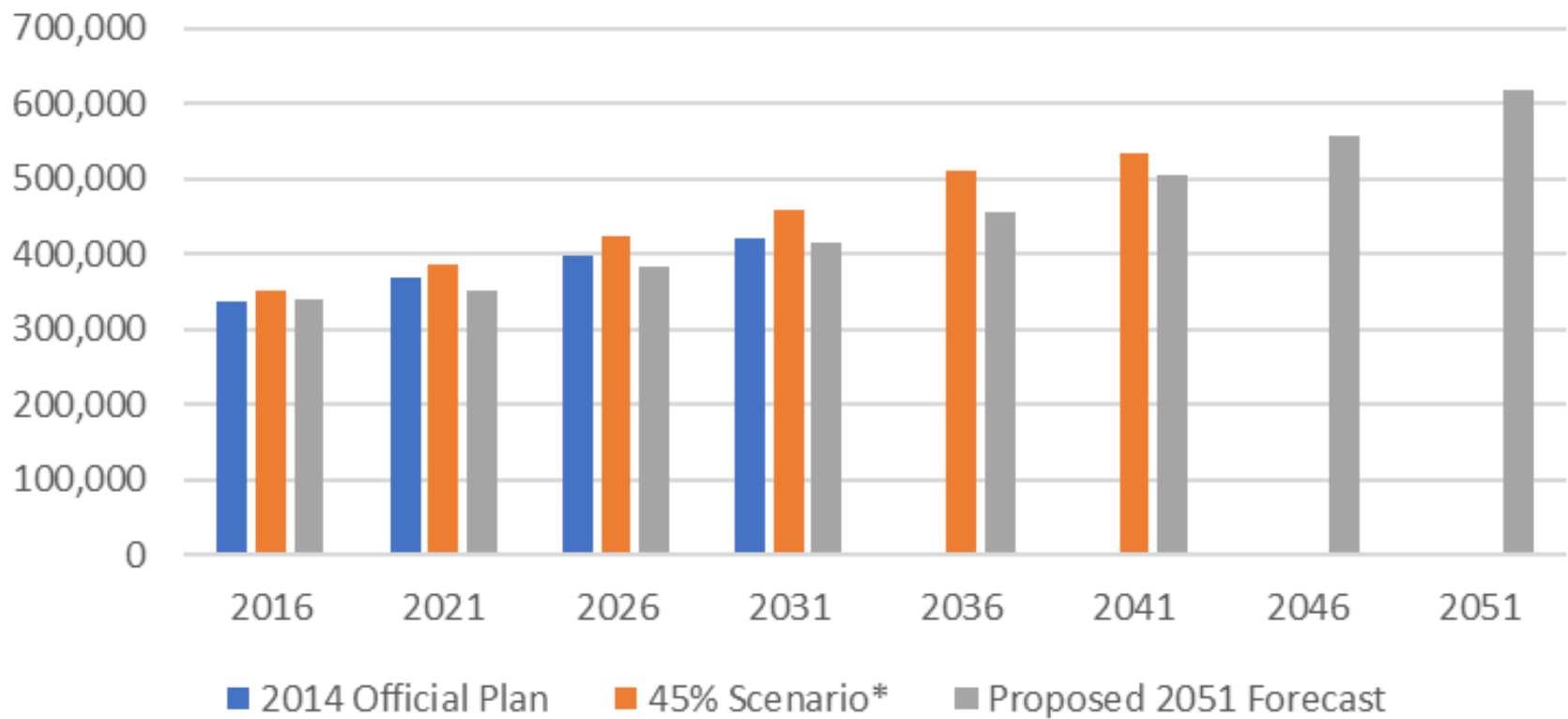
- Forecast growth of 280,100 persons 2016-2051 = **8,000 persons/yr**
 - Official Plan forecast 2006-2031 = 5,900 persons/yr
 - Actual population growth 2006-2019 = 4,150 persons/yr
- Forecast growth of 127,200 jobs 2016-2051 = **4,200 jobs/yr**
 - Official Plan forecast 2006-2031 = 3,800 jobs/yr
 - Actual employment growth 2006-2019 = 3,000 jobs/year

Housing Unit Growth:

- Forecast growth of 97,000 units 2016-2051 = **2,760 units/yr**
 - Official Plan forecast 2006-2031 = 2,380 units/yr
 - Actual unit growth 2010-2019 = 2,240 units/yr



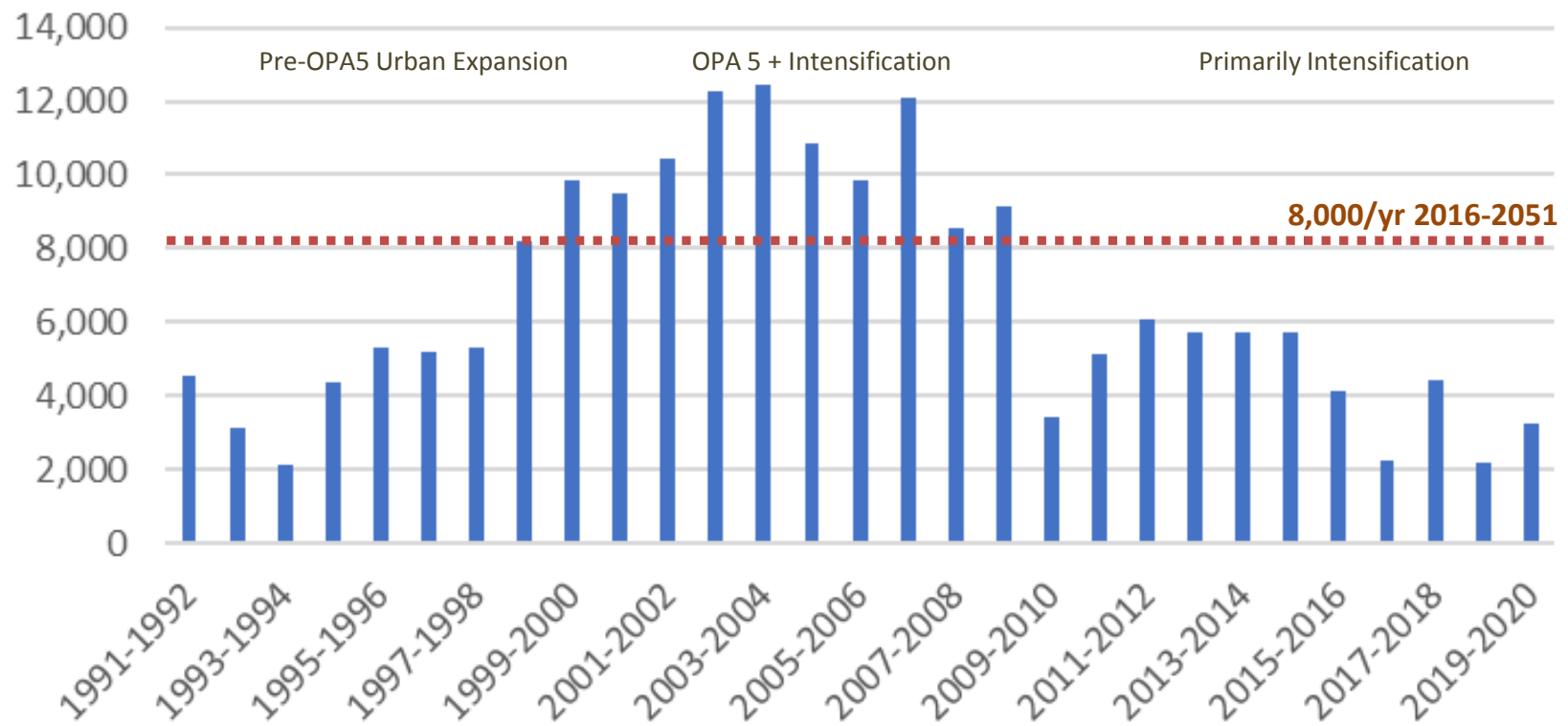
Population Forecast Comparison Markham OP vs Proposed 2051 Forecast



*Region's 2015 '45% Scenario to 2041' has no status and is shown for comparison purposes only.



Historical Annual Population Growth Markham 1991-2020

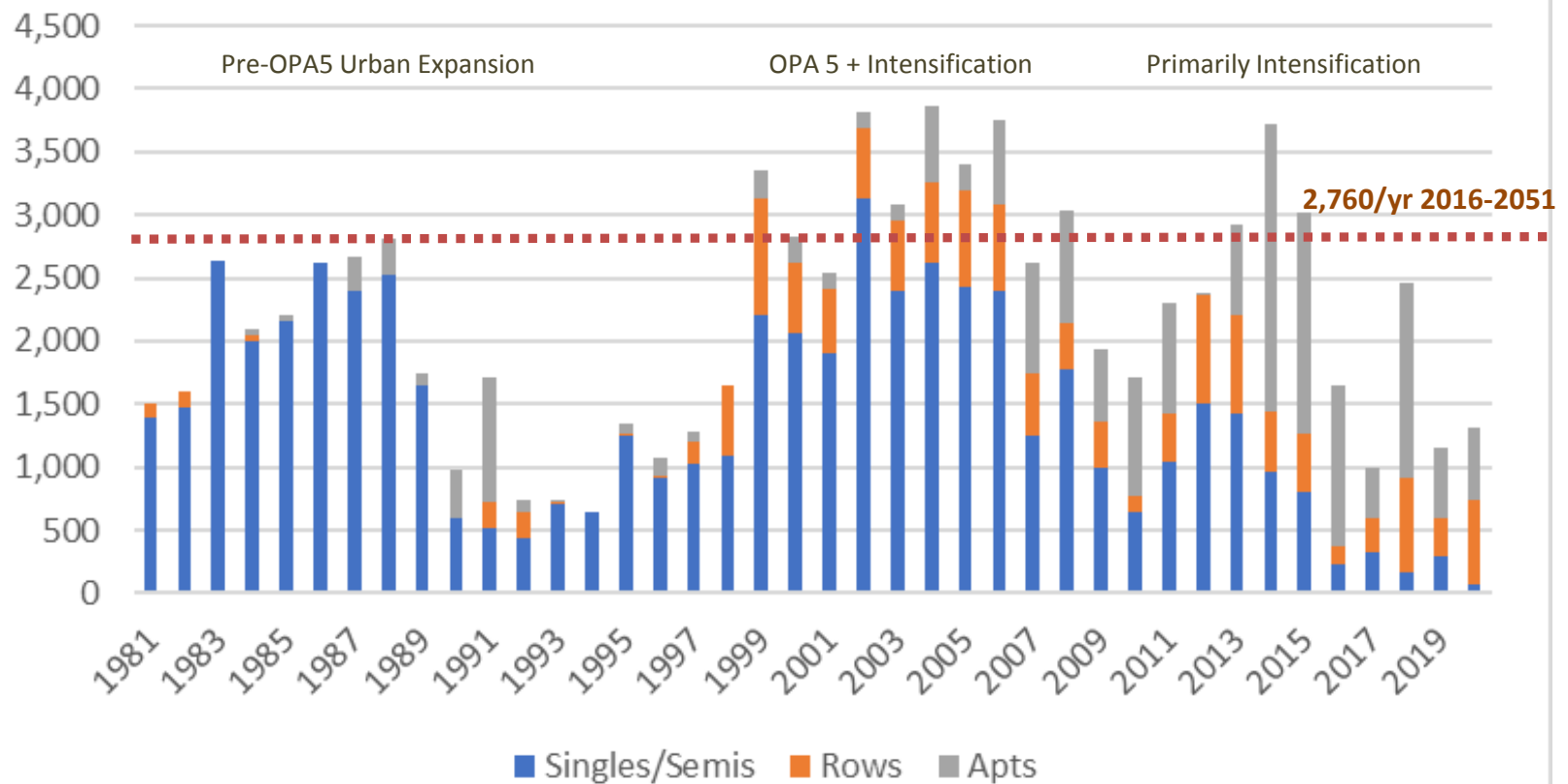


Source: York Region and City of Markham.



Historical Average Annual Housing Completions by Type

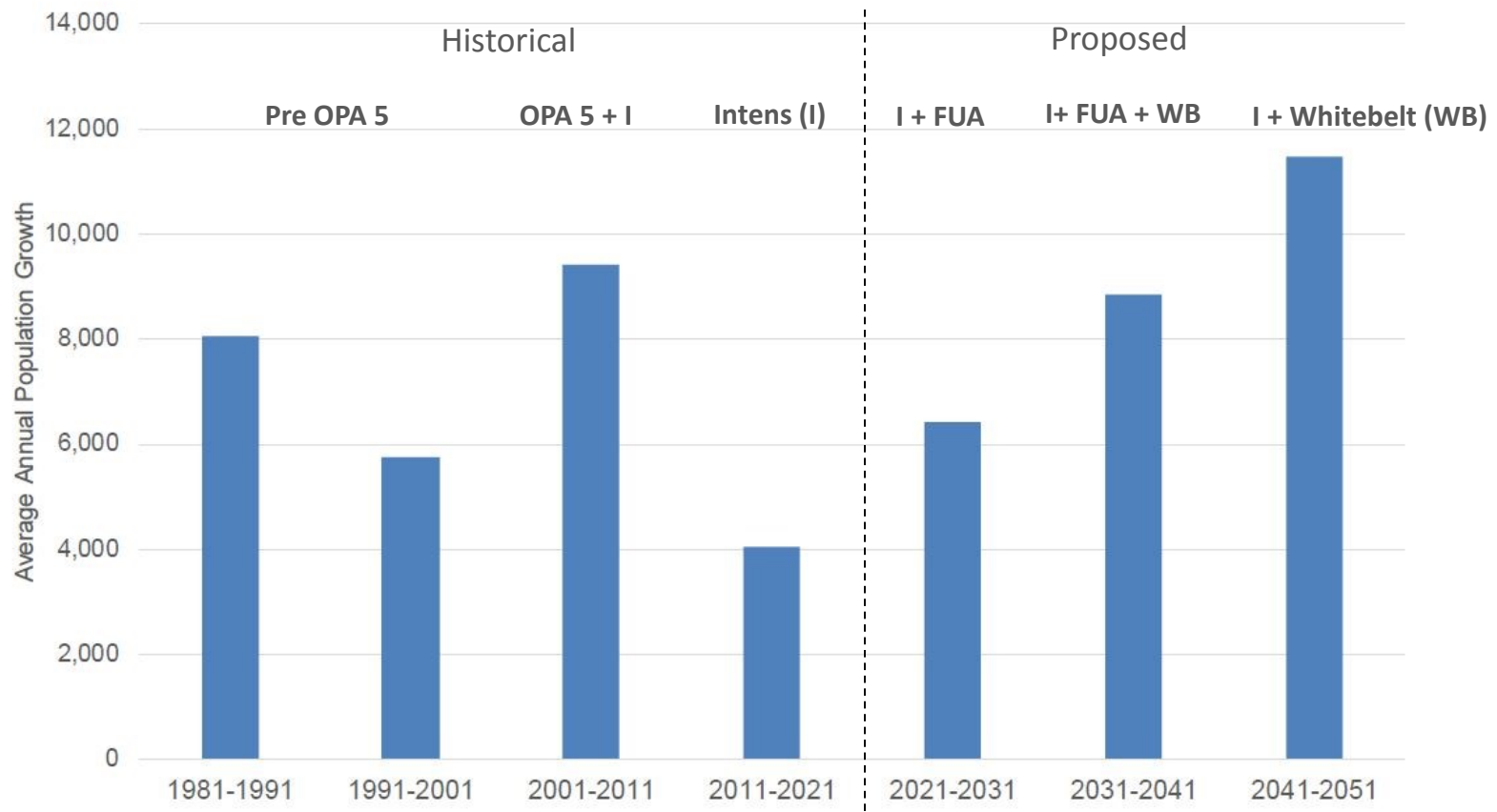
Markham 1981-2019

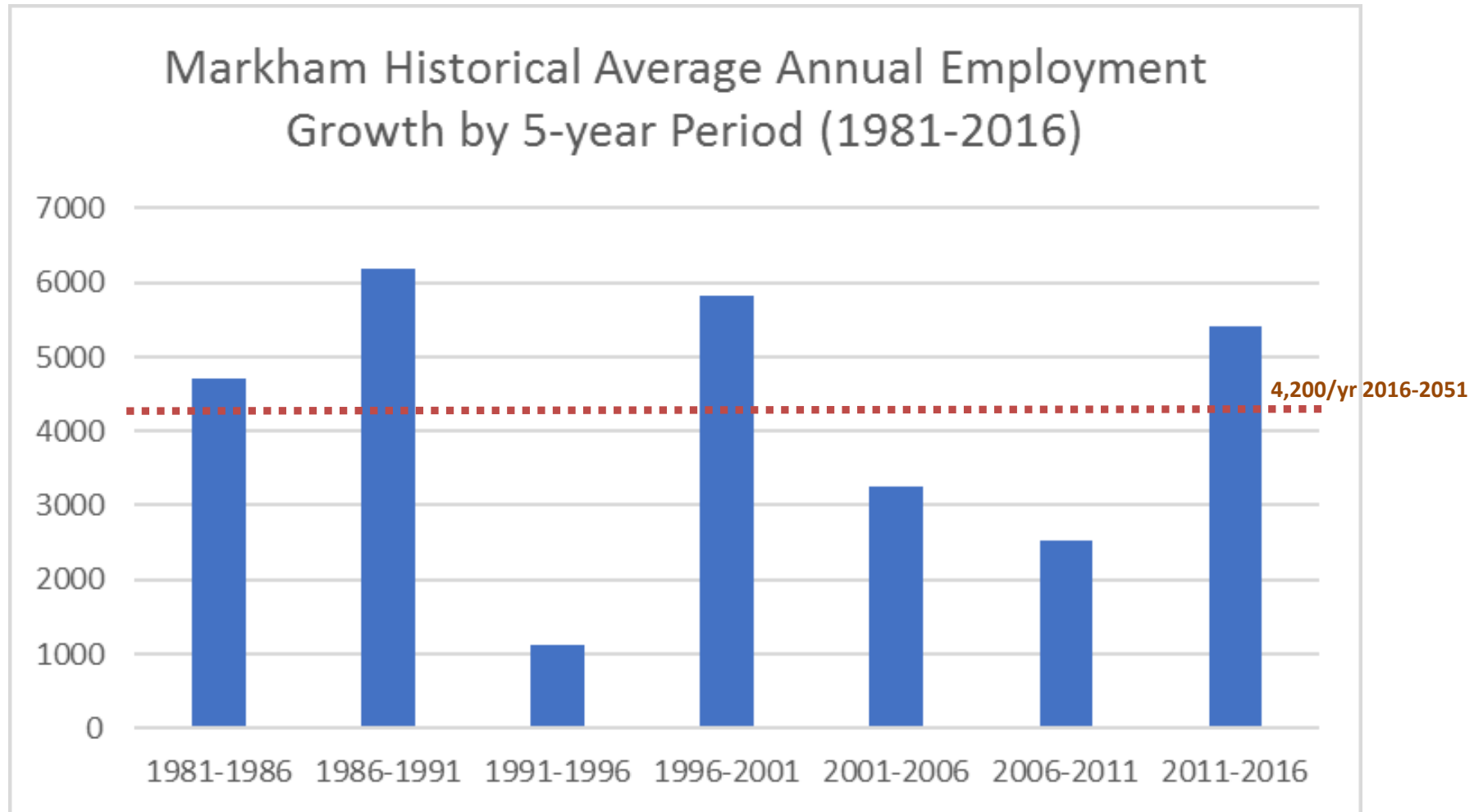


Source: York Region and City of Markham.



Markham Historical and Proposed Average Annual Population Growth by 10-year Period





Source: York Region and City of Markham.



2. The proposed intensification target of 52% (1,400 units/yr) appears to be achievable

- The 2051 forecast is based on the minimum Region-wide intensification target of 50% (based on Regional Council direction)
- 50% of the total unit growth in the Region = 155,500 intensification units
- These units are distributed to the nine local municipalities according to local conditions (availability of higher order transit, land supply, etc)
- The forecast allocates one-third of the intensification units (50,300) to Markham, representing 52% of total unit growth in Markham.
- If Markham requests higher than 52% intensification the additional intensification units would need to be redirected from another municipality (Vaughan, Richmond Hill, etc).



2. The proposed intensification target of 52% (1,400 units/yr) appears to be achievable (cont'd)

- The Region has indicated that all of Markham's whitebelt lands are needed to provide a variety of housing types (e.g., ground-oriented family housing) to reach York Region's growth targets by 2051.
- Therefore, increasing the intensification rate in Markham is likely to result in a higher total population forecast for Markham, not necessarily a reduction in whitebelt land expansion.
- In order to reduce the amount of whitebelt land needed in Markham, the forecast would have to be based on a Region-wide intensification rate higher than 50%.

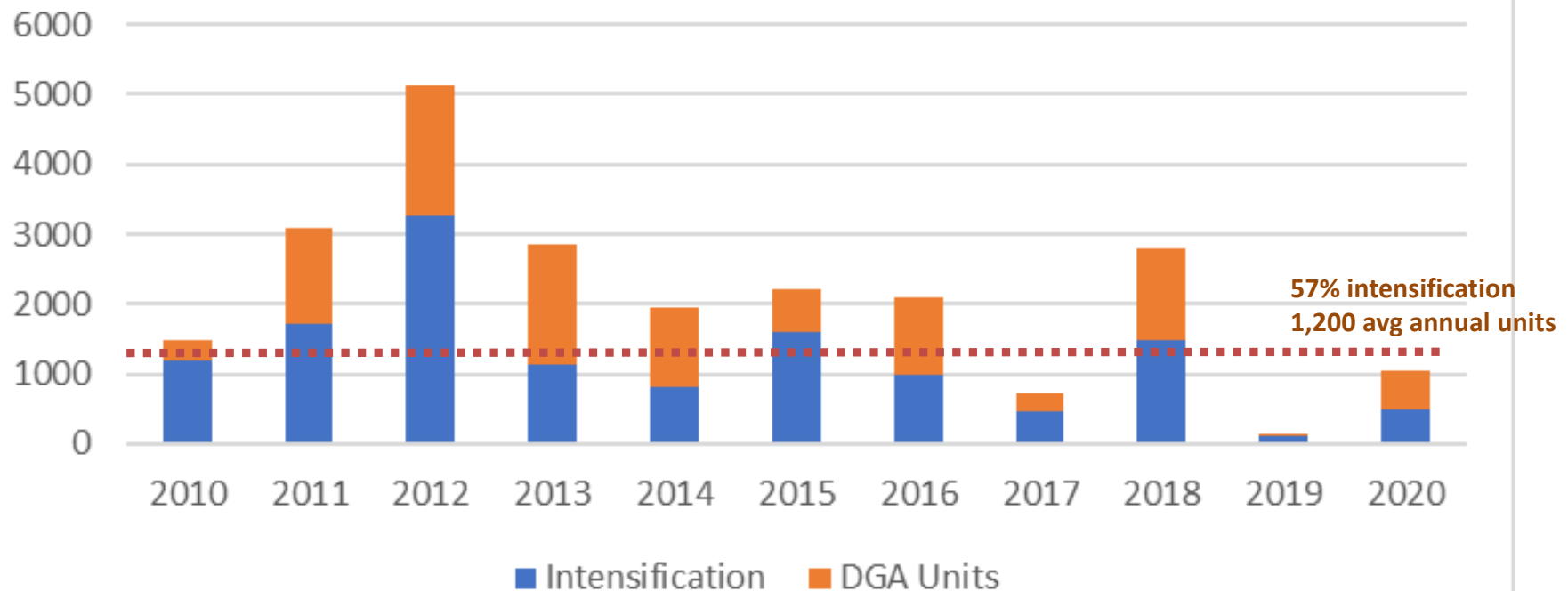


2. The proposed intensification target of 52% (1,400 units/yr) appears to be achievable (cont'd)

- The appropriate level of intensification in Markham should be informed by the number of higher density housing units (e.g., apartments) the market is likely to absorb in a year
- The 1,400 intensification units/yr assumed in the 2051 forecast (52%) is slightly higher than:
 - The 1,260 intensification units/yr assumed in the 2014 OP (53%)
 - The 1,200 intensification units/yr achieved in 2010-2020 (57%)
- The forecast assumes 75% of intensification units in Markham will be apartments, which is 1,100 apts/yr
- Average annual apartment units built 2010-2020 = 1,000/yr
(1,000 apt units/year = approx. 4 x 25-storey buildings)



Annual Intensification and DGA Units* Markham 2010-2020

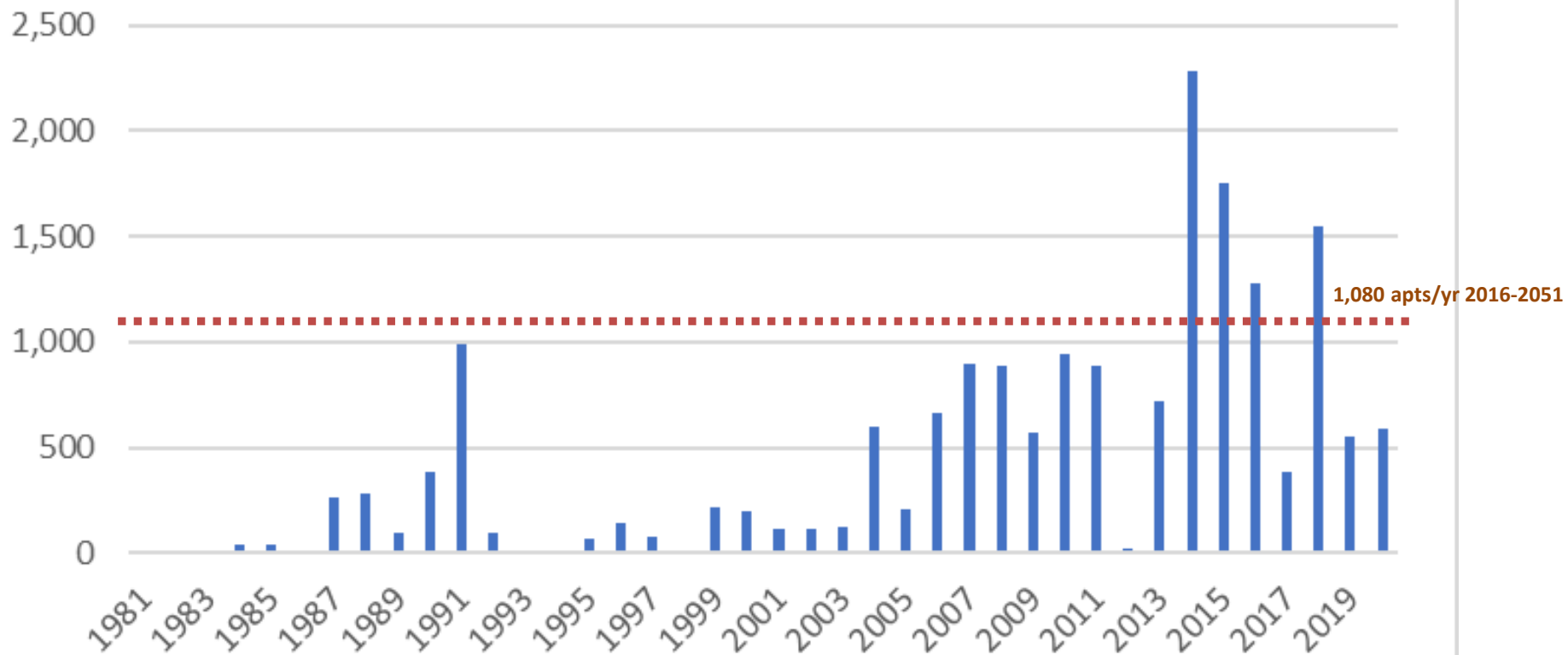


*Based on building permits rather than completions.

Source: York Region and City of Markham.



Historical Apartment Unit Completions Markham 1981-2019



Source: York Region and City of Markham.

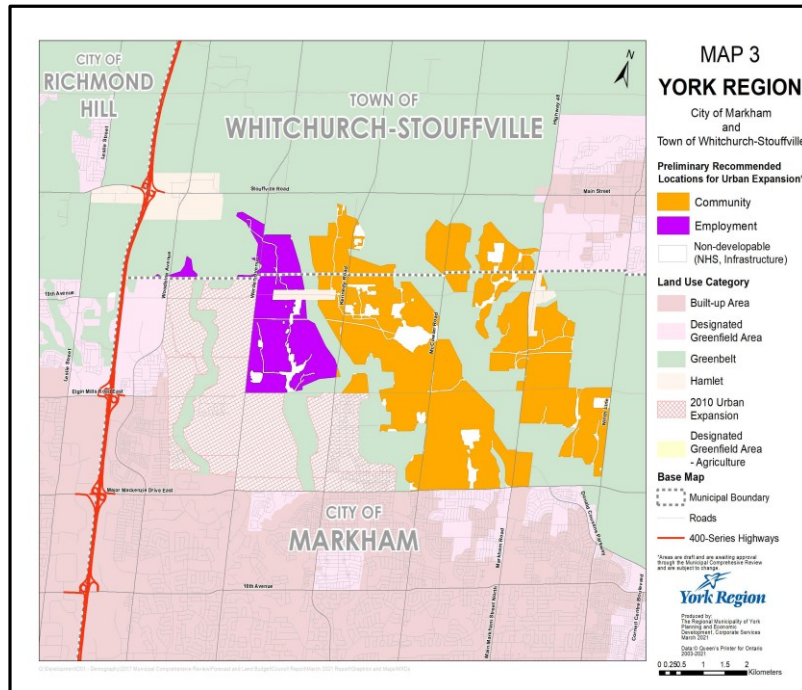


Intensification Scenarios (theoretical)

					Historical	
Total	Intensification	Total	Forecast	Intens	Intens Units/Yr	% Increase
Unit Growth	Rate	Intens. Units	(years)	Units/Yr	2010-2020	Over Historical
97,000	52%	50,440	35	1,441	1,200	20
97,000	55%	53,350	35	1,524	1,200	27
97,000	60%	58,200	35	1,663	1,200	39
97,000	70%	67,900	35	1,940	1,200	62
97,000	80%	77,600	35	2,217	1,200	85
Source: City of Markham						



3. The designated greenfield area (DGA) minimum density target of 70 residents + jobs/ha for Markham expansion lands requires review



Forecast assumes Region-wide 60 residents+jobs/ha DGA target, and 70 residents+jobs for Markham's DGA

Region's examples of community densities at build-out:

Wismer - 76 residents+jobs/ha

Berczy - 67 residents+job/ha

Cornell - over 100 residents+jobs /ha

Future Urban Area – achieving 70 residents + jobs/ha (20 uph) was dependent on achieving higher density residential uses along Major Mackenzie Dr rapid transit corridor

No planned higher order transit north of Elgin Mills Rd



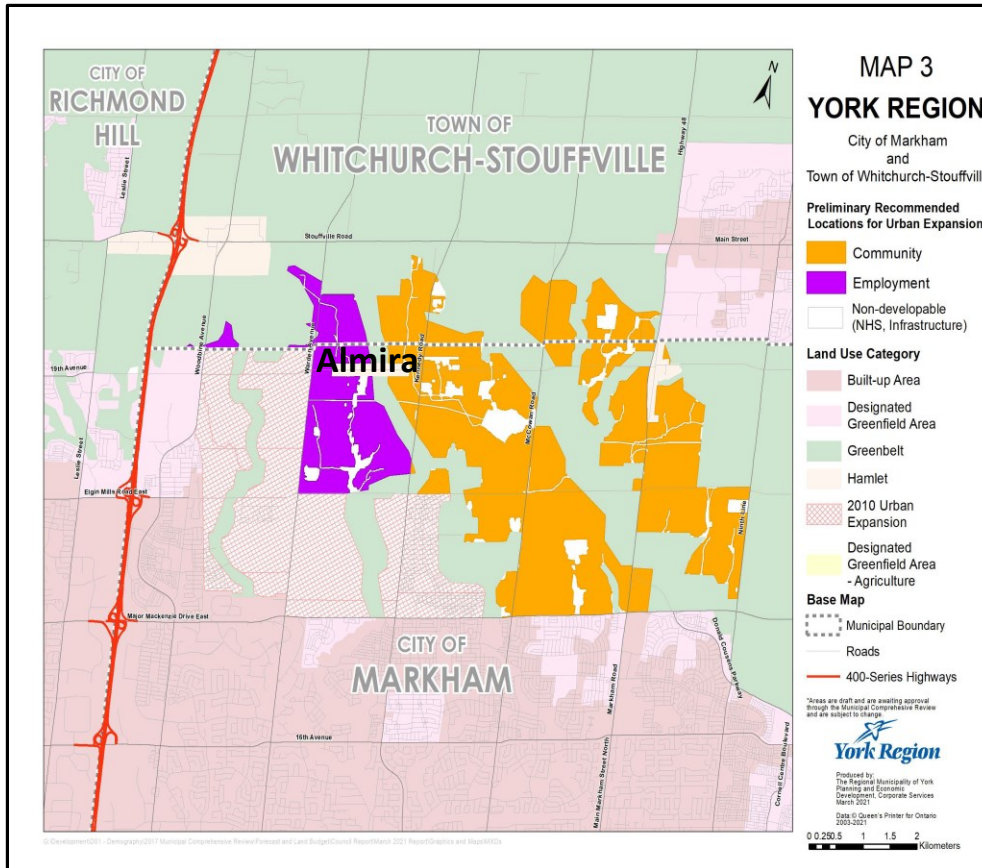
4. Viability of employment land expansion east of Warden Ave needs to be confirmed

Considerations:

- Distance from Hwy 404
- Impact on Almira Hamlet

Alternative: Lands east of Hwy 48?

- Not in proximity to 400-series highway goods movement corridor
- Possible noise restrictions of future Pickering Airport (on residential) still to be determined - noise contours need to be updated to reflect ultimate airport size and function





5. Markham will need to ensure appropriate opportunities for major office development along the Yonge North Subway corridor and in the Langstaff Gateway.

- Approximately 45,000 additional major office jobs are assumed for Markham by 2051 (44% of Region total).
- Major office growth assumed to be accommodated in business parks along Highway 404, Markham Centre, Langstaff Gateway and the Yonge Corridor (supported by Yonge Subway).
- Staff to undertake more detailed analysis of underlying assumptions.



Infrastructure and Financial Implications

a) Transportation

- Transportation improvements needed to support 2051 growth will be identified in Region's Transportation Master Plan Update (currently underway).
- Region's TMP will build on the 2016 TMP and will identify further road, transit and other modal improvements and services necessary to accommodate growth in travel demand in intensification areas and greenfield areas.
- City staff anticipate that the Region will assume jurisdiction of 19th Ave and possibly Reesor Rd, in addition to Elgin Mills Rd which has already been agreed to. Further widening of arterial roads beyond what is already planned may be needed as well.
- Transit Improvements – City staff expect that in addition to the Yonge Subway extension, the Hwy 7 Viva rapidway to Cornell and beyond will be completed, as well as bus rapid transit on Major Mackenzie Dr; the rapid transit needs of the northerly expansion communities should also be examined.



a) Transportation (cont'd):

- The improvements noted assume 2051 growth follows a similar pattern as in the past 30 years, and trip making behaviour does not change significantly from pre-pandemic norms. If remote work becomes more prevalent in the future, a different set of transportation improvements may emerge.
- Transportation technological changes such as connected and autonomous vehicles, complete electrification of the transportation system, climate change response, etc, could also change the landscape of how people travel.
- In consultation with the local municipalities, the Region will be confirming assumptions about how much travel demand could be accommodated through non-auto and non-transit modes such as micro-transit, active transportation and micro-mobility devices, particularly in intensification areas to serve short to medium trips so that the major road network can continue to function at a reasonable level of service.



b) Servicing

- The amount of growth proposed will need to be serviced by a combination of existing and new infrastructure (e.g., being planned as part of the FUA).
- Potential need for upgrading existing infrastructure
 - Where growth areas are to be serviced by the extension of existing infrastructure (e.g., extension of services from the FUA), the existing infrastructure may not be designed to take additional flows from growth, and will need to be upgraded/oversized.
 - This potential need and responsibility for oversizing should be considered now as infrastructure is being designed/approved.
 - Any upgrades will need to be identified and captured in the Development Charges Background Study.
 - Upgrading of existing infrastructure may also impact mature communities.



c) Financial Implications

The City is currently preparing:

- updated Development Charges (DC) Background Study;
- updated Parkland Dedication/Cash-in-lieu Policy; and
- new Community Benefit Charge Strategy

These studies rely on population and employment forecasts to determine needs (e.g., parkland, infrastructure) and how to allocate costs to development proponents.

Risks of overestimating growth:

- City could build infrastructure in advance of growth but not have enough new development to fully recover cost
- Since DC infrastructure costs are divided by expected growth, DC rates could be set too low
- An overestimation of non-residential growth (which often happens), results in an undercharge to residential growth

Mitigating Strategy:

The City has a good track record of matching the construction of new infrastructure with growth. If growth does not occur as planned, annual capital budgets should be reduced.



Need for Strong Phasing Policies and Monitoring

- The forecast represents a substantial amount of growth for Markham and the Region, in terms of both population and geography.
- Strong phasing policies are required to ensure the lands are brought online in a manner that ensures required infrastructure (both hard and soft) is available as new communities are developed, and that there is an appropriate balance in infrastructure funding between intensification and greenfield areas.
- Staff will continue to work with the Region in developing appropriate policies at the Regional and local level.
- The forecast will need to be reviewed regularly (e.g., through MCRs every 5-10 years) to reassess the underlying assumptions and pace of growth.



Next Steps

- Region is seeking comments on the forecast by mid-July 2021.
- Public input currently being sought through:
 - Your Voice Markham
 - Special Meeting of DSC (May 11)
 - Meetings with various stakeholders (ratepayer associations, development industry)
 - Virtual City-wide Community Information Meeting (May 27)
 - Consultation with City departments
- Following consultation, staff will report back to DSC with comments (late June).



Thank you