



Building Markham's Future Together  
Journey to Excellence

# York Region Draft Growth Scenarios to 2041

Special Meeting of Development Services Committee  
September 11, 2015



# Presentation

1. Background/Context
2. Overview of Region's Draft Growth Scenarios to 2041
3. Lessons from Markham 2007-2010 Growth Strategy
4. Next Steps
5. Discussion

## Background

- May 15, 2014:** York Region released a work program for a Regional Municipal Comprehensive Review and Regional Official Plan Review, including an update of population and employment forecasts to 2041
- April 23, 2015:** York Region released a report describing three draft growth scenarios for 2041 – circulated to local municipalities
- May 19, 2015:** Markham staff reported to DSC on the three draft scenarios; York Region Chief Planner also provided a presentation

# Regional Municipal Comprehensive Review

## – what is it and why now?

- The Planning Act requires that municipal official plans be reviewed at least every 5 years after taking effect.
- Under the Provincial Growth Plan for the Greater Golden Horseshoe (Growth Plan), official plan reviews are done within the context of a Municipal Comprehensive Review, which comprehensively applies the policies and schedules of the Growth Plan, including provincial population and employment forecasts.
- The Regional Official Plan 2010 plans for growth to 2031 under the original Growth Plan forecasts. Updated Growth Plan forecasts for population and employment to 2041 came into effect in 2013 (Amendment 2). Municipalities must update their official plans to implement the updated (2041) forecasts by June, 2018.

## Provincial Growth Plan – Schedule 3 (2006)

|                           | POPULATION   |              |               |               | EMPLOYMENT   |              |              |              |
|---------------------------|--------------|--------------|---------------|---------------|--------------|--------------|--------------|--------------|
|                           | 2001         | 2011         | 2021          | 2031          | 2001         | 2011         | 2021         | 2031         |
| Region of Durham          | 530          | 655          | 816           | 960           | 190          | 260          | 310          | 350          |
| Region of York            | 750          | 1,050        | 1,300         | 1,500         | 290          | 590          | 700          | 790          |
| City of Toronto           | 2,590        | 2,760        | 2,930         | 3,080         | 1,440        | 1,540        | 1,600        | 1,640        |
| Region of Peel            | 1,030        | 1,320        | 1,490         | 1,540         | 530          | 730          | 820          | 870          |
| Region of Halton          | 390          | 520          | 650           | 780           | 190          | 280          | 340          | 390          |
| City of Hamilton          | 510          | 540          | 590           | 660           | 210          | 230          | 270          | 300          |
| <b>GTAA TOTAL**</b>       | <b>5,810</b> | <b>6,800</b> | <b>7,770</b>  | <b>8,620</b>  | <b>2,950</b> | <b>3,630</b> | <b>4,040</b> | <b>4,330</b> |
| County of Northumberland  | 80           | 87           | 93            | 96            | 25           | 32           | 33           | 33           |
| County of Peterborough*   | 56           | 58           |               |               | 16           | 17           |              |              |
| City of Peterborough*     | 74           | 79           | 144           | 149           | 37           | 41           | 60           | 68           |
| City of Kawartha Lakes    | 72           | 80           | 81            | 100           | 20           | 23           | 25           | 27           |
| County of Simcoe*         | 254          | 294          |               |               | 85           | 102          |              |              |
| City of Barrie*           | 108          | 157          | 583           | 667           | 53           | 77           | 230          | 254          |
| City of Orillia*          | 30           | 33           |               |               | 16           | 17           |              |              |
| County of Dufferin        | 53           | 62           | 71            | 80            | 19           | 22           | 25           | 27           |
| County of Wellington*     | 85           | 91           | 269           | 321           | 36           | 41           | 137          | 158          |
| City of Guelph*           | 110          | 132          |               |               | 63           | 76           |              |              |
| Region of Waterloo        | 456          | 526          | 623           | 729           | 236          | 282          | 324          | 366          |
| County of Brant*          | 35           | 39           |               |               | 16           | 17           |              |              |
| City of Brantford*        | 94           | 102          | 157           | 173           | 39           | 45           | 67           | 71           |
| County of Haldimand       | 46           | 49           | 53            | 56            | 17           | 19           | 19           | 20           |
| Region of Niagara         | 427          | 442          | 474           | 511           | 186          | 201          | 209          | 218          |
| <b>OUTER RING TOTAL**</b> | <b>1,980</b> | <b>2,230</b> | <b>2,560</b>  | <b>2,800</b>  | <b>870</b>   | <b>1,010</b> | <b>1,130</b> | <b>1,240</b> |
| <b>TOTAL GGH**</b>        | <b>7,790</b> | <b>9,030</b> | <b>10,330</b> | <b>11,500</b> | <b>3,810</b> | <b>4,640</b> | <b>5,170</b> | <b>5,560</b> |

## York Region Official Plan 2010

|                               | 2006    | 2016      | 2021      | 2026      | 2031      |
|-------------------------------|---------|-----------|-----------|-----------|-----------|
| <b>Aurora</b>                 |         |           |           |           |           |
| Population                    | 49,700  | 63,700    | 68,100    | 69,600    | 70,200    |
| Employment                    | 20,300  | 29,000    | 32,400    | 33,500    | 34,200    |
| <b>East Gwillimbury</b>       |         |           |           |           |           |
| Population                    | 22,000  | 34,700    | 48,100    | 66,300    | 86,500    |
| Employment                    | 5,900   | 11,600    | 18,700    | 26,700    | 34,400    |
| <b>Georgina</b>               |         |           |           |           |           |
| Population                    | 44,600  | 52,800    | 57,900    | 63,900    | 70,300    |
| Employment                    | 8,000   | 11,000    | 13,900    | 17,400    | 21,200    |
| <b>King</b>                   |         |           |           |           |           |
| Population                    | 20,300  | 27,000    | 29,900    | 32,500    | 34,900    |
| Employment                    | 7,100   | 9,700     | 11,000    | 11,400    | 11,900    |
| <b>Markham</b>                |         |           |           |           |           |
| Population                    | 273,000 | 337,800   | 370,300   | 398,300   | 421,600   |
| Employment                    | 144,800 | 200,300   | 221,500   | 231,200   | 240,400   |
| <b>Newmarket</b>              |         |           |           |           |           |
| Population                    | 77,600  | 88,700    | 91,900    | 94,500    | 97,100    |
| Employment                    | 42,100  | 47,600    | 48,700    | 49,000    | 49,400    |
| <b>Richmond Hill</b>          |         |           |           |           |           |
| Population                    | 159,800 | 216,900   | 231,400   | 239,100   | 242,200   |
| Employment                    | 61,100  | 86,100    | 94,300    | 97,400    | 99,400    |
| <b>Vaughan</b>                |         |           |           |           |           |
| Population                    | 249,300 | 329,100   | 360,400   | 388,800   | 416,600   |
| Employment                    | 162,200 | 226,000   | 248,900   | 257,600   | 266,100   |
| <b>Whitchurch-Stouffville</b> |         |           |           |           |           |
| Population                    | 25,500  | 49,400    | 55,800    | 59,100    | 60,600    |
| Employment                    | 10,900  | 19,200    | 21,900    | 22,700    | 23,000    |
| <b>York Region</b>            |         |           |           |           |           |
| Population                    | 931,900 | 1,200,100 | 1,313,800 | 1,412,100 | 1,500,000 |
| Employment                    | 462,300 | 640,500   | 711,200   | 746,900   | 780,000   |

## Markham Official Plan 2014



## Growth Plan Amendment 2 (2013)

### Amendment 2:

- updated 2031 forecasts (population and employment)
- added 2036 and 2041 forecasts, extending the Growth Plan horizon

| York Region Forecasts in Amendment No. 2 to the Growth Plan, June 2013 |               |              |           |           |
|--|---------------|--------------|-----------|-----------|
| York Region  | Original 2031 | Updated 2031 | 2036      | 2041      |
| Forecast Population  | 1,500,000     | 1,590,000    | 1,700,000 | 1,790,000 |
| Forecast Employment  | 780,000       | 790,000      | 840,000   | 900,000   |

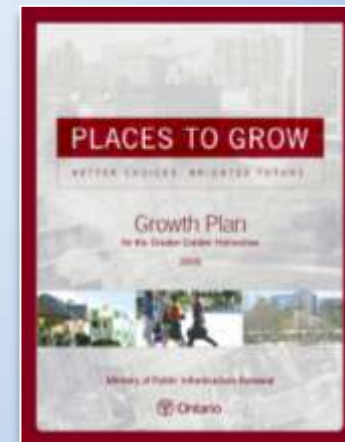
These updated forecasts are the basis of the Region's draft growth scenarios to 2041 in their ongoing MCR.

Note: because the Planning Act only allows for lands to be designated to accommodate growth within a 20-year planning horizon, only the forecasts to 2036 may be used to justify the addition of urban lands in a municipality.

# Growth Plan Requirements

## Growth Plan Goals:

1. Make better use of existing infrastructure
2. Limit expansion of urban boundaries
3. Address traffic congestion through investment and planning for transit
4. Protect employment lands for future economic opportunities

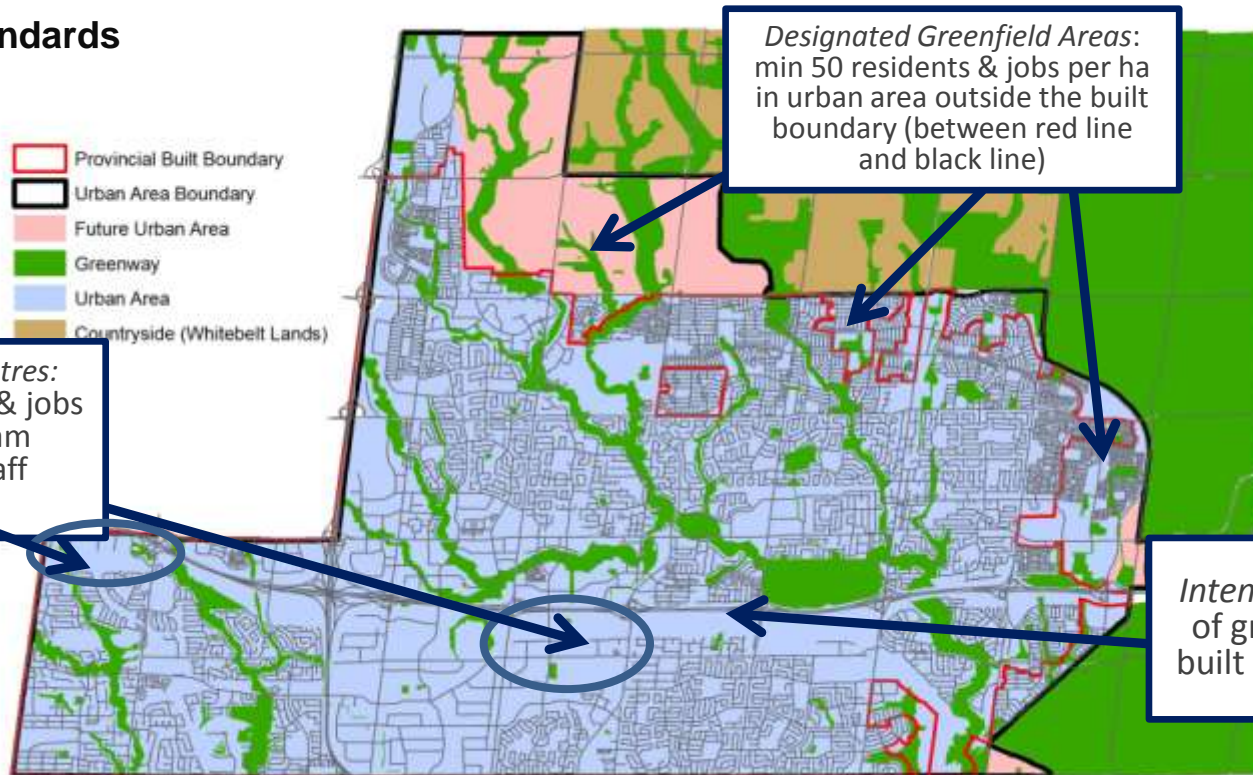


## Growth Plan Minimum Requirements:

1. Accommodate growth through *intensification* - by the year 2015 and for each year thereafter, a **minimum of 40% of all residential development** occurring annually within each upper-tier or single-tier municipality will be within the *built-up area* (defined by a built boundary)
2. Within *urban growth centres*, plan to achieve minimum **200 residents and jobs** per hectare
3. Growth in *designated greenfield areas* (outside the built boundary) – plan to achieve a minimum density target not less than **50 residents and jobs** combined per developable hectare.



## Growth Plan standards



## Regional Official Plan 2010 - Targets for 2031 Forecasts

### Residential *Intensification* Target

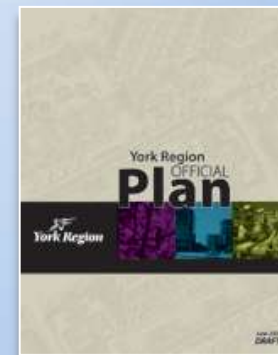
- Minimum 40% Region-wide
- Target varies among local municipalities – southern municipalities have greater potential for intensification, therefore higher intensification targets assumed than in northern municipalities
- Minimum **40%** intensification Region-wide = approximately **52%** for Markham

### *Designated Greenfield Area* Targets:

- Minimum 50 residents and jobs per developable hectare as per Growth Plan
- In *new communities* (i.e., Future Urban Area) – minimum 70 residents and jobs per developable hectare, and minimum 20 units per developable hectare

### *Urban Growth Centres and Key Development Area* Targets:

- Within *urban growth centres*, plan to achieve minimum **200 residents and jobs** per hectare; minimum **2.5** floor space index (3.5 fsi near subway stations)
- Within *key development areas*, plan to achieve a minimum density target of 2.5 floor space index.



## Markham Official Plan 2014 - Targets for 2031 Forecasts

### Residential *Intensification* Target:

- Minimum **60%**

### Urban Growth Centres and Key Development Area Targets:

- Within *urban growth centres*, plan to achieve minimum **200 residents and jobs** per hectare, and minimum **2.5** floor space index (3.5 fsi near subway station)
- Within *key development areas*, plan to achieve a minimum density target of **2.5** floor space index (3.5 fsi near subway station).

### Designated Greenfield Area Targets:

- Future Urban Area - minimum **70 residents and jobs** per developable hectare, and **minimum 20 units** per developable hectare (consistent with ROP)



## Region's Draft Growth Scenarios to 2041

**3 draft scenarios:** Region-wide targets of either **40% intensification**, **50% intensification**, or **no expansion** (65% intensification)

- **40% intensification:**
  - ✓ Meets Growth Plan requirement; same as ROP 2010 target to accommodate 2031 growth
  - ✓ Greatest need for urban expansion lands (2,460 ha)
- **50% intensification:**
  - ✓ Exceeds Growth Plan and ROP 2010 targets to 2031
  - ✓ Less urban expansion land required than 40% scenario (1,260 ha)
- **No expansion** (65% intensification):
  - ✓ Substantially exceeds Growth Plan and ROP 2010 targets to 2031
  - ✓ No additional urban expansion lands required
  - ✓ Highest percentage of apartment development required

Current and planned servicing capacity and land supply were key considerations in developing the scenarios

## What the Scenarios mean for Markham

| Population and Employment Forecasts for Markham and York Region (2011-2041)                         |                  |                  |                    |                  |                       |
|---|------------------|------------------|--------------------|------------------|-----------------------|
| Population  | 2011             | 2014             | 2031<br>(ROP 2010) | 2041             | Growth<br>(2011-2041) |
| <b>Markham</b>  |                  |                  |                    |                  |                       |
| 40% Intensification   | 311,800          | 338,000          | 421,600            | 541,800          | 230,000               |
| 50% Intensification   | 311,800          | 338,000          | 421,600            | 541,900          | 230,100               |
| No Expansion  | 311,800          | 338,000          | 421,600            | 536,600          | 224,800               |
| <b>York Region</b>  | <b>1,065,500</b> | <b>1,113,900</b> | <b>1,500,000</b>   | <b>1,790,000</b> | <b>724,500</b>        |
| <b>Employment</b>   |                  |                  |                    |                  |                       |
| 40% Intensification   | 154,800          | 170,000          | 240,400            | 275,700          | 120,900               |
| 50% Intensification   | 154,800          | 170,000          | 240,400            | 275,600          | 120,800               |
| No Expansion  | 154,800          | 170,000          | 240,400            | 274,800          | 120,000               |
| <b>York Region</b>  | <b>510,000</b>   | <b>564,300</b>   | <b>780,000</b>     | <b>900,000</b>   | <b>390,000</b>        |
| Source: Regional Draft Growth Scenarios 2011 and 2041 Forecasts. York Region estimate for mid 2014. |                  |                  |                    |                  |                       |



## Recent and Forecast Growth in Markham

Figure 1: Year-to-Year Population Growth in Markham between 2004 and 2014

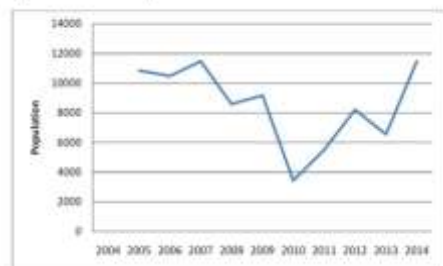
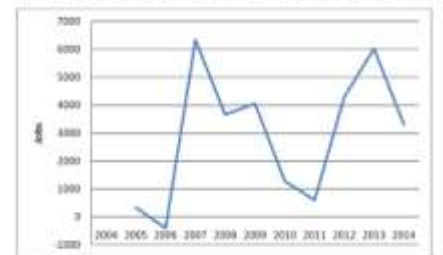
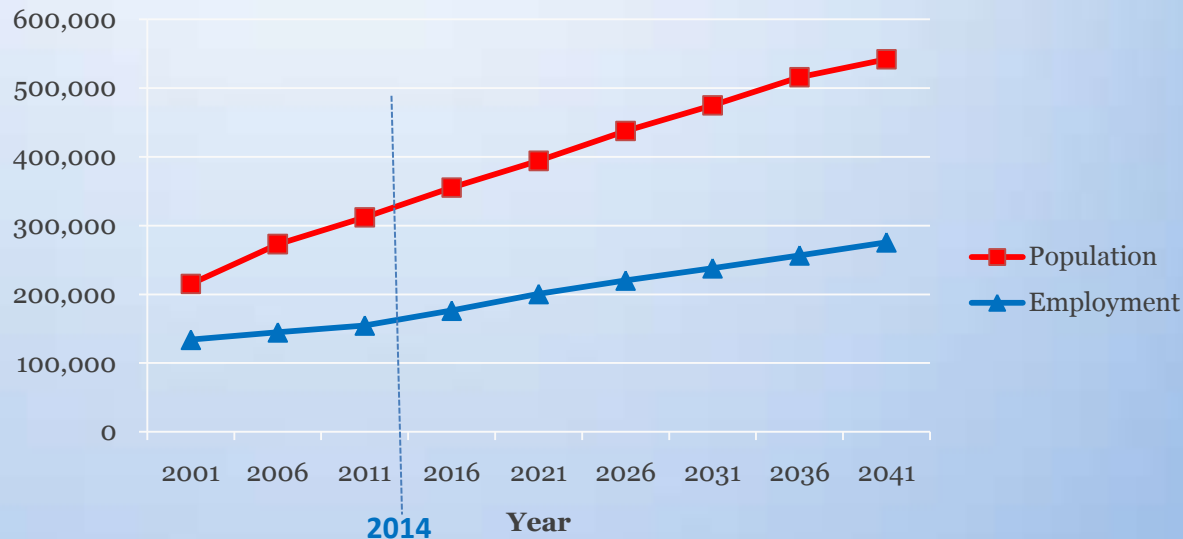


Figure 2: Year-to-Year Employment Growth in Markham between 2004 and 2014\*



\*Surveyed employment



## Comparison with Past Growth and Forecasts

### Population

#### Markham Forecast Growth 2006-2031:

**5,900** persons per year

#### Region's Draft Scenarios for 2041:

**7,600** persons per year

#### Actual Growth 2004-2014:

**8,600** persons per year

### Employment

#### Markham Forecast Growth 2006-2031:

**3,800** jobs per year

#### Region's Draft Scenarios for 2041:

**4,000** jobs per year

#### Actual Growth 2004-2014:

**2,900** jobs per year \*

\* Not representative of total growth

## Distribution of Forecast Population Growth within York Region

- Markham share of Region-wide population growth to 2041 increases compared to previous 2031 forecast
- East Gwillimbury share increases in 40% scenario
- Vaughan share declines while Richmond Hill share remains fairly stable
- Combined share of the southern three municipalities increases with increased intensification
- The share for the balance of York Region (5 municipalities) declines

| Percentage Distribution of York Region Population Growth<br>Comparing 2010 ROP Forecast to Draft Growth Scenarios |                                   |  |             |             |
|---|-----------------------------------|--|-------------|-------------|
| Municipalities  | 2010<br>Region OP<br>2006 to 2031 | Forecast Growth 2011 to 2041<br>Draft Growth Scenarios |             |             |
|   |                                   | 40%  | 50%         | No Expan    |
| Markham   | 26%                               | 32%  | 32%         | 31%         |
| Richmond Hill   | 13%                               | 11%  | 13%         | 13%         |
| Vaughan   | 29%                               | 26%  | 26%         | 26%         |
| Southern Three  | 68%                               | 69%  | 70%         | 70%         |
| East Gwillimbury  | 11%                               | 16%  | 12%         | 12%         |
| Balance of Region   | 20%                               | 16%  | 17%         | 18%         |
| <b>York Region</b>  | <b>100%</b>                       | <b>100%</b>  | <b>100%</b> | <b>100%</b> |

# Distribution of Forecast Employment Growth within York Region

- Local municipal shares of employment growth are similar to previous 2031 forecast

| Percentage Distribution of York Region Employment Growth<br>Comparing 2010 ROP Forecast to Draft Growth Scenarios |                                   |  |             |             |
|---|-----------------------------------|--|-------------|-------------|
| Municipalities  | 2010<br>Region OP<br>2006 to 2031 | Forecast Growth 2011 to 2041<br>Draft Growth Scenarios |             |             |
|   |                                   | 40%  | 50%         | No Expan    |
| Markham   | 30%                               | 31%  | 31%         | 31%         |
| Richmond Hill   | 12%                               | 11%  | 11%         | 11%         |
| Vaughan   | 33%                               | 33%  | 33%         | 33%         |
| Southern Three  | 75%                               | 74%  | 75%         | 75%         |
| East Gwillimbury  | 9%                                | 11%  | 10%         | 9%          |
| Balance of Region   | 16%                               | 15%  | 16%         | 16%         |
| <b>York Region</b>  | <b>100%</b>                       | <b>100%</b>  | <b>100%</b> | <b>100%</b> |

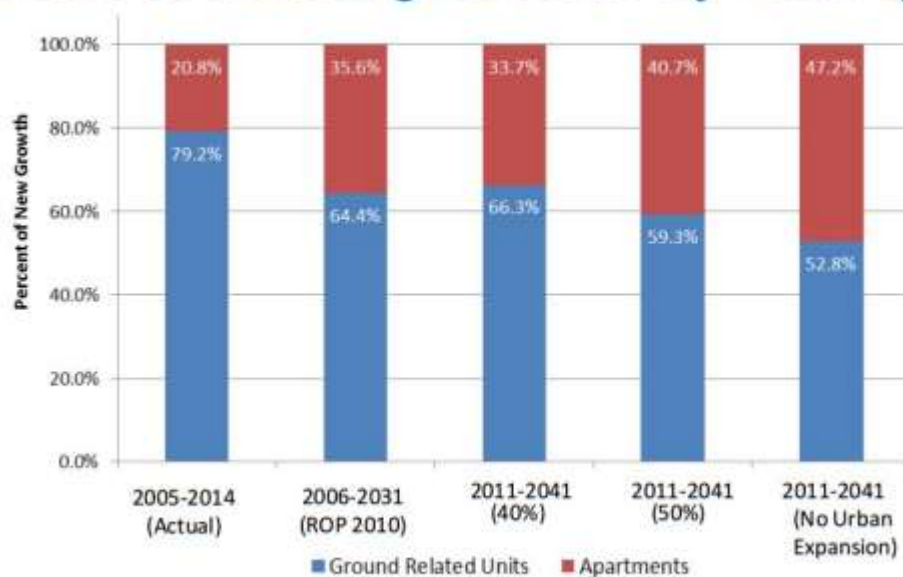
# Draft Growth Scenarios – Population and Housing

1. The scenarios are named for the targeted percentage of residential intensification **across the Region**; the percentage for Markham will always be higher than the Region-wide average; the 50% scenario represents a requirement for about 60% intensification in Markham, consistent with the Markham Official Plan 2014.
2. Persons-per-unit values (ppu's) decline at a slower rate than in previous forecasts - meaning relatively fewer households/housing units will be needed to accommodate the forecast population.
3. All scenarios show an increased share of higher density housing forms - the 'no expansion' scenario relies on the highest levels of apartment growth, requiring the greatest shift in market preferences.
4. The 40% and 50% scenarios require additional urban land after 2031; the 40% scenario would require twice as much additional community land (2,300 ha) as the 50% scenario (1,100 ha); a portion of this additional urban land could be expected to be located in Markham.



(Region-wide)

## Housing Mix Comparison – Share of housing Growth By Unit Type



Source: Region of York.

# Draft Growth Scenarios - Employment

1. The scenarios account for three types of employment used in forecasting:
  - Major Office
  - Employment Land
  - Population-Related
2. Employment is assigned to local municipalities based on:
  - ability to attract Major Office development
  - available and potential employment land
  - forecast population growth
3. The scenarios account for certain approved employment land conversions in Markham; no future conversions are assumed.

4. The scenarios reflect a GTAH shift from a goods producing to a more service-oriented economy; the Region-wide share of Employment Land Employment is less in the long term than previously forecast, while the shares of Major Office and Population-Related Employment are forecast to increase

| York Region Employment Forecast by Type Comparison |      |              |                 |                    |        |
|--|------|--------------|-----------------|--------------------|--------|
| Scenario   | Year | Major Office | Employment Land | Population-Related | Total  |
| York Region Official Plan 2010                     | 2031 | 15.4%        | 47.4%           | 37.2%              | 100.0% |
| Draft 40% and 50% Intensification                  | 2041 | 18.0%        | 41.5%           | 40.5%              | 100.0% |
| Draft No Urban Expansion                           | 2041 | 18.7%        | 40.7%           | 40.6%              | 100.0% |

Table 4 reproduced from York Region report dated April 9, 2014

5. The 40% and 50% scenarios assume an additional 160 ha of employment lands are required Region-wide; a portion could be expected to be located in Markham.



## Urban Expansion Land Requirements - 2041

- **Region-wide** the draft Growth Scenarios will require 1,100 to 2,300 ha of community land and 160 ha of employment land
- No specific additional urban land requirements have been identified for Markham, but can be expected for the 40% and 50% scenarios
- Region to test urban expansion locations in next phase of analysis, once preferred scenario is identified
- Any additional urban land located in Markham would be lands north and east of the urban area outside the Greenway System (i.e., Countryside lands shown in brown)



| SUMMARY OF REGION'S DRAFT GROWTH SCENARIOS – IMPLICATIONS FOR MARKHAM |  |   |                            |
|---|--|---|----------------------------|
|   | Region's Growth Scenarios                            |   |                            |
|   | 40%  | 50%   | No Expansion               |
| <b>Markham</b>  |  |   |                            |
| <b>Population in 2041</b>   | 541,800 (same as 50%)                                | 541,900 (same as 40%)                       | 536,600 (marginally lower) |
| <b>Employment in 2041</b>   | 230,000 (same as 50%)                                | 230,100 (same as 40%)                       | 224,800 (marginally lower) |
|   |  |   |                            |
| <b>% Intensification (est.)</b>                                       | 50%  | 60%   | 75%                        |
|   |  |   |                            |
| <b>Population Growth Rate<br/>(average annual)</b>                    | 7,700 persons/yr                                     | 7,700 persons/yr                            | 7,600 person/yr            |
| <b>Employment Growth Rate<br/>(average annual)</b>                    | 4,000 jobs/yr  | 4,000 jobs/yr                               | 4,000 jobs/yr              |
| <b>Housing Mix</b>  | Higher apartment share,<br>but lowest of 3 scenarios | Higher apartment share<br>than 40% scenario | Very high apartment share  |
| <b>Urban Expansion required</b>                                       | Yes  | Yes   | No                         |
|   |  |   |                            |

## Previous Markham MCR Growth Alternatives

- Between 2007 and 2010 Markham considered a number of growth alternatives as part of the Growth Management Strategy, including:
  - a 52% residential intensification alternative (representing the Region's proposed 40% intensification alternative)
  - A 60% residential intensification alternative; and
  - a 'no urban expansion' alternative in which all growth to 2031 would be located within the (then) current urban area
- These three 'low', 'medium' and 'high' residential intensification options are not unlike the Region's 3 Draft Growth Scenarios for 2041; factors considered in the analysis of Markham's three alternatives in 2010, are still relevant in considering the Region's current draft growth scenarios for 2041

## Markham's 'Low' Intensification Option - 52%

### Concerns with this alternative included:

- Under-represented Markham's preference to increase residential intensification
- Least support for additional higher density housing to diversify housing stock
- Least suited to build on Markham's higher average employment densities
- Offered more diverse economic development opportunities, but with a reduced focus on strategic location of higher density employment
- Least support for increased ridership to warrant ongoing investment in rapid transit
- Least support for mixed use development
- Greatest requirement for urban expansion on to land available for agricultural use

## Markham's 'High' Intensification Option – no expansion

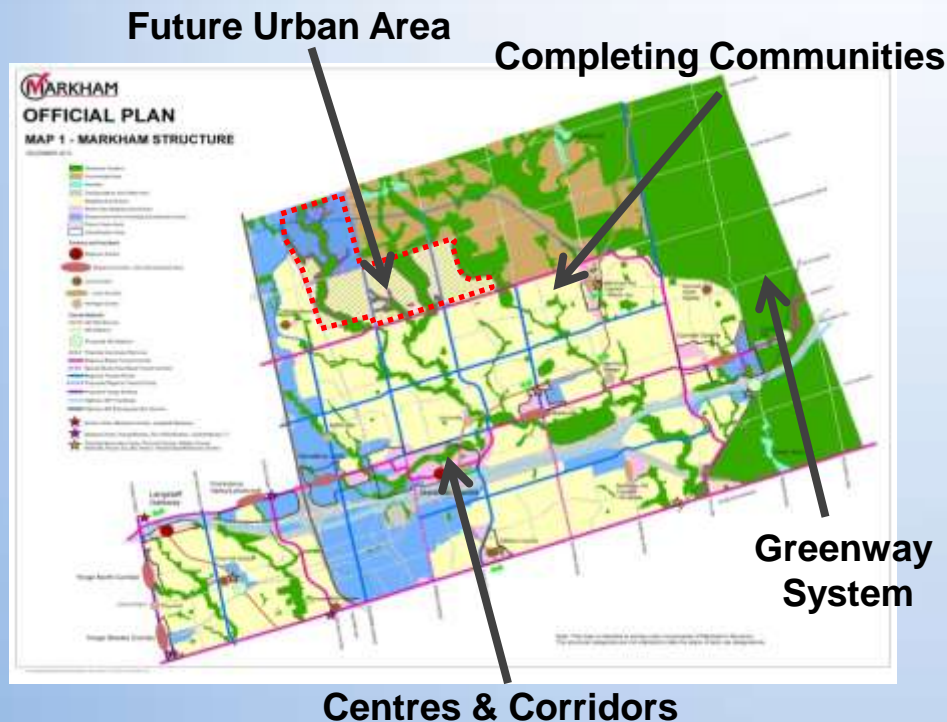
### Concerns with this alternative included:

- The need to accommodate growth with an increasingly constrained land supply - potential for increased land use conflicts
- Least responsive to current and forecast market preferences; required early and sustained shift in housing and employment markets
- Increased municipal financial risk when basing infrastructure funding on uncertain market performance, i.e., potential to fall short of achieving assigned growth
- Decreased economic development opportunities
- Potential for increased demand to convert employment land
- Increasing land value, possibly contributing to reduced market competitiveness

## Markham's 'Medium' Intensification Option - 60%

**This alternative was recommended as preferred:**

- Most realistic in support for intensification and mixed use development
- Incorporates some urban expansion to accommodate forecast housing and employment growth
- Diversifies housing stock while responding to both the higher density and ground-related housing markets
- Optimizes economic development opportunities
- Provides opportunities for, and promotes some change in accommodation preferences in the housing and employment markets – more acceptable municipal financial risk
- Supportive of investment in transit, roads and active transportation infrastructure – a multi-modal transportation system
- Identified as the 'Balanced Alternative'; more consistent with more Growth Plan objectives than other alternatives; endorsed by Council in 2010 as the basis for preparing 2014 Markham OP



The 60% intensification alternative:

- ✓ Ensured protection of the natural environment through an identified protected Greenway System
- ✓ Directed the majority of growth to Centres and Corridors along rapid transit routes within the built boundary (intensification) – 60%
- ✓ Completed the existing urban area communities and employment districts – 20%
- ✓ Allowed limited expansion of the urban area (Future Urban Area ) – 20%

## Comments:

Markham prefers a Regional Growth Scenario to 2041 that:

- Protects Markham's Greenway System
- Is consistent with Markham's current residential intensification target of 60%
- Provides for a range of employment growth and accommodation, ensuring Markham remains economically competitive
- Provides for a diverse housing stock, including affordable housing forms
- Is supportive of increased travel options and ongoing investment in a multi-modal transportation system
- Facilitates mixed use development at appropriate locations, particularly the integration of retail and service uses with primary residential and office development
- Is supported by servicing, transportation and community infrastructure planning and financing that ensures timely delivery and operation of facilities to serve future growth

## Comments (cont'd)

- The Region's 40%, and to a greater extent, the 50% Growth Scenario appear most likely to be consistent with Markham's preferences.
- Clarification is requested on how any identified expansion lands to 2036 would be phased with the current Future Urban Area.

## Next Steps

- **Sept /Oct 2015 DSC** - Markham staff report incorporating today's discussion as basis for comments to Region
- **November 2015** – target date for Regional Council to release Preferred Growth Scenario; expected to be variation on the draft scenarios presented today
- **Early 2016** – target date for Regional Council to release Draft Regional Official Plan Amendment to incorporate 2041 forecasts into ROP
- **Late 2016** – target date for Regional Council adoption of Amendment

Markham will need to amend the 2014 Official Plan to incorporate the 2041 forecasts assigned by the Region

## Next Steps (cont'd)

### **Current Markham Planning Priorities:**

- 1) Bringing 2014 Official Plan into force – resolving appeals at OMB (2016-2017)
- 2) Detailed planning for Future Urban Area in north Markham (2016-2017)
- 3) Secondary Plans – bringing current plans and new Secondary Plans into conformity with 2014 Official Plan (ongoing)
- 4) Work program for Markham Official Plan 2041 conformity exercise (late 2016/2017)



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# Discussion