



Clause 6 in Report No. 7 of Committee of the Whole was adopted, without amendment, by the Council of The Regional Municipality of York at its meeting held on April 23, 2015.

6

2041 York Region Draft Growth Scenarios and Land Budget

Committee of the Whole recommends:

1. Receipt of the presentation by Valerie Shuttleworth, Chief Planner.
2. Receipt of the following deputations:
 1. Patricia Foran, Aird & Berlis LLP on behalf of Lindvest Properties (Cornell) Limited.
 2. Don Given, Malone Given Parsons Ltd. on behalf of Box Grove Hill Developments Inc.
3. Receipt of the communication from Ryan Mino-Leahan, KLM Partners Inc. on behalf of Melrose Properties Inc., Ironrose Investments Inc., MCN (Pinevalley) Inc., Mel-Terra Investments Inc., Azure Woods Home Corp., and Lazio Farms Holdings Inc., the owners of approximately 191.16 hectares of land located within Block 42 in the City of Vaughan, dated April 8, 2015.
4. Adoption of the following recommendations, as amended, in the report dated March 26, 2015 from the Commissioner of Corporate Services and Chief Planner:
 1. Council endorse *in principle* the three draft growth scenarios outlined in this report as the basis for further consultation *with local municipalities* and input to the Regional Municipal Comprehensive Review and Regional Official Plan Review.
 2. The Regional Clerk circulate this report to local municipalities, Building Industry and Land Development Association and the Ontario Ministry of Municipal Affairs and Housing.

1. Recommendations

It is recommended that:

1. Council endorse the three draft growth scenarios outlined in this report as the basis for further consultation and input to the Regional Municipal Comprehensive Review and Regional Official Plan Review.
2. The Regional Clerk circulate this report to local municipalities, Building Industry and Land Development Association and the Ontario Ministry of Municipal Affairs and Housing.

2. Purpose

This report presents population and employment forecasts to the year 2041 for three draft growth scenarios and a land budget. The information is to be used as the basis for further consultation and analysis through the next phase of the Regional Municipal Comprehensive Review (MCR) and for the current water and wastewater and transportation master plan updates.

3. Background

Amendment 2 to the *Growth Plan for the Greater Golden Horseshoe* requires the Region to update its population and employment forecasts

Amendment 2 to the *Growth Plan for the Greater Golden Horseshoe* (the *Growth Plan*), which came into effect in June 2013, provides updated forecasts of population and employment for 2031 and introduces new population and employment forecasts for 2036 and 2041 for York Region and the rest of the Greater Golden Horseshoe (GGH). These forecasts are to be used for planning and managing growth in the GGH. York Region is forecast to grow to a population of 1.79 million and employment of 900,000 by 2041 (see Table 1). The Regional Official Plan must be brought into conformity with Amendment 2 by June 17, 2018.

**Table 1
Growth Plan Schedule 3 Forecasts**

York Region	2014*	2031	2036	2041
Population	1,133,900	1,590,000	1,700,000	1,790,000
Employment	564,600	790,000	840,000	900,000

Source: Growth Plan for the Greater Golden Horseshoe, 2006, Office Consolidation, June 2013

*Note: 2014 figures are a York Region Long Range Planning Division estimate.

Update of the Region’s forecasts is part of the Regional Municipal Comprehensive Review and 5 year Regional Official Plan update

Committee and Regional Council received the “Regional Municipal Comprehensive Review Work Plan” staff report in May 2014, which outlined the work plan components and anticipated timing. The purpose of the work is to update the *York Region Official Plan, 2010 (YROP-2010)* to be consistent with Amendment 2 to the *Growth Plan* and the updated *Provincial Policy Statement, 2014* and also to review *YROP-2010* policies. The MCR is a primary component of the mandatory five-year review and update of the *YROP-2010*, a requirement under the *Planning Act*.

The Regional Municipal Comprehensive Review consists of a number of studies and projects

The MCR involves undertaking a number of separate studies, some of which have been completed or are in progress while others are to follow. The review consists of the following key components.

- Residential unit supply inventory
- Employment land supply and major office inventories
- Regional land budget and associated studies including the Retail Trends Study, Employment Trends Analysis and Cemetery Land Needs Study
- *YROP-2010* policy review
- Long-term fiscal impact analysis
- Population and employment forecasts

The Region last undertook an MCR updating the existing *YROP-2010*. The updated MCR that incorporates Amendment 2 to the *Growth Plan* is following a similar methodology and approach in completing the forecasting and land budget work, relevant background studies, and policy review and consultation.

The new forecasts will provide the foundation for infrastructure master plans and development charges background study

Updates to the Regional Water and Wastewater Master Plan and the Transportation Master Plan are currently in progress and are planned to be completed in 2016. This work will be based on updated York Region population and employment forecasts in order to properly assess and plan for the Region's long-term infrastructure requirements. In addition, background work for the next development charges by-law will commence in 2016 and will be based on updated growth forecasts.

Draft growth scenarios will be the basis for iterative work in Phase 2 of the MCR

The population and employment draft growth scenarios presented in this report will be reviewed and evaluated through Phase 2 of the MCR process. They will be evaluated as part of the water and wastewater and transportation master plan process and will also be subject to a fiscal impact assessment and land use planning assessment. Based on this analysis along with consultation with the public, stakeholders and local municipalities, a preferred growth scenario is planned to be presented to Council in Q4 2015.

The draft growth scenarios were prepared within the context of provincial plans and the Provincial Policy Statement

The draft growth scenarios were prepared within the context of the *Provincial Policy Statement, 2014 (PPS)*, and a number of provincial planning documents including the *Growth Plan*, the *Greenbelt Plan*, the *Oak Ridges Moraine Conservation Plan* and the *Lake Simcoe Protection Plan*.

The *PPS* provides policy direction on land use matters that are of Provincial interest. All planning decisions must be consistent with *PPS* policies. Within York Region there is significant overlap between the requirements of the *PPS*, the *Growth Plan* and other plans. All draft growth scenarios considered the fundamental guiding principles contained in both the *PPS* and the *Growth Plan*:

- The building of strong, healthy, complete communities for people of all ages,
- Supporting a strong and competitive economy,
- Making wise use and management of natural resources to protect and enhance a clean, healthy environment, and
- Optimizing and making efficient use of infrastructure to support the planning of growth in a compact and efficient manner.

4. Analysis and Options

Three draft growth scenarios were developed

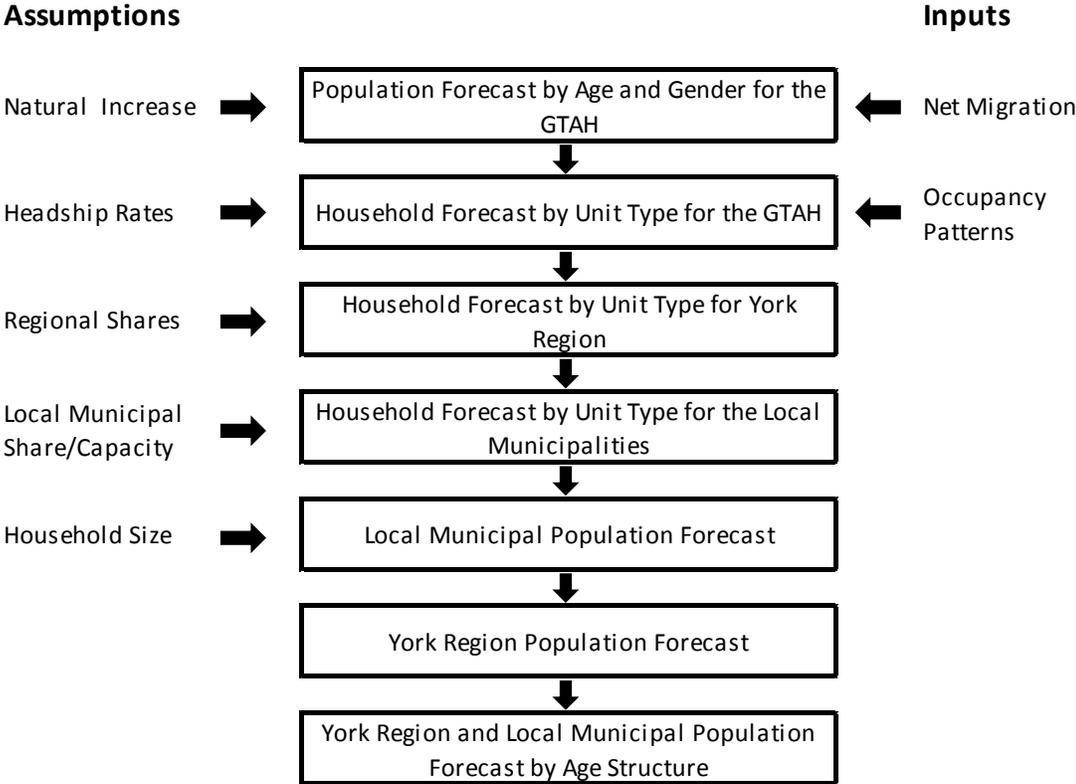
Three growth scenarios were developed by York Region staff based on varying levels of residential intensification. The three scenarios are: 40% intensification, 50% intensification and a no urban expansion scenario. The intensification percentages refer to the share of housing growth occurring annually within the provincially defined Built Boundary. The 40% scenario is the minimum standard for intensification set by the Growth Plan. Both the 40% and 50% intensification scenarios require an urban expansion to accommodate the 2041 population and employment. The no urban expansion scenario constitutes the highest level of intensification possible. Under this scenario there would be no urban expansion in the Region beyond ROPA's 1, 2 and 3. This scenario equates to an intensification level of approximately 65%. Finally, the 50% scenario is an intermediate scenario which lies in between the minimum and maximum intensification scenarios.

The draft growth scenarios incorporate a range of demographic, economic, land use planning policy and infrastructure factors

Regional staff maintain an in-house population, household and employment forecast model. The model uses the cohort (age group) survival method modified by migration factors that ages the population and calculates future growth based on assumptions on fertility rates, mortality rates and net migration.

The model forecasts population and households for the GTHA and then distributes this growth to York Region and its local municipalities based on a share analysis of the housing market. This top down approach is used in conjunction with land use planning policy targets, vacant land inventories and infrastructure capacity, location and timing factors and local municipal growth management work. Figure 1 below summarizes the population and household forecast method.

**Figure 1
Population and Household Forecast Methodology**



The residential inventory work discussed in the report “Residential Unit Supply Inventory” endorsed by Council in March 2015 was an input to the housing unit forecast for the Region and local municipalities. Servicing capacity was a key consideration in the development of the draft growth scenarios. All three draft growth scenarios assume that the water and wastewater projects in the approved 2015 ten year capital plan will be maintained, in order to provide the required servicing capacity to accommodate growth within the planned time frame.

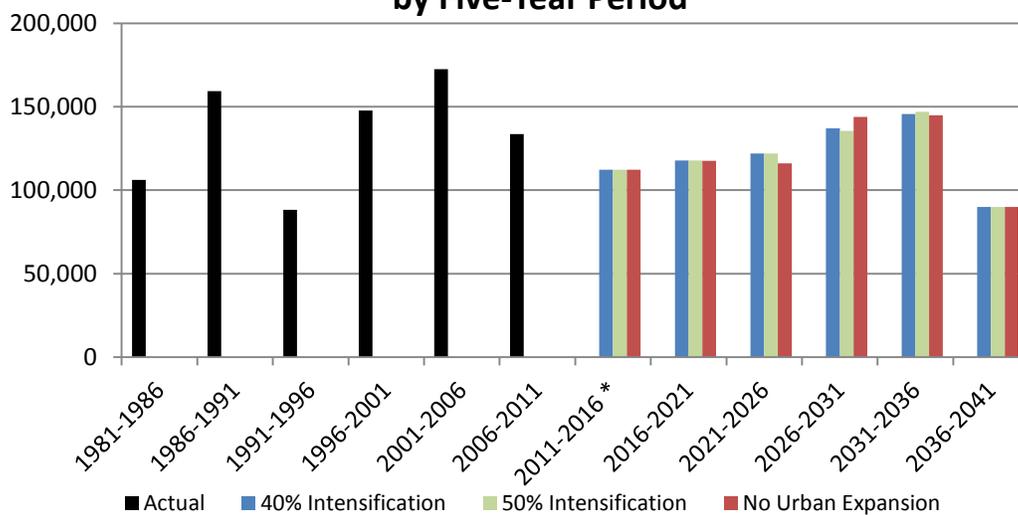
Growth of approximately 645,000 in population by 2041 is required to meet *Growth Plan* forecast

The *Growth Plan* forecast requires York Region to grow from a 2014 year-end population base of approximately 1.14 million to 1.79 million by 2041. This requires population growth of about 645,000 or an average annual growth level of about 24,300 people from 2015 to 2041. This compares to average annual historical growth of 26,500 people from 1981 to 2014.

Consistent population and housing growth is maintained for most of the forecast period to 2041 for all three draft growth scenarios

The 40% and 50% draft growth scenarios maintain relatively similar levels of annual population growth through the forecast period (see Figure 2) and are similar to recent levels of growth in the Region. The no urban expansion scenario shows slightly higher levels of population growth in the 2026 to 2031 period. The rate of growth declines towards the end of the forecast period as a result of the overall slowing of growth in the GTHA due to demographic trends and the ageing of society.

Figure 2
York Region Population Growth
by Five-Year Period



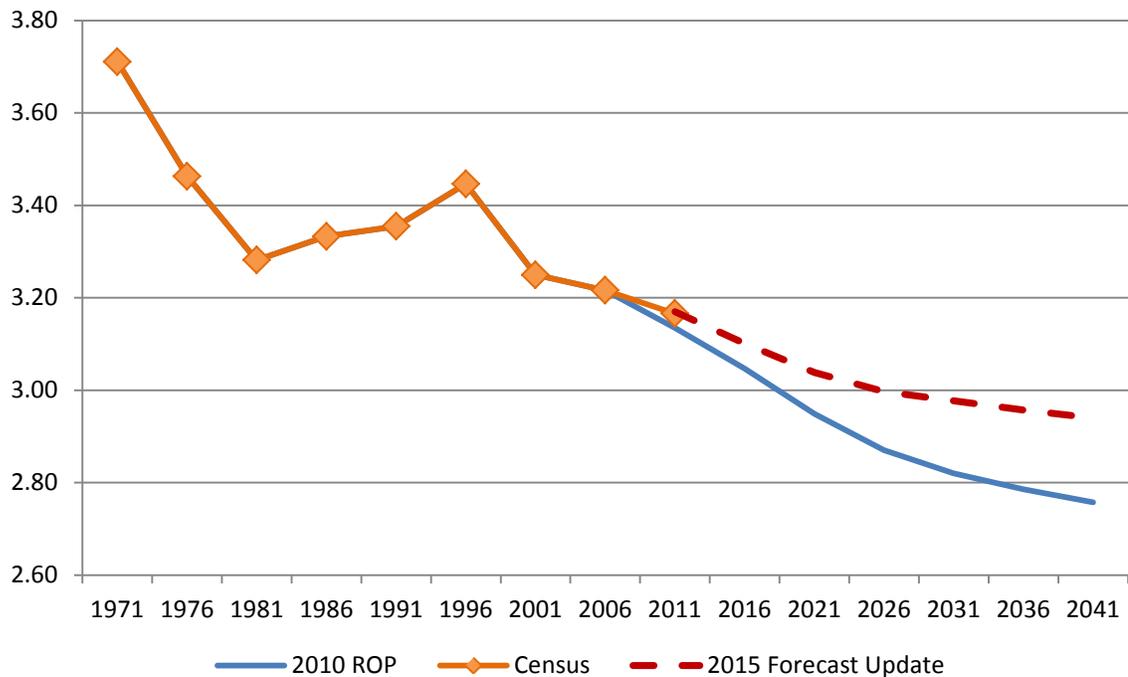
* Note: 2011-2016 – York Region Long Range Planning Division estimate based on CMHC housing completion data to 2014 and forecast to 2016.

Persons per unit forecast to decline at a slower rate than anticipated in forecast for the York Region Official Plan 2010

Persons per unit is calculated by dividing the total household population by the number of households. Changes in average persons per unit over time are important in planning for housing growth to reach target population forecasts. Over time, average household size has tended to decrease. This is a common trend in the western world and is related to a fertility rate below replacement level, an aging population and an increase in empty nesters, childless and single person households. Figure 3 shows historical and projected average persons per unit for York Region. Data from the 2011 Census as well as the background work done in support of the *Growth Plan Amendment 2* forecasts indicate that the rate of decline is not as steep as was previously forecast in the work done for the *YROP-2010* due primarily to higher fertility and life expectancy. A slower rate of

decline in the average persons per unit means that fewer households will be required to accommodate the forecasted population.

Figure 3
York Region Persons per Household 1971 to 2041



Draft growth scenarios result in varying levels of household growth and housing unit mixes

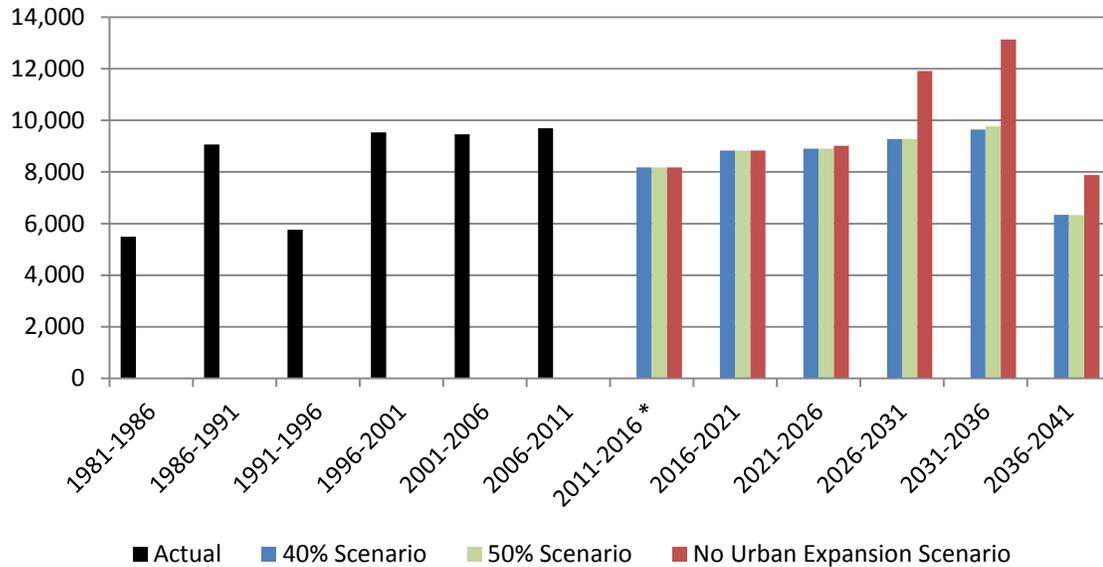
All three draft growth scenarios reach the *Growth Plan* target population of 1.79 million but each achieves this through different means in terms of housing growth and housing type mix. Table 2 compares the share of housing growth through ground-related units (single detached, semi-detached and row houses) and apartments for the last 10 years, the current *YROP-2010* forecast and the three growth scenarios.

Table 2
Housing Mix Comparison – Share of Housing Growth By Unit Type

Scenario	Ground-Related Units	Apartments	Total	Total Stock Ground-Related / Apartments
2005 to 2014 Actual	79.2%	20.8%	100.0%	87% / 13%
YROP-2010 Forecast: 2006 to 2031	64.4%	35.6%	100.0%	78% / 22%
40% Intensification: 2011 to 2041	66.3%	33.7%	100.0%	79% / 21%
50% Intensification: 2011 to 2041	59.3%	40.7%	100.0%	75% / 25%
No Urban Expansion: 2011 to 2041	52.8%	47.2%	100.0%	71% / 29%

Historically, York Region's housing growth has been largely oriented to ground-related housing but there has been a shift in recent years to increasing shares of growth in medium and higher density forms of housing. In order to support the development of more complete communities with a range of housing types that are more compact, provide more affordable housing options and can support public transit and mixed use, all of the growth scenarios project an increased share of housing growth towards higher density forms. The no urban expansion scenario proposes the largest shift in housing type, with just under half of the housing growth from 2011 to 2041 in apartments. Attachment 1 provides detailed graphs on housing growth by type for each scenario, by 5-year period. Figure 4 shows average annual total housing growth for the three draft growth scenarios. The no urban expansion scenario necessitates high levels of apartment growth from 2026 onwards to meet the *Growth Plan* forecast for 2041.

Figure 4
York Region Average Annual Housing Unit Growth by Five Year Period



*Note: 2011-2016 – York Region Long Range Planning Division estimate based on CMHC housing completion data to 2014 and forecast to 2016.

Draft growth scenarios vary distributions of population growth among the Region’s local municipalities

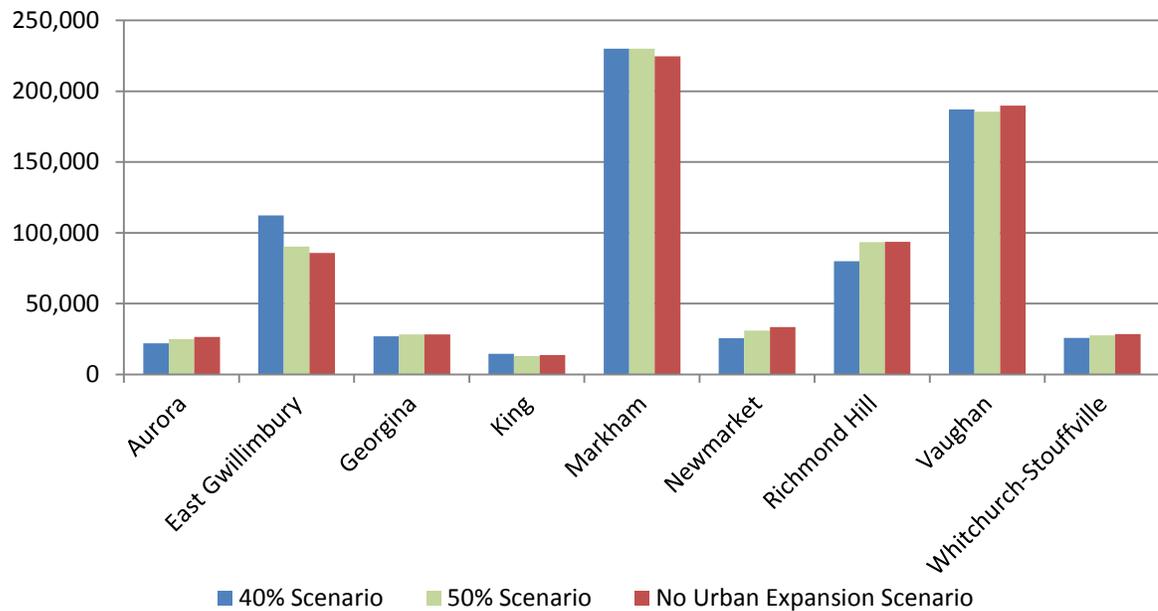
All nine local municipalities are projected to experience population growth under each scenario. Table 3 shows the forecast 2041 population by local municipality along with the current *YROP-2010* 2031 forecasts. However, since the three growth scenarios are based on varying levels of intensification, the distribution of growth to the Region’s local municipalities varies with each scenario. Under the 40% scenario, the municipalities with the largest amount of available land for potential urban expansion show the highest levels of growth. Attachment 2 shows the full local municipal forecast by 5-year period for each growth scenario.

Table 3
YROP-2010 and Draft Growth Scenarios Population Forecast

Municipality	YROP-2010: 2031 Population	40% Intensification: 2041 Population	50% Intensification: 2041 Population	No Urban Expansion: 2041 Population
Aurora	70,200	76,700	79,500	81,000
East Gwillimbury	86,500	135,300	113,400	108,700
Georgina	70,300	71,900	73,300	73,400
King	34,900	35,100	33,600	34,200
Markham	421,600	541,800	541,900	536,600
Newmarket	97,100	107,000	112,400	114,900
Richmond Hill	242,200	270,900	284,400	284,700
Vaughan	416,600	486,100	484,500	488,600
Whitchurch-Stouffville	60,600	65,200	67,000	67,900
York Region	1,500,000	1,790,000	1,790,000	1,790,000

Figure 5 displays the distribution of population growth among the nine local municipalities from 2011 to 2041. Markham, Vaughan and Richmond Hill are forecast to continue to accommodate the largest shares of the Region's residential growth. In addition, the Town of East Gwillimbury is anticipated to play a more significant role in the next 25 years in accommodating population growth in the Region with the extension of servicing capacity to allow for the full development of Holland landing, Sharon, Queensville, ROPA 1 lands and potentially additional urban expansion lands.

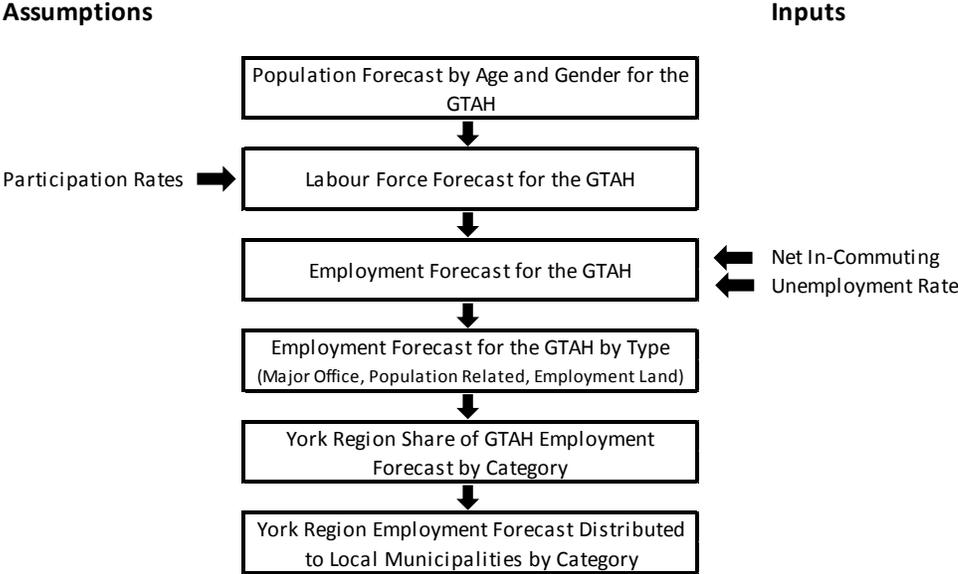
Figure 5
2011 - 2041 Population Growth by Local Municipality



Employment growth is forecast by three employment types

Similar to the population forecast model, the employment forecast model projects York Region employment by a share analysis of GTHA employment taking into account labour force participation rates, net in-commuting and unemployment rates. Figure 6 summarizes the employment forecast method used for the draft growth scenarios.

**Figure 6
Employment Forecast Methodology**



Employment is forecast by three types: major office employment, population-related employment and employment land employment. Definitions of each type are provided in Attachment 3. The following points summarize the key forecast assumptions for each employment type.

Major Office Employment: Major office employment growth is forecast through a market share analysis of the major office forecast for the entire GTHA. All three growth scenarios anticipate that York Region will increase its market share of GTHA office growth and that the Region’s Centres and Corridors will attract increased levels of office development.

Population-Related Employment: Population-related employment is employment serving the local population (e.g. retail, services, education, government). Population-related employment is forecast as a ratio in relation to population growth since it tends to grow in response to population.

Employment Land Employment: Employment land employment is forecast by applying projected employment densities against vacant land supply in the Region’s employment land areas. A factor was also applied to account for a portion of the employment growth occurring within existing vacant space and buildings. The Region’s vacant employment land supply is based on the work contained in the report that Council considered in June 2014, titled “York Region Vacant Employment Land Inventory”.

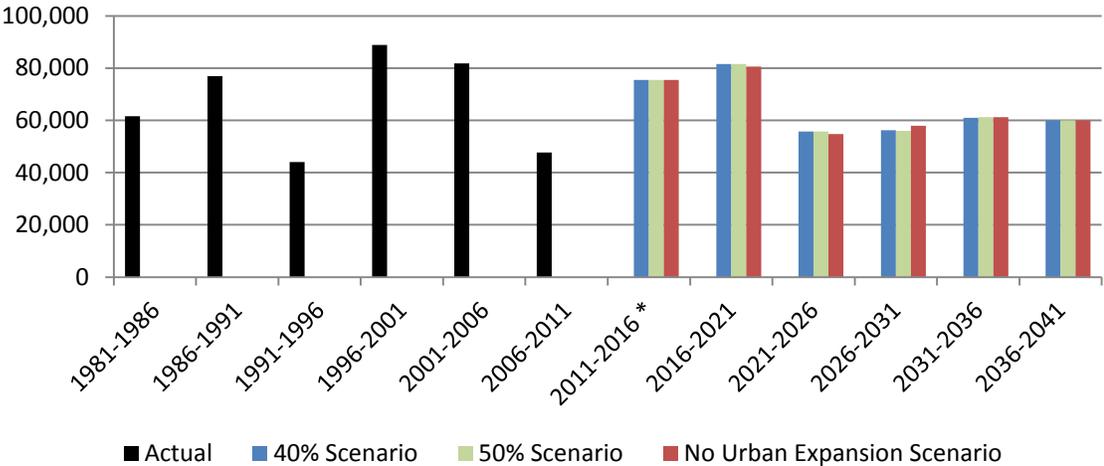
Draft growth scenarios account for employment land conversions proposed to be supported by the Region

The employment land forecast takes account of employment land conversions in the City of Markham that are proposed to be supported by York Region staff. An accompanying staff report entitled “Proposed Employment Land Conversions, City of Markham” is being presented to Committee on the same April 9 2015 agenda. That report provides recommendations on 10 Markham site-specific employment land conversion requests within the context of the MCR and applicable policy framework. That report also provides recommendations on site-specific Official Plan amendments for three of the 10 properties adopted by Markham Council and sent to the Region for approval.

Employment growth in York Region is forecast to continue to shift to service producing sectors

York Region, along with the rest of the GTHA and Ontario continues to experience a shift from goods producing to a service producing economy. Since recovering from the 2008/2009 economic recession, employment in York Region has been growing steadily at an average annual growth of about 15,000 jobs per year over the past five years. While it is anticipated that manufacturing and related industries will remain key parts of York Region’s economy, its share of future employment growth is anticipated to decline. Figure 7 shows historical and forecast employment growth under the three growth scenarios.

**Figure 7
York Region Employment Growth
by Five-Year Period**



* Note: 2011-2016 – York Region Long Range Planning Division estimate based on York Region 2014 employment survey and forecast to 2016.

Table 4 displays the forecast employment by type for York Region in 2041 in comparison to the forecast for 2031 in the current *YROP-2010*. The new growth scenarios anticipate a greater share of employment growth occurring in the major office and population-related employment categories reflecting the shift to the service-producing sectors. The no urban expansion scenario results in a slightly lower share of employment land employment in 2041 in comparison to the other two scenarios.

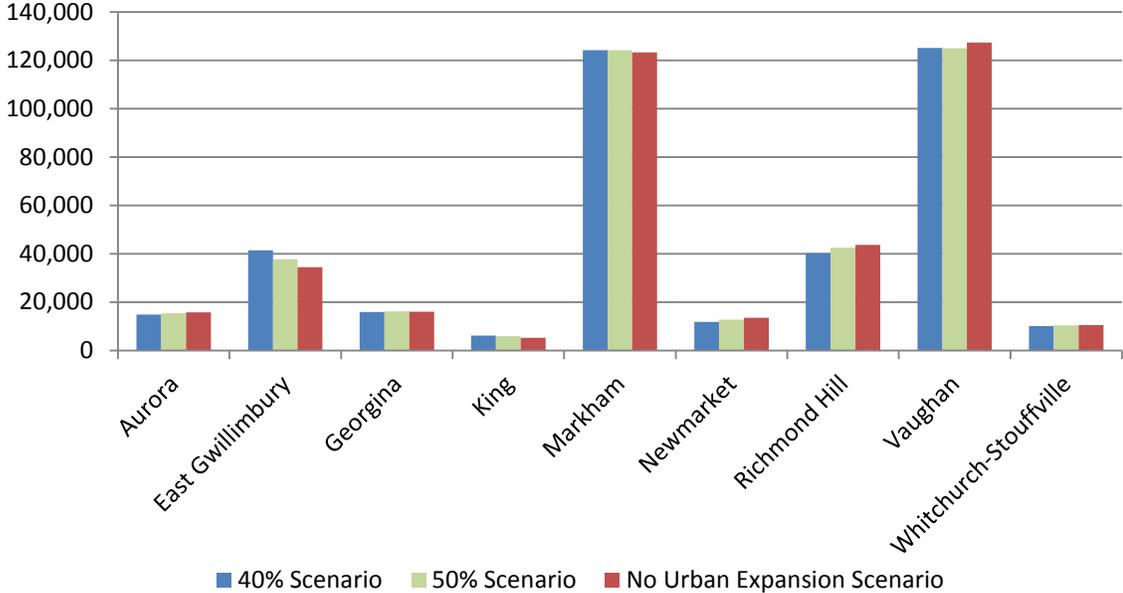
Table 4
York Region Employment Forecast By Type Comparison

Scenario	Major Office	Employment Land	Population- Related	Total
<i>YROP-2010</i> : 2031	15.4%	47.4%	37.2%	100%
40% and 50%: 2041 Intensification	18.0%	41.5%	40.5%	100%
No Urban Expansion: 2041	18.7%	40.7%	40.6%	100%

Each local municipality in the Region is forecast to continue to accommodate growth in employment

Forecast employment at the York Region level was distributed to the local municipalities based on available and potential employment land supply, ability to attract major office development and in relation to population growth. All nine local municipalities are projected to experience employment growth over the forecast period. Figure 8 shows total employment growth by local municipality for 2011 to 2041 by draft growth scenario. Attachment 4 shows the full employment forecast by 5 year period for each scenario by local municipality.

**Figure 8
2011-2041 Employment Growth by Local Municipality**



Vaughan has the largest share of employment land employment growth in the Region owing to its large vacant land supply, located mainly in West Vaughan. Major office employment is forecast to continue to increase in the Region’s existing major office concentrations in Markham, Richmond Hill, Vaughan, Aurora and Newmarket in both Centres and Corridors and employment areas and business parks. Large increases in population-related employment growth are forecast for those local municipalities anticipated to experience a relatively higher amount of population growth.

40% and 50% intensification draft growth scenarios require urban expansion for residential and employment lands

A land demand/supply analysis (land budget) was undertaken to determine the ability of the existing Urban Area in York Region to accommodate the forecast population and employment growth. Both the 40% and 50% intensification growth scenarios require additional urban lands to accommodate the population and employment forecast to 2041. The area remaining outside of the existing Urban Area and also outside of the Greenbelt Plan boundary, an area commonly referred to as the “Whitebelt Lands”, could potentially be used for urban expansion if required (see map in Attachment 5). These remaining areas in York Region are in East Gwillimbury, King, Markham, Vaughan and Whitchurch-Stouffville, totalling approximately 4,500 developable hectares.

Table 5 summarizes the approximate urban expansion requirements for the 40% and 50% intensification scenarios based on a preliminary review and analysis. A more fulsome analysis of land requirements and locations within the Region for urban expansion will be assessed and options proposed through Phase 2 of the MCR. This would also include the release of a comprehensive and detailed forecasting and land budget report outlining methodology and assumptions.

Table 5
Draft Growth Scenario Whitebelt Land Requirements (hectares) to 2041

Scenario	Community Lands	Employment Lands	Total
40% Intensification Scenario	2,300	160	2,460
50% Intensification Scenario	1,100	160	1,260

Preferred growth scenarios must meet *Growth Plan* requirements

The following are key *Growth Plan* policy requirements that must be met by the preferred growth scenario:

- Population and employment forecasts in Schedule 3 are to be used for planning and managing growth.
- By 2015 and for each year thereafter, a minimum of 40% of all residential development occurring annually will be within the built-up area.
- Urban growth centres are planned to achieve by 2031 or earlier, a gross density target of 200 people and jobs per hectare.
- The designated greenfield area will be planned to achieve a minimum density target that is not less than 50 residents and jobs combined per hectare.

All three draft growth scenarios meet the Schedule 3 forecast of 1.79 million population and 900,000 jobs by 2041. In addition, all three also meet the minimum 40% intensification requirement. Density targets for the Region’s urban growth centres are maintained in all scenarios. Regional staff have undertaken preliminary work on the 50 people and jobs density analysis which will be completed as part of the Phase 2 land use planning evaluation of the draft growth scenarios.

Draft growth scenarios will be subject to review and consultation in Phase 2 of the MCR

The three draft growth scenarios were developed in consultation with regional departments and the local municipalities, and are the product of a number of assumptions based on the most recent social, demographic and economic trends and on provincial, regional and local policy. As part of MCR Phase 2 consultation and evaluation work, there may be significant refinements to the draft growth scenarios in deriving the preferred scenario.

The three draft growth scenarios will be discussed, reviewed and evaluated based on a number of factors including:

- The planned urban structure of centres and corridors that provide a focus for intensification, mixed use development and live/work opportunities,
- Transit supportive and pedestrian oriented new, complete communities,
- Protection of the Greenbelt and Oak Ridges Moraine and agricultural, rural and resource areas,
- Transit investment to support intensification,
- The pace of growth and required infrastructure investment for water and wastewater and roads and cycling,
- The long-term financial impact of growth and fiscal responsibility,
- Job creation to match labour force growth that requires the identification and protection of employment lands,
- Housing diversity and affordable housing to offer regional residents housing choices and for attracting a more diverse and skilled labour force and
- A land use planning analysis that will include an assessment of options for different locations for urban expansion, should this be required as part of the preferred scenario.

Regional Council, local municipal councils and staff, the development industry and other stakeholders will be consulted on the draft growth scenarios in this next phase of the MCR. Phase 2 will be an extensive, iterative process involving multiple rounds of scenario evaluation and refinement. The cost of infrastructure will be a key consideration in the identification of the preferred growth scenario and the associated distribution of growth at the local municipal level.

The Province is currently embarking on a review of the *Greenbelt* and *Oak Ridges Moraine Plans* as well as the *Growth Plan*. If required, the draft growth scenario forecasts and land budget will take into account any policy changes in these plans which may affect the forecasts and land budget.

Preferred growth scenario is expected to be presented to Council in Q4 2015

Based on the analysis described above in Phase 2, a recommended growth scenario is anticipated to be presented to Council in Q4 2015. The recommended growth scenario could be a refined version of one of the three scenarios presented in this report or it could be a modified version combining different elements of these scenarios. A draft Official Plan Amendment incorporating the preferred growth scenario is anticipated to be brought forward in mid-2016.

Link to key Council-approved plans

The MCR will result in an amendment to the *YROP-2010* to update the Regional and local municipal population and employment forecasts and associated policies. The MCR also supports a number of the *2015 to 2019 Strategic Plan* Priority Areas including – Managing Environmentally Sustainable Growth, Strengthening the Region’s Economy and Supporting Community Health and Well-being. The MCR work will also support *Vision 2051*’s goal area of Creating Liveable Cities and Complete Communities through the preparation of updated growth forecasts and land budget that will provide the framework for the future growth and development of communities in the Region.

5. Financial Implications

The forecast and land budget work was undertaken in-house by existing staff in the Planning and Economic Development branch, with support from staff in other Regional branches and departments.

A comprehensive fiscal impact analysis will be undertaken during Phase 2 to assist in the evaluation and development of a recommended scenario. The recommended growth scenario will form the basis for the growth forecast for the next development charge by-law update which is required to be adopted in 2017.

6. Local Municipal Impact

Local municipal staff are part of the MCR Technical Advisory Committee which met on December 8, 2014 and February 10, 2015 to discuss the MCR process, residential land supply, review of Regional Official Plan policies and the draft

growth scenarios. In addition, regional staff met with staff from each local municipality individually in December 2014, January and February 2015 to discuss the residential land supply that feeds into the draft growth scenarios. Local municipal staff will continue to be consulted through the next phase of the MCR involving the evaluation of the three growth scenarios. The new forecasts generated through the MCR, once approved, will be the new forecasts to which local official plans will need to conform and form the basis for local municipal infrastructure and service delivery planning.

7. Conclusion

York Region is required to update its forecasts to be consistent with Amendment 2 to the *Growth Plan* which forecasts the Region to grow to 1.79 million people and 900,000 jobs by 2041. In mid-2014, Regional staff commenced a Regional Municipal Comprehensive Review to update the Region's forecasts and review policies in the Regional Official Plan. New forecasts are required as input to the water and wastewater and transportation master plan updates as well as the forthcoming development charges by-law update.

This report has presented three draft growth scenarios for population and employment forecasts to 2041 by local municipality. These scenarios are to be evaluated and refined through Phase 2 of the MCR from the perspective of water/wastewater and transportation infrastructure, financial and land use planning impacts as well as local municipal and stakeholder input. A recommended growth scenario will be presented to Council in Q4 2015.

For more information on this report, please contact Paul Bottomley, Manager, Policy, Research and Forecasting at 905-830-4444 ext.71530.

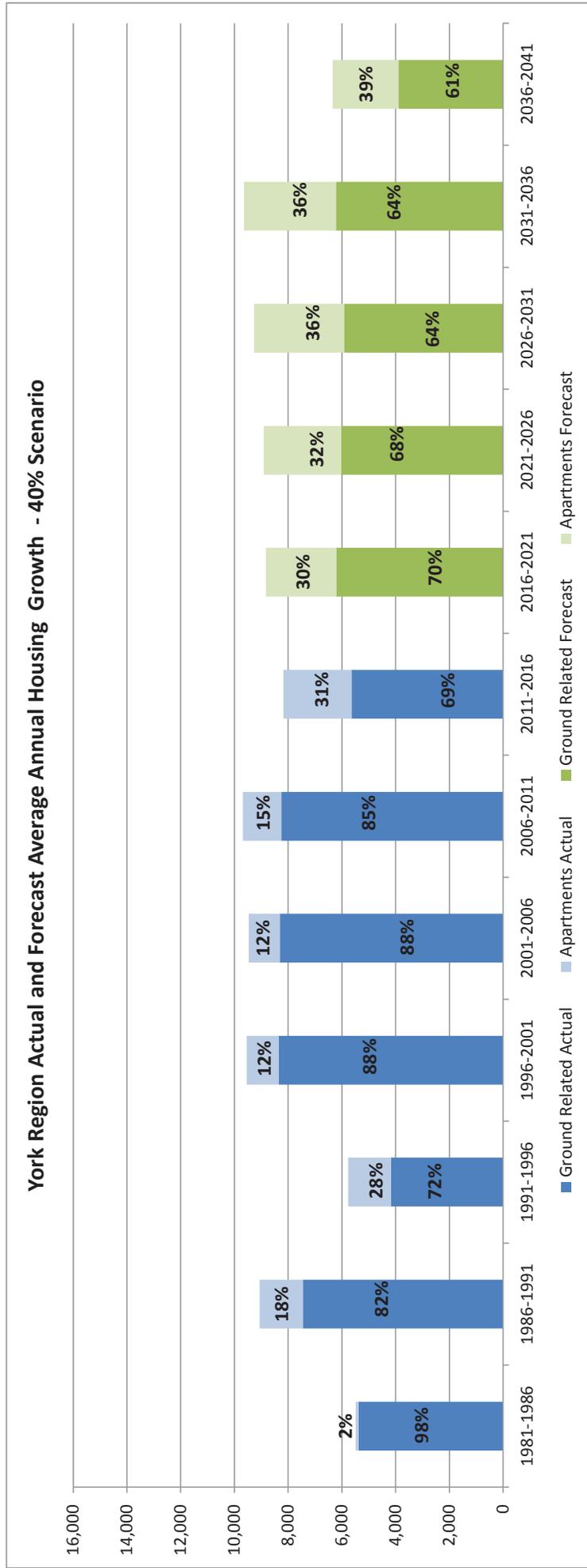
The Senior Management Group has reviewed this report.

Attachments (5)

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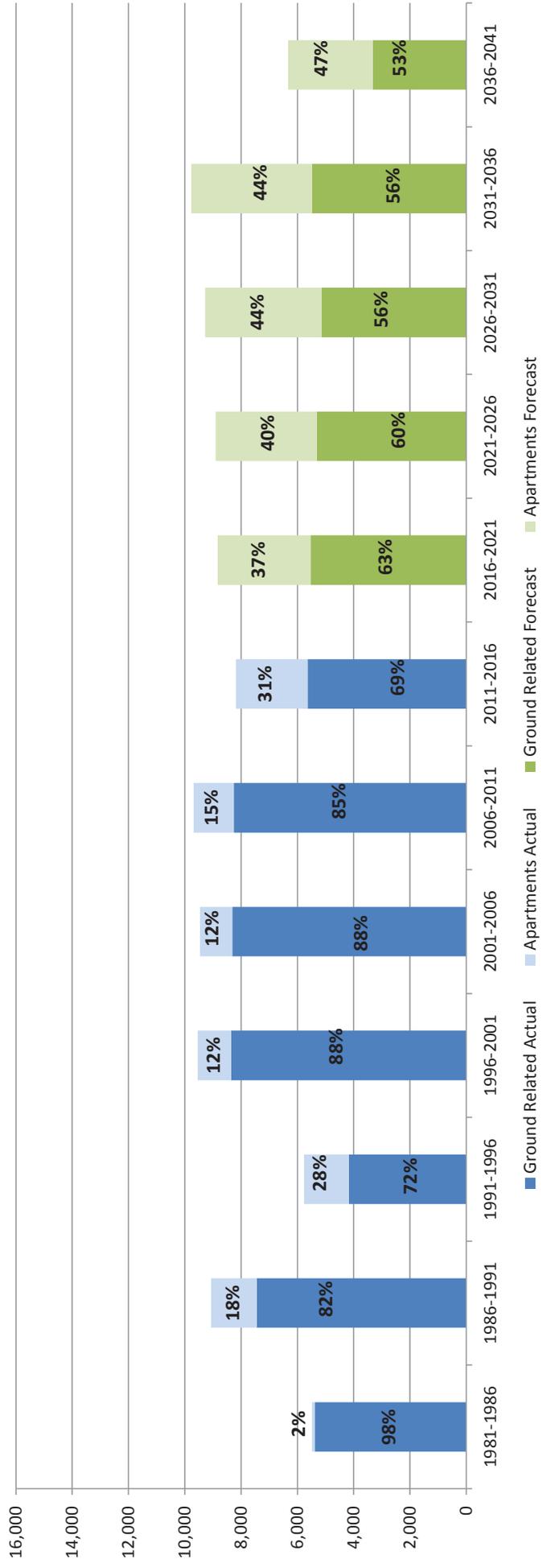
Accessible formats or communication supports are available upon request

Attachment 1: York Region Actual and Forecast Average Annual Housing Growth for Ground Related and Apartment Unit Types



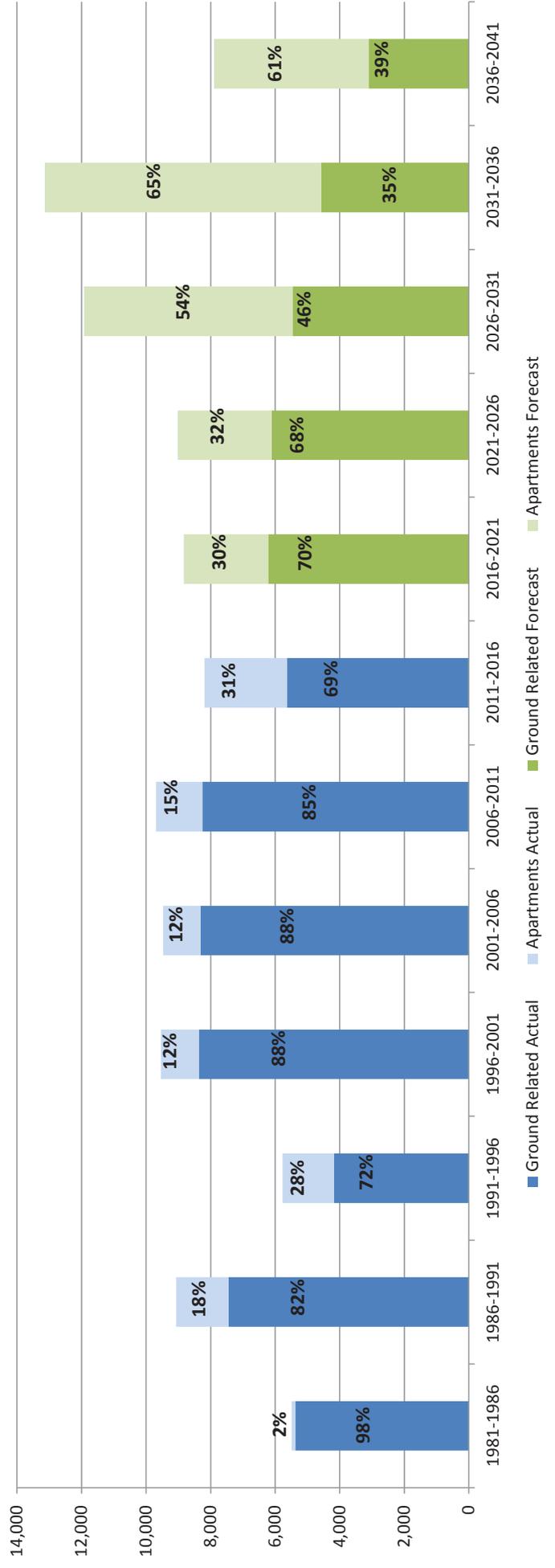
Notes: 40% Scenario refers to 40% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.
 2011-2016 - York Region Long Range Planning Division estimate based on CMHC housing completion data to 2014 and forecast to 2016.

York Region Actual and Forecast Average Annual Housing Unit Growth - 50% Scenario



Notes: 50% Scenario refers to 50% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041. 2011-2016 - York Region Long Range Planning Division estimate based on CMHC housing completion data to 2014 and forecast to 2016.

York Region Actual and Forecast Average Annual Housing Unit Growth - No Urban Expansion



Notes: No Urban Expansion Scenario assumes no urban expansion in the Region beyond existing designations (including ROPA's 1,2 and 3). This scenario equates to an intensification level of approximately 65%.
 2011-2016 - York Region Long Range Planning Division estimate based on CMHC housing completion data to 2014 and forecast to 2016.

Attachment 2: Population Forecasts by Five-Year Period for Draft Growth Scenarios

Population Forecast by 5-year period - 40% Intensification Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	54,600	58,200	63,700	69,600	72,700	75,000	76,700
East Gwillimbury	23,000	25,600	38,200	49,500	85,200	115,100	135,300
Georgina	45,000	47,400	50,400	53,800	58,300	65,400	71,900
King	20,500	25,300	28,800	31,300	32,100	34,300	35,100
Markham	311,800	355,200	392,200	434,300	456,700	509,800	541,800
Newmarket	81,500	87,400	92,100	97,100	100,300	104,200	107,000
Richmond Hill	190,900	209,800	227,500	244,700	255,900	265,000	270,900
Vaughan	298,800	323,100	349,600	377,200	431,000	467,200	486,100
Whitchurch-Stouffville	39,400	45,600	52,900	59,900	62,200	64,000	65,200
York Region	1,065,500	1,177,600	1,295,400	1,417,400	1,554,400	1,700,000	1,790,000

Notes: 40% Scenario refers to 40% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.
 2011 data is a York Region Long Range Planning Division estimate adjusted for the Census undercount.

Population Forecast by 5-year period - 50% Intensification Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	54,600	58,200	63,300	68,600	73,100	77,100	79,500
East Gwillimbury	23,000	25,600	36,100	45,500	66,300	94,400	113,400
Georgina	45,000	47,400	50,000	52,900	57,200	66,000	73,300
King	20,500	25,300	28,200	30,200	31,800	33,100	33,600
Markham	311,800	355,200	394,100	437,600	474,800	515,700	541,900
Newmarket	81,500	87,400	92,700	98,300	103,200	108,500	112,400
Richmond Hill	190,900	209,800	229,400	248,200	263,800	276,700	284,400
Vaughan	298,800	323,100	349,700	378,100	420,700	463,200	484,500
Whitchurch-Stouffville	39,400	45,600	52,000	58,100	62,200	65,300	67,000
York Region	1,065,500	1,177,600	1,295,500	1,417,500	1,553,100	1,700,000	1,790,000

Notes: 50% Scenario refers to 50% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.

2011 data is a York Region Long Range Planning Division estimate adjusted for the Census undercount.

Population Forecast by 5-year period - No Urban Expansion Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	54,600	58,200	64,300	70,500	72,800	77,700	81,000
East Gwillimbury	23,000	25,600	37,500	50,500	101,600	105,500	108,700
Georgina	45,000	47,400	50,400	54,400	69,200	71,700	73,400
King	20,500	25,300	28,800	31,600	32,100	33,400	34,200
Markham	311,800	355,200	392,200	429,200	453,200	504,900	536,600
Newmarket	81,500	87,400	92,100	96,300	101,100	109,900	114,900
Richmond Hill	190,900	209,800	227,500	242,100	254,400	273,100	284,700
Vaughan	298,800	323,100	349,600	376,900	408,100	457,900	488,600
Whitchurch-Stouffville	39,400	45,600	52,900	59,800	62,700	65,900	67,900
York Region	1,065,500	1,177,600	1,295,300	1,411,300	1,555,200	1,700,000	1,790,000

Notes: No Urban Expansion Scenario assumes no urban expansion in the Region beyond ROPA's 1, 2 and 3.
 2011 data is a York Region Long Range Planning Division estimate adjusted for the Census undercount.

Population Forecast by 5-year period - ROP 2010

	2011	2016	2021	2026	2031
Aurora	54,600	63,700	68,100	69,600	70,200
East Gwillimbury	23,000	34,700	48,100	66,300	86,500
Georgina	45,000	52,800	57,900	63,900	70,300
King	20,500	27,000	29,900	32,500	34,900
Markham	311,800	337,800	370,300	398,300	421,600
Newmarket	81,500	88,700	91,900	94,500	97,100
Richmond Hill	190,900	216,900	231,400	239,100	242,200
Vaughan	298,800	329,100	360,400	388,800	416,600
Whitchurch-Stouffville	39,400	49,400	55,800	59,100	60,600
York Region	1,065,500	1,200,100	1,313,800	1,412,100	1,500,000

Notes: 2011 data is a York Region Long Range Planning Division estimate adjusted for the Census undercount.
 2016 to 2031 forecasts derived from YROP 2010.

Attachment 3: Employment Type Definitions

Major Office Employment: Employment occurring in office building of 1,860 square metres (20,000 square feet) or larger (does not include city or town halls, hospitals or school board offices). Major office employment forms a key part of the Region's strategy for maintaining and attracting high quality jobs. Growth in office development is also a key component of the Region's Centres and Corridors strategy and is needed to support the Region's major transit infrastructure investments.

Population-Related Employment: Employment serving the local population such as retail, services, education, municipal government, institutions and community services. This type of employment tends to grow mainly in response to population growth..

Employment Land Employment: Refers to employment within the Region's employment lands, excluding major office employment. This employment category typically includes business activities such as manufacturing, research and development, warehousing and also includes ancillary retail and service uses.

Attachment 4: Employment Forecasts by Five-Year Period for Draft Growth Scenarios

Employment Forecast by 5-year period - 40% Intensification Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	21,900	25,500	29,400	31,700	33,400	35,200	37,000
East Gwillimbury	7,400	9,100	13,800	17,800	27,000	37,500	48,900
Georgina	7,700	9,000	11,600	13,400	16,100	19,600	23,600
King	8,200	9,700	10,900	11,500	12,000	13,100	14,300
Markham	154,800	176,300	200,100	219,400	234,900	255,500	275,700
Newmarket	42,800	45,400	47,900	49,800	51,500	53,300	55,000
Richmond Hill	69,300	79,500	88,800	95,400	100,500	105,600	110,400
Vaughan	185,100	215,500	246,500	263,700	282,400	298,000	312,100
Whitchurch-Stouffville	12,800	15,300	18,100	20,000	21,200	22,200	23,000
York Region	510,000	585,300	667,100	722,700	779,000	840,000	900,000

Notes: 40% Scenario refers to 40% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.

2011 based on the York Region 2011 employment survey.

Employment Forecast by 5-year period - 50% Intensification Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	21,900	25,500	29,300	31,500	33,500	35,500	37,400
East Gwillimbury	7,400	9,100	13,400	17,000	23,800	34,000	45,200
Georgina	7,700	9,000	11,500	13,300	15,900	19,700	23,900
King	8,200	9,700	10,800	11,300	12,000	12,900	14,100
Markham	154,800	176,300	200,500	220,100	237,900	256,600	275,600
Newmarket	42,800	45,400	48,000	50,000	52,000	54,000	55,900
Richmond Hill	69,300	79,500	89,200	96,100	101,900	107,600	112,700
Vaughan	185,100	215,500	246,500	263,800	280,700	297,400	312,000
Whitchurch-Stouffville	12,800	15,300	17,900	19,700	21,100	22,300	23,200
York Region	510,000	585,300	667,100	722,800	778,800	840,000	900,000

Notes: 50% Scenario refers to 50% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.
 2011 based on the York Region 2011 employment survey.

Employment Forecast by 5-year period - No Urban Expansion Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	21,900	25,500	29,400	32,000	33,600	35,800	38,000
East Gwillimbury	7,400	9,100	13,600	17,800	29,500	35,800	41,900
Georgina	7,700	9,000	11,600	13,500	17,800	20,900	23,700
King	8,200	9,700	10,900	11,600	12,000	12,700	13,400
Markham	154,800	176,300	199,400	217,600	233,000	253,300	274,800
Newmarket	42,800	45,400	47,900	49,600	51,600	54,200	56,600
Richmond Hill	69,300	79,500	88,700	94,900	100,500	107,200	113,800
Vaughan	185,100	215,500	246,400	263,800	279,400	297,600	314,400
Whitchurch-Stouffville	12,800	15,300	18,000	20,000	21,200	22,500	23,400
York Region	510,000	585,300	665,900	720,800	778,600	840,000	900,000

Notes: No Urban Expansion Scenario assumes no urban expansion in the Region beyond ROPA's 1, 2 and 3.
 2011 based on the York Region 2011 employment survey.

Employment Forecast by 5-year period - ROP 2010

	2011	2016	2021	2026	2031
Aurora	22,100	29,000	32,400	33,500	34,200
East Gwillimbury	7,400	11,600	18,700	26,700	34,400
Georgina	7,700	11,000	13,900	17,400	21,200
King	8,200	9,700	11,000	11,400	11,900
Markham	151,600	200,300	221,500	231,200	240,400
Newmarket	43,100	47,600	48,700	49,000	49,400
Richmond Hill	70,100	86,100	94,300	97,400	99,400
Vaughan	187,000	226,000	248,900	257,600	266,100
Whitchurch-Stouffville	12,800	19,200	21,900	22,700	23,000
York Region	510,000	640,500	711,200	746,900	780,000

Notes: 2011 based on the York Region 2011 employment survey. 2016 to 2031 forecasts derived from YROP 2010.

York Region Land Use Categories

Land Use Categories

- Built-up Area
- Undelineated Built-up Area*
- Designated Greenfield Area
- Greenbelt Area
- ROPA 3 - Under Appeal

*Undelineated Built Up Areas are smaller unserved or partially-served settlement areas (as identified by the Province) with limited capacity to accommodate significant future growth.

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