

## Memorandum

TO: Development Services Committee

FROM: Jim Baird, Commissioner of Development Services

PREPARED BY: T. J. Lambe, Senior Project Coordinator, Growth Forecasts (ext. 2910)  
Marg Wouters, Senior Manager, Policy and Research (ext. 2909)

DATE: March 24, 2015

RE: **Monitoring of Population Forecasts for the City of Markham and Selected Areas**



### Background

At the December 9, 2014 Development Services Committee meeting, staff were requested to provide information on the applications and build-out population figures associated with Langstaff, Buttonville, and Markham Centre. Reference was made to an earlier presentation by the Unionville Ratepayers Association regarding the rate of build out in Markham Centre potentially exceeding forecasts.

At the January 13, 2015 meeting, Committee clarified that when reporting, staff should also have regard for “the build-out areas throughout Markham, the relevance of the build-out areas to the approved Official Plan and the city-wide forecast, and the growth requirements of the Regional Official Plan.”

This memorandum responds to these requests, building on the staff memo dated May 6, 2014 which responded to the Unionville Ratepayers Association presentation on the same date.

### City Population Forecasts

The May 6, 2014 staff memo concluded that since 2011, the City’s estimated population has been tracking approximately 1-2% higher than the suggested prorated York Region forecasts for the period between 2011 and 2016, which is considered to be a minor variation from the forecast.

Estimated 2014 mid-year population estimates released by the Region subsequent to the May 6, 2014 staff memo indicate that the actual mid-year population in Markham was approximately 3.5% higher than the prorated 2014 estimate based on the original forecasts. The estimated 2014 population, prepared by the Region, is based on actual housing completions. Although this increase is higher than the 1-2% increase identified in the earlier memo, it would be premature to conclude that this result represents an overall higher City-wide growth rate that could be expected to continue throughout the forecast period to 2031, rather than representing a short term spike in housing completions that will average out over the longer forecast period.

Markham's new Official Plan is based on a 2031 population of 421,600 as assigned by the Region. Markham forecasts are being updated by the Region as part of the Regional Municipal Comprehensive Review (Regional Official Plan review), which is currently underway. The Regional Municipal Comprehensive Review will, among other things, result in draft growth scenarios for the Region and the nine local municipalities to reflect 2041 forecasts for York Region assigned through Amendment 2 to the Growth Plan for the Greater Golden Horseshoe. Markham staff reported to Committee on Amendment 2 in January 22, 2013, and will be reporting further on the ongoing Regional Municipal Comprehensive Review, including the draft growth scenarios, following presentation of the draft scenarios to Regional Council scheduled for April 2015.

#### Forecasts for Markham Centre and Langstaff Gateway Urban Growth Centres

The intensification target identified in Markham's Growth Strategy is approximately 37,000 residential units, representing approximately 60% of forecast growth from 2006 to 2031. (The Region's intensification target for Markham is 31,590 units representing approximately 52% of forecast growth to 2031.) Markham's Growth Strategy assumed that about half of the anticipated intensification in the City would occur in the Markham Centre and Langstaff Gateway Urban Growth Centres. The remaining intensification units were expected to be primarily accommodated in identified key development areas and local centres and corridors.

With respect to Markham Centre, the May 6, 2014 staff memo indicated that the City's Growth Management Strategy projected approximately 14,800 dwelling units in Markham Centre in 2031, with a corresponding population of 28,650 persons, and that Council had approved approximately 1,800 more residential units than contemplated in the Growth Strategy. Staff also cautioned that the actual market take-up and translation into building permits and construction is not guaranteed, as it is dependent on both market demand and business decisions by the development industry. For example, at the time of approval there was a strong interest in higher density residential development, whereas more recently some landowners have expressed interest in reducing densities in certain areas.

Table 1 provides an update of the population analysis taking into account the 2014 population estimate based on the original York Region forecasts.

<b>Table 1: Current Population Forecasts for Markham Centre and Langstaff Gateway</b>					
<b>Centre</b>	<b>Anticipated Prorated 2014 Population</b>	<b>Estimated 2014 Population (based on built to date)</b>	<b>% Difference between pro-rated and estimated 2014 population</b>	<b>Currently Estimated 2031 Population</b>	<b>Currently Estimated Build-out Population</b>
Markham Centre	13,680	12,980	-5.1%	28,650*	41,000*
Langstaff Gateway	70	70	0	11,000	32,000**
* Subject to revision via mobility hub study and updated Secondary Plan.					
** Secondary Plan provides for up to 32,000 population.					

The 2014 population is estimated at 12,980 based on approximately 6,000 units built. This population is approximately 5 percent lower than the anticipated prorated 2014 population of

13,860 based on forecasts to 2031. The 2031 and build-out population forecasts for Markham Centre will be reviewed and updated through the mobility hub study and update of the Markham Centre Secondary Plan.

With respect to the Langstaff Gateway Centre, no new development was forecast for 2014 and none has occurred.

#### Approvals and completions in other areas identified for intensification

Table 2 below provides a comparison of major development approvals (i.e., zoning approval for apartments) and construction over the past several years for selected areas within the City identified as having the highest potential for intensification. Table 2 is not an exhaustive list of all intensification applications. Some intensification is also expected in the form of townhouses, detached and semi-detached dwellings.

<b>Table 2: Development Approvals and Units Built in Selected Areas*</b>				
<b>Centre</b>	<b>Development Proposals</b>	<b>Zoning Approvals (Apt Units) (rounded)</b>	<b>Units Built</b>	<b>Units Built as % of Zoning Approvals</b>
Cornell Centre	Springhill Macwood, Lindvest Properties	2,130	0	0%
Yonge Steeles/ German Mills Centre	World on Yonge, Frangian Holdings, Shops on Steeles	2,620	1,250	48%
Markham Rd/Mount Joy	Greenpark, Great Eldin, Flato, Cedardale	1,350	435**	32%
Milliken Main Street	Nearby, 4600 Steeles, Mon Sheong Foundation***	990	390	39%
Leitchcroft	Times	850	850	100%
Cathedraltown	Monarch, King David	590	190	31%
Other	Tribute (Unionville) Sierra Homes (Markham Village)	260	145	56%
<b>Total</b>		<b>8,790</b>	<b>3,260</b>	<b>37%</b>
* Not all development approvals are included				
**Includes 220 units under construction				
*** Retirement facility and nursing home (600 units)				

Table 2 indicates that of the approximately 8,800 apartment units with approved zoning, just over one-third have proceeded to site plan approval and construction.

With respect to the Buttonville Airport lands, no residential development was anticipated in the current model forecasts. A Secondary Plan for Buttonville, is currently under appeal to the Ontario Municipal Board.

Updates to population and employment forecasts for areas identified for intensification will be undertaken as part of secondary plan updates, and as input to the development of the Region's and ultimately the City's, draft growth scenarios for 2041.

### Conclusion

The estimated 2014 population values for Markham as a whole and Markham Centre approximate the anticipated population incorporated into current forecasting models. Development in other areas in the City identified as having potential for intensification also aligns with the 2031 forecasts and intensification targets.

Population and employment growth is monitored on an ongoing basis through Secondary Plan updates and City-wide forecasting exercises such as the Regional Municipal Comprehensive Review. Markham staff are working closely with Regional staff on the current Regional Municipal Comprehensive Review and will be reporting to Committee on the Regional draft growth forecasts to 2041 in the coming months.

In the May 6, 2014 memo, staff indicated that updates would be provided to Committee as the Markham Centre mobility hub study advances, and the Committee requested staff to report back in approximately six months on progress regarding transportation strategies. The Mobility Hub study has not sufficiently advanced to provide more refined transportation analysis and conclusions beyond the IBI Study of 2012. There is budget allocated for an update of the Markham Centre Transportation Study in 2015.

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THE CORPORATION OF THE CITY OF MARKHAM

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**EXTRACT CONTAINING ITEM #0001 OF THE DEVELOPMENT SERVICES COMMITTEE  
OF (May 06, 2014)****1. MARKHAM CENTRE AND WARD 3 - POPULATION PROJECTIONS AND  
IMPLICATIONS (10.0)****Presentation Memo**

Peter Miasek, President, Unionville Ratepayers Association, and Harry Eaglesham gave a presentation on the URS Assessment of Markham Centre and Ward 3 population projections and implications. The analysis method, findings, and conclusions were reviewed.

The URA suggests that development in Markham Centre and in Markham in general will create unacceptable congestion in the near future. Although the City has concluded that the projected 2031 level of development can be accommodated with transportation improvements, the URA projects that population growth will be more aggressive than anticipated, and improvements will be needed by 2023. The URA recommends additional strategic transportation improvements: advancing the Markham Centre Mobility Hub/East Precinct Plan/MC Secondary Plan; reviewing the pace of other infrastructure such as schools; considering implementation of caps or holds; and, conducting an employment count analysis.

Jim Baird, Commissioner of Development Services, addressed the staff memo responding to the URA presentation, advising that the 2009 figures were forecasts only. While planning applications are trending towards higher density than forecast, the units still have to be built, and the market is cyclical. Improvements within the City's control – roads and VIVA – have been advancing, and the mobility hub study may encourage the province to provide a funding commitment for infrastructure. The use of Hold provisions could be considered in the Secondary Plan discussion.

In response to the staff memo, Mr. Miasek suggested that the Markham Center Secondary Plan should be accelerated and should include employment forecasts as well as establishing milestones and a comprehensive development phasing plan. The URA also recommends that the residents be fully involved in the development of Markham Centre. The Committee suggested that basement apartments be added to the URA calculations.

The Committee expressed concern for traffic congestion and requested that staff follow up on the URA presentation. Staff outlined the next steps of the mobility hub study followed by updating transportation studies and developing a new Secondary Plan.

The Committee discussed encouraging residents to use transit, the City's efforts to build transit-oriented development, working with developers to create the transit hub, and the need for the

province to provide the tools and infrastructure to accommodate mandated growth.

The Committee expressed appreciation to the URA for their deputation and research.

Moved by: Councillor Don Hamilton


Seconded by: Councillor Carolina Moretti

- 1) That the presentation dated May 6, 2014 and titled Markham Centre and Ward 3 - Population Projections and Implications, provided by Peter Miasek, President, Unionville Ratepayers Association (URA), be received; and,
- 2) That the memorandum from the Commissioner of Development Services, dated May 6, 2014 and titled URA Presentation to Development Services Committee be received; and further,
- 3) That staff report back to Development Services Committee in approximately six months on progress regarding transportation strategies.

**CARRIED**



## MEMORANDUM

FROM: Jim Baird, Commissioner of Development Services 

TO: Development Services Committee

PREPARED BY: Richard Kendall, Manager of Development, Central District  
Brian Lee, Senior Manager, Special Projects, Engineering  
Tim Lambe, Policy and Research Division

DATE: May 6, 2014

RE: **URA Presentation to Development Services Committee**

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Unionville Ratepayers Association (URA) has prepared a presentation outlining growth projections for Markham Centre using a number of timeframes – 2016, 2023 and 2031. URA is concerned that recent development approvals and current development applications could result in the population within Ward 3 and Markham Centre in particular growing faster than anticipated, and that development within Markham Centre may exceed the City's projections for the 2031 timeframe by 2023. The presentation also discusses infrastructure that was previously identified in the City's Transportation Study Up-date for Markham Centre that is required to support the City's development projections for 2031. The URA presentation was previously presented to Staff and the local Councillor on March 26, 2014, and was also the subject of a presentation to the Markham Centre Advisory on April 24, 2014.

### **Population**

Planning Staff reviewed the material provided by URA and wish to comment as follows. City population forecasts are prepared by York Region and incorporated into the Region and City Official Plans. The current population forecasts for Markham identified in the Official Plans are:

- 2006 273,000
- 2016 337,800
- 2021 370,300
- 2026 398,300
- 2031 421,600

Based on York Region forecasts the estimated 2011 population for the City was approximately 309,200.

York Region also reports annual mid-year estimates of population reflecting dwelling unit completions. Since 2011, the City's estimated population has been tracking approximately one to two percent higher than the suggested prorated forecasts for the period between 2011 and 2016. This percentage difference is considered minor. Market demand for housing is subject to a broad range of socio-economic factors; whereas the housing market has been in a positive cycle, market demand and land absorption can be expected to vary over time.

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### **Markham Centre**

Forecasts for Markham Centre were undertaken in 2009 in support of Markham's Growth Management Strategy. These forecasts were undertaken relative to the land budget assumptions underlying the new Official Plan – i.e. to forecast land absorption and land requirements by housing type, and in the case of high density housing, to identify the forecast distribution of required land supply across the City's intensification areas. These forecasts assumed that Markham Centre would absorb a high proportion of the City's high density units, but Markham Centre would not need to be fully built out to meet the City's forecast demand for high density units to 2031 (given the other intensification areas also available). Unit and population estimates identified for Markham Centre at that time were:

	<u>Units</u>	<u>Population</u>
• 2011	4,855	9,975
• 2016	8,105	16,150
• 2021	10,055	19,715
• 2026	12,865	25,065
• 2031	14,800	28,650

Prorating these forecasts to obtain estimates for 2013 and 2023 results in the following:

	<u>Units</u>	<u>Population</u>
• 2013	6,155	12,445
• 2023	11,180	21,855

The City's Growth Strategy (2009) prorated 2023 values of 11,180 units and 21,855 persons are lower than the URA forecasts of 13,424 units and 26,061 persons. The differences amount to about 2,200 units and 4,200 persons. The principal reason for the differences appears to be the inclusion in the URA forecasts of approximately 2,300 units that have Council approval, or are currently proposed, but were not known or reflected in the 2009 forecasts.

CMHC completions data show that over the 10 years from 2004 through 2013, the City absorbed an average of 638 apartment units per year (highest yearly number, 942 units). The URA analysis is suggesting that between 2013 and 2023 Markham Centre alone will absorb 10,021 units or 1,000 units per year. While the URA forecasts are based on development applications, the actual market take-up and translation into building permits and actual construction remains to be seen.

### **Transportation**

A fundamental aspect of a Provincial Growth Centre is providing a mix of uses to minimize external trips to and from the centre. URA's presentation identified a number of transportation and road improvements which were part of the Markham Centre Transportation Study Up-date prepared by IBI for the City in 2012. Staff note that the infrastructure components that are within the City's direct control are proceeding through the EA, design and construction processes, within the 2023 timeline suggested by URA as follows:



- |                                       |   |
|---------------------------------------|---|
| • Birchmount Road Rouge Crossing      | Bridge scheduled to open in July, 2014                                  |
| • Verclaire Gate Rouge River Crossing | Design to commence in 2014  |
| • Sciberras Road Rouge River Crossing | Pending development and EA, could occur within a ten year timeframe     |
| • Enterprise Blvd extension to Rodick | EA is underway  |
| • Miller Ave ext Warden/Birchmount    | EA approved – construction dependant on property issues and development |

In addition to the improvements identified above, Rodick Road is now open from Highway 7 to Esna Park (2012) and staff are actively involved with implementing Transportation Demand Management (TDM) measures in conjunction with development approvals. Significant work on the cycling and path systems is underway and the Markham Centre Mobility Hub Study has been endorsed and should commence shortly. These elements all contribute to achieving the City's transportation goals for Markham Centre.

With respect to the higher level transit improvements identified by URA, these are under the control of other levels of government and subject to available funding. VIVA's rapidway is funded and construction along Highway 7 is advanced. The section through Markham Centre (Next Phase H3.4) is also funded and preliminary engineering and design work has commenced. This will be a design-build-finance project which includes two sections within Markham Centre. The primary focus at this time is the Civic Mall / Simcoe Promenade section of dedicated rapidway between Birchmount Road and Sciberras Road. The project has aggressive timelines which include the issuance of a Request for Design-Build proposals in June, 2014, with anticipated commencement of construction in the Fall of 2015, after the Pan Am games. YRT has also rationalized some of their bus routes and is seeing significant ridership increases on its express buses from Unionville GO Station to the Finch subway station in Toronto.

It is noted that an EA is currently underway for all day GO rail service on the Stouffville line serving Markham Centre, and is expected to be completed by June 2014. When funding is available, this is a priority item for GO to implement.

The EA for the Highway 407 transitway has been completed to Kennedy Road. It is anticipated that the Mobility Hub study will further address the design and alignment of the transitway through Markham Centre. The construction of the 407 transitway is outside of Metrolinx's 15 year capital programme. In the interim, GO buses are operating along Highway 407.

### **Conclusion**

The City's Growth Management Strategy projected approximately 20,000 dwelling units in Markham Centre, with a corresponding population of 41,000 persons, and 39,000 employees. Recent market trends and applications have reflected a strong interest in higher density residential development. To-date, Council has approved approximately 1,800 more residential units than contemplated in the Growth Strategy. At the same time, there has been a lower demand for employment uses. With the endorsement of the Mobility Hub study, the development projections for Markham Centre will be further reviewed and up-dated. This study and up-dates to the Markham Centre Transportation Study will inform future amendments to the Markham Centre Secondary Plan. Staff will provide up-dates to Committee as the Mobility Hub Study advances.