PLANNING for POPULATION AND EMPLOYMENT TO 2041

Presented to
Planning Advisory Committee

Presented by
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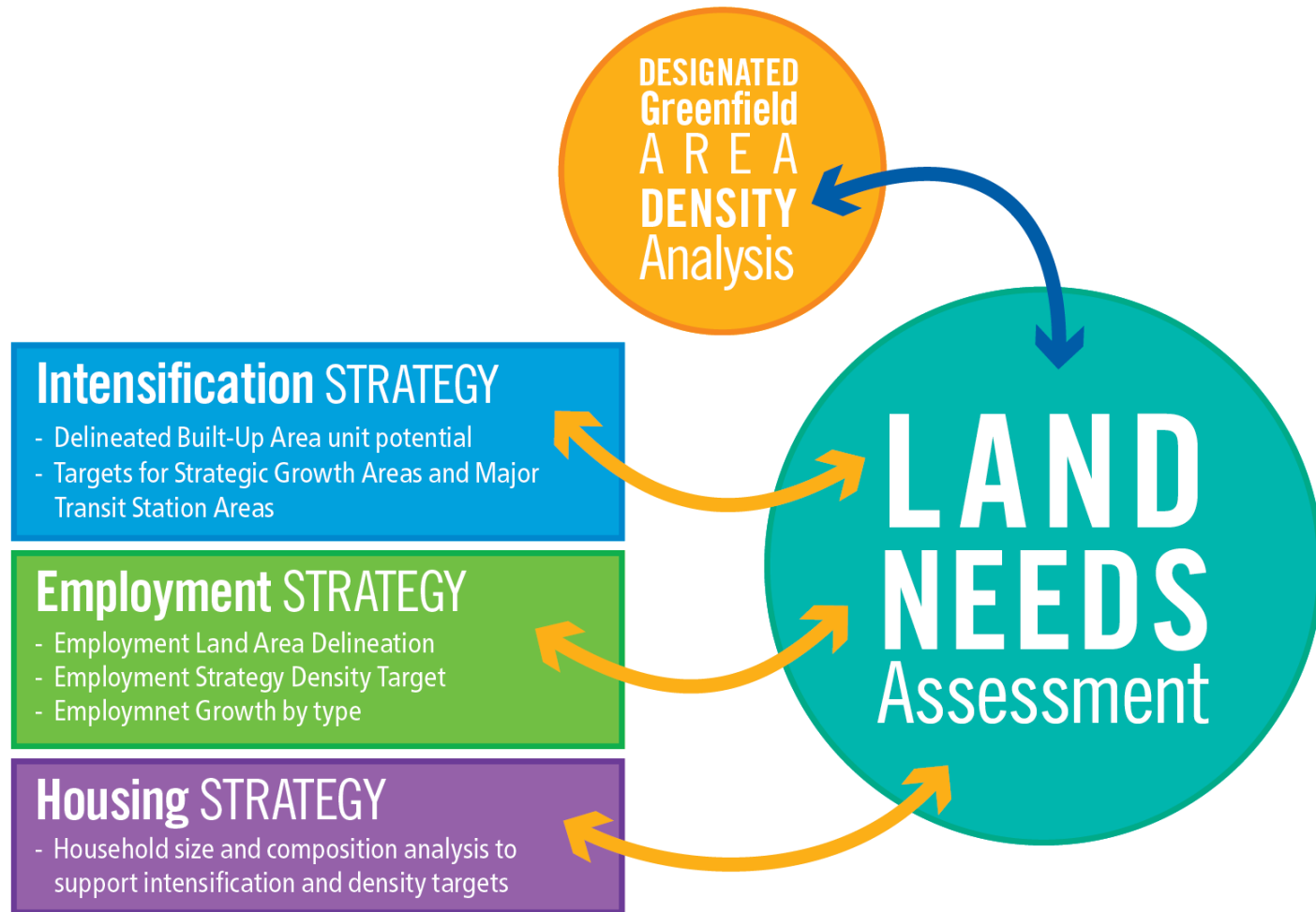
December 4, 2019

York Region

OUTLINE

- Overview of Land Needs Assessment Methodology

- Forecasting for Population
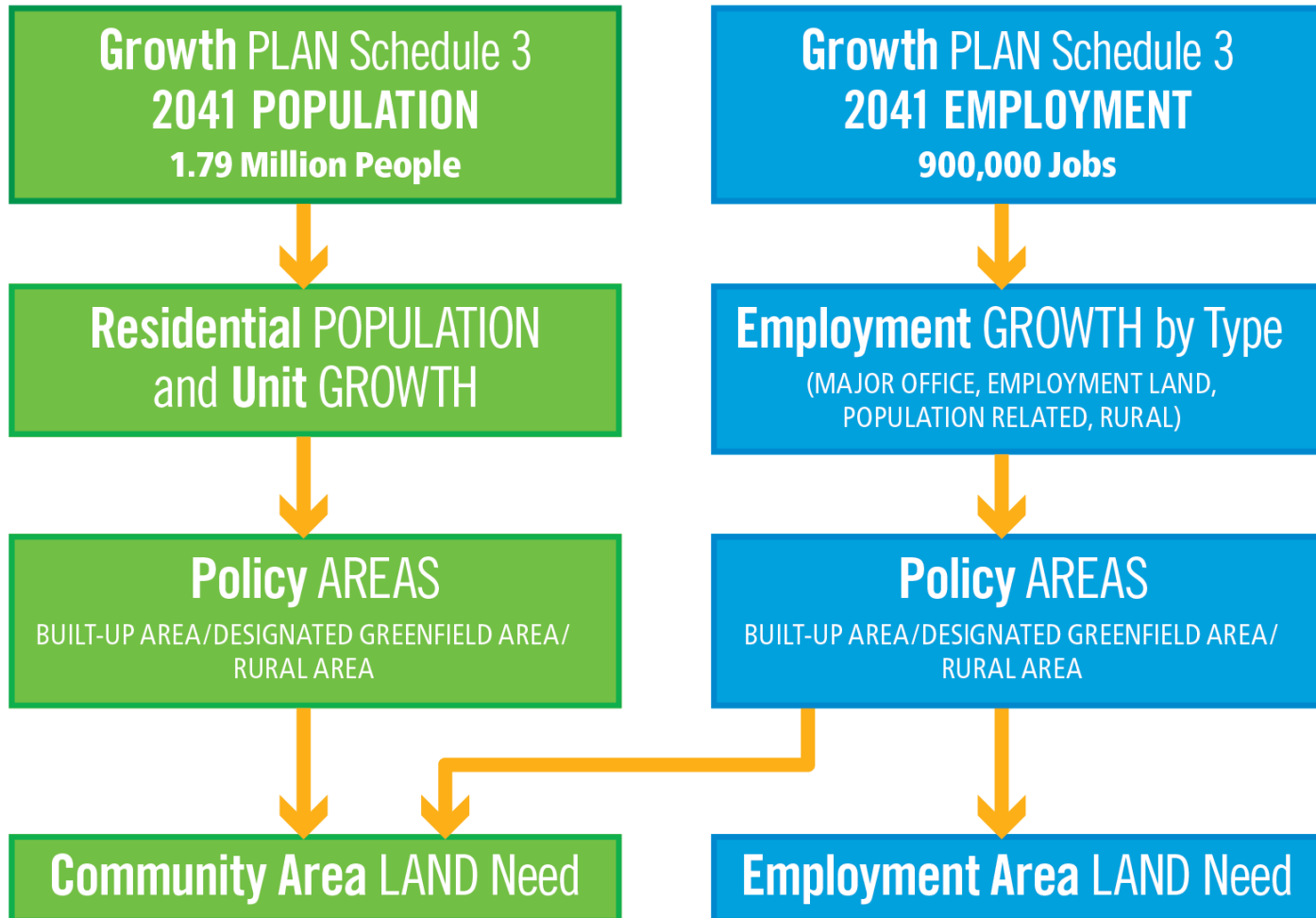
- Forecasting for Employment

LAND NEEDS ASSESSMENT METHODOLOGY

- Determines land required to accommodate population and employment growth to 2041

- Determines quantum but not location of any urban expansion lands

- Premised on achieving intensification and density policy targets

  - 50% intensification

  - 50 people and jobs per hectare in the Designated Greenfield Area

METHODOLOGY OVERVIEW

Growth PLAN Schedule 3
2041 POPULATION
1.79 Million People

Growth PLAN Schedule 3
2041 EMPLOYMENT
900,000 Jobs

Residential POPULATION and **Unit** GROWTH

Employment GROWTH by Type
(MAJOR OFFICE, EMPLOYMENT LAND, POPULATION RELATED, RURAL)

Policy AREAS
BUILT-UP AREA/DESIGNATED GREENFIELD AREA/ RURAL AREA

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BUILT-UP AREA/DESIGNATED GREENFIELD AREA/ RURAL AREA

Community Area LAND Need

Employment Area LAND Need

Forecasting Population

KEY STEPS – Population and Units

Population growth to 2041 – 646,000 people

Unit growth to 2041
- Results in a fixed number of housing units in forecast

KEY STEPS — Population

Allocate unit growth by land use category

Built Up Area

50% unit growth

- applications **+**
- ground-related infill **+**
- apartments
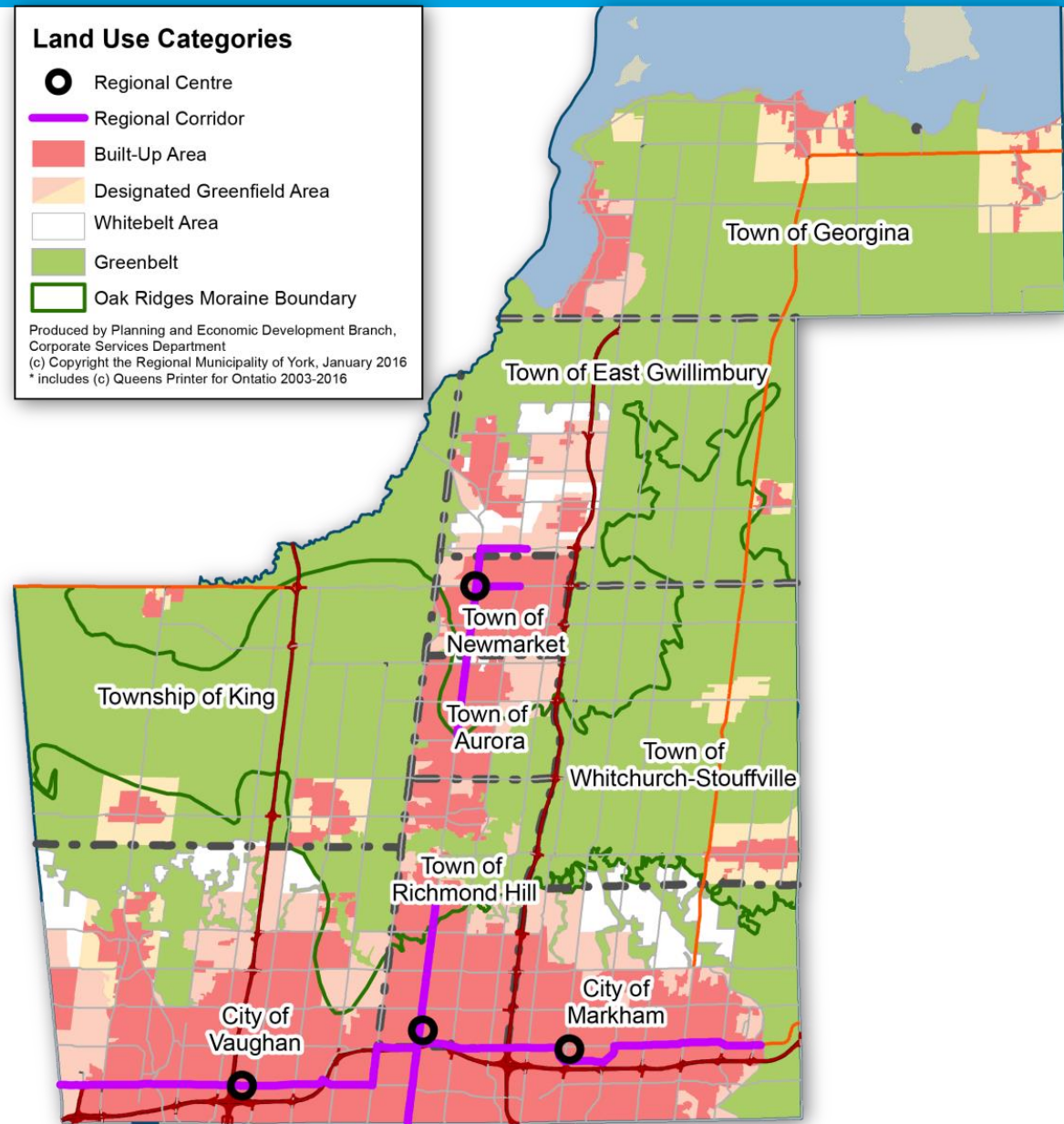
Rural Area

<1% unit growth

- applications **+**
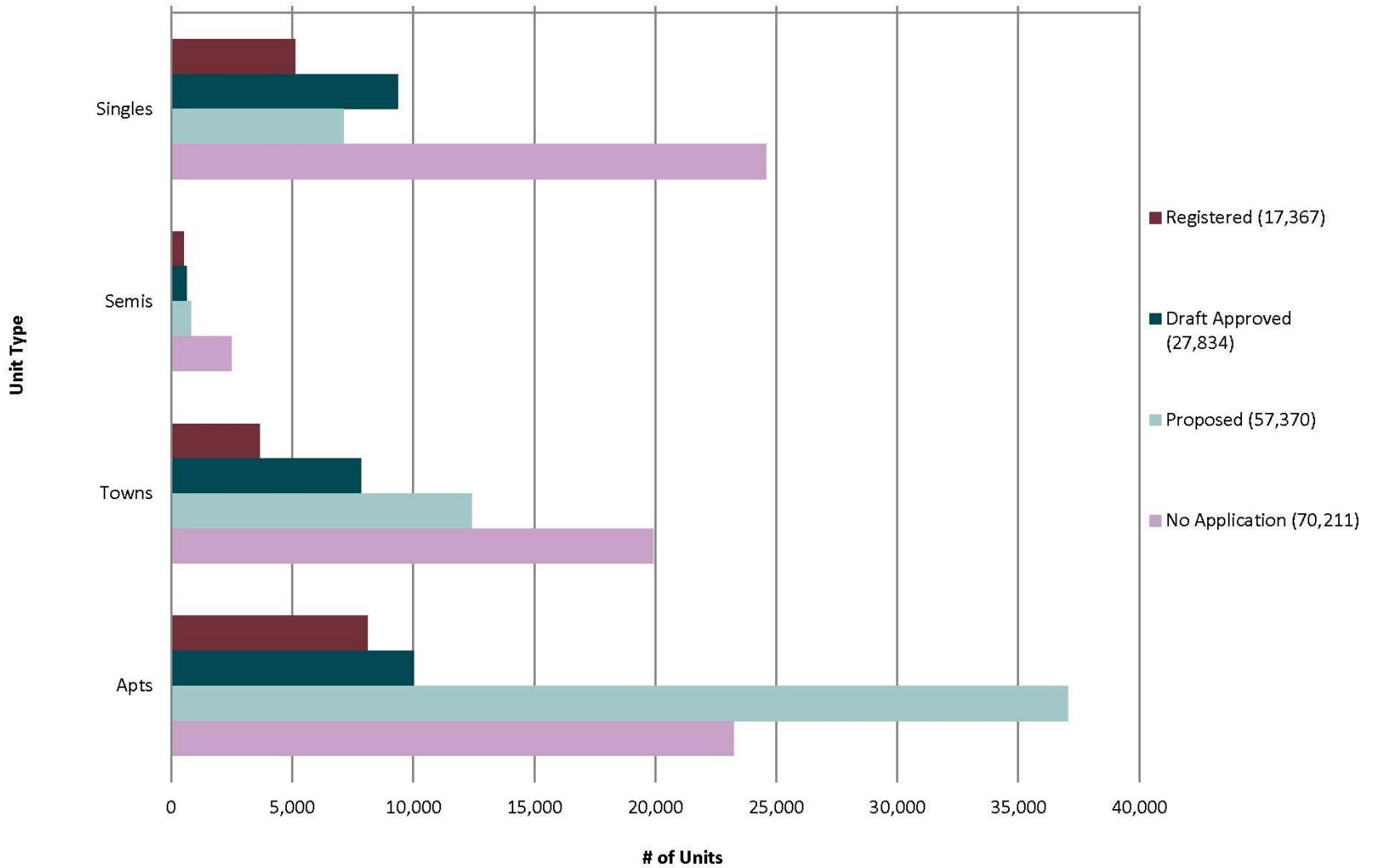- small number of additional units

Designated Greenfield Area

Total Units − BUA − Rural

- Approved secondary plans

REGIONAL STRUCTURE

York Region's Residential Housing Supply by Application Status, 2019

Horizontal bar chart. Y-axis: Unit Type (Singles, Semis, Towns, Apts). X-axis: # of Units (0 to 40,000).

Legend:
- Registered (17,367)
- Draft Approved (27,834)
- Proposed (57,370)
- No Application (70,211)

York Region's Residential Housing Supply by Municipality, 2019

# of Units (y-axis)

Municipality (x-axis)

Legend:
- APARTMENTS
- GROUND RELATED

Municipality	Total	Apartments	Ground Related
Aurora	4,900	24%	76%
East Gwillimbury	21,900	16%	84%
Georgina	5,440	6%	94%
King	3,190	3%	97%
Markham	57,000	53%	47%
Newmarket	3,790	47%	53%
Richmond Hill	19,270	42%	58%
Vaughan	52,620	58%	42%
Whitchurch-Stouffville	7,530	39%	61%
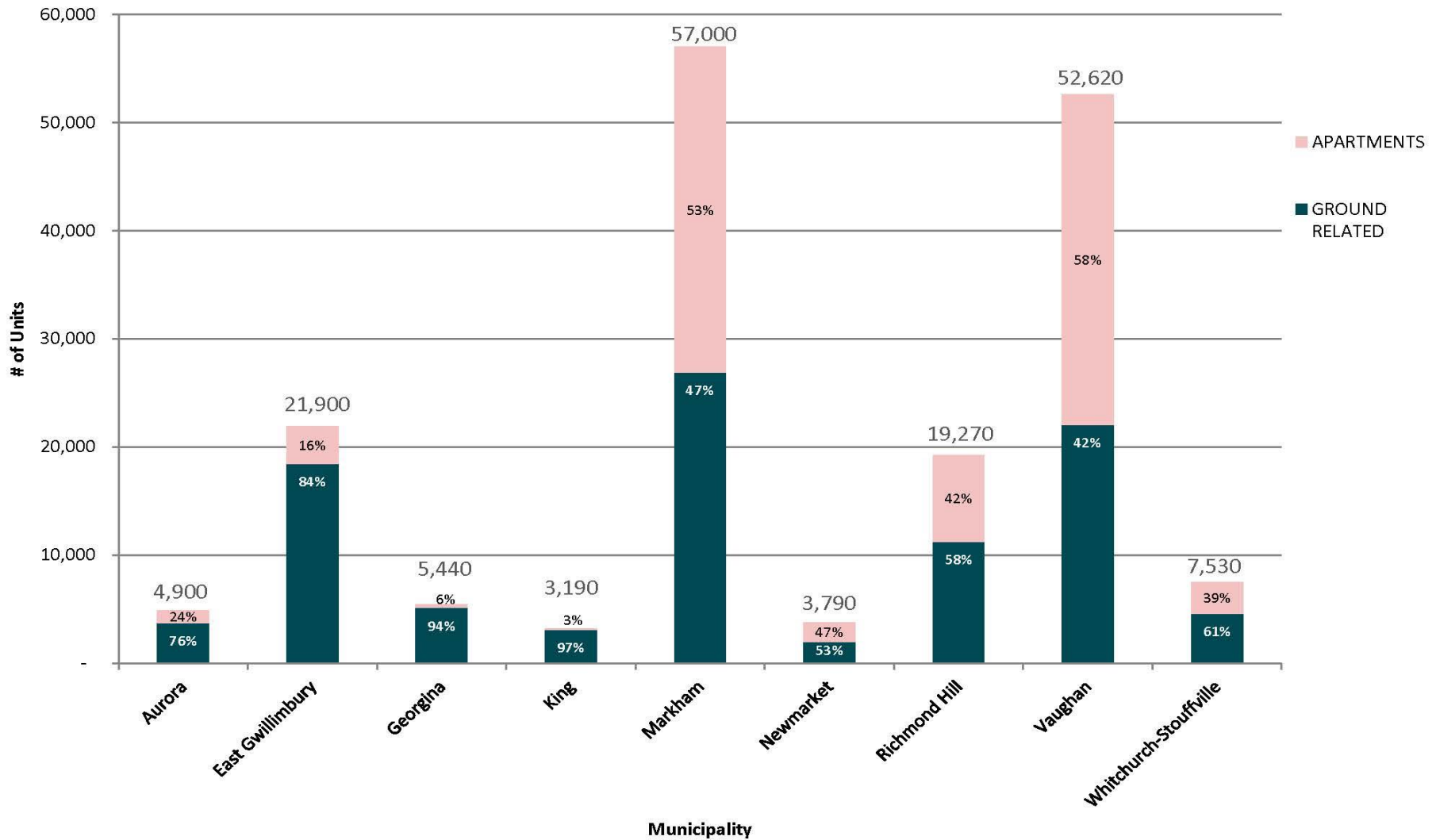
MAJOR TRANSIT STATION AREAS
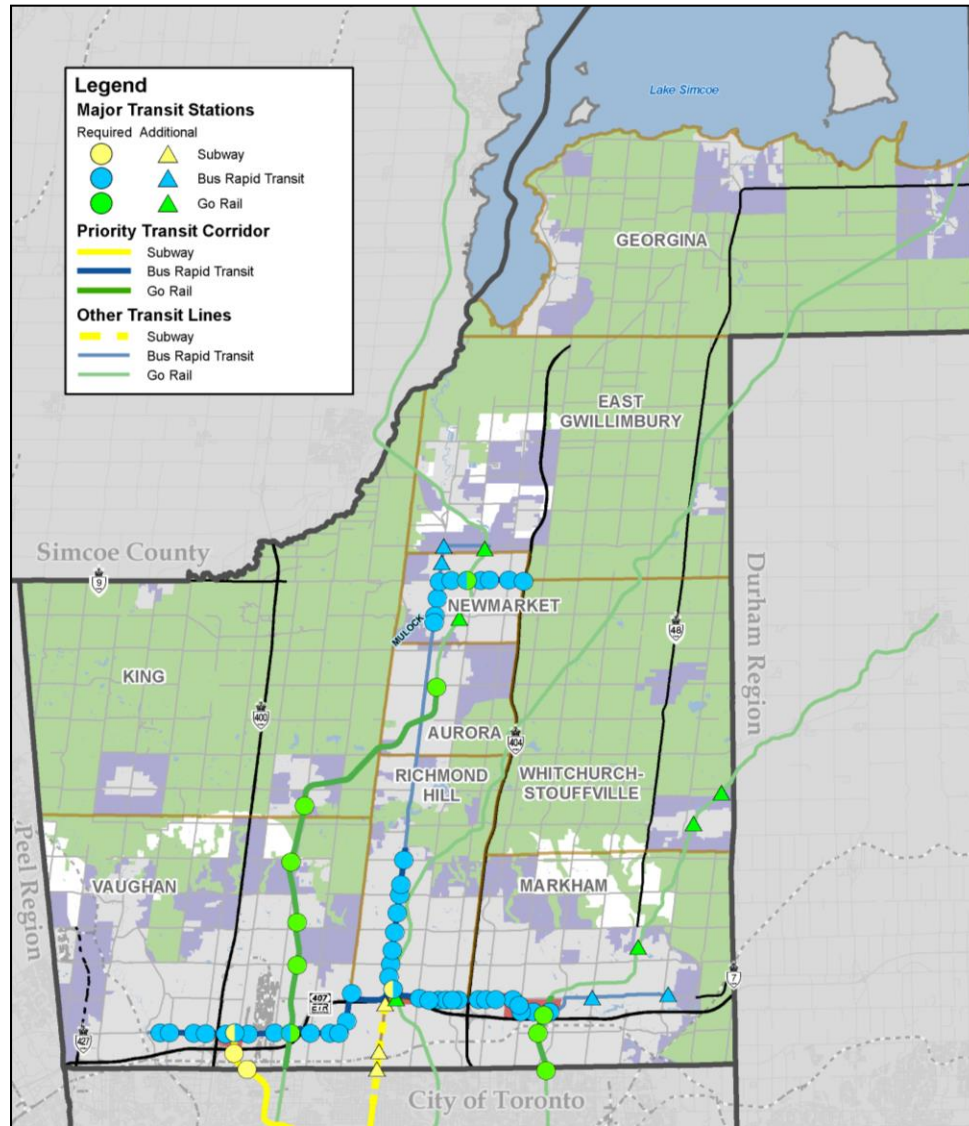
Municipality	Required MTSAs	Additional MTSAs	Total MTSAs
Aurora	1	0	1
East Gwillimbury	0	2	2
Georgina	0	0	0
King	1	0	1
Markham	11	4	15
Markham / Richmond Hill (shared)	5	0	5
Markham / Vaughan (shared)	0	4	4
Newmarket	10	2	12
Richmond Hill	10	0	10
Richmond Hill / Vaughan (shared)	1	0	1
Vaughan	18	0	18
Whitchurch-Stouffville	0	2	2
York Region	**57**	**14**	**71**

Population Forecast Distribution to Local Municipalities

Key inputs:

- Intensification targets

- DGA supply

- Market potential

- Active applications

- Key infrastructure

  - Yonge subway - 2027

  - Upper York - 2027

  - Northeast and Northwest Vaughan - 2028

  - Duffin Creek – post 2031

Key Considerations

- Building complete communities

- Supporting transit and infrastructure

- Optimizing infrastructure investment

- Housing Market

- Shift of families to higher density units

- Housing affordability

- Sustainability
- Others?

Discussion

- What are the most important considerations?

- Shift in households to increasing number of apartments

- Higher densities in new community areas

Forecasting Employment

KEY STEPS — Employment

Employment growth to 2041 – 299,000 jobs

Distribute employment growth by type
- Balances a top-down and bottom-up approach

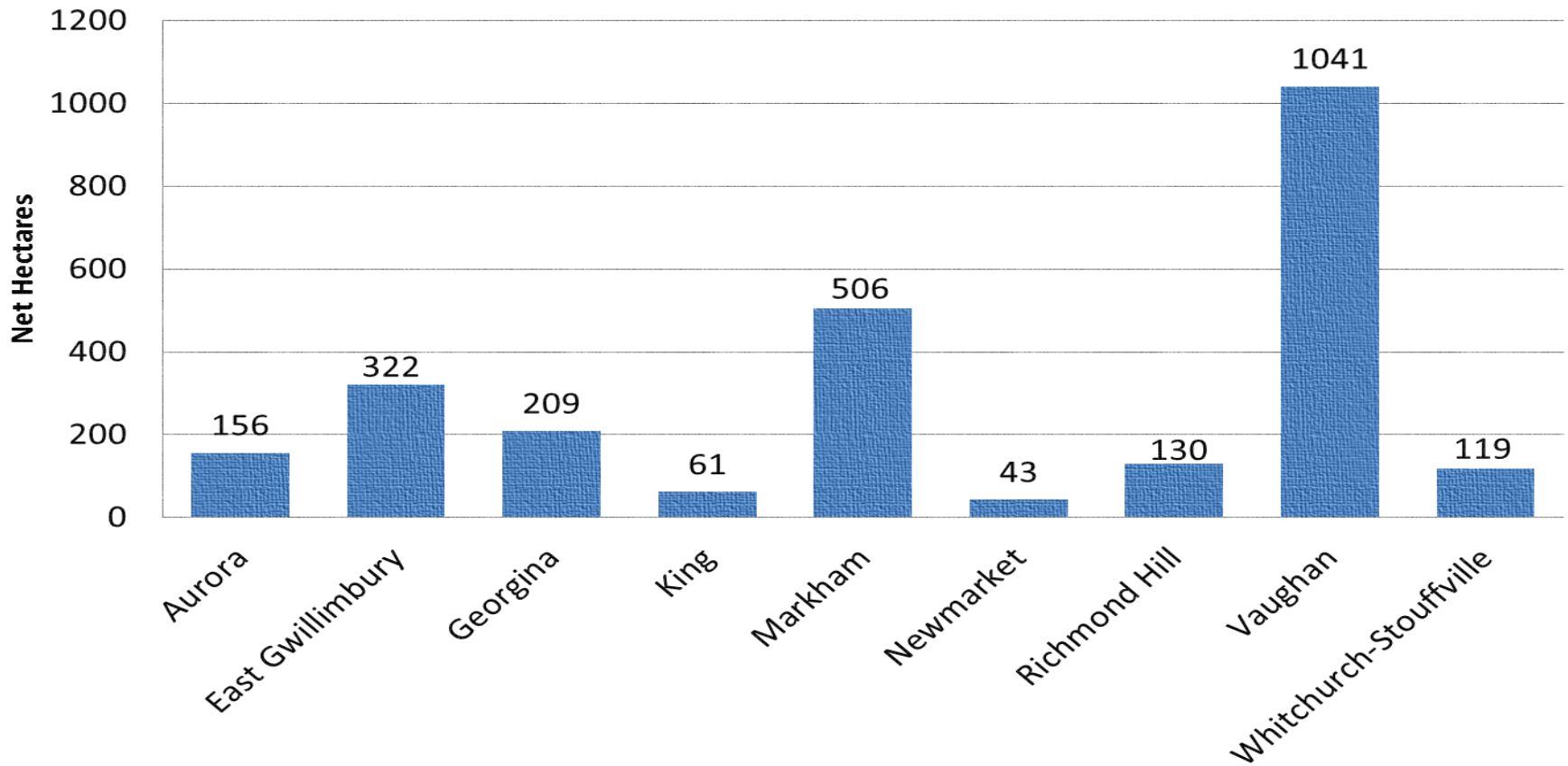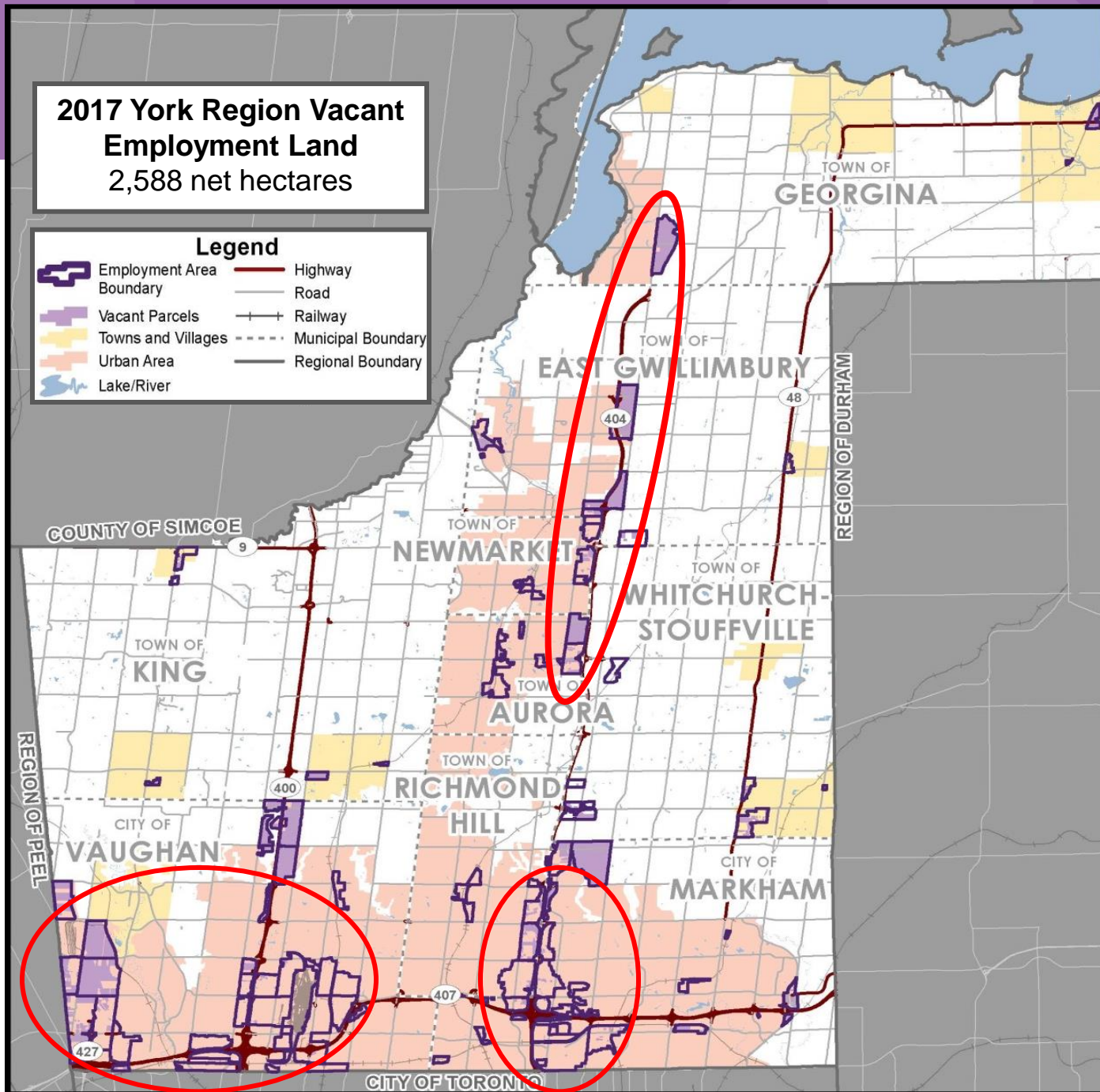| **Major Office jobs**	**Employment Area jobs**	**Population-Related jobs**	**Rural area jobs**
• Share of GTHA	• Sector trends/ automation potential	• In line with population growth	

Employment Area Supply

- 2,600 vacant hectares of employment land as of 2017

2017 York Region Vacant Employment Land
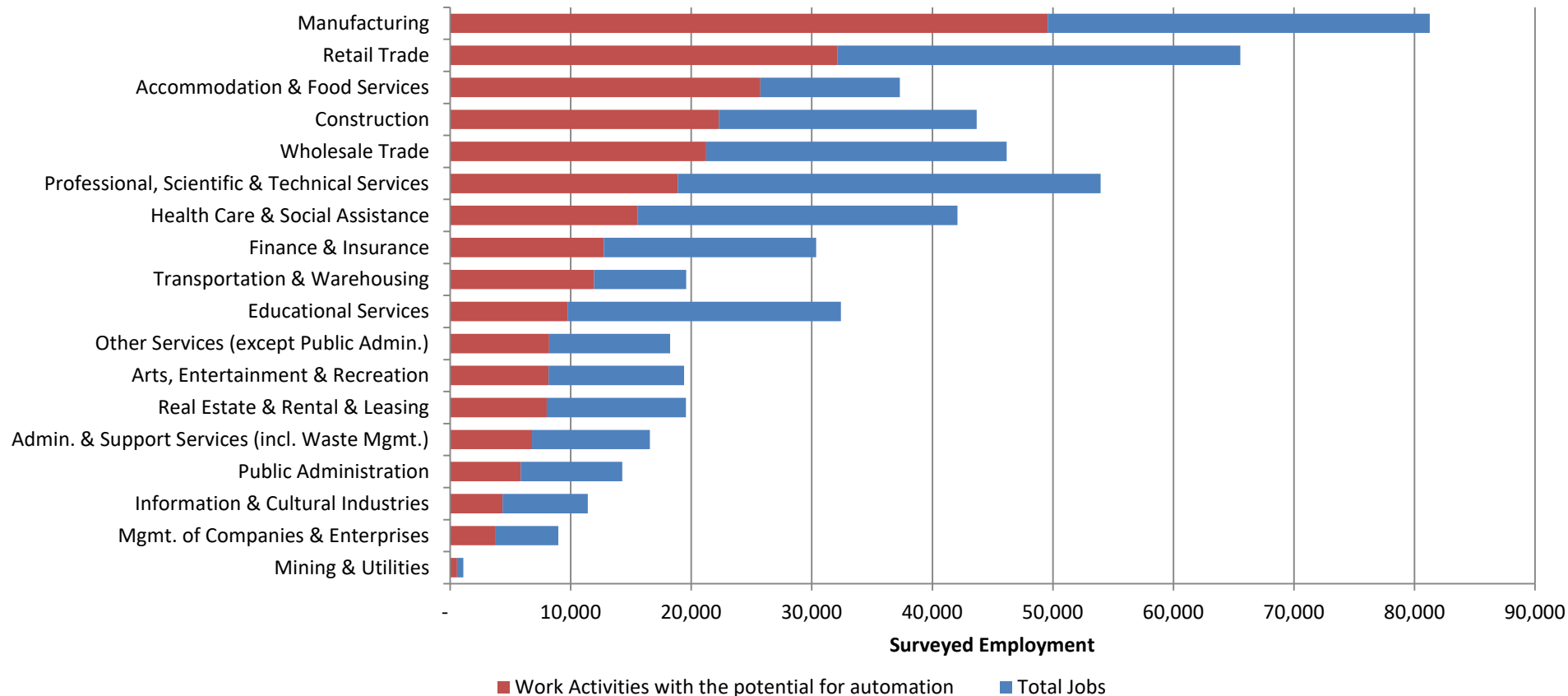2,588 net hectares

KEY CONSIDERATIONS & DISCUSSION

Employment area conversions have potential significant impacts on land needs:

- Approximately 600-700 ha under pressure for conversion

- Potential to provide additional residential supply which could result in a surplus of community land

- Could result in a potential need for additional employment land

Work Activities with the Potential for Automation in York Region, by Sector

Legend: ■ Work Activities with the potential for automation ■ Total Jobs

X-axis: Surveyed Employment (-, 10,000, 20,000, 30,000, 40,000, 50,000, 60,000, 70,000, 80,000, 90,000)

Sectors (top to bottom):
- Manufacturing
- Retail Trade
- Accommodation & Food Services
- Construction
- Wholesale Trade
- Professional, Scientific & Technical Services
- Health Care & Social Assistance
- Finance & Insurance
- Transportation & Warehousing
- Educational Services
- Other Services (except Public Admin.)
- Arts, Entertainment & Recreation
- Real Estate & Rental & Leasing
- Admin. & Support Services (incl. Waste Mgmt.)
- Public Administration
- Information & Cultural Industries
- Mgmt. of Companies & Enterprises
- Mining & Utilities

Calculated using "potential for automation" by NAIC data from Brookfield Institute and York Region surveyed employment for 2017

Employment Forecast Distribution to Local Municipalities

Key inputs:

- Major office

  - Market potential in southern vs northern municipalities

  - Growth in centres and corridors vs employment areas

- Employment area

  - Vacant employment area capacity

  - Intensification potential in built employment areas

  - Market demand

- Population-related tied to population growth

- Key infrastructure

Key Considerations/Discussion

- Employment conversions

- Protecting employment lands

- Providing businesses with locational choice

- Impact of automation

- Supporting transit and infrastructure

- Optimizing infrastructure investment

- Live/Work opportunities

- Others?

THANK YOU

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