

The background of the slide is a photograph of the York Region Council Building. The building is a modern, multi-story structure with a curved facade and large glass windows. Two prominent, cylindrical towers rise from the building, each featuring a clock face. The sky is blue with some light clouds.

Proposed 2051 Forecast and Land Needs Assessment

Presented to
REGIONAL COUNCIL

Presented by
Paul Bottomley

March 18, 2021

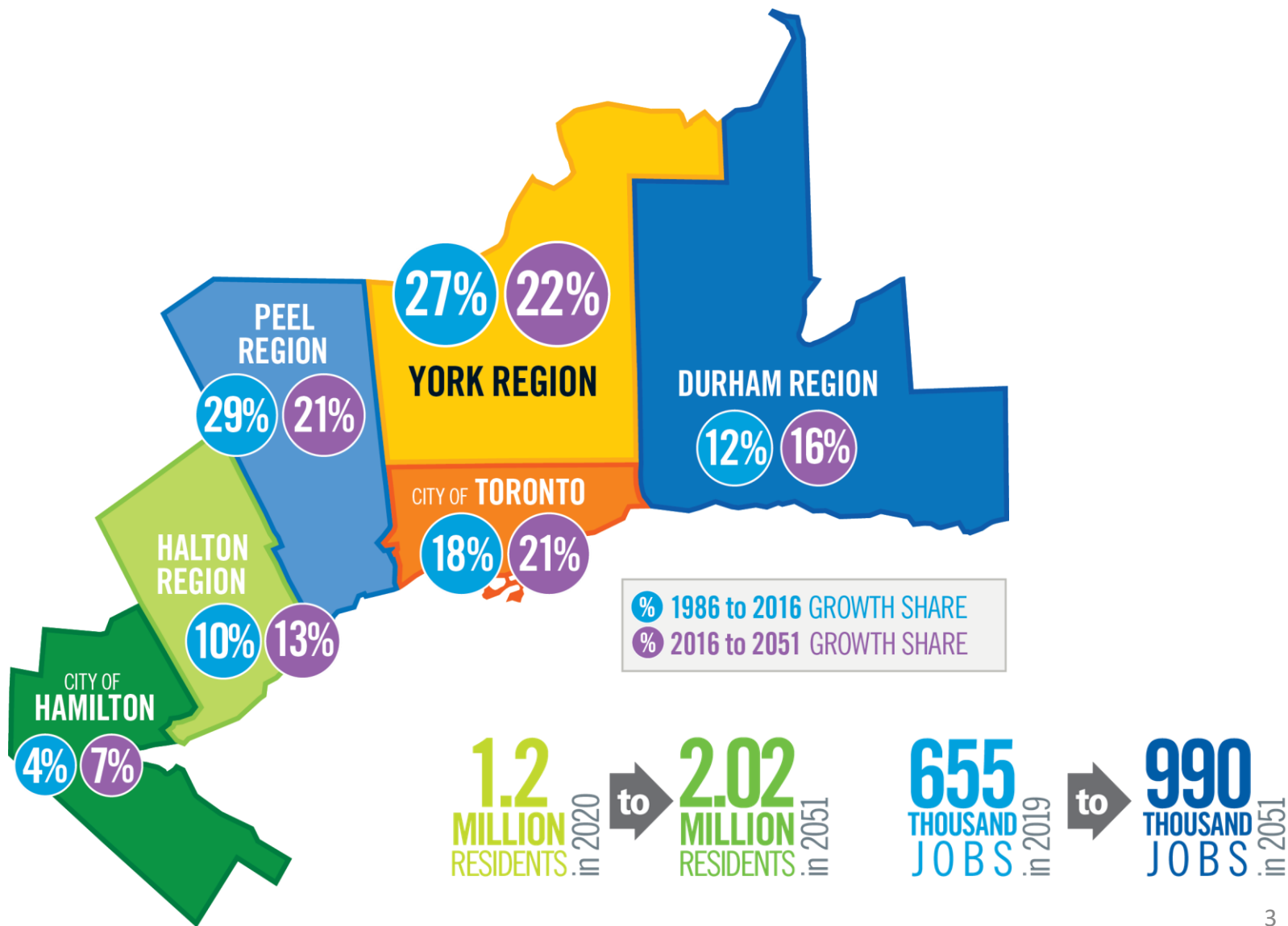
The logo for York Region, featuring a stylized white bird or wing shape above the text "York Region" in a white serif font.

York Region

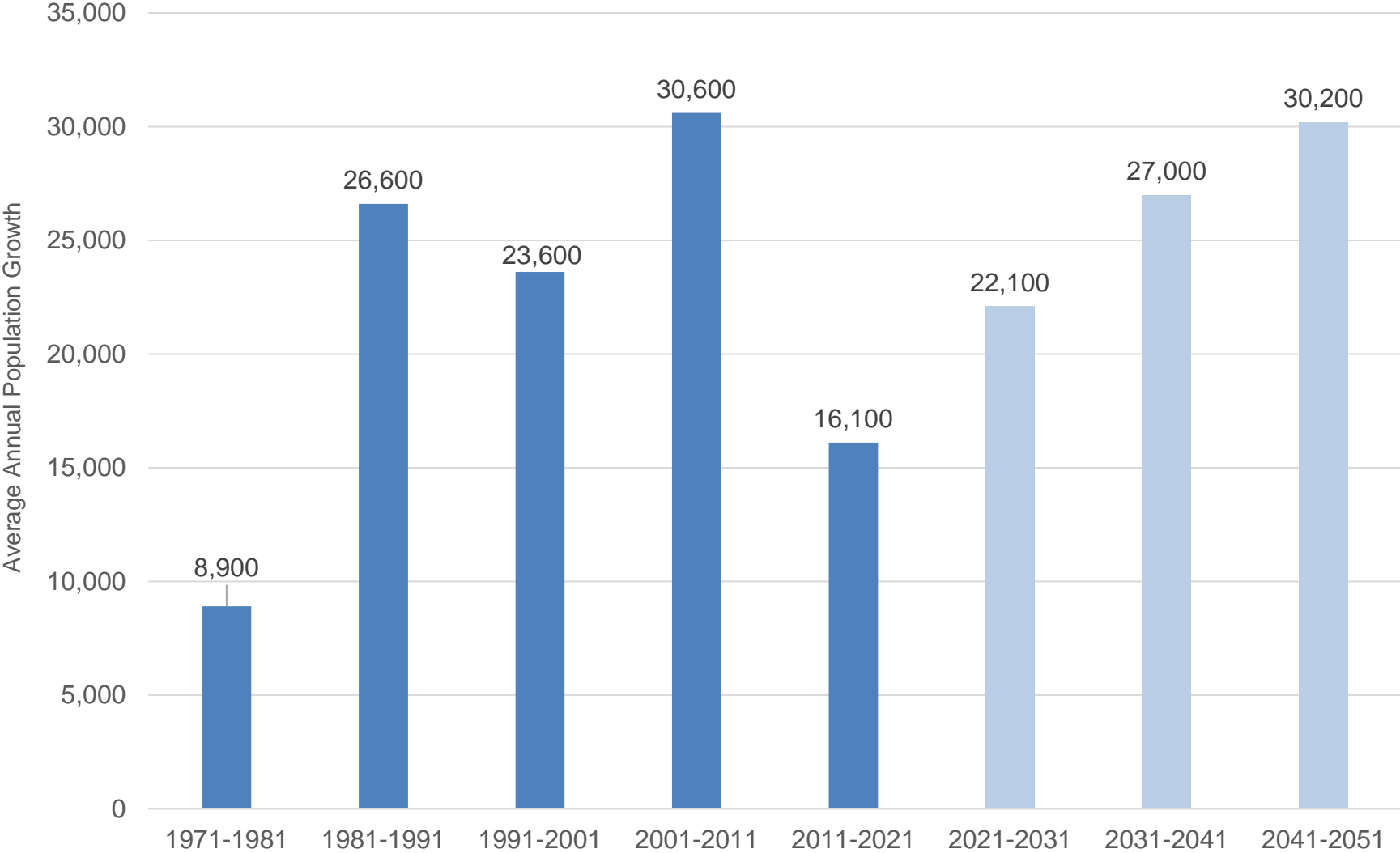
Objectives

1. Provincial Forecast & Land Needs Assessment results
2. Proposed urban expansion mapping
3. Forecasts by local municipality
4. Integrated Growth Management
5. Next Steps

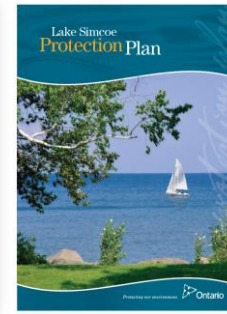
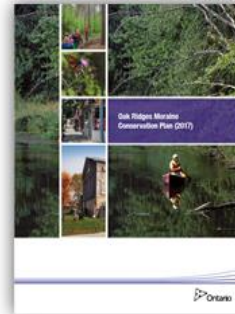
Province Anticipates York Region to Attract Highest Share of Growth in the Greater Toronto and Hamilton Area



York Region Historical and Forecast Growth 1971 to 2051



York Region is Required to Conform to Provincial Plans



Mandated Provincial Land Needs Assessment Methodology is used to determine land needs

2051 Community Land Needs Assessment Results

276,000 new units required

- Minimum 50% intensification target (138,000 units)
- DGA demand-supply analysis determines need for urban expansion

$$\begin{aligned} & \mathbf{137,000} \text{ units (Demand)} - \mathbf{101,000} \text{ units (Supply)} \\ & = \mathbf{\frac{36,000 \text{ units}}{17 \text{ units/Ha}}} \\ & = \mathbf{2,100 \text{ Ha} + \text{Contingency (200 Ha)}} \\ & = \mathbf{2,300 \text{ Ha}} \end{aligned}$$

Provincial Land Needs Assessment results in a need for **2,300 hectares** of community land

Importance of Getting Greenfield Density Right in Land Needs

- Important to plan for what the market will deliver in greenfield areas
- Implications on infrastructure timing and delivery, estimating transit ridership, and calculating development charges rates and revenues
- Higher density supports a range and mix of uses promoting complete communities
- Recently developed communities are achieving an average of 62 people and jobs per hectare

60 people and jobs per hectare in new community areas reflects what the market is delivering

York Region Well Positioned to Meet 50% Intensification Target



INTENSIFICATION SUPPORTS

\$3.2 BILLION

INVESTED BUS RAPID TRANSIT
and SPADINA SUBWAY EXTENSION



\$5.6 BILLION

YONGE SUBWAY EXTENSION

POTENTIAL for **700,000** PEOPLE and JOBS
in MAJOR TRANSIT STATION AREAS

Watson identifies that 50% intensification is appropriate

2051 Employment Land Needs Assessment Results

345,000 new jobs required

- Growth in knowledge based, transportation/ warehousing industries
- Assumed COVID-19 will not impact long term forecast
- Employment area demand-supply analysis determines land need

$$\begin{aligned} & \mathbf{128,000 \text{ jobs}} \text{ (Demand)} \text{ - } \mathbf{90,000 \text{ jobs}} \text{ (Supply)} \\ & = \frac{\mathbf{38,000 \text{ jobs}}}{\mathbf{40 \text{ jobs/Ha}}} \\ & = \mathbf{950 \text{ Ha}} + \text{Contingency (150 Ha)} \\ & = \mathbf{1,100 \text{ Ha}} \end{aligned}$$

Provincial Land Needs Assessment results in a need for **1,100 hectares** of employment land

Significant Infrastructure Investment Required to Support Growth to 2051



\$7.6 BILLION

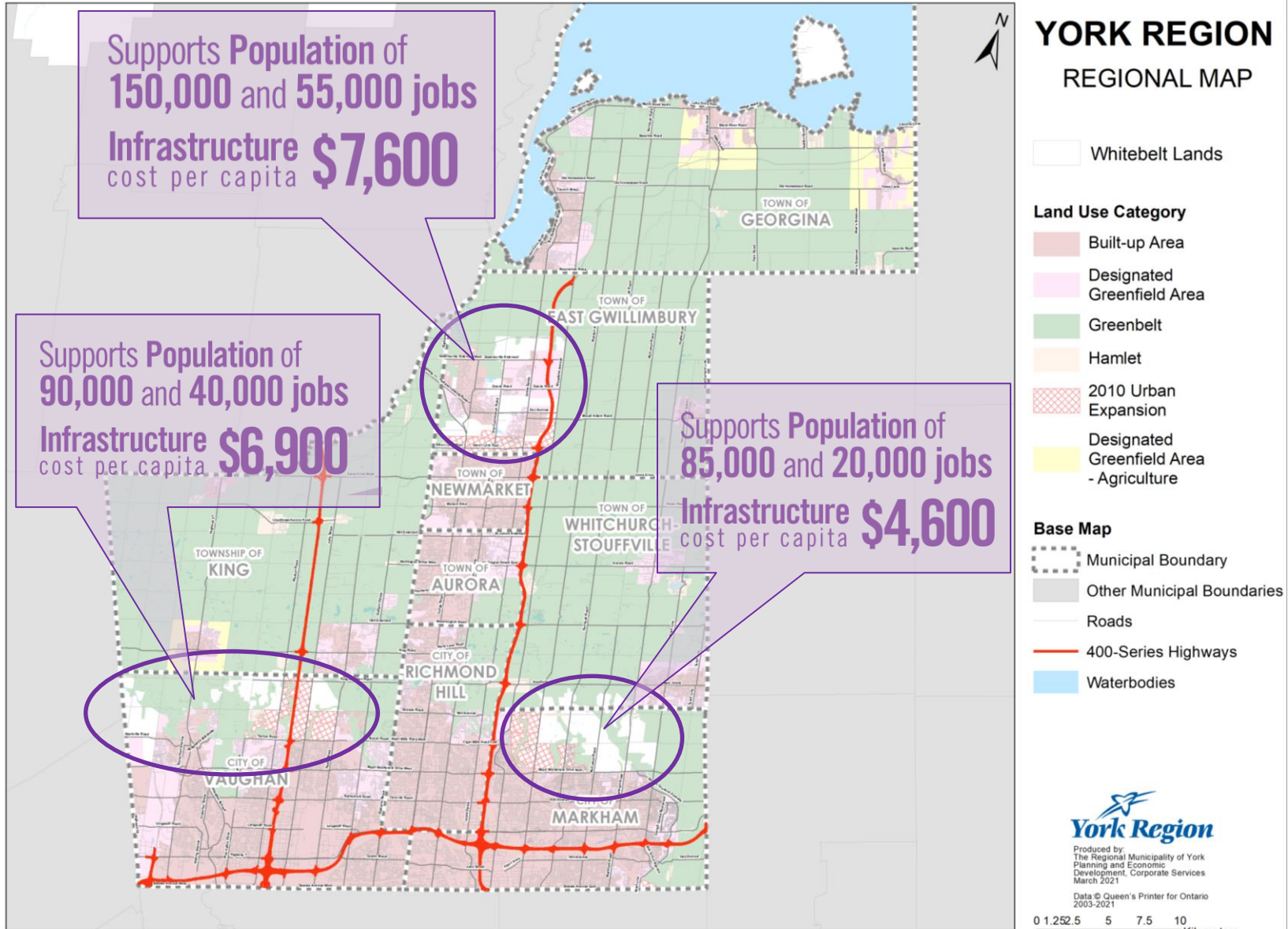
Invested by Regional Council since 2005

\$11.6 BILLION

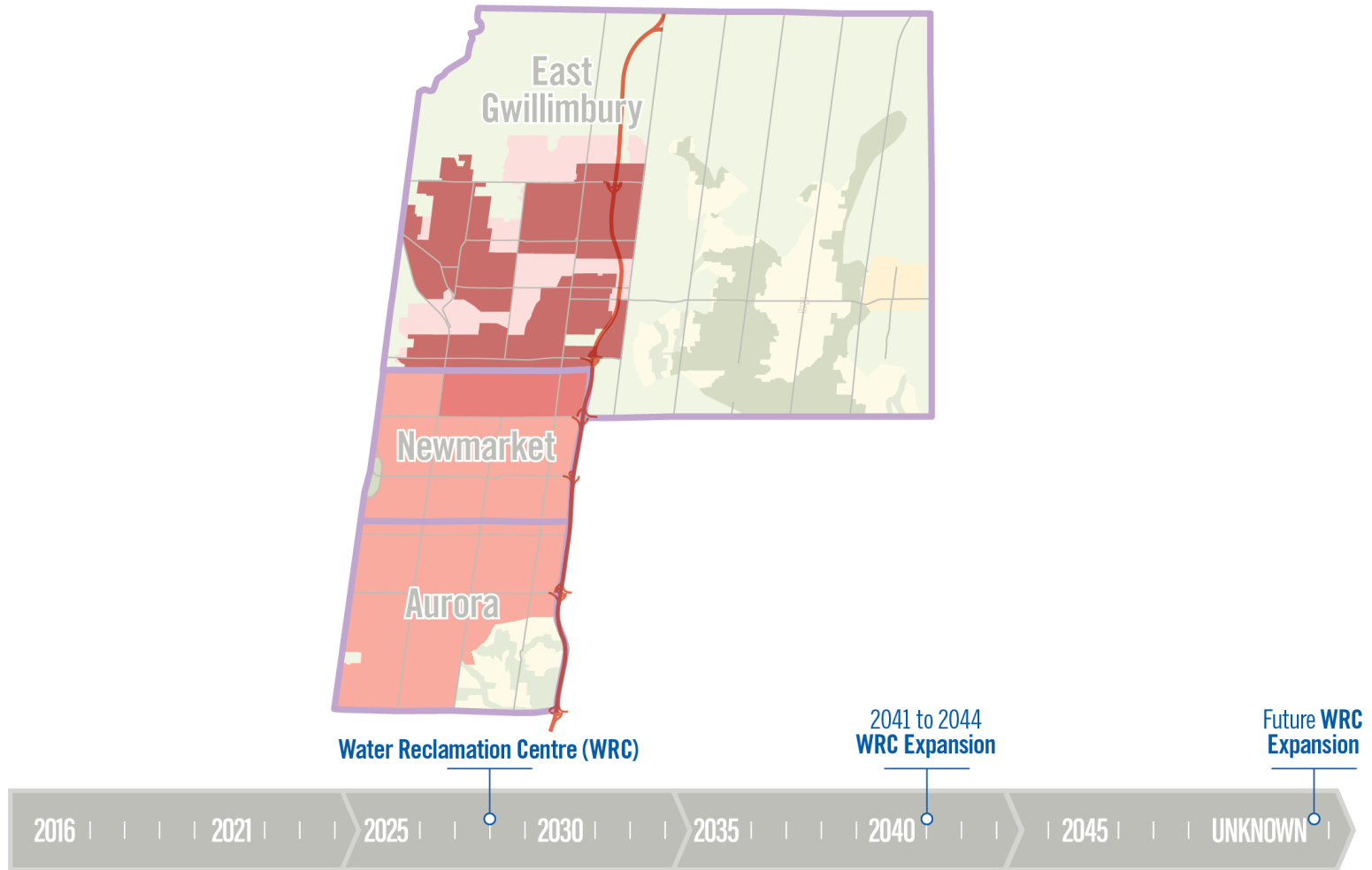
Estimated growth-related cost to 2051



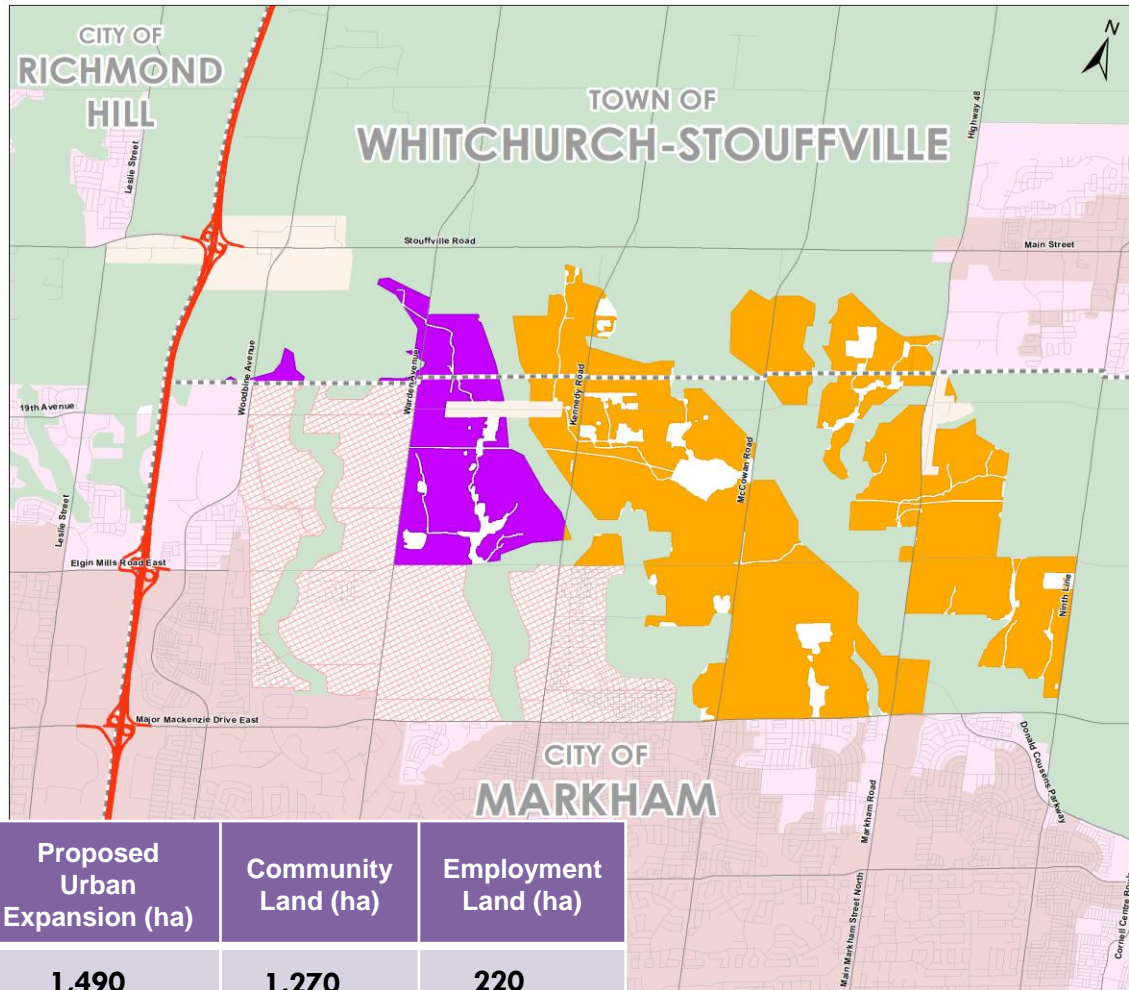
Whitebelt Area Considerations



Development in the North is Dependent on Infrastructure



Proposed Geography of Urban Expansion - Southeast



YORK REGION

City of Markham
and
Town of Whitchurch-Stouffville

Preliminary Recommended Locations for Urban Expansion*

- Community
- Employment
- Non-developable (NHS, Infrastructure)

Land Use Category

- Built-up Area
- Designated Greenfield Area
- Greenbelt
- Hamlet
- 2010 Urban Expansion
- Designated Greenfield Area - Agriculture

Base Map

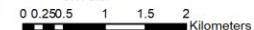
- Municipal Boundary
- Roads
- 400-Series Highways

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



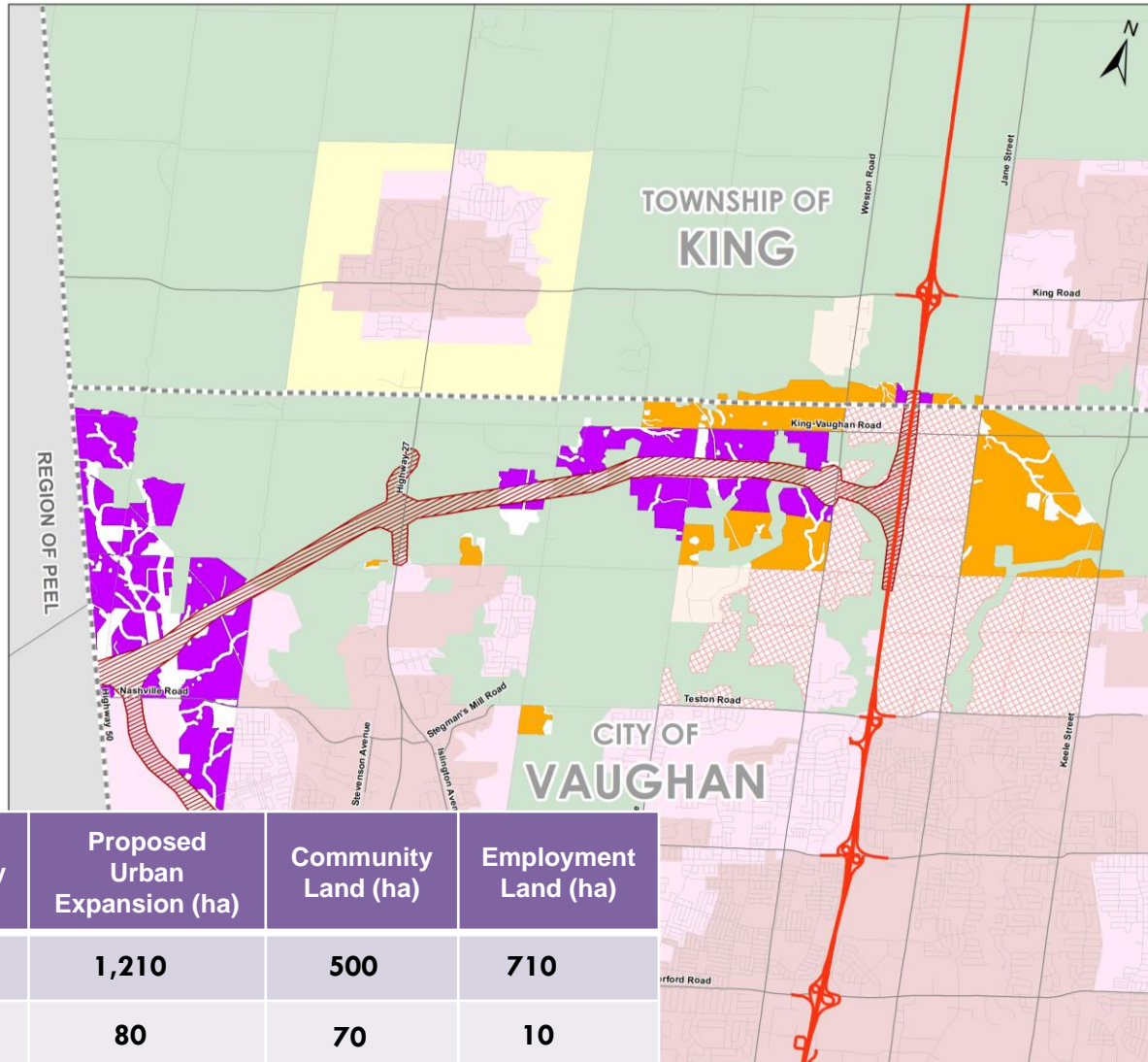
Produced by:
The Regional Municipality of York
Planning and Economic
Development, Corporate Services
March 2021

Data © Queen's Printer for Ontario
2003, 2021



Municipality	Proposed Urban Expansion (ha)	Community Land (ha)	Employment Land (ha)
Markham	1,490	1,270	220
Whitchurch-Stouffville	375	280	95

Proposed Geography of Urban Expansion - Southwest



YORK REGION

Township of King
and
City of Vaughan

Preliminary Recommended Locations for Urban Expansion*

- Community
- Employment
- Non-developable (NHS, Infrastructure)

Land Use Category

- Built-up Area
- Designated Greenfield Area
- Greenbelt
- Hamlet
- 2010 Urban Expansion
- Designated Greenfield Area - Agriculture

Base Map

- 400-Series Highways
- Municipal Boundary
- Roads
- 400-Series Highways (Proposed)

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



Produced by
The Regional Municipality of York
Planning and Economic
Development, Corporate Services
March 2021

Data © Queen's Printer for Ontario
2003-2021

0 0.375 0.75 1.5 2.25 3 Kilometers

Municipality	Proposed Urban Expansion (ha)	Community Land (ha)	Employment Land (ha)
Vaughan	1,210	500	710
King	80	70	10

Proposed Geography of Urban Expansion - North



YORK REGION

Town of East Gwillimbury

Preliminary Recommended Locations for Urban Expansion*

- Community
- Employment
- Remaining Developable Whitebelt Areas
- Non-developable (NHS, Infrastructure)

Land Use Category

- Built-up
- Designated Greenfield Area
- Greenbelt
- Hamlet
- 2010 Urban Expansion
- Designated Greenfield Area - Agriculture

Base Map

- 400-Series Highways
- Municipal Boundary
- Roads
- 400-Series Highways (Proposed)

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



Produced by
The Regional Municipality of York
Planning and Economic
Development, Corporate Services
March 2021

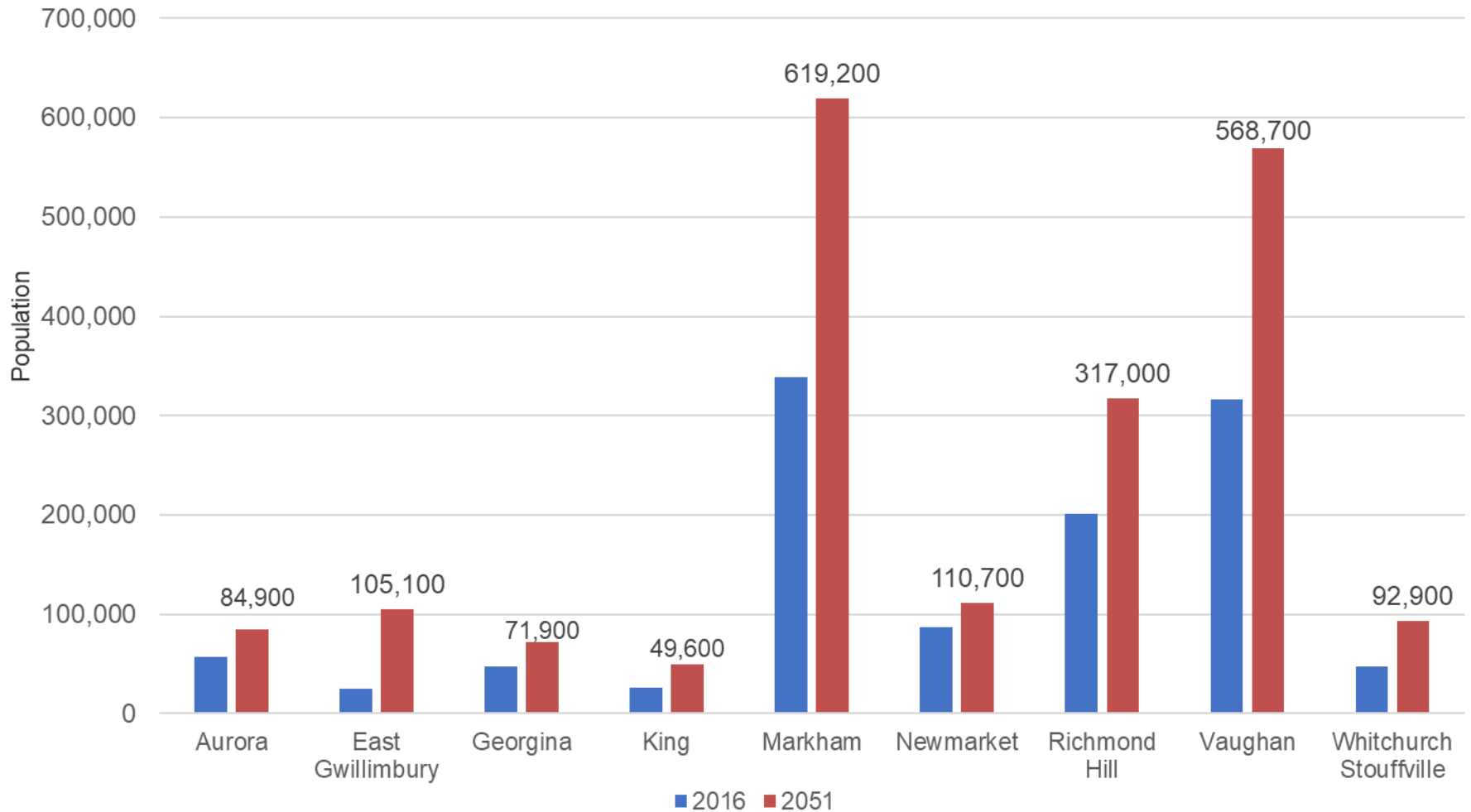
Data © Queen's Printer for Ontario
2003-2021

0 0.250.5 1 1.5 2
Kilometers

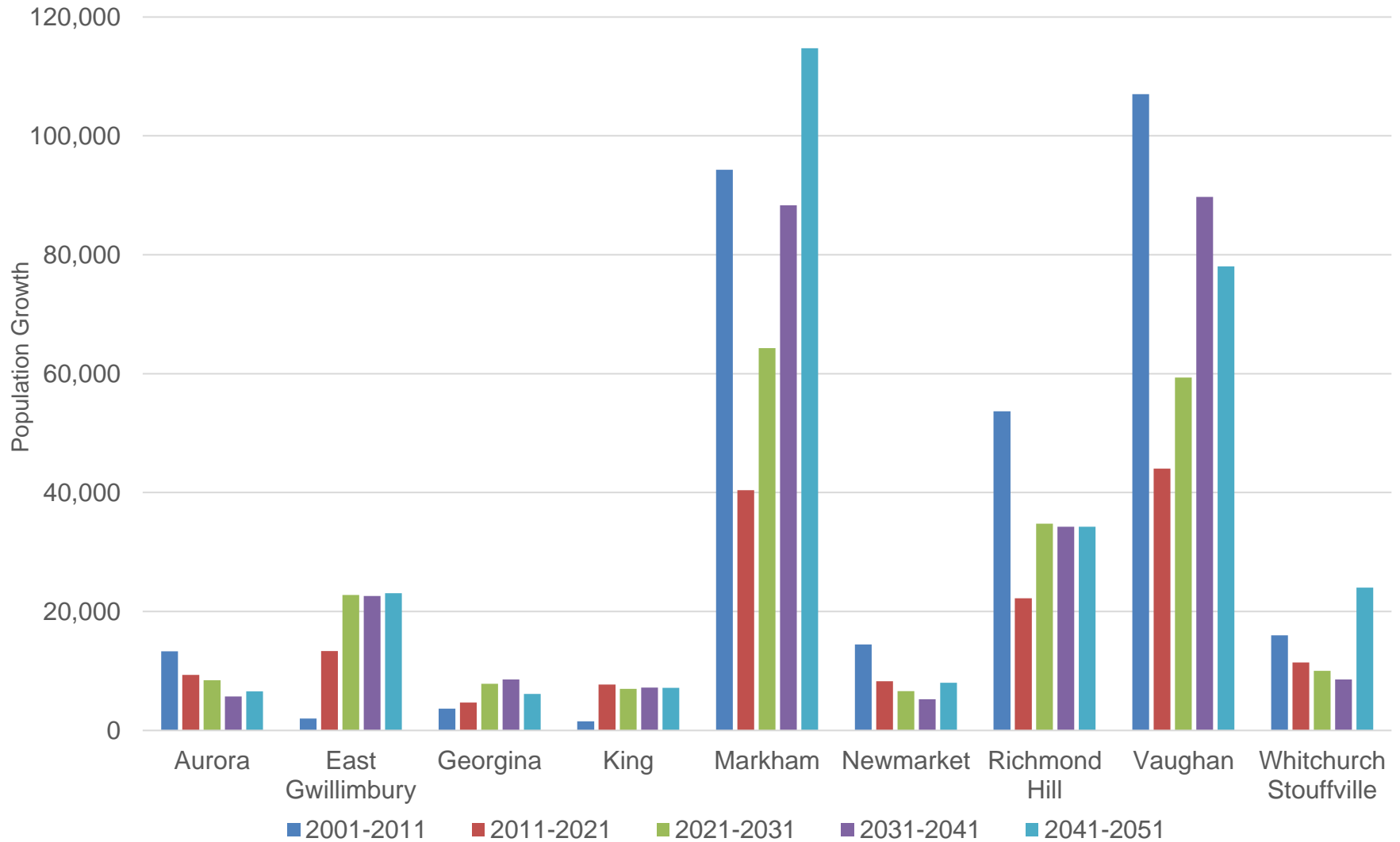
Municipality	Proposed Urban Expansion (ha)	Community Land (ha)	Employment Land (ha)
East Gwillimbury	245	180	65

Forecasts by Local Municipality

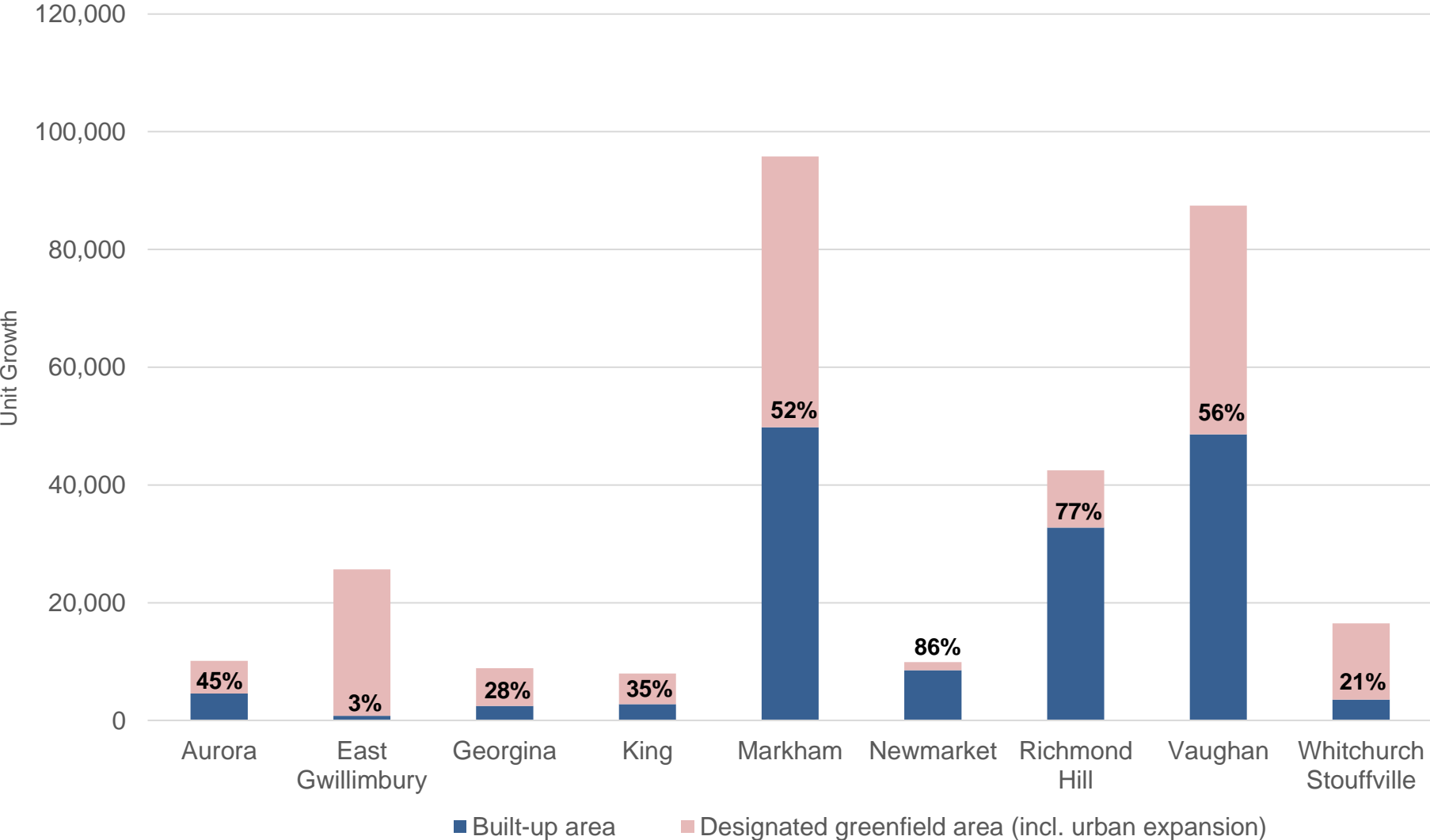
Population Forecast by Local Municipality



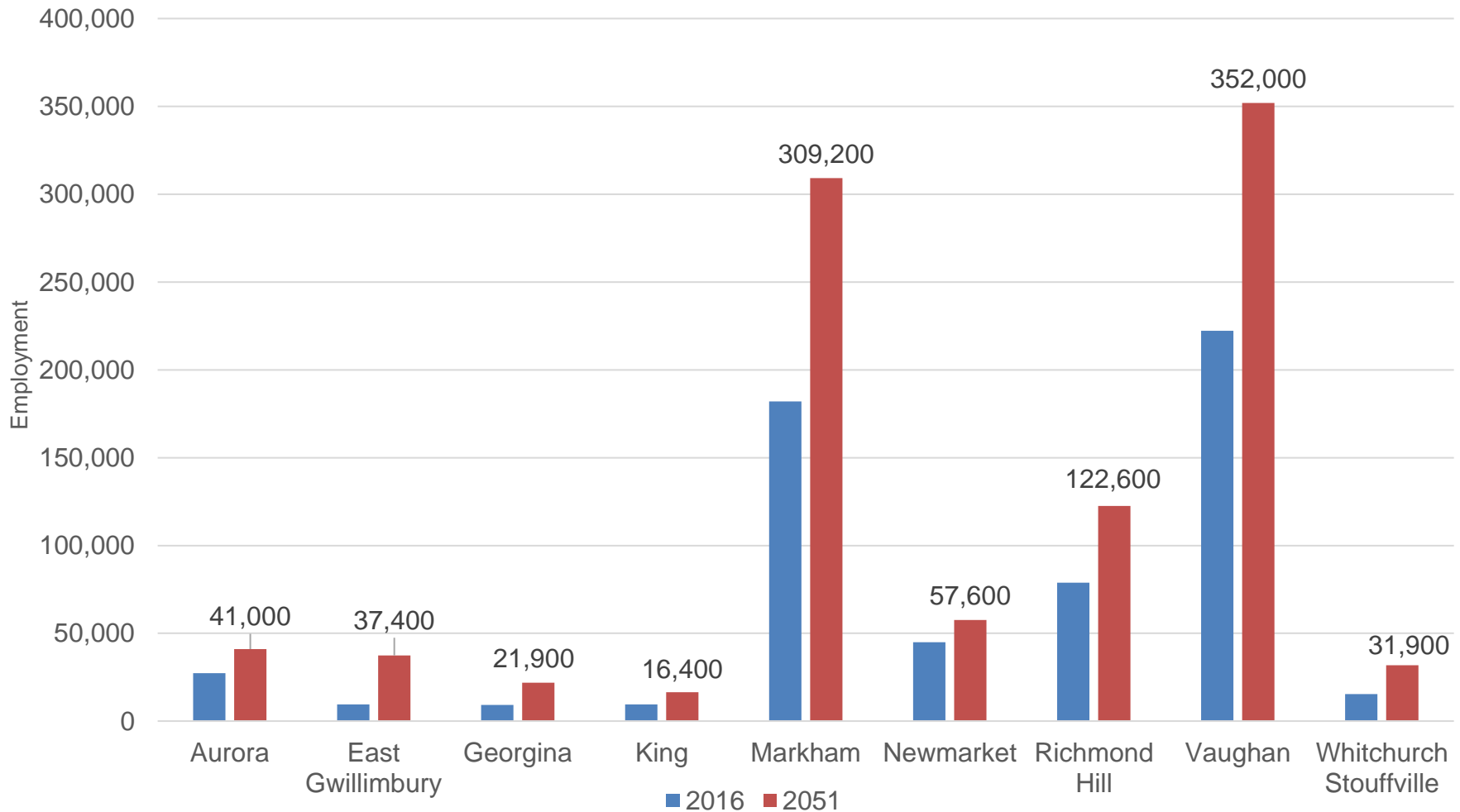
Population Growth Distribution by Local Municipality



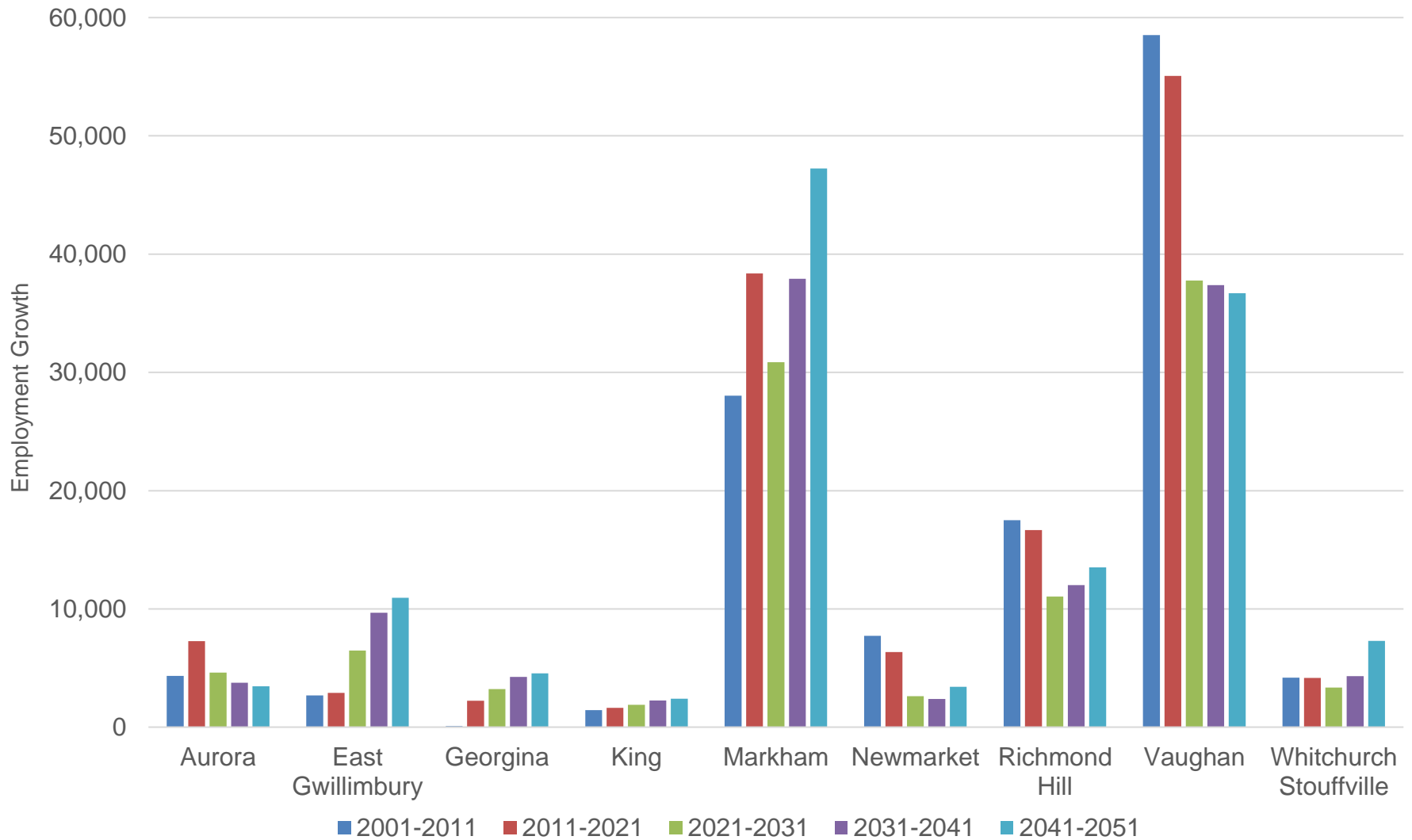
Growth Distribution and Intensification Targets



Employment Forecast by Local Municipality



Employment Growth Distribution by Local Municipality



Integrated Growth Management

York Region is Entering a Mature Stage of Growth

- Significant investments in infrastructure have been made
- Experiencing a lower rate of growth
- Fiscal Strategy was put in place to manage debt
- An estimated \$11.6B in new infrastructure is required to 2051
- Managing debt and borrowing capacity for next generation of infrastructure

Phasing growth and infrastructure will be
key to mitigate risk

Transit Investment will be Key to Support 2051 Growth

- \$5.6B Yonge-North Subway Extension
- \$5.4B investment required in unfunded bus rapid transit infrastructure

Bus Rapid Transit Project	Preliminary Estimated Cost (\$M)
Highway 7 East	\$437
Highway 7 West	\$297
Yonge Street (Central York)	\$713
Yonge Street (North)	\$184
Major MacKenzie Drive	\$1,250
Jane Street	\$313
Leslie Street	\$470
Other future BRT	\$1,690

Funding from Senior levels of government is essential to service growth

Strategies for Managing Growth

- Continue to achieve Council priorities including:
 - Protecting and enhancing the natural environment
 - Building complete communities
 - Providing balanced and affordable housing
- Provincial LNA results in a need to designate 80% of the whitebelt to 2051
 - Provides certainty and focus for the delivering of infrastructure
 - Better alignment between infrastructure delivery and timing/ pace of Development Charges collections
- Considering a 'Future Urban' identification for the remaining whitebelt lands

Phasing Policies Needed in the Regional Official Plan

- Magnitude of growth to 2051 - cannot happen everywhere at once
- Growth in new areas is dependent on major infrastructure projects
- Phasing ensures urban expansion is aligned with planned infrastructure delivery and actual growth
- Possible approaches include:
 - Policy driven, local municipal implementation
 - Designation driven, Regional implementation

Potential Approaches to Phasing in the Regional Official Plan

- Policy driven, local municipal implementation
 - Strengthen phasing requirements for local municipalities
- Designation driven, Regional implementation
 - Urban expansion areas identified for designation in 2 or 3 phases
 - Prioritizing areas with lower per capita costs, more certainty, and greater potential return on investment
 - Tying the timing of release of new growth areas to population thresholds and/or a sustained intensification rate of 50%

Next Steps

- Consultation – Spring/Summer 2021
 - Local municipalities
 - Public
 - Development industry
- Policy Directions Report III (including additional direction on phasing)
- Draft Regional Official Plan – Targeted for Fall 2021
- Master Plans and Development Charges Bylaw update – 2021/2022

Recommendations

- Council direct staff to consult on the proposed forecast and land needs assessment, including preliminary urban expansion mapping
- Council continue to advocate to senior levels of government for funding for the Yonge North Subway Extension, Bus Rapid Transit, and GO rail systems
- Staff report back on phasing policies necessary to manage growth to 2051 as part of the draft Regional Official Plan
- The Regional Clerk forward this report to local municipalities and MMAH