



Preliminary Growth Management Strategy

Town of Whitchurch-Stouffville

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Watson & Associates Economists Ltd.
905-272-3600
info@watsonecon.ca

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List of Acronyms and Abbreviations

| Acronym | Full Description of Acronym |
|----------------|---|
| B.U.A. | Built-up area |
| COVID-19 | Coronavirus disease |
| D.G.A. | Designated greenfield area |
| E.L.E. | Employment land employment |
| G.F.A. | Gross floor area |
| G.G.H. | Greater Golden Horseshoe |
| G.I.S. | Geographic information systems |
| G.T.H.A. | Greater Toronto and Hamilton Area |
| L.N.A. | Land Needs Assessment |
| M.C.R. | Municipal Comprehensive Review |
| M.M.A.H. | Ministry of Municipal Affairs and Housing |
| M.O.E. | Major office employment |
| M.T.S.A. | Major Transit Station Area |
| M.Z.O. | Minister's Zoning Order |
| N.F.P.O.W. | No fixed place of work |
| O.P. | Official Plan |
| O.P.A. | Official Plan Amendment |
| P.G.M.S. | Preliminary Growth Management Strategy |
| P.P.S. | Provincial Policy Statement |
| P.P.U. | Persons per unit |
| P.R.E. | Population-related employment |



List of Acronyms and Abbreviations (Cont'd)

| | |
|--------|------------------------|
| R.O.P. | Regional Official Plan |
| sq.ft. | square foot/feet |
| sq.m | square metre/metres |



1. Introduction

1.1 Terms of Reference

The Town of Whitchurch-Stouffville retained Watson & Associates Economists Ltd. (Watson) to prepare a Preliminary Growth Management Strategy (P.G.M.S.) for the Town to the year 2051. The primary objective of this assignment is to provide a long-term assessment of future urban growth and associated urban land needs to inform and support the Town's Official Plan (O.P.) review and inform York Region's Municipal Comprehensive Review (M.C.R.) process. This report reflects York Region's approved R.O.P. (Regional Official Plan), 2022, as approved by the Province with modifications dated November 4, 2022.^[1] The population, housing and employment data used in this report reflects the updated growth projections provided by York Region as of May 2023.

In general, the primary objectives of this study are to:

- Provide a comprehensive assessment of the Town's long-term population, housing, and employment growth potential within the context of Region-wide development trends and regional economic growth drivers;
- Ensure that there is an adequate supply of urban lands to accommodate long-term demand which satisfies the Town's longer-term employment and population growth objectives; and
- Provide strategic policy recommendations within the context of the provincial, regional, and municipal planning policy frameworks.

1.2 Provincial Policy Context

Land use planning in Ontario is guided by several interrelated provincial documents, plans, guidelines and supporting documents. These documents provide the legislative requirements and general direction that informs the way municipalities plan for urban and rural areas over the long term. These documents also form a critical guide to the delivery and funding of municipal infrastructure and services.

^[1] **ERO number** 019-5865. Decision was made on November 4, 2022, to approve, with modifications, the Region of York Official Plan, as adopted by By-Law 2022-40.



Two key provincial policy documents are the Provincial Policy Statement (P.P.S.), 2020 and A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 (August 2020 Consolidation). The policies therein outline provincial land use planning interests and provide high-level policy direction for municipalities.

1.2.1 Provincial Policy Statement, 2020

The P.P.S., 2020 provides policy direction on matters of provincial interest relating to land use planning and development. It is issued under the authority of section 3 of the *Planning Act* and requires that all planning decisions “shall be consistent with” the P.P.S., 2020 (*Planning Act*, R.S.O. 1990, c. P. 13 s. 3).

The P.P.S., 2020 came into effect on May 1, 2020.^[2] Its purpose was to update the P.P.S., 2014 so that it worked together with changes to the provincial land use planning system that occurred around the same time. This included changes to the *Planning Act* through Bill 108, the *More Homes, More Choice Act, 2019* and the updates to the Growth Plan. Additional reasons for the update largely related to the need to increase urban housing supply, support the economy and job creation, and reduce barriers and costs to the land use planning system in order to provide greater predictability.

A significant change in the P.P.S., 2020 with regard to housing policy is the provision of a housing options approach to address an appropriate range and mix of housing, and to specifically meet market-based needs of current and future residents (policy 1.4.3). Providing for housing options adds broader considerations like ownership structures and housing program planning to built-form considerations. Housing options are defined as:

“A range of housing types such as, but not limited to single detached, semi-detached, rowhouses, townhouses, stacked townhouses, multiplexes, additional residential units, tiny homes, multi-residential buildings and uses such as, but not limited to life lease housing, co-ownership housing, co-operative housing, community land trusts, affordable housing, housing for people with special needs, and housing related to employment, institutional or educational uses.”^[3]

^[2] Provincial Policy Statement, 2020. Under the *Planning Act*. Ontario.

^[3] Ibid., Definitions, p. 45.



Throughout the P.P.S., 2020, there is strong encouragement to consider the housing market when addressing planning matters such as managing growth overall, identifying market-ready sites to improve economic development and competitiveness, and providing for a range and mix of housing options. Although this may assist with managing growth and development in a way that may more accurately reflect market realities, it could make it more challenging for municipalities to transition to other types of development forms that they have not historically had considerable success in implementing. As such, while housing market demand is important when considering long-range, land use planning and housing objectives, this demand must be broadly considered within the context of expansive provincial interests. This includes ensuring the efficient use of land, resources, and infrastructure; providing a clean and healthy environment for current and future generations; providing for affordable housing; diversifying the economic base; and supporting job creation.

Other areas impacted by the changes include settlement boundary expansions, employment, and housing. Policy 1.1.3.9 for settlement boundary expansions outlines that boundary adjustments could be made outside of a comprehensive review provided the expansion would not result in a net increase in land within the settlement areas, the adjustment would support the municipality's ability to meet intensification and redevelopment targets established by the municipality, prime agricultural areas are addressed, and the settlement area with the added lands is appropriately serviced and it could be demonstrated that there is sufficient reserve infrastructure capacity to service the lands. These conditions for a settlement boundary expansion to occur outside of a comprehensive review pose additional questions such as: What threshold of a settlement boundary expansion request is required to encourage the use of this policy? What would differentiate settlement boundary expansion requests within and outside of a comprehensive review? How would a settlement boundary expansion outside of a comprehensive review improve the efficiencies of the land use planning system?

The employment and housing policies of the P.P.S., 2020 underwent the most changes in terms of level of specificity. The P.P.S., 2014 recognizes the significant economic contribution of Employment Areas, the importance of planning for Employment Areas to take advantage of economic and strategic opportunities, and the protection and preservation of Employment Areas. The employment policies of the P.P.S., 2020, however, are relatively detailed in how municipalities should plan for employment in order to implement the employment policy intents of the P.P.S., 2014. The P.P.S., 2020



policies suggest preparing and readying Employment Areas by identifying strategic sites, monitoring the availability and suitability of employment sites with a focus on market-ready sites, and actively seeking to address potential barriers to investment (policy 1.3.2). The P.P.S., 2020 policies further outline that, during an O.P. review or update, planning authorities assess Employment Areas in local O.P.s to ensure the designation is appropriate for the planning function of the Employment Area (policy 1.3.2.2). The policies continue by recognizing the long-term operational and economic viability of Employment Areas planned for industrial and manufacturing uses and directing the planning for these areas to be separated or mitigated from sensitive land uses. Finally, the P.P.S., 2020 employment policies outline that land within existing Employment Areas may be converted to non-employment uses provided the area has not been identified as provincially significant through a provincial plan exercise, or regionally significant by a regional economic development corporation (policy 1.3.2.5). The policies further outline that there be an identified need for the conversion and that the land is not required for employment purposes over the long term, the proposed uses would not adversely affect the overall viability of the Employment Area, and the existing or planned infrastructure is available to accommodate the proposed uses. The P.P.S., 2020 employment policies demonstrate a significant provincial and regional emphasis on establishing and protecting a network of functional and market- and investment-ready Employment Areas throughout the Province.

1.2.2 Growth Plan for the Greater Golden Horseshoe

The Growth Plan, 2019 sets out where and how growth will occur across the Greater Golden Horseshoe (G.G.H.) to 2051 and all planning decisions are required to conform to the Plan.^[4] The Growth Plan, 2019 provides growth forecasts for single- and upper-tier municipalities and provides policy direction on a range of matters including land use, infrastructure, and transportation. On August 28, 2020, the Province of Ontario released an amendment (referred to as Amendment 1) to A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019.^[5] The Growth Plan, 2019 and Amendment 1 have been incorporated into an Office Consolidation, August 2020 document, hereinafter referred to as the Growth Plan, 2019. The Office Consolidation

^[4] A Place to Grow: Growth Plan for the Greater Golden Horseshoe. May 2019. Ontario.

^[5] A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Office Consolidation. August 2020.



Growth Plan document has been updated in conjunction with an outcome-based Land Needs Assessment (L.N.A.) methodology for the G.G.H. These documents are in effect as of August 28, 2020. The population and employment growth forecast horizon set out in Schedule 3 of the Growth Plan, 2019 and the applicable time horizon for land use planning has now been extended to 2051. It is further noted that the Schedule 3 growth forecasts are to be treated as minimums, with higher growth forecast alternatives permitted by upper- and single-tier municipalities through their respective M.C.R. process.^[6] If an alternative growth forecast that exceeds Schedule 3 of the Growth Plan, 2019 is utilized, the M.C.R. must demonstrate that the alternate growth scenario meets the Growth Plan, 2019 policy objectives of accommodating a range of housing choices to meet market demand and the needs of current and future residents, and provides additional labour opportunities for the G.G.H. labour market.^[7] It should be noted that higher forecasts established by upper- and single-tier municipalities through their M.C.R.s will not apply to provincial ministries and agencies.^[8]

Other changes to the Plan were largely intended to address potential barriers to increase the supply of housing, create jobs and attract investments across the G.G.H. To achieve these objectives, the Growth Plan, 2019 introduced revised policies aimed to:

- Speed up development (reducing number of studies, e.g., watershed studies, infrastructure feasibility studies) and unlock modest growth opportunities outside the M.C.R.;
- Provide greater local autonomy for local governments;
- Allow for more collaboration from local governments;
- Provide a simplified criteria and language that stresses “market demand;” and
- Provide reduced minimum intensification and greenfield density targets as well as opportunities for alternative targets that are reflective of local real estate market conditions across the G.G.H.

^[6] Growth Plan, Office Consolidation 2020, Policy 5.2.4., p. 56.

^[7] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Land Needs Assessment Methodology for the Greater Golden Horseshoe, p. 5.

^[8] Growth Plan, 2020, Policy 5.2.4.8., p. 57.



Relevant aspects of the Growth Plan, 2019 for this study include the following:

Managing and Directing Growth

- Growth will be directed to settlement areas, and within settlement areas it will be focused to strategic growth areas, locations where higher-order transit exists or is planned, and areas with existing or planned public services facilities.
- Municipalities should develop as complete communities with a diverse mix of land uses, including employment and residential with convenient access to local stores, services and public service facilities.
- Population and employment growth is to be accommodated by reducing dependence on automobiles through the development of mixed-use, transit-supportive, pedestrian-friendly urban environments.

Minimum Intensification Targets

- New minimum intensification targets (i.e., the minimum percentage of all residential development occurring annually within the delineated built-up area (B.U.A.) have been established for upper-tier and single-tier municipalities in the G.G.H.^[9] The B.U.A. includes stable residential neighbourhoods that were identified as built as of 2006.^[10]
- Major Transit Station Areas (M.T.S.A.s) served by light rail transit or bus rapid transit will be planned to achieve a minimum density target of 160 residents and jobs combined per gross hectare, while M.T.S.A.s served by GO Transit will be planned to achieve a minimum density target of 150 residents and jobs combined per gross hectare.

Minimum Greenfield Density Targets^[11]

- New minimum density targets have been established for the horizon of the Growth Plan, 2019 for G.G.H. upper-tier and single-tier municipalities and include

^[9] The delineated B.U.A. refers to the limits of developed urban area as of 2006 as defined by the Province.

^[10] For more information, please refer to the Housing Intensification Study Technical Report for an analysis on intensification opportunities within the Region and the ability to achieve the minimum Growth Plan, 2019 intensification target.

^[11] Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.4.



two geographic groups. It is important to note that the greenfield density targets established in the Growth Plan, 2019 do not include employment lands.^[12] York Region is required to plan to achieve, within the horizon of this Plan, a minimum density target that is not less than 50 residents and jobs combined per hectare.

Settlement Area Boundary Adjustments and Expansions^[13]

- Section 2.2.8 of the Growth Plan, 2019 sets out the specific requirements that must be met to support a settlement boundary expansion for G.G.H. municipalities.
- It is noted that G.G.H. municipalities are allowed to undertake settlement area boundary expansions that are less than 40 hectares (approximately 99 acres) outside of the M.C.R process, subject to criteria.
- Settlement area boundary adjustments are permitted outside of an M.C.R. provided there is no net increase in land within settlement areas, subject to criteria.

1.2.3 Bill 23: More Homes Built Faster Act, 2022

On October 25, 2022, the Ontario government introduced the *More Homes Built Faster Act, 2022* (Bill 23). Following Bill 108 and Bill 109, Bill 23 is part of a long-term strategy to address the housing crisis by facilitating the construction of 1.5 million homes over the next 10 years. The identified need for additional housing relates to demand associated with both existing Ontario residents and newcomers to the Province through immigration.

Bill 23 received Royal Assent by the provincial legislature on November 28, 2022. The Bill is intended to increase the housing supply and provide a mix of ownership and rental housing types for Ontarians. Some of the Bill's changes to the D.C.A., the *Planning Act*, and the *Conservation Authorities Act* intend to reduce and exempt fees to spur new home construction and reduce the cost of housing. This includes ensuring affordable residential units, select attainable residential units, inclusionary zoning housing units, and non-profit housing developments will be exempt from payment of

[12] Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.7.

[13] Ibid., section 2.2.8.



municipal development charges (D.C.s) and community benefits charges (C.B.C.s), and parkland dedication provision.

To support the provincial commitment to getting 1.5 million homes built over the next 10 years, there are a number of sweeping and substantive changes to a range of legislation, as well as through updates to regulations and consultations on various provincial plans and policies. One of the changes includes implementation of an updated “additional residential unit” framework which can allow up to three units per lot in many existing residential areas.^[14]

1.3 Provincial Land Needs Assessment Methodology

The Minister formally issued the final L.N.A. methodology on August 28, 2020, in accordance with policy 5.2.2.1 c) of the Growth Plan, 2019.^[15] This methodology replaces the previous L.N.A. methodology for the G.G.H. which was issued on May 4, 2018. The revised L.N.A. methodology focuses on a more simplified and outcome-based approach in comparison to the 2018 L.N.A. methodology. Upper- and single-tier municipalities in the G.G.H. are required to use the methodology in combination with the policies of the Growth Plan, 2019, to assess the quantity of land required to accommodate forecast growth.

The L.N.A. methodology identifies that the results of an L.N.A. can only be implemented through an M.C.R. As previously identified, an M.C.R. is a new O.P., or an O.P.A. initiated by an upper- or single-tier municipality under section 26 of the *Planning Act* that comprehensively applies the policies and schedules in the Growth Plan, 2019.

In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas including Community Areas and Employment Areas, as defined below:

Community Areas: Areas where most of the housing required to accommodate the forecasted population will be located, as well as most population-related jobs, most office jobs and some employment land

^[14] <https://www.ontario.ca/laws/statute/90p13>

^[15] A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario. August 28, 2020.



employment jobs. Community areas include delineated built-up areas [B.U.A.] and designated greenfield areas [D.G.A.].^[16]

Employment Areas: Areas where most of the employment land employment jobs are (i.e., employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the employment area. Employment areas may be located in both delineated built-up areas [B.U.A.] and designated greenfield areas [D.G.A.].^[17]

The L.N.A. methodology prescribes the key steps to establishing Community Area and Employment Area land needs, as discussed in Chapter 6 herein.

1.4 Regional Growth Outlook and Planning Context

With a reported population of 1,209,600 as of 2021,^[18] York Region is expected to grow to approximately 2.09 million people by the year 2051. As York Region continues to mature, new housing development activity is anticipated to densify, with a greater share of new housing development occurring through more compact medium- and high-density housing forms. To accommodate future residents in York Region, there is an increasing need to develop new and innovative approaches to housing development within areas that are pedestrian oriented and transit supportive. This includes options that provide greater opportunities for mixed-use development planned within intensification nodes and corridors, including additional residential units, live/work units, and a range of affordable housing opportunities.

It is a guiding principle of the Growth Plan, 2019 and the 2022 approved R.O.P. to support the achievement of healthy and complete communities that provide opportunities for all ages, including an appropriate mix of local jobs, local amenities and services, a full range of housing, transportation options and public services facilities. With this objective in mind, planning and development of both existing and new

^[16] D.G.A. includes lands within settlement areas (not including rural settlements) but outside of delineated built-up areas that have been designated in an official plan for development and are required to accommodate forecast growth to the horizon of this Plan. Designated greenfield areas do not include excess lands.

^[17] Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020), pp. 6 and 7.

^[18] Statistics Canada Census, 2021, adjusted for net Census population undercount.



communities should be designed to generate a unique sense of place and identity that fosters community health, individual well-being, and livability.

York Region's employment base is forecast to steadily increase over the next several decades. By 2051, York Region's employment base is forecast to reach 990,600, which represents an estimated increase of 349,000 jobs, in accordance with the Region's 2021 job base of 641,600.^[19]

As part of the recent R.O.P. review, York Region prepared an M.C.R., which was undertaken within the context of the current provincial planning policy framework. This included the preparation of long-term population, housing, and employment projections to 2051 with allocations for its area municipalities and a corresponding assessment of Community and Employment Area land needs. The R.O.P. was adopted by York Region in July 2022, and approved by the Province with modifications in November 2022. York Region has prepared an updated set of projections as of May 2023 to reflect the modifications approved by the Province. This report has utilized the policies in the Region's approved R.O.P. and the growth forecast prepared by York Region in May 2023.

1.5 Whitchurch-Stouffville Urban Structure

The Town of Whitchurch-Stouffville is one of nine lower-tier municipalities that make up York Region. The Town is located just north of the City of Markham and east of the Towns of Newmarket and Aurora in the eastern part of York Region. Whitchurch-Stouffville is largely characterized by the environmental features that traverse through the Town such as the Oak Ridges Moraine, Greenbelt Area, and the Rouge River watershed. Agricultural lands comprise a significant portion of the Town's land base. Within the Town of Whitchurch-Stouffville there are six settlement areas:

- Community of Stouffville;
- Gormley;
- Hamlet of Bloomington;
- Vandorf;
- Ballantrae; and

[19] Forecast data provided by York Region as of May 2023.



- Musselman Lake.

These settlement areas are shown on the map in Figure 1.

The Community of Stouffville is the only fully serviced settlement within Whitchurch-Stouffville and the only settlement area with a delineated built boundary as identified by the Province. Within the Community of Stouffville, the Town has identified a number of Strategic Growth Areas including the Stouffville GO M.T.S.A., the Old Elm GO (formerly Lincolnville GO) M.T.S.A., the Gateway and Western Approach Mixed Use Areas, and the Highway 48 Mixed Use Corridor. This is in addition to a range of designated greenfield land supply opportunities within the Phase 3 lands as well as new urban expansion areas within the whitebelt lands as reflected in the R.O.P, 2022 as approved by the Province with modifications.

1.6 Planning Considerations

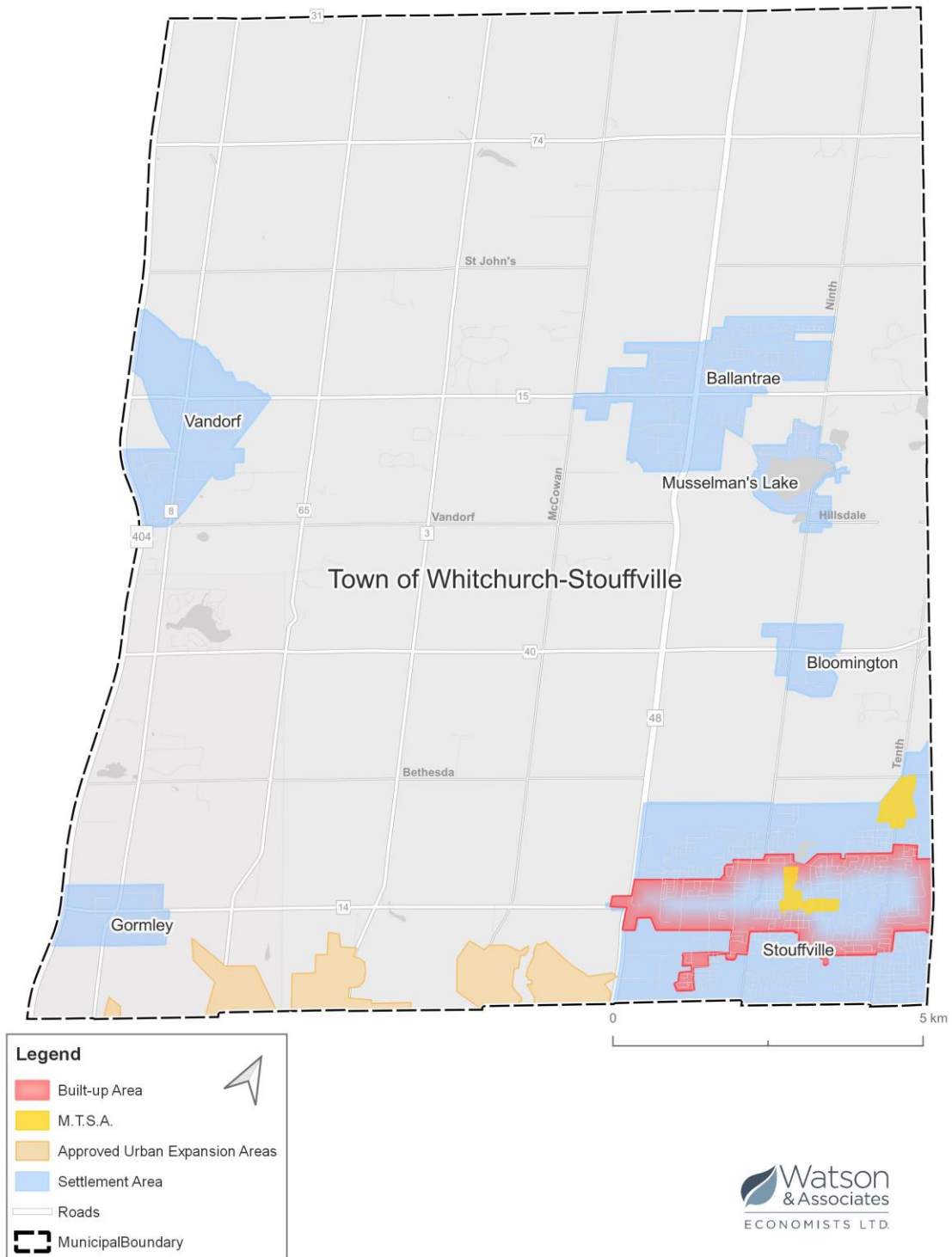
This study represents an important background document to the Town's growth conformity exercise. Integral to this analysis for the Town is a comprehensive review of how growth in the B.U.A., remaining D.G.A.s, and future greenfield lands will be planned, phased and accommodated through the 2051 planning horizon. This analysis is critical to guiding the timing and amount of future land needs, hard and soft infrastructure requirements, and municipal finance impacts associated with new development.

The P.G.M.S. was developed within the policy framework of the P.P.S., 2020 and the Growth Plan, 2019. In addition, the study adheres to the Oak Ridges Moraine Conservation Plan, 2017, and the Greenbelt Plan, 2017.

The P.G.M.S. must also consider the 2022 approved R.O.P. and the 2051 growth projections, intensification and density targets, and the land needs assessment determined through the Region's M.C.R. (as of May 2023), identified for Whitchurch-Stouffville.



Figure 1
Town of Whitchurch-Stouffville
Community Structure





2. Broad Factors Influencing Whitchurch-Stouffville's Long-Term Population and Employment Growth Potential

The following provides an overview of recent macro-economic and regional trends which are anticipated to influence future growth trends on residential and non-residential lands within Whitchurch-Stouffville over the coming decades.

2.1 Macro-economic Trends Influencing Development Trends

Future population and employment growth within Whitchurch-Stouffville is strongly correlated with the growth outlook and competitiveness of the regional economy, which in this case is largely represented by the Greater Golden Horseshoe (G.G.H.). Potential employment opportunities within the Town and the surrounding commuter-shed, most notably within the Greater Toronto and Hamilton Area (G.T.H.A.), represent the primary driver of net migration to this area. Net migration, particularly international net migration, has been the key contributor to population growth across the G.T.H.A., including York Region and Whitchurch-Stouffville, over the past two decades.

As identified in the Growth Plan, 2019, the long-term outlook for the G.G.H. is positive, characterized by strong population growth fueled by economic expansion that is increasingly concentrated in large urban centres. The population of the G.G.H. is forecast to increase from 9.5 million in 2016 to 14.9 million in 2051. This represents a population increase of 5.3 million people (153,000 annually), or 1.3% annually between 2016 and 2051. With respect to the region's economic potential, the G.G.H. employment base is forecast to increase from 4.6 million in 2016 to 7 million jobs in 2051. This represents an employment increase of 2.4 million jobs (69,000 annually), or 1.2% annually between 2016 and 2051. Currently, the G.G.H. represents the fourth largest and one of the fastest growing larger City/Regions in North America.

Similar to the provincial economy as a whole, the nature of the G.G.H. economy is changing. Over the past decade, the composition of the G.G.H.'s employment base has gradually shifted from a goods-producing economy to a services-producing economy, led by employment growth in a range of "knowledge-based and creative-class



economy”^[20] sectors including professional, scientific and technical services; financial services; information and cultural industries; educational services; health care and social assistance; as well as real estate.

Within the service sector, economic growth has been particularly strong for small- to medium-scale knowledge-based businesses that are focused on innovation and entrepreneurship. With an increasing emphasis on these knowledge-based sectors, major office, flex office and multi-purpose facilities encompassing office and non-office uses are becoming an increasingly dominant built form.

The G.T.H.A. has experienced significant employment growth in the Goods Movement sector over the past decade comprising transportation/warehousing and wholesale trade. This sector is highly concentrated within the Regions of Peel, York, and Halton, which are located within proximity to the Toronto Pearson International Airport. Other regional infrastructure attributes, including access to 400-series highways as well as existing and planned intermodal facilities in Brampton, Vaughan, and Milton, continue to play a key role in driving demand within this sector across the G.T.H.A. Increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. This continues to drive demand for increasingly larger, more land-extensive warehousing facilities, generally in greenfield Employment Areas.

York Region is expected to experience relatively strong growth over the next three decades, as illustrated in Figure 2. Over the 2021 to 2051 period, the Region’s population and its housing base are expected to increase by 878,700 and 292,470, respectively. Over the same period, the Region’s employment base is expected to expand by 349,000 jobs.

[20] Richard Florida, *The Rise of the Creative Class*. 2002.



Figure 2
Region of York
Population, Housing and Employment 2021 to 2051

| Metric | 2021 | 2031 | 2041 | 2051 | Incremental Growth: 2021-2051 |
|----------------------------------|-----------|-----------|-----------|-----------|-------------------------------|
| Population ^[1] | 1,209,300 | 1,450,100 | 1,731,700 | 2,088,000 | 878,700 |
| Housing | 391,030 | 470,740 | 568,920 | 683,500 | 292,470 |
| Employment | 641,600 | 744,800 | 859,800 | 990,600 | 349,000 |

^[1] Population includes a net Census undercount estimated at approximately 3.1%. Population figures have been rounded.

Source: 2021 population and housing derived from Statistics Canada Census Data, 2021 Employment and 2031-2051 figures derived from York Region's M.C.R. (May 2023) presented by Watson & Associates Economists Ltd., 2023.

The strength of the broader regional G.G.H. and York Region economies presents a tremendous opportunity for the Whitchurch-Stouffville economy and its residents within commuting distance to this growing broader regional employment market.

2.2 Regional Population and Housing Market Trends

As York Region and Whitchurch-Stouffville continue to mature, new housing development activity is anticipated to densify, with a greater share of new housing development occurring through more compact medium- and high-density housing forms. To accommodate future residents, there is an increasing need to develop new and innovative approaches to housing development within areas that are pedestrian oriented and transit supportive. This includes options that provide greater opportunities for mixed-use development planned within intensification nodes and corridors, including additional residential units, live/work units, and a range of affordable housing opportunities.

To maintain well-balanced and healthy communities and ensure long-term sustainability, it is vital that municipalities offer a wide range of housing options to a broad range of income groups, including a provision for rental and affordable housing.



The availability of housing is considered a key factor in attracting and retaining people and businesses to a community. In an increasingly knowledge-based environment, the ability to cultivate, retain, and attract talented workers is increasingly important.

Attracting and retaining people of working age and their families, which is necessary to support a broad range of employment opportunities, requires a diverse housing stock.

York Region and Whitchurch-Stouffville have historically been highly desirable locations for middle- and upper-income households and families. The existing housing base largely reflects this demographic base, comprising a large share of low-density housing (single detached/semi-detached dwellings) and high levels of home ownership relative to the G.T.H.A. and the provincial average. Comparatively, there are fewer higher-density and rental options in York Region and Whitchurch-Stouffville relative to the broader regional market area.

Demographic trends strongly influence both housing need and form. Across the G.T.H.A. the population is getting older on average, due to the aging of the Baby Boomers. The first wave of this demographic group turned 75 years of age in 2021.

The average age of the population base in York Region and Whitchurch-Stouffville is getting older, due to the large concentration of Baby Boomers.^[21] As presented in Figure 2, over the 2021 to 2051 period, York Region's housing base is expected to increase by 281,800 units. The strongest anticipated household growth by primary age of maintainer is expected for those aged 65+.

The aging of the population base further reinforces the need to attract younger age groups to the Region, particularly those characterized as Millennials and Generation Z as well as other future generations.^[22] Not only is the Baby Boomer age group large in terms of its population share, but it is also diverse with respect to age, income, health, mobility, and lifestyle/life stage. When planning for the needs of older adults, it is important to consider these diverse physical and socio-economic characteristics relative to younger age groups. On average, seniors, particularly those in the 75+ age group, have less mobility, less disposable income, and typically require increased health care compared to younger seniors (65-74 age group) and other segments of the younger

^[21] Baby Boomers are generally defined as those born between 1946 and 1964.

^[22] Millennials are generally defined as those born between 1980 and 1992. For the purposes of this study, we have assumed that those born between 1993 and 2005 comprise Generation Z.



working-age population. Typically, these characteristics associated with the 75+ age group drive the demand for higher-density housing forms (e.g., apartments and seniors' homes) that are in proximity to urban amenities (e.g., hospitals/health care facilities, amenities, and other community services geared towards older seniors).

2.3 Emerging Industry Sector and Labour Force Trends

Continued structural changes in the global economy and technological advancements will require municipalities to be increasingly responsive and adaptive to changing industry needs and disruptive economic forces. The following key industry trends are expected to influence growth and development patterns in Whitchurch-Stouffville.

- **E-Commerce as a Major Disruptor for Retail and Logistics** – E-commerce sales in Canada have increased at a rate that is five times the pace of overall growth in retail trade. The rise of e-commerce has reduced the demand for retail square footage, in particular retail space for the sale of goods-based retailers. Increasing growth in e-commerce is also having a significant impact on employment growth and land demand related to the logistics sector. Delivery expectations within this sector are increasing on an annual basis. As delivery times decrease, it is anticipated that demand for regional fulfilment centres will increase. Furthermore, it is estimated that 25% to 30% of online merchandise is returned which is driving the need for reverse logistics and return centres.
- **Potential Impacts of Technology on Commercial Services** – Digital and mobile technologies are making it easier to access goods and services on-demand which has led to alternative platforms to purchase products and services. Among these platforms are those that support the sharing economy which provide opportunities for individuals to earn an income by leveraging under-utilized assets. These platforms provide customers with an alternative to traditional buying/selling platforms, including those in hospitality (e.g., hotels and taxis) and office leasing (office sharing). Other alternative purchasing platforms are providing income-earning opportunities for individuals to perform services or tasks that are typically not outsourced by households (e.g., assembling furniture, small household repairs, picking up food at fast-food restaurants, meal preparation, grocery pick-up and delivery). It is anticipated that further advancements in the sharing economy will have an increasingly negative impact



on the need for non-residential building space and continued growth in precarious employment.

- **Trends in Manufacturing** – While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate significant labour-force growth across the Province. In general, globalization has led to increased outsourcing of production processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario and in Whitchurch-Stouffville, the nature of traditional industrial processes is rapidly shifting, becoming more capital/technology intensive and automated, with lower labour requirements. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented.
- **Trends in Work at Home and No Fixed Place of Work Employment** – Over the 2001 to 2016 period, the percentage of Whitchurch-Stouffville’s labour force defined as having a usual place of work declined, offset by a gradual increase in the share of people who have a steady increase in the share of work at home and no fixed place of work (N.F.P.O.W.) employment. Technological innovation and improved broadband regional telecommunications have been, and will continue to be, key drivers of economic expansion in knowledge-based sectors as well as the steady rise of the gig economy.^[23] Looking forward, continued advances in technology and telecommunications (e.g., 5G technology) is anticipated to further enable remote work patterns and ultimately increase the relative share of off-site employees over the long term. Over the coming decades, work at home and N.F.P.O.W. employment in Whitchurch-Stouffville is expected to steadily increase as a result of these trends. Demographics and socio-economics also play a role in the future demand for off-site and work at home employment within an increasingly knowledge- and technology-driven economy. It is anticipated that many working residents in Whitchurch-Stouffville, particularly younger adults as well as older adults (i.e., Baby Boomers) approaching retirement or semi-retirement will utilize technology to allow them to supplement their income in more flexible ways in contrast to traditional work patterns.

^[23] The gig economy is characterized by flexible, temporary, or freelance jobs, often involving connecting with clients or customers through an online platform.



2.4 COVID-19 and the New Economy

COVID-19 had a significant negative impact on short-term macro-economic growth. Within the Whitchurch-Stouffville context, near-term economic challenges due to the pandemic resulted in elevated rates of unemployment with contraction in employment across a broad range of industry sectors. Despite these near-term challenges, local employment levels largely recovered in 2021.

COVID-19 accelerated changes in work and commerce as a result of technological disruptions which were already taking place prior to the pandemic, including growth in e-commerce, the gig economy, and automation. In a post-COVID-19 economy, a sustained hybrid working model is emerging across many industry sectors with remote work enabled by technology. This continues to put downward pressure on non-residential space needs, particularly in the office market.

These trends are anticipated to have a direct influence on residential, commercial and industrial real estate needs over both the near and longer term. In light of these anticipated trends, it is important that the long-term population and employment forecasts adequately consider the manner in which these impacts are likely to impact the nature of employment and associated building space needs by type as well as by place of work.

2.5 Observations

A broad range of considerations related to demographics, economics and socio-economics is anticipated to impact population and employment growth trends throughout Whitchurch-Stouffville over the coming decades. These factors will not only affect the rate and magnitude of growth but will also influence the form, density and location of residential and non-residential development.

As summarized above, a range of broad factors such as macro-economics, demographics, and competitiveness will continue to influence the future population and employment potential of York Region over the 2021 to 2051 planning horizon. In addition, Whitchurch-Stouffville faces opportunities and challenges resulting from the structural changes and disruptions that are occurring within the macro economy. Similar to the Province as a whole, Whitchurch-Stouffville's economy has transitioned



away from goods production and towards service delivery. As a result of continuing structural changes occurring in the macro-economy, it is important to recognize that the above-mentioned trends will generate both positive and disruptive economic impacts related to labour force demand, industrial, commercial, and retail space requirements, as well as long-term residential and employment land needs. Ultimately, this will continue to influence local planning and economic development initiatives which will be increasingly geared to the knowledge-driven economy.

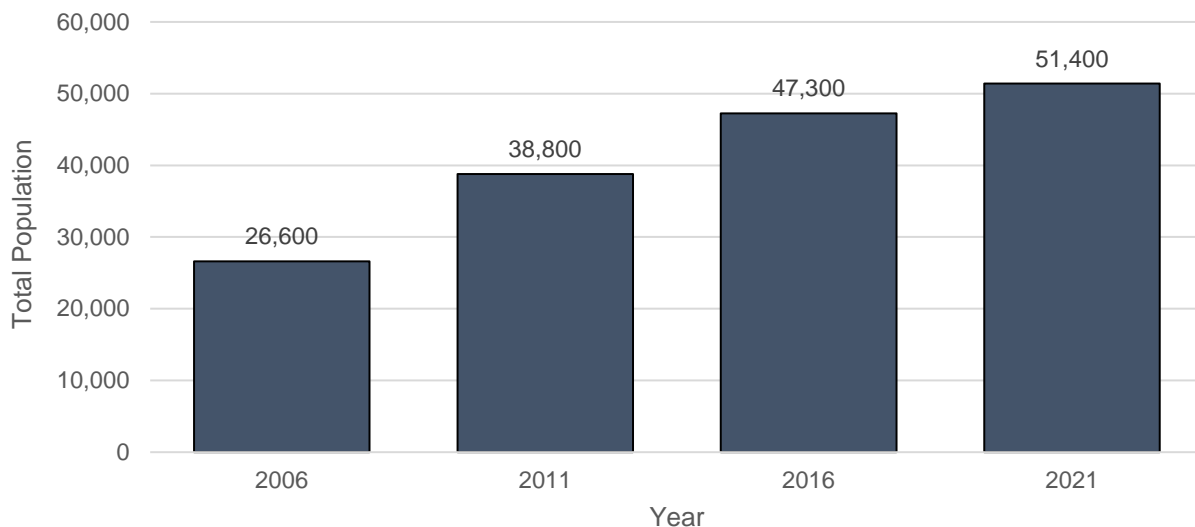


3. Whitchurch-Stouffville Community Profile and Growth Trends

3.1 Population Trends

Figure 3 and Figure 4 summarize the historical population growth rates for Whitchurch-Stouffville during the 2006 to 2021 period. For comparative purposes, historical population growth rates have also been provided for York Region. As illustrated, Whitchurch-Stouffville’s population base increased from 26,600 in 2006 to 51,400 in 2021, reflecting average annual growth rates of 7.8% over the 2006 to 2011 period, 4.0% over the 2011 to 2016 period and 1.7% over the 2016 to 2021 period. While the rate of population growth in Whitchurch-Stouffville slowed over the 15-year period, the average annual growth rates demonstrated in the Town were notably higher than the Region-wide average.

Figure 3
Town of Whitchurch-Stouffville
Historical Population, 2006 to 2021

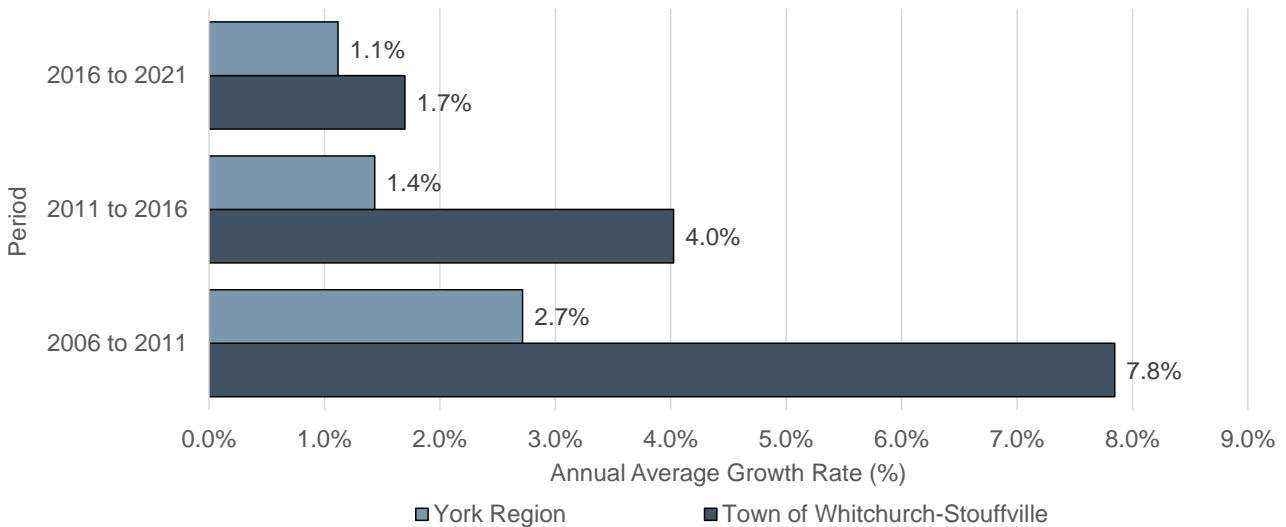


Note: Population includes a net Census undercount estimated at approximately 3.1%. Population figures have been rounded.

Source: Derived from Statistics Canada Census Data by Watson & Associates Economists Ltd., 2022.



Figure 4
Town of Whitchurch-Stouffville and York Region
Average Annual Population Growth Rate, 2006 to 2021



Notes: Figures include a net Census undercount estimated at approximately 3.1%.
Source: Derived from Statistics Canada Census data by Watson & Associates Economists Ltd., 2022.

The Community of Stouffville, with approximately 36,200 people, accounts for about 72% of the Town’s population.^[24] During the 10 years from 2011 to 2021, approximately 94% of the Town’s population growth was accommodated within the Community of Stouffville.^[25]

3.2 Housing Growth Trends

As shown in Figure 5, Whitchurch-Stouffville’s 2021 housing base comprises approximately 16,680 occupied dwelling units, largely consisting of low-density housing (single detached/semi-detached) which accounts for 79% of units.^[26] The Town’s

^[24] Watson estimate.

^[25] Watson estimate.

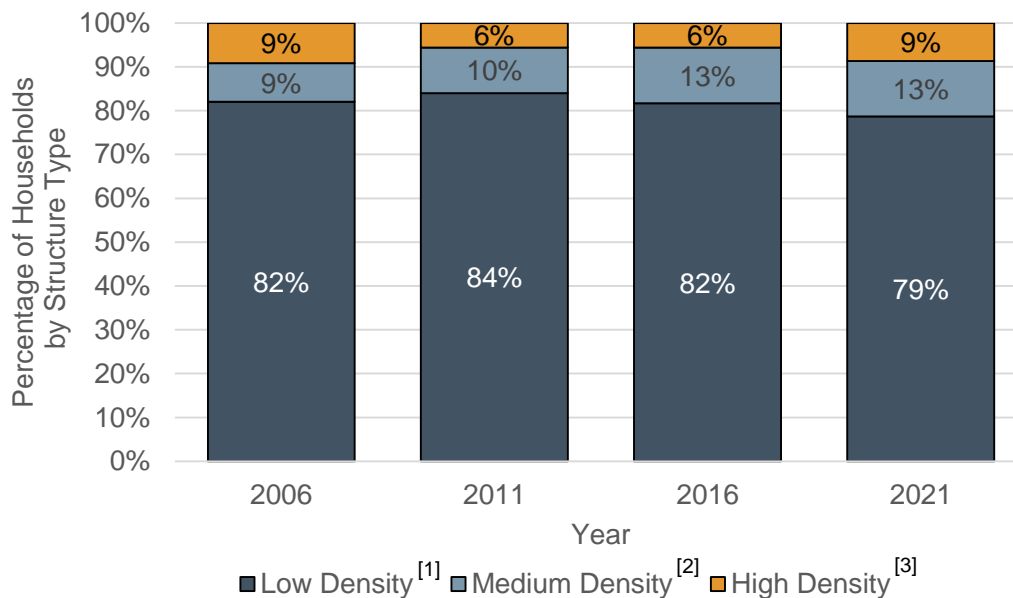
^[26] Based on York Region’s draft M.C.R. housing units for the Town of Whitchurch-Stouffville.



housing base comprises approximately 13% and 9% medium- and high-density units, respectively. Key observations include:

- Whitchurch-Stouffville’s housing base has historically been predominantly owner-occupied low-density units (single and semi-detached); and
- The local housing market is gradually becoming more diverse with a greater share of higher-density units.

Figure 5
Town of Whitchurch-Stouffville
Housing by Structure Type, 2006 to 2021



[1] Includes single and semi-detached units.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Notes: Numbers may not add precisely due to rounding.

Source: Derived from Statistics Canada Census data by Watson & Associates Economists Ltd., 2022.

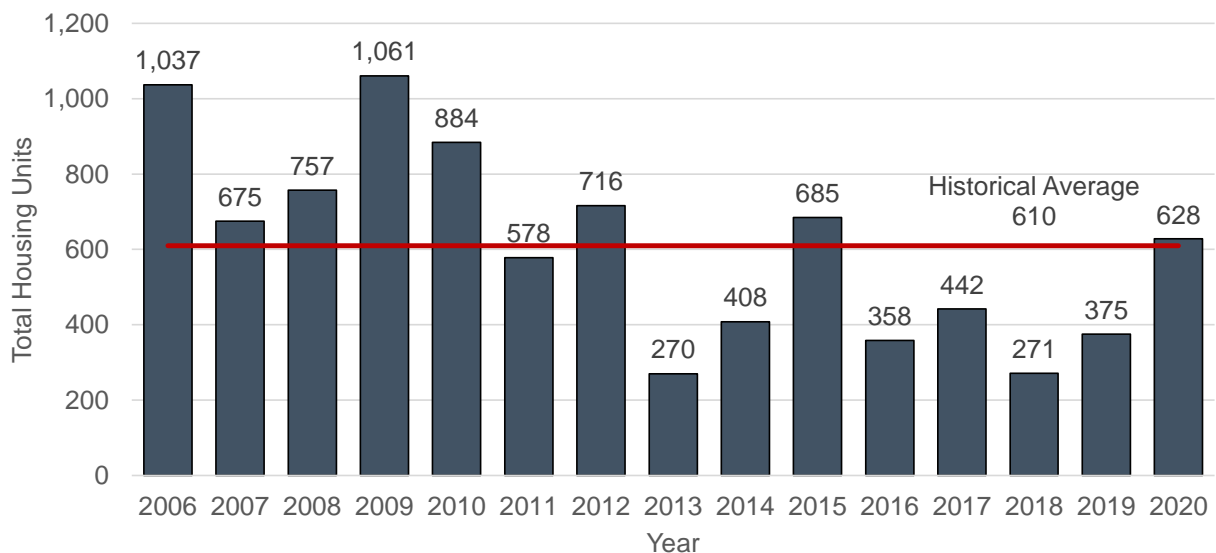
The Town of Whitchurch-Stouffville has historically exhibited strong housing growth, averaging 610 new residential units per year over the past 15 years (2006 to 2021), as illustrated below, due to favourable market opportunities for housing. Over the period, Whitchurch-Stouffville has accounted for an estimated 7.5% of the Region’s housing growth, ranging from a high of 9.4% from 2006 to 2011 to a low of 6.0% from 2016 to 2021.



Key observations include:

- Low-density dwellings have accounted for the majority (69%) of development activity;
- Whitchurch-Stouffville’s residential development activity has slowed over the past 15 years;
- Between 2006 and 2010, the Town averaged approximately 883 new housing units per year. In the following period, between 2011 and 2015, the Town averaged 531 units per year and in the most recent period, between 2016 and 2020, the Town averaged 415 units per year; and
- Between 2011 and 2020, 91% of housing construction in Whitchurch-Stouffville occurred in the Community of Stouffville. Over the same period, 64% of housing in Whitchurch-Stouffville was in the D.G.A., compared to 10% in the other settlement areas and remaining rural areas, and the remaining 27% was in the B.U.A.

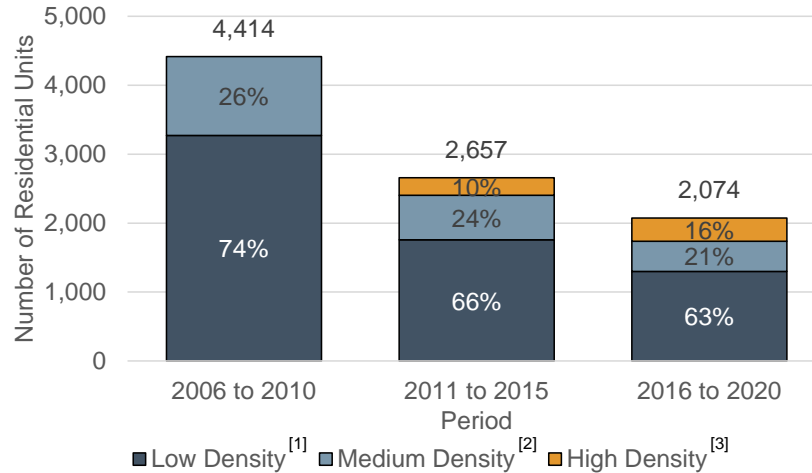
Figure 6
Town of Whitchurch-Stouffville
New Housing Construction, 2006 to 2020



Source: Building permit data provided by the Town of Whitchurch-Stouffville summarized by Watson & Associates Economists Ltd., 2022.



Figure 7
Town of Whitchurch-Stouffville
New Housing Construction by Structure Type, 2006 to 2020



[1] Includes single and semi-detached units.

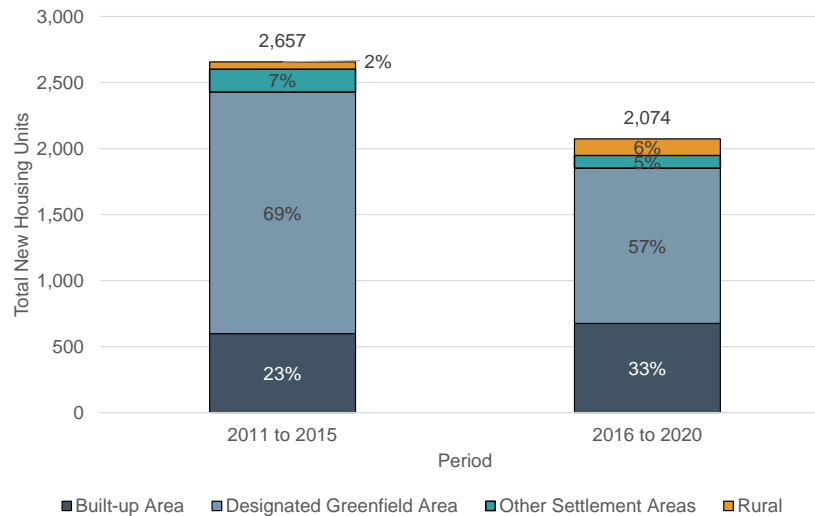
[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Notes: Numbers may not add precisely due to rounding.

Source: Historical 2006 to 2020 data derived from Town of Whitchurch-Stouffville building permits by Watson & Associates Economists Ltd., 2021.

Figure 8
Town of Whitchurch-Stouffville
New Housing Construction by Planning Policy Area, 2011 to 2020



Notes: Numbers may not add precisely due to rounding.

Source: Historical 2011 to 2020 data derived from Town of Whitchurch-Stouffville building permits by Watson & Associates Economists Ltd., 2021.



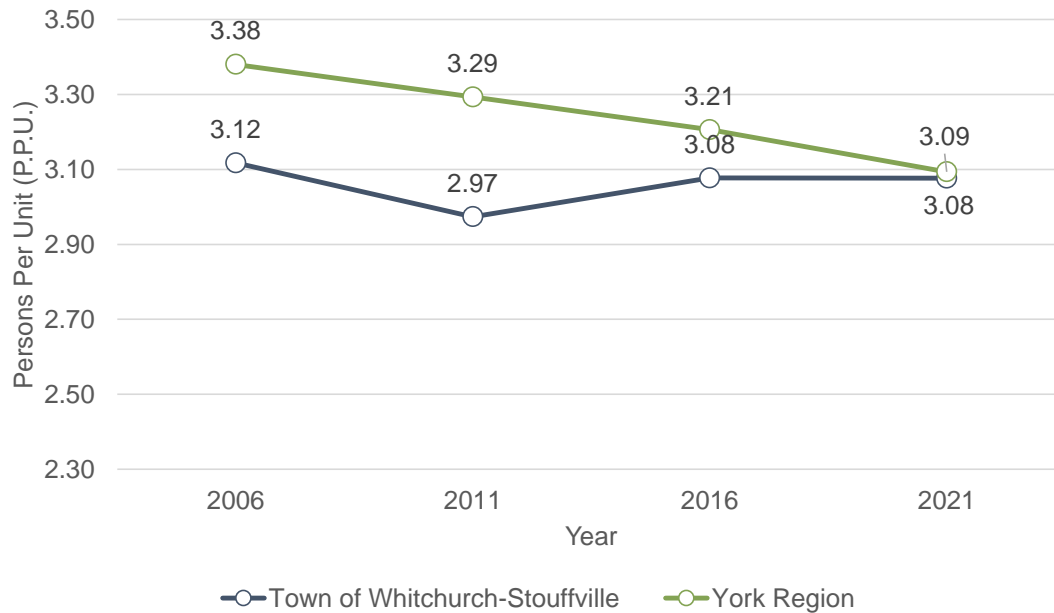
Figure 9 summarizes average housing occupancy in Whitchurch-Stouffville in comparison to York Region. This is expressed as the average number of persons per dwelling unit (P.P.U.).^[27] The general downward trend in housing occupancy in York Region has been driven by the aging of the population which increases the proportionate share of empty nester and single-occupancy households. As shown, the P.P.U. decline in Whitchurch-Stouffville has been less pronounced than in York Region. Between 2011 and 2021, the P.P.U. in the Town of Whitchurch-Stouffville stabilized with a current (2021) P.P.U. of 3.08 which is only slightly lower than York Region's estimate of 3.09. The Town and Region may see a change in the P.P.U. trends due to increase in multi-generational homes. Multigenerational homes are homes that are shared by three or more generations. According to Census 2021 data, these households have increased in number by 50% since 2001 as compared to the overall housing increase of 30%. Some of the factors affecting increase in multigenerational homes include ageing of population, increase in share of indigenous and newcomer families, housing cost hikes and need for family caregiving.^[28]

^[27] Average number of persons per unit (P.P.U.) defined as the total population divided by the number of occupied dwelling units.

^[28] <https://vanierinstitute.ca/sharing-a-roof-multigenerational-homes-in-canada-2021-census-update/>



Figure 9
Town of Whitchurch-Stouffville and York Region
Average Household Occupancy, 2006 to 2021



Note: Population includes a net Census undercount estimated at approximately 3.1%.
Source: Derived from Statistics Canada Census data by Watson & Associates Economists Ltd., 2022.

3.3 Employment and Non-Residential Growth Trends

Whitchurch-Stouffville is home to an estimated 17,000 jobs, as of 2021. The majority (40% or 6,800 jobs) is population-related employment (P.R.E.), while 22% is employment land employment (E.L.E.), 4% major office employment (M.O.E.) and 34% is rural.^{[29] [30]}

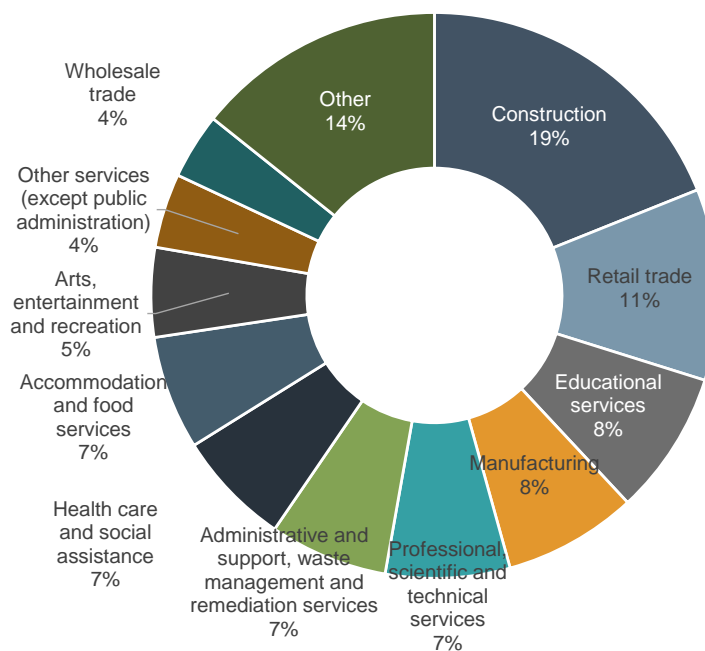
^[29] Based on the latest employment figures from York Region's M.C.R. for the Town of Whitchurch-Stouffville (May 2023). Please note that figures may not add precisely due to rounding.

^[30] P.R.E. includes employment in institutional and commercial sectors such as retail and services that generally serve the local population base; Major Office Employment (M.O.E.) comprises employment accommodated in free-standing office buildings greater than 1,900 sq.m (20,000 sq.ft.); Employment Lands Employment (E.L.E.) represents jobs accommodated in industrial-type buildings.



Whitchurch-Stouffville has a diverse employment base, as illustrated in Figure 10. The largest sector in the Town is construction which accounts for 19% of total employment. Other key sectors include retail trade, educational services, manufacturing, professional, scientific and technical services, and administrative support. Both health care and social assistance, and accommodation and food services sectors account for 7% of the Town's overall employment base in 2021.

Figure 10
Town of Whitchurch-Stouffville
Employment Base by Sector, 2021



Note: Figure includes employed and self-employed jobs.

Source: Data derived from EMSI by Watson & Associates Economists Ltd., 2021.

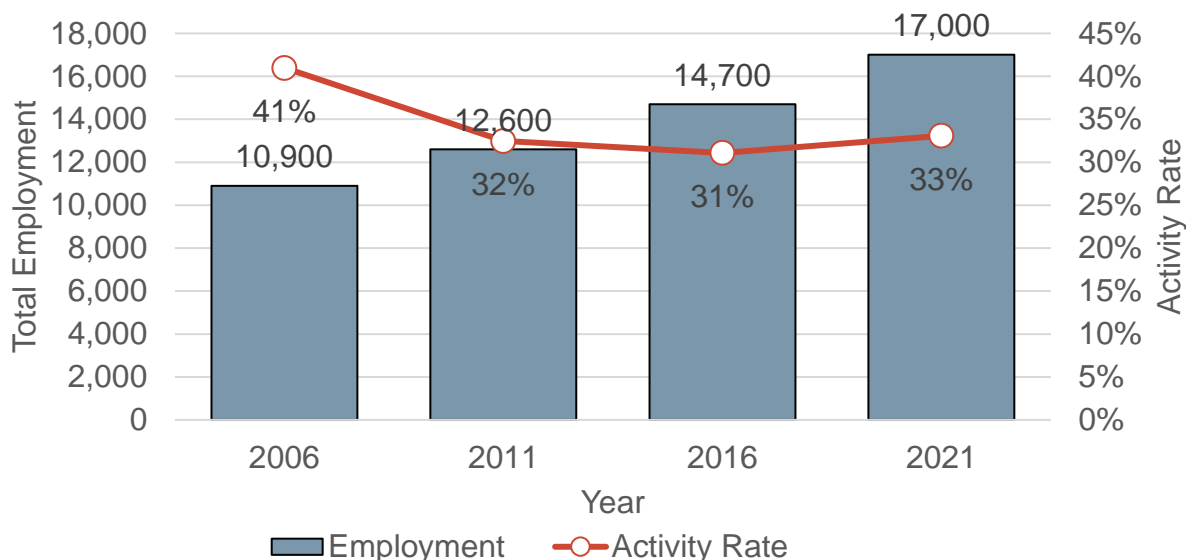
The total employment base for the Town grew by 55.5% between 2006 and 2016, increasing from approximately 10,900 to 14,700 jobs, as illustrated in Figure 11. The Town's employment base is estimated to total 17,000 in 2021, having increased by an estimated 2,300 jobs over the 2016 to 2021 period. Over the 15-year period (2006 to



2021), employment growth averaged 3.0% annually, which is greater than the average employment growth rate across York Region as a whole.^[31]

As illustrated in Figure 11, over the 2006 to 2016 period, the Town's employment activity rate (ratio of jobs to population) declined between 2006 and 2011 indicating that the local population base increased faster than the local employment base. Over the past decade, the Town's activity rate has stabilized; over the 2011 to 2021 period, the activity rate increased slightly to 33%.

Figure 11
Town of Whitchurch-Stouffville
Total Employment, 2006 to 2021



Note: Employment figures include work at home and no fixed place of work (N.F.P.O.W.). Employment figures have been rounded.

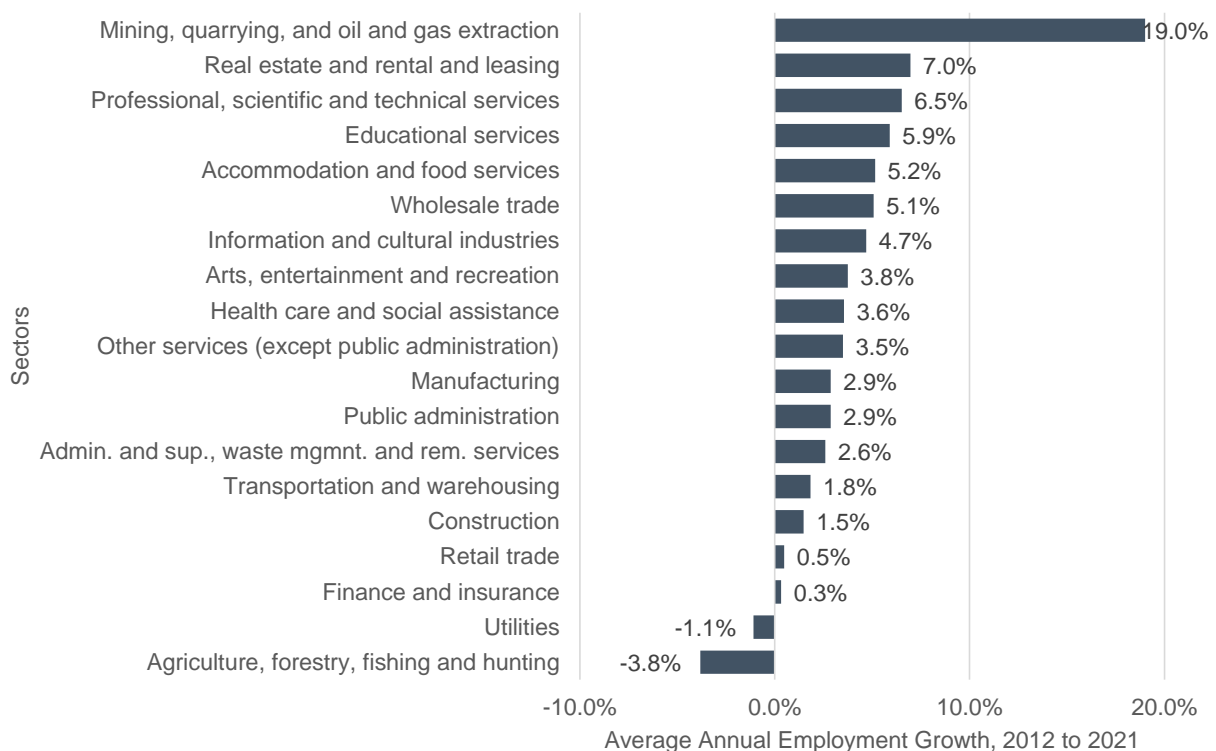
Source: Historical 2006 to 2016 employment figures derived from Statistics Canada Place of Work data. 2021 employment figures taken from approved R.O.P. (2022) and York Region's forecast as of May 2023 for the Town of Whitchurch-Stouffville presented by Watson & Associates Economists Ltd., 2023.

^[31] Between 2006 and 2021, York Region's employment base grew at an annual average rate of 2.3% compared to the Town of Whitchurch-Stouffville, which grew at an annual average rate of 3.0% over the same period.



Similar to the provincial economy as a whole, the nature of Whitchurch-Stouffville's economy is changing. Over the past decade, the composition of the Town's employment base has gradually shifted from goods-producing sectors to services-producing sectors. Figure 12 illustrates the employment change by industry sector over the 2012 to 2021 period in Whitchurch-Stouffville. Over the past decade, the Town has incurred strong growth in key knowledge-based sectors including real estate and rental and leasing; professional, scientific and technical services; educational services; and accommodation and food services. The Town has also incurred growth within key industrial sectors including wholesale trade, manufacturing, and construction.

Figure 12
Town of Whitchurch-Stouffville
Employment Growth by Sector, 2012 to 2021



Note: Figures include employed and self-employed jobs. Management of Companies and Enterprises have been excluded from this list due to data unavailability.

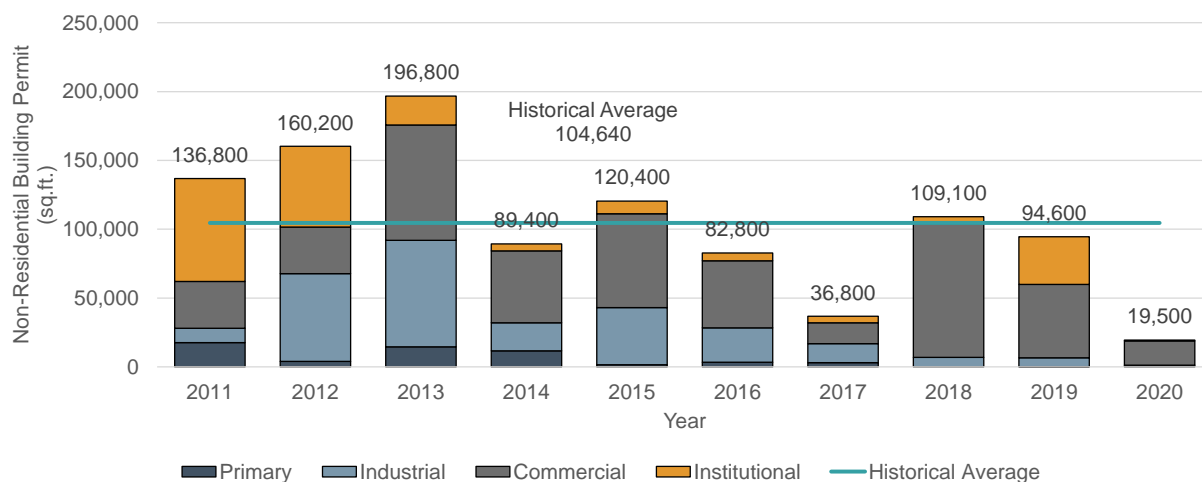
Source: Derived from EMSI by Watson & Associates Economists Ltd., 2021.

Between 2011 and 2020, Whitchurch-Stouffville accommodated an average of 104,600 sq.ft.) of new non-residential gross floor area (G.F.A.) annually, as illustrated in Figure



13. Non-residential development activity was generally strong in the Town over the period, though activity slowed notably in 2020. Over the 2011 to 2020 period, almost half the non-residential development (48%) was in the commercial sector. This is compared to 25% in the industrial sector, followed by 21% in the institutional sector. The remaining 5% of non-residential development in Whitchurch-Stouffville was in the primary sector (e.g., Agriculture, Forestry, Fishing and Hunting and Mining, Quarrying, and Oil and Gas Extraction).

Figure 13
Town of Whitchurch-Stouffville
Non-Residential Building Permit Activity by Sector, 2011 to 2020



Note: Numbers may not add precisely due to rounding.

Source: Building permit data derived from the Town of Whitchurch-Stouffville summarized by Watson & Associates Economists Ltd., 2021.

3.4 Employment Areas

Building on the economic overview presented in Chapter 2, the following provides a brief profile of Whitchurch-Stouffville's employment lands which are largely accommodated in Employment Areas. Employment lands are an integral part of the Town's economic development potential, and they accommodate a significant share of the Town's businesses and employment. One of the most critical aspects related to Whitchurch-Stouffville's economic competitiveness is the marketability and availability of the Town's employment land base relative to the surrounding market area.



Whitchurch-Stouffville's diverse cluster of Employment Areas totals approximately 222 hectares (548 acres) of developed land delineated into four key areas: Community of Stouffville, Cardico, Gormley and Vandorf. Only the Stouffville Employment Area, located in the Stouffville urban area, is municipally serviced. The Stouffville Employment Area, with a developed land base of 85 hectares (211 acres) is the largest of the Town's Employment Areas and is situated within the western portion of the Stouffville urban area, along the east side of Highway 48. The Employment Area extends north to Bethesda Sideroad and south to the Whitchurch-Stouffville/Markham boundary. Meanwhile, the employment lands in Vandorf, Cardico and Gormley are located along the Highway 404 corridor and are on private servicing. Though the Highway 404 corridor employment lands are well located geographically, the lack of municipal servicing limits their prestige appeal, land utilization and their development potential.

As of 2019, Whitchurch-Stouffville's Employment Areas accommodated approximately 5,925 jobs.^[32] Of this, approximately 65% is within industrial sectors including construction, manufacturing, wholesale trade, and transportation and warehousing. The Town's Employment Areas also accommodate a range of commercial and institutional sectors including professional, scientific and technical services, auto dealerships, places of worship, long-term care homes, and government services.

Over the past decade (2012 to 2021) period, 46 net hectares (113 net acres) of employment lands were absorbed in Whitchurch-Stouffville, representing an average of approximately 5 hectares (11 acres) per year. Development accommodated has been largely comprised of single tenant industrial buildings, multi-tenant industrial condominiums and auto dealerships. Employment densities have averaged 46 jobs per net hectare (19 jobs per net acre) with an average of 59 jobs per net hectare (24 jobs per net acre) in Stouffville and 28 jobs per net hectare (11 jobs per net acre) in Gormley.^[33]

Figure 14 summarizes employment growth accommodated on employment lands absorbed over the 2012 to 2019 period by sector. Key sectors that have been accommodated on recently absorbed employment lands include construction, wholesale

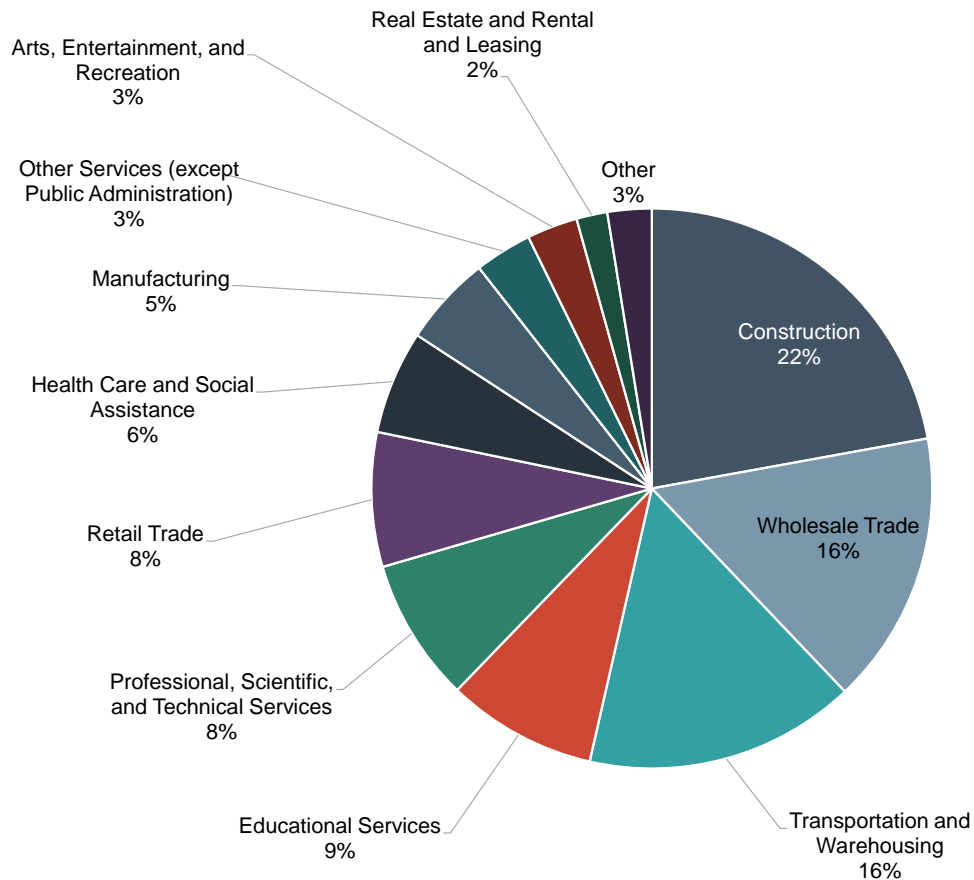
[32] Derived from 2019 York Region Employment Survey by Watson & Associates Economists Ltd.

[33] Watson & Associates Economists Ltd. survey data.



trade, transportation and warehousing, educational services, professional, scientific and technical services, and retail trade.

Figure 14
Town of Whitchurch-Stouffville
Employment Growth on Absorbed Employment Lands by Sector, 2012 to 2019



Source: Derived from 2019 York Region Employment Survey data by Watson & Associates Economists Ltd., 2021.



4. Opportunities to Accommodate Growth in Whitchurch-Stouffville

The following summarizes the Town's potential to accommodate future housing and employment growth within its designated settlement areas, future growth areas, and rural lands. With respect to the Town's designated urban residential areas, residential development opportunities are summarized by active development applications, vacant D.G.A.s, and intensification opportunities. Consideration has been given to the Town's ability to accommodate future non-residential growth on employment lands.

4.1 Housing Supply Potential

To determine the Town's capacity to accommodate future housing growth, a residential supply inventory was prepared. This inventory included vacant residential units in the form of registered subdivisions (remaining to be built), subdivisions that are draft approved, and applications currently undergoing review. In addition, potential units can be accommodated through residential intensification in the B.U.A. (also known as the built boundary) of the Stouffville Urban Settlement Area. Housing supply opportunities across the development approvals process, intensification and redevelopment, and greenfield development are discussed in the following sections.

4.1.1 Units in Development Approvals Process

The Town's residential units in the development approvals process (registered un-built, draft approved and proposed), as of May 2021 are presented in Figure 15. Collectively, these supply opportunities represent the majority of Whitchurch-Stouffville's short- to medium-term development opportunities. Key observations include:

- The Town has 5,312 residential units in the development approvals process (reflecting 384 registered un-built, 1,745 draft approved units, and 3,183 proposed units);
- Residential units that are registered un-built and draft approved account for 40% of the Town's overall residential units, while most of the Town's residential units are classified as proposed, accounting for 60% of total units; and



- Overall, the Town’s residential units in the development approvals process comprise 43% low-density, 18% medium-density, and 39% high-density housing units.

Figure 15
Town of Whitchurch-Stouffville
Housing Units in Development Approvals within Settlement Areas

| Type | Low Density ^[1] | Medium Density ^[2] | High Density ^[3] | Total |
|---|----------------------------|-------------------------------|-----------------------------|--------------|
| Registered Unbuilt | 229 | 155 | - | 384 |
| Draft Approved | 1,551 | 194 | - | 1,745 |
| Proposed | 482 | 606 | 2,095 | 3,183 |
| Units in Development Approvals Process | 2,262 | 955 | 2,095 | 5,312 |

^[1] Includes singles and semi-detached.

^[2] Includes townhouses and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Source: Data provided by the Town of Whitchurch-Stouffville, presented by Watson & Associates Economists Ltd., May 2021.

As previously mentioned, Stouffville is the only settlement area in the Town with full municipal services and continues to be the focus of development, as approximately 88% of the Town’s supply in the development approvals process is concentrated in this settlement area. The remaining housing supply in the development approvals process is in Ballantrae-Musselman Lake (540 units), Bloomington (68 units), and Vandorf settlement areas (11 units).

4.1.2 Other Vacant Designated Residential Lands

Additional supply opportunities on vacant designated residential lands outside of units in the development approvals process were reviewed by each community in the Town of Whitchurch-Stouffville and are summarized in Figures 16 through 18. As illustrated:

- **Stouffville** – has vacant designated residential land which is not in the development approvals process but is part of the Phase 3 lands. The Phase 3 lands (59 net hectares) are designated for residential uses within the urban area and are intended to accommodate residential growth over the longer term. Other designated lands in Stouffville, including the Phase 3 lands, can potentially accommodate 2,114 housing units.



- **Ballantrae-Musselman Lake** – contains 25 net hectares (62 net acres) of land currently designated for residential uses which could potentially accommodate 127 low-density housing units. The unit potential may likely increase once O.P.A. 136 is approved but pending the availability of municipal water allocation.
- **Bloomington** – has 2 net hectares (5 net acres) of developable residential land with the potential to accommodate four low-density units.

Figure 16
Town of Whitchurch-Stouffville
Residential Supply Opportunities of Phase 3 in the Stouffville Community

| Housing Type | Net Land Area (hectares) | Density (units/hectare) | Units | Housing Mix |
|--------------|--------------------------|-------------------------|--------------|-------------|
| Low | 45.8 | 29 | 1,329 | 63% |
| Medium | 10.5 | 50 | 526 | 25% |
| High | 2.2 | 120 | 259 | 12% |
| Total | 59.0 | 36 | 2,114 | 100% |

Source: Derived from August 2019 data provided by the Town of Whitchurch-Stouffville by Watson & Associates Economists Ltd., 2021. Density and housing mix assumptions from the 2012 Growth Management Strategy Summary Report were used.

Figure 17
Town of Whitchurch-Stouffville
Residential Supply Opportunities in Ballantrae-Musselman Lake

| Land Area (hectares) | Net Developable Land Area (hectares) | Potential Unit Yield |
|----------------------|--------------------------------------|----------------------|
| 38 | 25 | 127 |

Note: Units per net hectare assumption determined by assessing the densities of units in the development approvals process in Ballantrae; assuming 5 units per net hectare.
Source: Derived from August 2019 data provided by the Town of Whitchurch-Stouffville by Watson & Associates Economists Ltd., 2021.



Figure 18
Town of Whitchurch-Stouffville
Residential Supply Opportunities in Bloomington

| Land Area (hectares) | Net Developable Land Area (hectares) | Potential Unit Yield |
|-------------------------|--|-------------------------|
| 4 | 2 | 4 |

Note: Units per net hectare assumption determined by assessing the densities of units in the development approvals process in Bloomington; assuming 1.7 units per net hectare.

Source: Derived from August 2019 data provided by the Town of Whitchurch-Stouffville by Watson & Associates Economists Ltd., 2021.

4.1.3 Old Elm GO M.T.S.A.

Located at the northeast corner of Bethesda Road and Tenth Line, the Old Elm GO (formerly Lincolnville GO) M.T.S.A. is an existing GO train station. As part of Metrolinx's GO Expansion, the agency decided to plan and construct a new GO station south of the existing one in addition to creating a layover facility.^[34] Furthermore, the Region and the Town are proposing to develop a transitive-supportive neighbourhood in this area. As such, the Town of Whitchurch-Stouffville undertook a land use study for this area to identify a preferred land use scenario that would guide future development in this area as well as recommend a delineation of an M.T.S.A. The Old Elm GO M.T.S.A. Official Plan Amendment (O.P.A. 155) was adopted by Town Council in February 2023. The study area is an approximately 800-metre radius from the future GO train station and encompasses most of the northeastern portion of the Stouffville community, which is also known as a portion of Stouffville Phase 3 lands.^[35]

A minimum, average, and maximum range of unit yields for Old Elm GO was determined using Concept Plans 2 and 3 from the Lincolnville GO Station Land Use Study (Figure 19). The average unit yields for Old Elm GO were assumed in the overall residential supply summary.

^[34] Metrolinx: Lincolnville Layover:

<http://www.metrolinx.com/en/greaterregion/projects/lincolnville-layover.aspx>

^[35] <https://www.cometogetherws.ca/lincolnville-go-land-use-study>



Figure 19
Town of Whitchurch-Stouffville
Range of Unit Yields for Old Elm GO (formerly Lincolnville GO)

| | Medium Density | High Density | Total Units | Notes |
|---------|----------------|--------------|-------------|---|
| Minimum | 500 | 1,760 | 2,260 | Assumes York Region Study Area Boundary Density at 150 people and jobs per ha |
| Average | 530 | 1,870 | 2,400 | Average of minimum and maximum yield ranges |
| Maximum | 560 | 1,970 | 2,530 | Assumes a higher density at 168 people and jobs per ha |

Source: Adapted from Lincolnville GO Land Use Study summarized by Watson & Associates Economists Ltd., May 2022.

4.1.4 Employment Conversions to Residential Uses

The Region has approved two employment conversion submissions through the M.C.R. process. Figure 20 identifies the first employment conversion site. The subject lands are approximately 27 hectares (67 acres) and currently vacant and leased for farming on an interim basis. Over the past 20 years, approximately 18 hectares (45 acres) have been designated Employment Areas but have failed to attract any development thus far. The plan proposes a mixed-use development with commercial, institutional, and residential uses that are mainly townhouse and apartment units, ranging between 1,170 units to 1,870 units.



Figure 20
Town of Whitchurch-Stouffville
Employment Land Conversion
12049 Highway 48



The second conversion site is illustrated in Figure 21. The subject site is approximately 11 hectares (27 acres); it is currently serviced, but vacant. The developer is proposing a variety of uses such as office, retirement home, as well as residential units. The proposal is to accommodate 1,020 residential units with 400 sq.ft. of non-residential space per new dwelling unit.



Figure 21
Town of Whitchurch-Stouffville
Employment Land Conversion
Southeast Quadrant of Hoover Park Drive and Highway 48



Figure 22 illustrates the potential housing units from the two employment conversions. In total, there are 2,875 units; approximately 58% of the total units are classified as high density, while the remaining 42% are medium density.



Figure 22
Town of Whitchurch-Stouffville
Housing Potential for Employment Conversion Sites

| Conversion Site | Low Density ^[1] | Medium Density ^[2] | High Density ^[3] | Total |
|--|----------------------------|-------------------------------|-----------------------------|--------------|
| 12049 Highway 48 | - | 191 | 1,680 | 1,871 |
| Southeast Quadrant of Hoover Park Drive and Highway 48 | - | 1,005 | - | 1,020 |
| Total | - | 1,195 | 1,680 | 2,875 |

^[1] Includes singles and semi-detached.

^[2] Includes townhouses and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

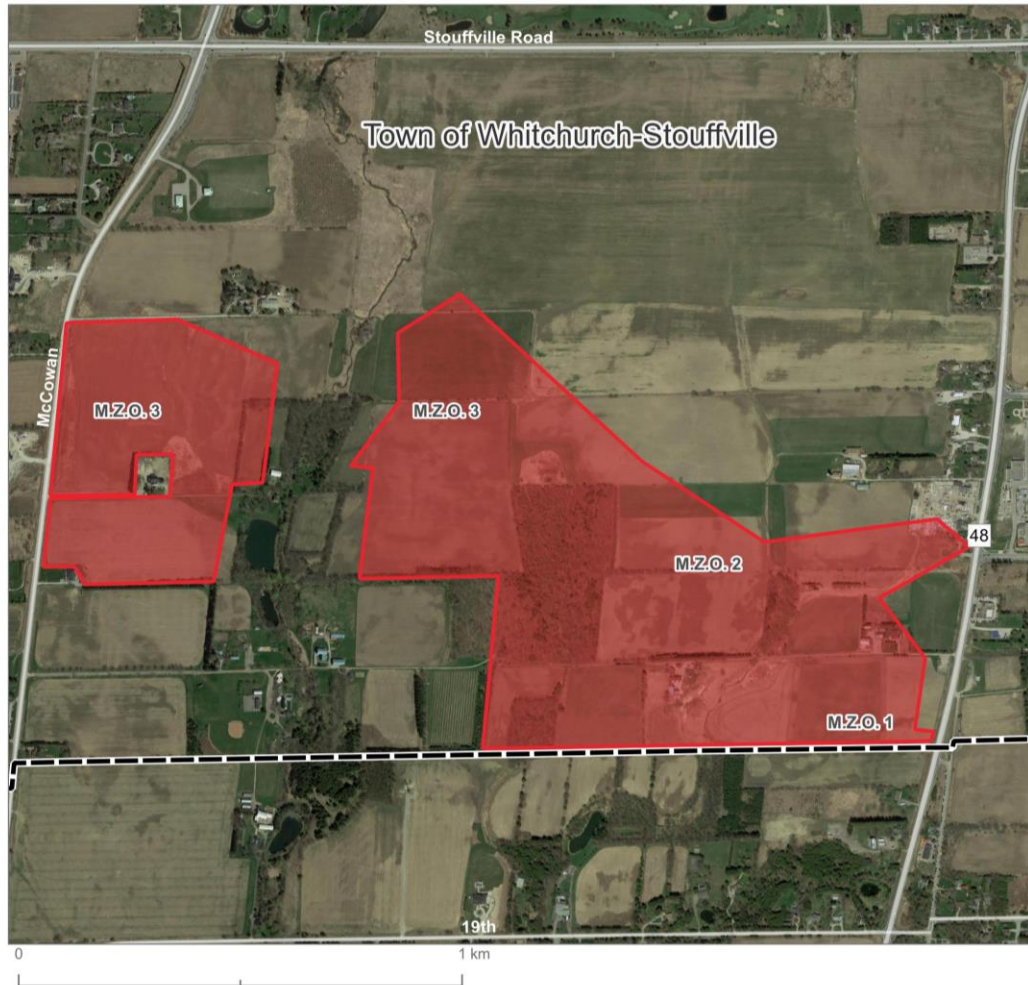
Source: Data provided by the Town of Whitchurch-Stouffville, presented by Watson & Associates Economists Ltd., 2021.

4.1.5 Minister's Zoning Orders for Proposed Residential Developments

At present, three Minister's Zoning Orders (M.Z.O.s) have been approved in the Town of Whitchurch-Stouffville, each located in the Town's whitebelt lands, immediately west of the Community of Stouffville. The first M.Z.O. is located at 11776 Highway 48. The developer, FLATO Developments Inc., is proposing to develop 650 residential units on approximately 8.5 hectares of land. On April 24, 2020, the Minister issued the M.Z.O. and currently the development is in the draft plan approvals process. The second M.Z.O. is located at 11776 and 11882 Highway 48. These lands are adjacent to the recently approved M.Z.O. lands, and the same developer, FLATO Developments Inc., is proposing to develop 1,964 housing units on 60.14 hectares of land, of which 16.15 hectares is subject to natural heritage features. On October 20, 2020, the Minister issued the M.Z.O. and currently the development is in the draft plan approvals process. The third M.Z.O. is municipally known as 11861 and 12045 McCowan Road. These subject lands are owned by Orca Equity Ltd. and total approximately 58.83 hectares; however, only 30.71 hectares are developable outside of the natural heritage features such as the Oak Ridges Moraine and the Greenbelt. The third M.Z.O. is estimated to accommodate a range of 1,029 to 1,530 housing units. On November 15, 2021, the Minister issued the M.Z.O. and the lands are currently in the planning approvals process.



Figure 23
Town of Whitchurch-Stouffville
Minister's Zoning Order (M.Z.O.) Lands



Legend


-  M.Z.O.
-  Municipal Boundary





Figure 24
Town of Whitchurch-Stouffville
Minister's Zoning Order (M.Z.O.) Housing Supply Potential

| M.Z.O. Reference | Low Density ^[1] | Medium Density ^[2] | High Density ^[3] | Total |
|-----------------------------|----------------------------|-------------------------------|-----------------------------|--------------|
| M.Z.O. 1 ^[4] | - | 101 | 550 | 651 |
| M.Z.O. 2 ^{[4],[5]} | 195 | 684 | 575 | 1,453 |
| M.Z.O. 3 ^{[4],[5]} | 290 | 490 | 500 | 1,280 |
| Total | 485 | 1,275 | 1,625 | 3,385 |

^[1] Includes singles and semi-detached.

^[2] Includes townhouses and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

^[4] Currently on whitebelt lands with the expectation that it will be designated as future residential.

^[5] Midpoint range between low and high range.

Source: Data provided by the Town of Whitchurch-Stouffville, presented by Watson & Associates Economists Ltd., May 2021.

4.1.6 Intensification Opportunities

In consultation with Town staff, intensification sites presented in the 2009 Residential Intensification Strategy – Background Analysis Report were reviewed and updated, and their minimum and maximum unit yield ranges were identified, as presented in Figure 25. The midpoint unit yields were used to summarize intensification supply opportunities in subsection 4.1.7.

Figure 25
Town of Whitchurch-Stouffville
Residential Intensification Supply Potential

| Intensification Area | Medium-Density Minimum | Medium-Density Maximum | High-Density Minimum | High-Density Maximum |
|----------------------------------|------------------------|------------------------|----------------------|----------------------|
| Main Street Intensification Area | 69 | 150 | 794 | 4,508 |
| Gateway | - | - | 335 | 2,297 |
| Stouffville GO | 74 | 74 | 1,116 | 1,116 |
| Total | 142 | 224 | 2,245 | 7,921 |

Source: Data provided by the Town of Whitchurch-Stouffville, presented by Watson & Associates Economists Ltd., May 2021.

The overall unit yields for Stouffville GO range from 74 to 1,116 units.



4.1.7 Total Housing Supply Potential

Figure 26 on the following page summarizes Whitchurch-Stouffville's potential to accommodate new housing development (summarized in housing units) by urban and rural area. Figure 26 illustrates the potential housing supply within the urban area by housing density and status, respectively.

- Stouffville's housing supply potential totals approximately 21,592 units, of which 18,210 (84%) are located within the settlement areas and 3,385 units (16%) are situated in the existing white belt and rural area;
- The Community of Stouffville makes up most of the Town's overall housing supply potential accounting for 83%, while the other settlement areas and hamlets account for 4% of the urban supply; and
- Of the total housing supply including proposed M.Z.O.s, 20% are low-density, 22% medium-density and 58% are high-density units.



Figure 26
Town of Whitchurch-Stouffville
Total Housing Supply Potential

| Settlement/Policy Area | Low-Density Housing ^[1] | Medium-Density Housing ^[2] | High-Density Housing ^[3] | Total | Share |
|---|------------------------------------|---------------------------------------|-------------------------------------|---------------|----------|
| Stouffville Urban Settlement Area – Within Built Boundary | - | - | - | - | - |
| Development Approvals Process | - | 41 | 1,178 | 1,219 | 6% |
| Intensification Potential ^[4] | - | 183 | 5,083 | 5,266 | 25% |
| Total Within Built Boundary | - | 224 | 6,261 | 6,485 | 30% |
| Stouffville Urban Settlement Area – Outside Built Boundary | - | - | - | - | - |
| Development Approvals Process | 1,774 | 782 | 917 | 3,473 | 16% |
| Other Designated Lands | 1,402 | 555 | 269 | 2,226 | 10% |
| Employment Conversion Sites ^[5] | - | 1,195 | 1,680 | 2,875 | 13% |
| Old Elm GO | - | 530 | 1,870 | 2,400 | 11% |
| Total Outside Built Boundary | 3,176 | 3,062 | 4,736 | 10,974 | 51% |
| Other Settlement Areas | - | - | - | - | - |
| Development Approvals Process | 487 | 132 | - | 619 | 3% |
| Other Designated Lands | 131 | - | - | 131 | 1% |
| Total Other Settlement Areas | 618 | 132 | - | 750 | 3% |
| New Growth Area | - | - | - | - | - |
| M.Z.O. 1 ^[6] | - | 101 | 550 | 651 | 3% |
| M.Z.O. 2 | 195 | 684 | 575 | 1,453 | - |
| M.Z.O. 3 | 290 | 490 | 500 | 1,280 | - |
| Total Potential New Growth Area | 485 | 1,275 | 1,625 | 3,384 | 16% |
| Whitchurch-Stouffville Total | 4,279 | 4,693 | 12,621 | 21,592 | - |
| Whitchurch-Stouffville Share | 20% | 22% | 58% | 100% | - |

[1] Includes singles and semi-detached.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

[4] Midpoint range between low and high range.

[5] Includes two employment conversions sites.

[6] Currently on whitebelt lands with the expectation that it will be designated as future residential.

Source: Data provided by the Town of Whitchurch-Stouffville, May 2021 with updates to Old Elm GO Area housing potential as of April 2022, presented by Watson & Associates Economists Ltd.



4.2 Employment Lands Supply

The Town has four main Employment Areas located in the Community of Stouffville, Cardico, Gormley and Vandorf. Only the Stouffville Employment Area, located in the Stouffville urban area, is municipally serviced.

Whitchurch-Stouffville's vacant employment land inventory was developed using geographic information systems (G.I.S.) based mapping software with various mapping overlays, including O.P. designations and orthophotos. Vacant designated employment lands were identified as those that fall under the O.P. designation of "Industrial," "Prestige Industrial," "Business Park Area" and are located within the urban area, in addition to the existing Cardico rural employment area, illustrating the geographic location of the Town's vacant designated employment lands. Figure 28 summarizes the total gross and net vacant employment land supply for Whitchurch-Stouffville (as of early 2021) by Employment Area. As illustrated, the Town has a total of 296 gross hectares (731 gross acres) of vacant employment land, most of which is found in the Vandorf Settlement Area. In determining the net vacant land inventory, downward adjustments were made to reflect environmentally sensitive lands/environmental features and internal infrastructure (i.e., roads, stormwater ponds, easements, etc.), where applicable.

The environmental take-outs were based on the land use plans for each Secondary Plan, for example in the Community of Stouffville, the Greenland Area as delineated in Schedule F of the Town's Secondary Plan. Larger vacant unsubdivided parcels (i.e., 4 hectares or greater) were subject to an additional downward adjustment to reflect internal infrastructure with a net to gross adjustment of 75%. In accordance with the adjustments for internal infrastructure and environmentally sensitive/constrained lands, the Town's net developable employment land supply is estimated at 193 net hectares (477 net acres).^[37] This comprises 61 net hectares (151 net acres) of fully serviced vacant developable land in the Community of Stouffville and 132 net hectares (326 net acres) of privately serviced "dry" vacant developable land located in Gormley, Cardico and Vandorf.

^[37] Includes the two employment designated sites (with a combined area of 38 gross hectares) that have been endorsed by the Town to be converted to non – employment uses. Details of employment conversion sites have been discussed in subsection 4.2.1.



Figure 27
Town of Whitchurch-Stouffville
Vacant Designated Employment Land Supply

| Settlement Area | Total Gross Land Area | Environmental Constraints Adjustment ^[1] | Area Adjusted for Environmental Constraints | Adjustment for Roads and Other Internal Infrastructure ^[2] | Net Developable Employment Land Supply | Net Developable Employment Land with Vacancy Adjustment |
|---------------------------------------|-----------------------|---|---|---|--|---|
| | (A) | (B) | (C = B - A) | (D) | (E = C - D) | (F = E*0.85) |
| Stouffville | 77 | 1 | 76 | 15 | 61 | 52 |
| Cardico | 1 | 0 | 1 | 0 | 1 | 1 |
| Gormley | 69 | 22 | 47 | 13 | 34 | 29 |
| Vandorf | 149 | 16 | 133 | 36 | 97 | 82 |
| Town of Whitchurch-Stouffville | 296 | 39 | 257 | 64 | 193 | 164 |

^[1] Reflects environmental take-out of vacant employment lands encroached by environmentally sensitive lands identified as Natural Resources/Environment in the Official Plan Layers provided by the Town of Whitchurch-Stouffville.

^[2] Downward adjustment of 25% of the gross area (after environmental take-outs) has been applied to account for internal infrastructure on parcels greater than 4 hectares.

^[3] Assumes a land vacancy adjustment of 15%.

Note: Based on gross land area with take-outs.

Source: Watson & Associates Economists Ltd., 2021.



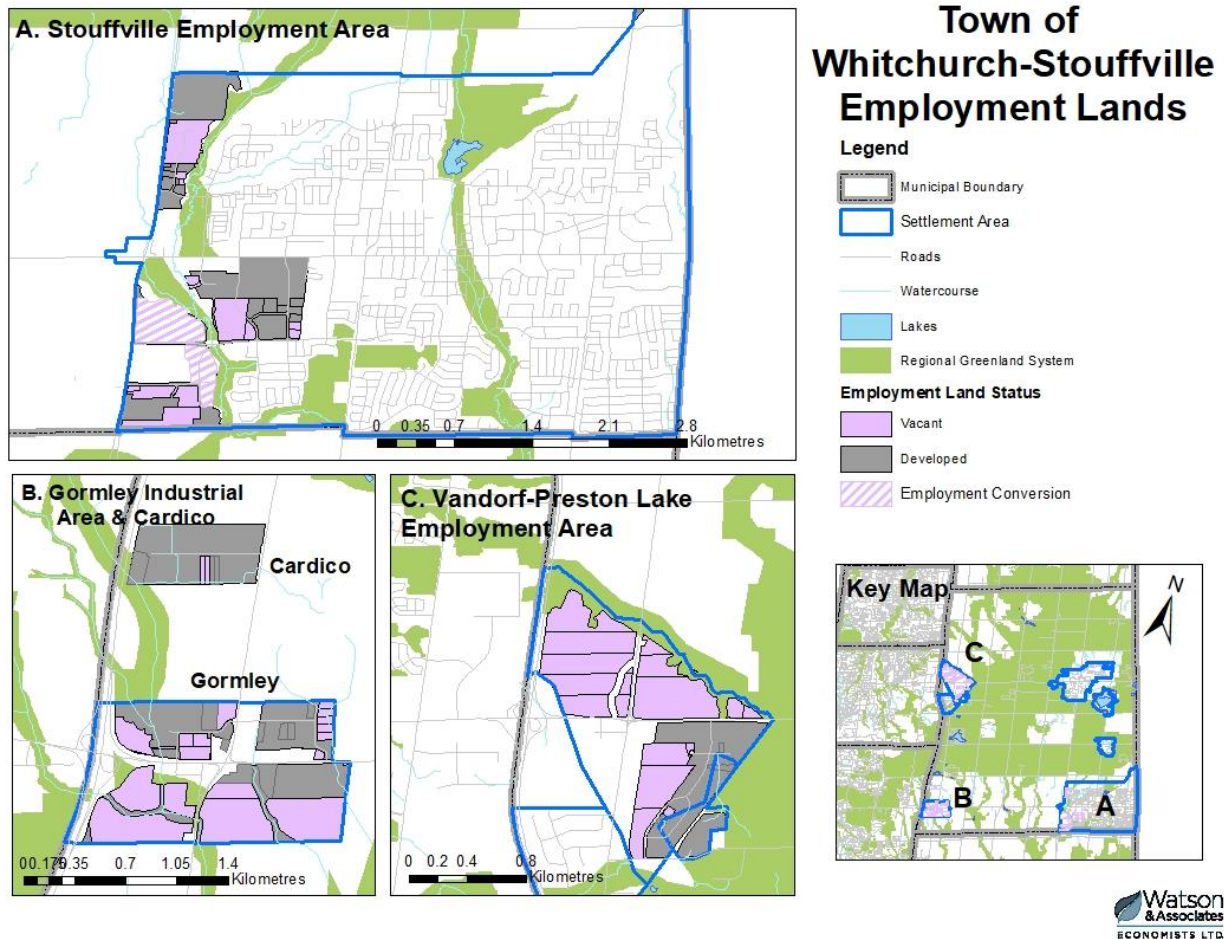
Long-term land vacancy (i.e., vacant industrial parcels) is a common characteristic which is experienced in mature industrial parks throughout Ontario, including the Town of Whitchurch-Stouffville. Typically, as employment lands are brought to market, the more marketable and developable sites absorb first. Often, the remaining less-marketable sites are fragmented throughout the Employment Area, which limits their potential for larger scale development. Invariably, many of these sites remain vacant over the longer term, due to their limited market choice for end users. While these observations largely apply to more mature Employment Areas, over time it is foreseeable that the Town's newer Employment Areas will also begin to exhibit these characteristics.

Accordingly, additional reductions to the net developable vacant employment land supply have been made to account for long-term land vacancy. This adjustment accounts for sites that are unlikely to develop over the long term due to odd/small lot sizes and poor configuration, unfavourable site conditions (e.g., low-lying areas prone to flooding), underutilized employment sites and site inactivity/land banking, which may tie up potentially vacant and developable lands.

For the purposes of this analysis, an estimate of approximately 15% long-term land vacancy has been used (i.e., total net vacant land area X 15%). Adjusted for land vacancy, the Town's net developable vacant employment land supply is approximately 164 net hectares (405 net acres).



Figure 28
Town of Whitchurch-Stouffville
Vacant Designated Employment Land Supply



4.2.1 Employment Conversions

As detailed in subsection 4.1.2.3, as part of the P.G.M.S., the Town of Whitchurch-Stouffville received two submissions for the conversion of sites within Employment Areas to permit non-employment uses. Both sites are located in the Stouffville settlement area boundary, covering a total land area of gross 38 hectares (gross 94



acres). These conversion requests were endorsed by the Town^[38] and approved by the Region through the M.C.R. process and reflected in the 2022 approved R.O.P.

The conversion of these two sites would have an impact on the Town's vacant designated employment land supply presented above. Reflecting the two recommended conversions, the Town's overall net developable employment land supply would be reduced from 193 net hectares (477 net acres) to 164 net hectares (405 net acres). The conversions represent a notable downward adjustment in the Town's fully serviced employment lands supply within Stouffville, with the inventory reduced from 61 net hectares (151 net acres) to 32 net hectares (79 net acres).

4.3 Urban Expansion Areas

As part of its M.C.R. process, in March 2021 York Region identified the Town's remaining whitebelt lands to be potentially redesignated as Urban Settlement Areas in order to accommodate future growth to 2051, as illustrated in Figure 29. This reflects about 392 hectares (969 acres) intended for Community Area uses.^[39] Furthermore, as discussed in section 4.1.2.4, three M.Z.O.s currently identified in the Town are located on whitebelt lands. These cover a land area of 96 gross hectares (237 gross acres).

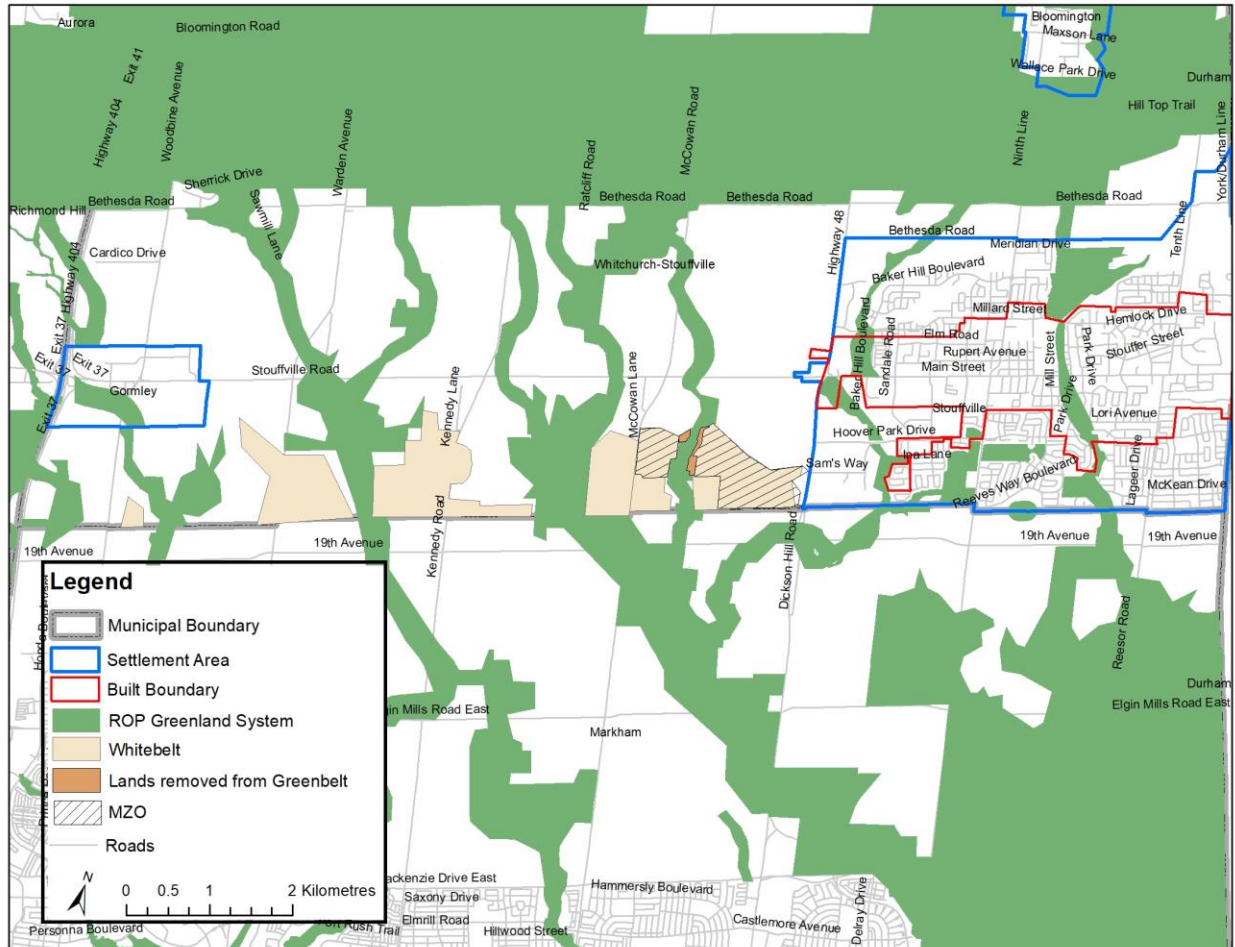
On March 23, 2022, Town Council endorsed Report No. DS-010-22 with comments on the Draft York R.O.P. and directed staff to forward this report to York Region and the Minister of Municipal Affairs and Housing. Through the Report, the Town requested that the urban settlement expansion area should be expanded to include all the remaining whitebelt lands within the area bound by Highway 48, Stouffville Road, McCowan Road, and the Town's municipal boundary. In addition to the approved M.Z.O.s, this would further increase the Town's developable urban area by approximately 33.5 gross hectares (83 gross acres). The Province, based on its decision issued on November 4, 2022, has approved the O.P. with the provision that all of the Town's remaining whitebelt lands identified by York Region be utilized for urban expansion.

^[38] 12049 Highway 48 (Zhawd Corporation) recommended through Staff Report: DS-012-19, March 19, 2019; and SmartCentres Lands (Southeast quadrant of Hoover Park Drive and Highway 48) recommended through Staff Report: DS-022-19, May 7, 2019.

^[39] This area includes all of the proposed lands included in for community area expansion lands according to data provided by York Region as of May 2023.



Figure 29
Town of Whitchurch-Stouffville
Urban Expansion Areas





5. Whitchurch-Stouffville Growth Outlook and Forecast

As part of the P.G.M.S., a long-term population, housing, and employment growth forecast to the year 2051 is presented. This reflects York Region's 2022 approved R.O.P. and updates to the forecast provided by the Region in May 2023. The growth forecast is intended to guide decision-making and policy development specifically related to planning and growth management, urban land needs, and long-range master planning for municipal services.

5.1 Regional and Local Growth Drivers

5.1.1 *What Drives Population Growth?*

A broad range of considerations related to demographics, economics, and socio-economics are anticipated to impact future population and employment growth trends throughout Whitchurch-Stouffville over the 2021 to 2051 planning horizon. These factors will not only affect the rate and magnitude of growth but will also influence the form, density, and location of residential and non-residential development.

As a starting point, it is important to recognize that future population and employment growth within Whitchurch-Stouffville is strongly correlated with the growth outlook and competitiveness of the economy within the Town and the surrounding region.

Growth in the regional export-based economy generates wealth and economic opportunities which in turn stimulates community-based or population-related employment sectors, including retail trade, accommodation and food, and other service sectors. As such, economic growth represents a key driver of net migration and ultimately the growth of the working-age population and their dependants (i.e., children, spouses not in the labour force, and others). In contrast, the long-term population growth of the 65+ population will be largely driven by the aging of the existing population and, to a lesser extent, the attractiveness and affordability of Whitchurch-Stouffville to new seniors.

Several key local drivers have been identified which are anticipated to influence future population, housing and employment growth within Whitchurch-Stouffville over the next 30 years. These drivers are identified below.



Market Choice in Local Residential Supply Opportunities

As presented in Chapter 4, Whitchurch-Stouffville has approximately 5,000 units in the development approvals process and three recent M.Z.O.s with a total of approximately 3,400 units. With diminishing greenfield supply in more mature urban municipalities in South York Region, Whitchurch-Stouffville offers significant potential for housing development over the short, medium and longer term.

Regional and Local Economic Opportunities

With a robust economy and diverse mix of export-based employment sectors, the G.G.H. is highly attractive on an international level to new businesses and investors. In addition, the G.G.H. has a strong appeal given the area's regional infrastructure (i.e., Toronto Pearson International Airport, other regional airports, provincial highways, inter-modal facilities), access to labour force, post-secondary institutions, and proximity to the U.S. border. In turn, this continues to support steady population, employment, and housing growth within this region, largely driven by international net migration.

Regional employment growth opportunities represent the primary driver of labour force growth, net migration, and ultimately long-term population growth within the Town of Whitchurch-Stouffville. Location plays a key role in the geographic distribution of the dominant industry clusters visible across the G.G.H. today. Whitchurch-Stouffville benefits from its central location within the G.T.H.A. and its proximity to major highway connections including Highway 404 and Highway 48.

Locally, continued economic diversification provides opportunities for a broader range of non-residential development potential and employment prospects for Whitchurch-Stouffville. Recent development trends, and employment and business growth over the past decade, as illustrated earlier, show a shift to more “knowledge-based” sectors in both the commercial and institutional sectors.

Potential expanded opportunities for accommodating employment uses along the Highway 404 corridor in the future may expand market opportunities for a range of industrial and commercial uses in Whitchurch-Stouffville.



Regional Population Growth Housing Demand Across a Range of Housing Typologies

As illustrated in Chapter 3, the G.G.H. is expected to experience strong population and housing growth over the next three decades. Housing demand is expected across a broad range of housing typologies, tenure, and affordability.

Whitchurch-Stouffville is anticipated to accommodate a growing share of young adults and new families (ages 25 to 44) seeking competitively priced home ownership and rental opportunities. Future housing demand generated by the 65+ age group is anticipated to remain strong over the next decade driven by the aging of the baby boom population. This will generate an increasing need to accommodate a growing number of seniors in housing forms that offer a variety of services ranging from independent living to assisted living and full-time care. On the other hand, a growing wave of new residents will be seeking housing opportunities that are geared towards active lifestyles and recreation.

Quality of Life

Quality of life is a key factor influencing the residential location decisions of individuals and their families. It is also a factor considered by companies in relocation decisions. Typically, quality of life encompasses several sub-factors such as employment opportunities, cost of living, housing affordability, crime levels, quality of schools, transportation, recreational opportunities, climate, arts and culture, entertainment, amenities and population diversity. The importance of such factors, however, will vary considerably depending on life stage and individual preferences.

Whitchurch-Stouffville has a reputation for being a vibrant and growing municipality, with access to a wide range of recreational opportunities within the Town and surrounding countryside.

5.2 Growth Forecast to 2051

As previously discussed, the Region has provided a population forecast to 2051, and allocated population to its lower-tier municipalities. This section provides a summary of the long-term population, housing and employment growth forecast for the Town of Whitchurch-Stouffville to the year 2051 in accordance with section 2 of the 2022 R.O.P.



(with updates to the forecast made in May 2023). A summary of the population, housing and employment growth forecast has been provided in Appendix A. This serves as the reference forecast and land needs assessment (presented in Chapter 6) in the P.G.M.S.

5.2.1 Population and Housing Forecast

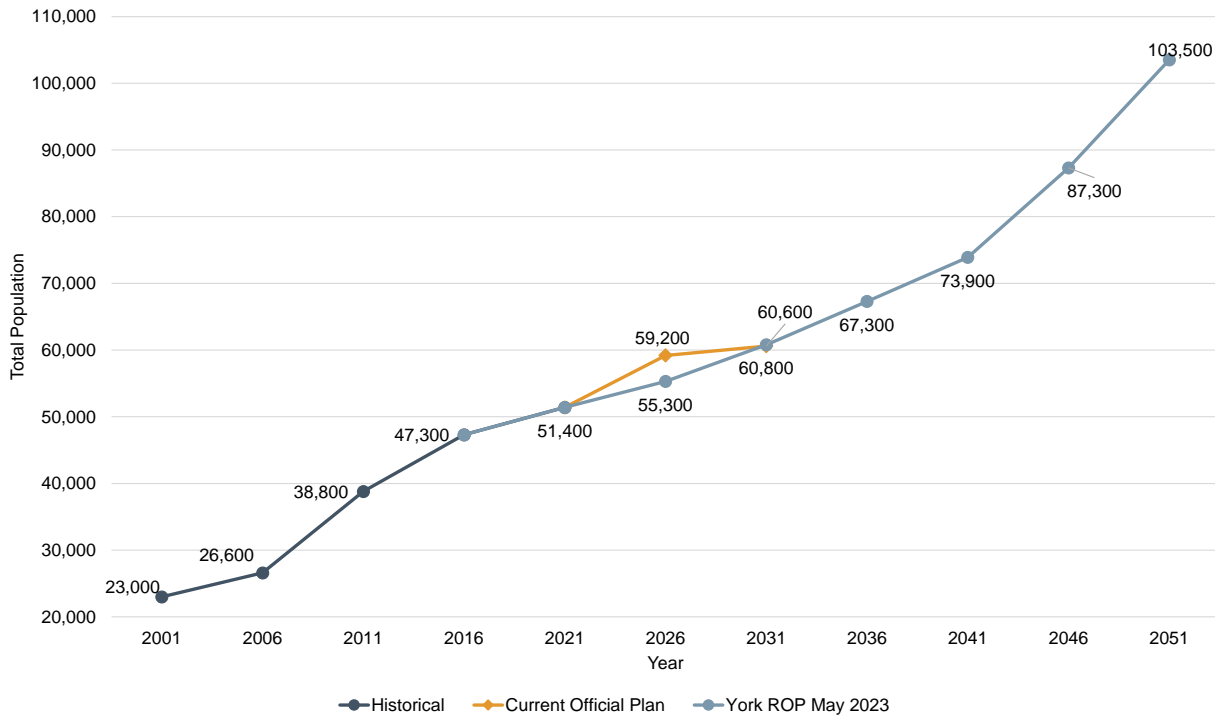
Figure 30 summarizes the long-term population for the Town over the 2021 to 2051 forecast period in five-year increments. In addition, the Town's current O.P. population forecast to the year 2031 is provided for comparative purposes.

As presented in Figure 30, Whitchurch-Stouffville's population base is forecast to steadily increase between 2021 and 2051, consistent with broader York Region growth trends. By 2051, the Town's population base is forecast to grow to approximately 103,500. This represents an increase of approximately 52,100 persons between 2021 and 2051, or an average annual population growth rate of 2.4% during this time period, as illustrated in Figure 31. Comparatively, the population of York Region as a whole is forecast to increase at a rate of 1.8% over the 2021 to 2051 time period, as shown in Figure 32. In accordance with the draft forecast, Whitchurch-Stouffville's share of York Region's population is expected to increase from 4.2% to 5.0% over the forecast period, as shown in Figure 33.

Based on the Region's forecast, over the next decade (i.e., 2021 to 2031) Whitchurch-Stouffville is forecast to grow at a lower rate than over the past decade, reaching 60,800 by 2031, marginally higher than the current Town O.P. 2031 target of 60,600.



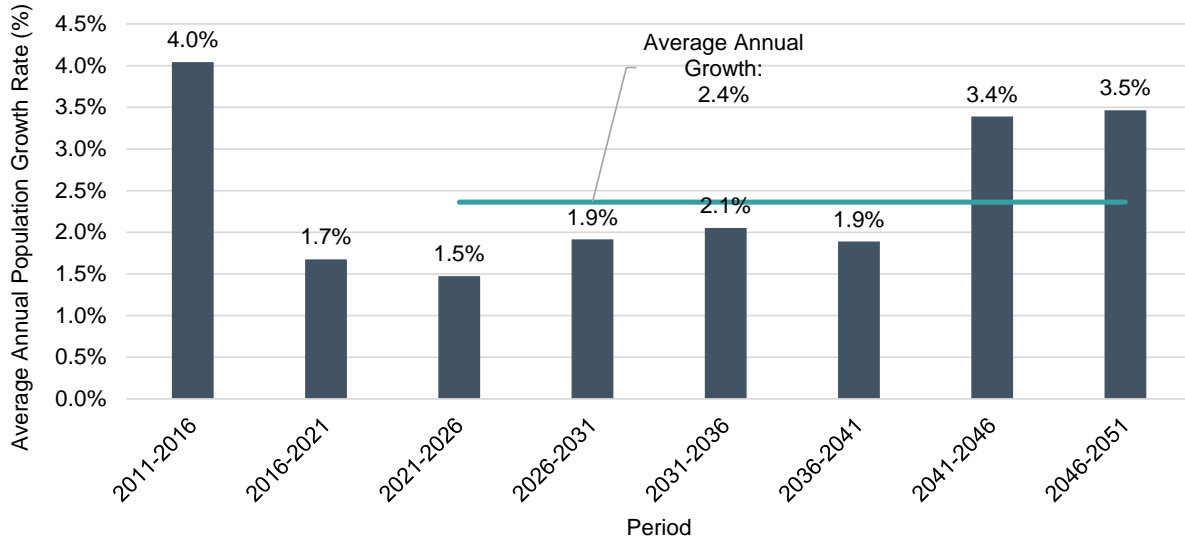
Figure 30
Town of Whitchurch-Stouffville
Population Forecast from 2021 to 2051 in Five-year Increments



Source: Derived from Statistics Canada Census Data from 2001 to 2021, York Region's 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023), and Town of Whitchurch-Stouffville's Official Plan 2020, by Watson & Associates Economists Ltd., 2023.

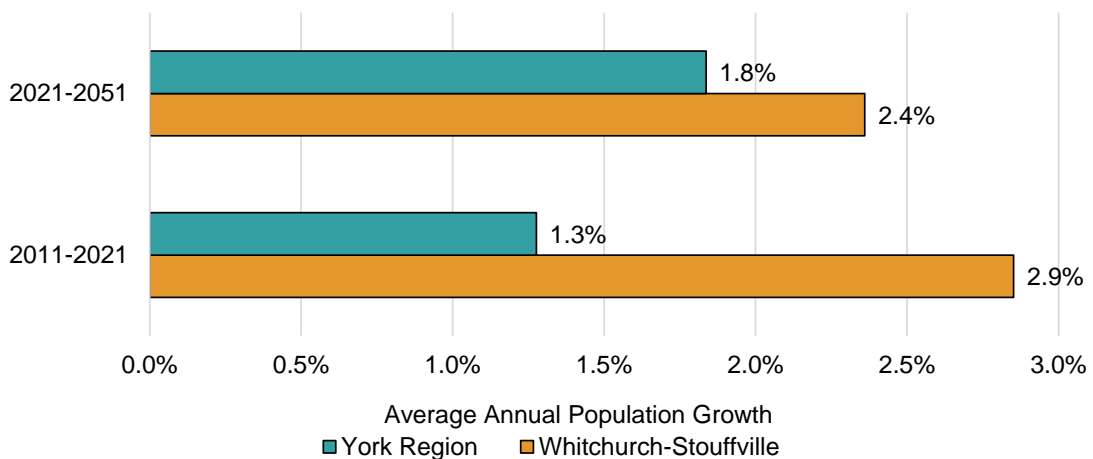


Figure 31
Town of Whitchurch-Stouffville
Average Annual Population Growth Rates, Historical and Forecast, 2011 to 2051



Source: Derived from Statistics Canada Census Data from 2011 to 2021, and York Region’s 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023) by Watson & Associates Economists Ltd., 2023.

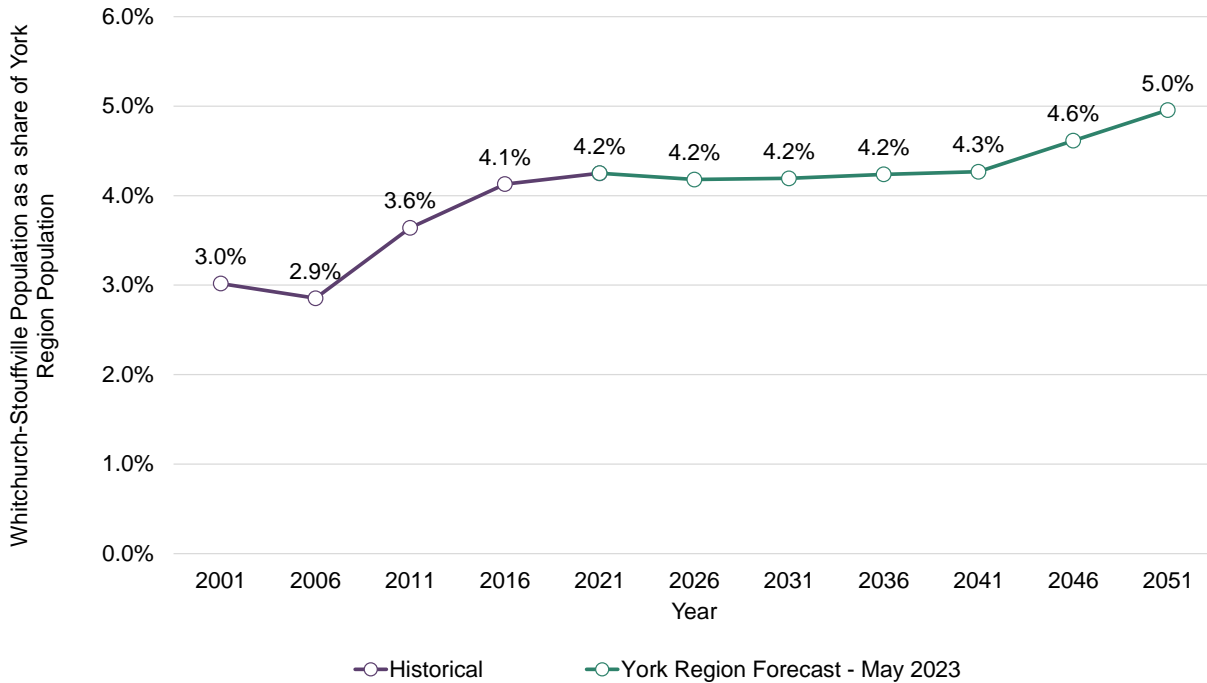
Figure 32
Town of Whitchurch-Stouffville and York Region
Historical and Forecast Population Growth Rates, 2011 to 2051



Source: Derived from Statistics Canada Census Data from 2011 to 2021, and York Region’s 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023) for 2021 to 2051, by Watson & Associates Economists Ltd., 2023.



Figure 33
Town of Whitchurch-Stouffville
Population as a Share of York Region Population



Source: Derived from Statistics Canada Census Data from 2011 to 2021, and York Region's 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023) for 2021 to 2051, by Watson & Associates Economists Ltd., 2023.

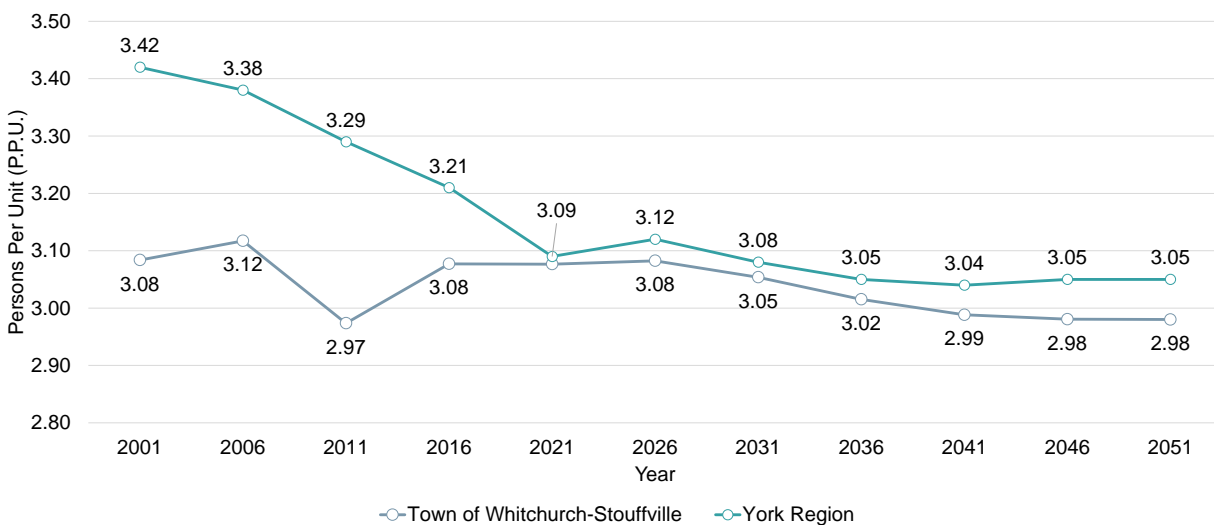
Figure 34 summarizes forecast trends in average housing occupancy for the Town of Whitchurch-Stouffville and York Region from 2021 to 2051. For additional context, historical housing occupancy trends from 2001 to 2016 are provided. Trends in household occupancy, or average persons per unit (P.P.U.), combined with trends in population age structure are particularly important statistics for land use planners, as these trends have broad implications for the amount and type of future housing needs associated with population growth as well as demands for public infrastructure, municipal services and schools. A more detailed discussion regarding the Town's future housing needs is provided in Chapter 6. Key observations with respect to forecast P.P.U. trends for York Region and Whitchurch-Stouffville are as follows:

- Average P.P.U.s within the Town have historically been lower and are anticipated to remain lower compared to York Region; however, this gap is anticipated to marginally narrow over the next 30 years.



- The average P.P.U. for the Town remained relatively steady at 3.08 over the 2001 to 2021 period.
- Over the same time period, York Region’s P.P.U. declined from 3.42 in 2001 to 3.09 in 2021.
- Over the next 30 years, average P.P.U. levels are anticipated to continue to stabilize across York Region. In comparison, in Whitchurch-Stouffville P.P.U.s are forecast to decline to 2.85 by 2051, largely associated with the aging of the population base. As discussed in section 3.2, the Town and Region may experience a change in these P.P.U. trends due to an increase in multi-generational homes.

Figure 34
Town of Whitchurch-Stouffville
Persons Per Unit (P.P.U.) Forecast from 2021 to 2051



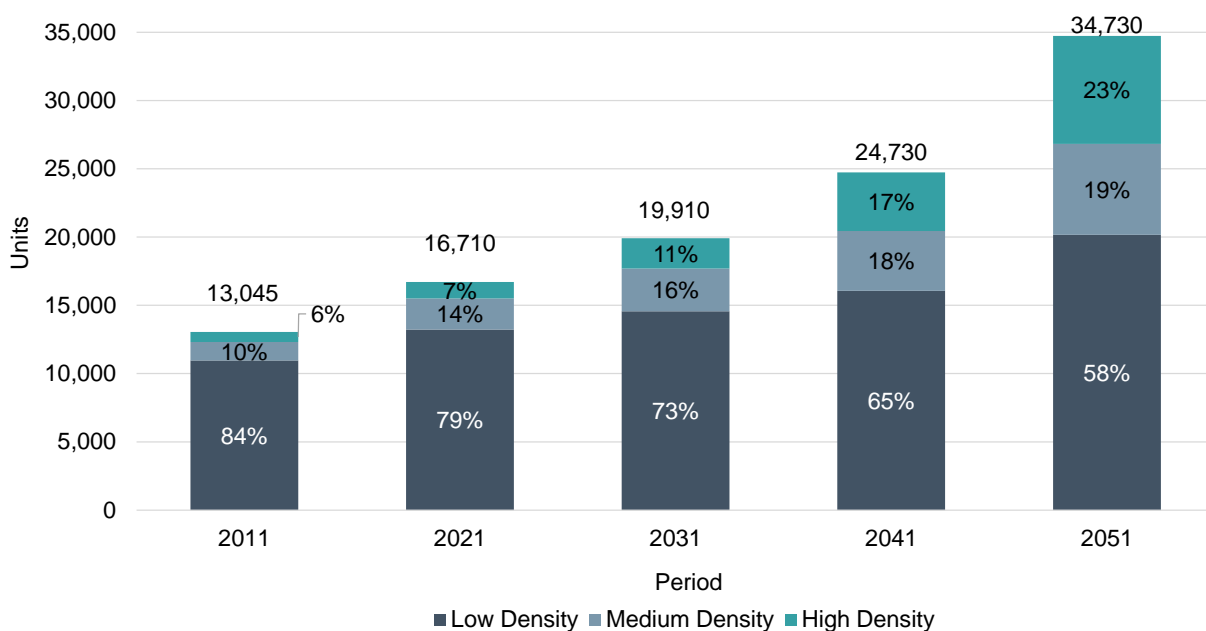
Source: Derived from Statistics Canada Census Data from 2001 to 2021, and York Region’s 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023) by Watson & Associates Economists Ltd., 2023.

As shown in Figure 35, Whitchurch-Stouffville’s 2021 housing base totals 16,710 units and is forecast to increase to 34,730 units by 2051, in accordance with the Region’s forecast. As of 2021, the Town’s housing stock largely comprises low-density units which account for 79% of total units, with medium- and high-density units accounting for 14% and 7% of the total, respectively.



The local housing market is gradually becoming more diverse by structure type with a greater share of medium- and higher-density units. Over the forecast period, the Town's housing base is expected to continue to shift gradually to an increasing share of higher-density units. The share of low-density housing units is forecast to decline from 79% in 2021 to 58% in 2051. In comparison, medium-density and high-density housing forms are forecast to increase over the next three decades. In 2021, medium-density housing accounted for 14% of the total housing stock in the Town; this housing form is forecast to increase to 19% by 2051. High-density housing accounted for 7% of Whitchurch-Stouffville's housing base in 2021, and the share is expected to increase by three-fold, rising to 23% by 2051.

Figure 35
Town of Whitchurch-Stouffville
Forecast Housing Base by Density Type, 2021 to 2051



Note: Numbers may not add due to rounding.

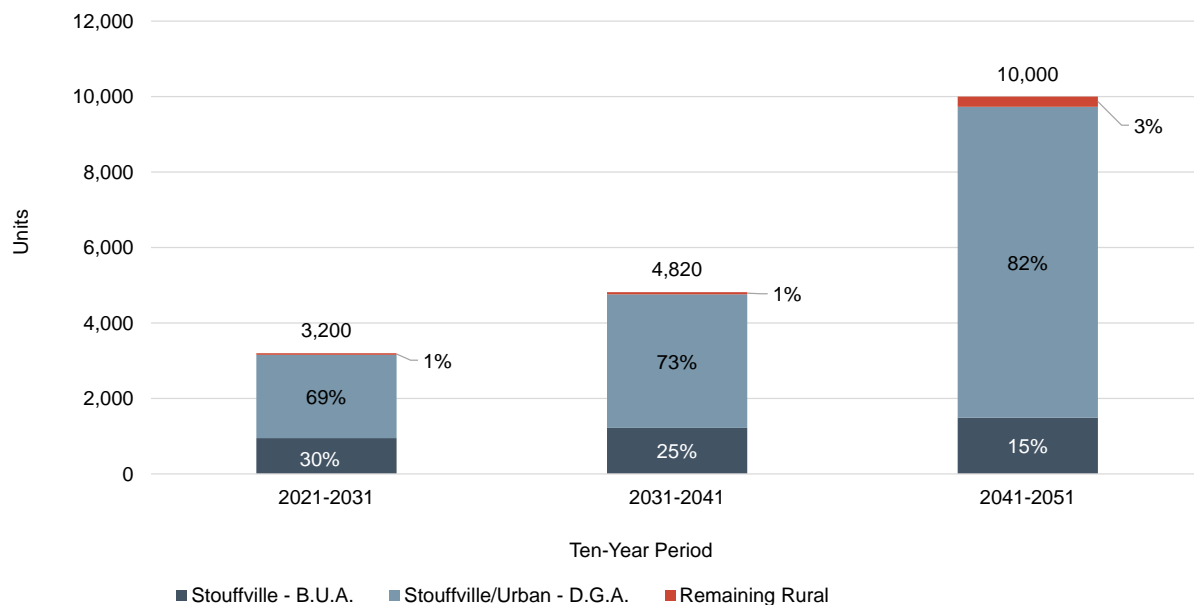
Source: Derived from Statistics Canada Census Data from 2011 to 2021, and York Region's 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023) for 2021 to 2051, by Watson & Associates Economists Ltd., 2023.

Figure 36 summarizes the housing forecast broken down by planning policy area. It should be noted that:



- The share of forecast housing in the B.U.A. decreases from 30% to 15% over the planning horizon;
- The existing/future D.G.A. share has increased from 69% from 2021 - 2031 to 82% for the 2041 to 2051 time period; and
- The share of housing growth in other settlement areas is expected to increase slightly from 1% to 3% over the forecast period.

Figure 36
Town of Whitchurch-Stouffville
Forecast Housing Growth by Planning Policy Area, 2021 to 2051



Note: Numbers may not add due to rounding.

Source: Derived from Statistics Canada Census Data 2021, and York Region's 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023) by Watson & Associates Economists Ltd., 2023

Figure 37 illustrates population growth by geographic area based on the anticipated housing growth over the 2021 to 2051 period. As shown, Town-wide population growth of 98% (50,800) is anticipated to be accommodated within the Community of Stouffville/Urban Area. This includes a population of 11,100 within the B.U.A. and 39,700 in the D.G.A. The Town's other settlement areas (i.e., Ballantrae-Musselman Lake,^[40]

^[40] It is noted that future growth within Ballantrae-Musselman Lake is subject to the availability and allocation of water services.



Vandorf, Bloomington and Gormley) are expected to accommodate a population growth of 910, with the remaining rural area accommodating a population increase of 400, together representing about 2% of the total Town-wide population growth.

Figure 37
Town of Whitchurch-Stouffville
Forecast Population and Housing Growth by Planning Policy Area, 2021 to 2051

| Period | Population | Housing Units | | | |
|---------------------------------|------------|-------------------------|-----------------------------------|---------------------------|------------------|
| | | Singles & Semi-Detached | Multiple Dwellings ^[2] | Apartments ^[3] | Total Households |
| Stouffville – B.U.A. | | | | | |
| 2021-2031 | 1,350 | 15 | 314 | 580 | 909 |
| 2021-2041 | 5,360 | 30 | 470 | 1,580 | 2,080 |
| 2021-2051 | 11,080 | 55 | 740 | 2,730 | 3,525 |
| Stouffville/Urban D.G.A. | | | | | |
| 2021-2031 | 7,810 | 1,280 | 500 | 430 | 2,210 |
| 2021-2041 | 16,490 | 2,690 | 1,570 | 1,490 | 5,750 |
| 2021-2051 | 39,690 | 6,560 | 3,500 | 3,930 | 13,990 |
| Stouffville/Urban Total | | | | | |
| 2021-2031 | 9,160 | 1,295 | 814 | 1,010 | 3,119 |
| 2021-2041 | 21,850 | 2,720 | 2,040 | 3,070 | 7,830 |
| 2021-2051 | 50,770 | 6,615 | 4,240 | 6,660 | 17,515 |
| Bloomington | | | | | |
| 2021-2031 | 70 | 21 | 0 | 0 | 21 |
| 2021-2041 | 140 | 40 | 0 | 0 | 40 |
| 2021-2051 | 310 | 85 | 10 | 5 | 100 |
| Ballantrae-Musselman | | | | | |
| 2021-2031 | 110 | 5 | 36 | 0 | 41 |
| 2021-2041 | 280 | 10 | 80 | 0 | 90 |
| 2021-2051 | 410 | 15 | 120 | 10 | 145 |
| Gormley | | | | | |
| 2021-2031 | -10 | 0 | 0 | 0 | 0 |
| 2021-2041 | -10 | 0 | 0 | 0 | 0 |
| 2021-2051 | -10 | 0 | 0 | 0 | 0 |
| Vandorf | | | | | |



| Period | Population | Housing Units | | | |
|-----------------------------------|------------|-------------------------|-----------------------------------|---------------------------|------------------|
| | | Singles & Semi-Detached | Multiple Dwellings ^[2] | Apartments ^[3] | Total Households |
| 2021-2031 | 30 | 10 | 0 | 0 | 10 |
| 2021-2041 | 90 | 25 | 0 | 0 | 25 |
| 2021-2051 | 200 | 60 | 0 | 0 | 60 |
| Remaining Rural | | | | | |
| 2021-2031 | 20 | 9 | 0 | 0 | 9 |
| 2021-2041 | 130 | 35 | 0 | 0 | 35 |
| 2021-2051 | 400 | 165 | 20 | 15 | 200 |
| Whitchurch-Stouffville Town Total | | | | | |
| 2021-2031 | 9,380 | 1,340 | 850 | 1,010 | 3,200 |
| 2021-2041 | 22,480 | 2,830 | 2,120 | 3,070 | 8,020 |
| 2021-2051 | 52,080 | 6,940 | 4,390 | 6,690 | 18,020 |

^[1] Multiple dwellings include row houses and duplexes.

^[2] Apartments include stacked townhouses and apartments.

^[3] The unit potential in Ballantrae-Musselman may likely increase once O.P.A. 136 is approved, pending the availability of municipal water servicing.

Source: Watson & Associates Economists Ltd., 2023.

5.2.2 Employment Forecast

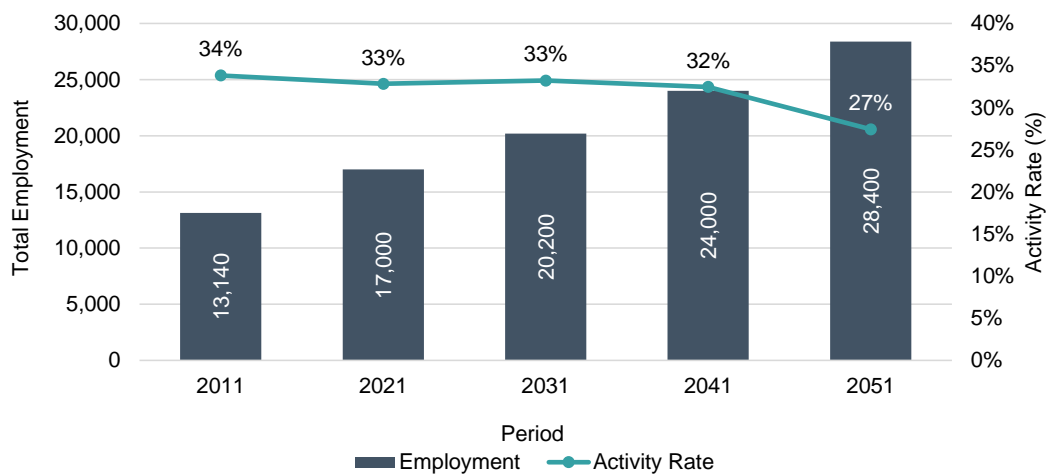
In accordance with the growth projections prepared by York Region, Whitchurch-Stouffville's employment base is forecast to reach 28,400 jobs by 2051, as illustrated in Figure 38. This represents an increase of approximately 11,400 jobs between 2021 and 2051, representing an average annual growth rate of 1.7% during this period, based on the current (2021) employment estimate for the Town of 17,000 jobs.

Figure 38 summarizes the long-term employment forecast for the Town by total employment and employment activity rate (ratio of jobs per population) in comparison to recent historical trends. As previously mentioned, Whitchurch-Stouffville's employment activity rate has decreased slightly from 34% in 2011 to 33% by 2021. Over the forecast horizon, due to the population growth being stronger than the employment growth expected over the planning period, the employment activity rate for the Town is forecast to decrease to 27% in 2051.



Figure 39 summarizes the historical and forecast average annual employment growth rates for the Town in comparison to York Region. As shown, over the 2011 to 2021 period, York Region and Whitchurch-Stouffville experienced relatively strong employment growth. Historically, the Town's employment base has grown at an average annual rate of 2.6%, slightly lower than York Region which has grown at an average annual rate of 2.8%. Over the forecast period (i.e., 2021 to 2051), the employment growth rates for York Region and Whitchurch-Stouffville are expected to moderate from the historical average during the past decade. Over the next three decades, the Town is expected to outpace York Region's employment growth rate. The Region is expected to grow at an average annual rate of 1.4%, which is approximately 11,530 jobs per year, while Whitchurch-Stouffville is expected to grow at an average annual rate of 1.7%, which is approximately 380 jobs per year.

Figure 38
Town of Whitchurch-Stouffville
Historical and Forecast Employment and Activity Rate, 2011 to 2051

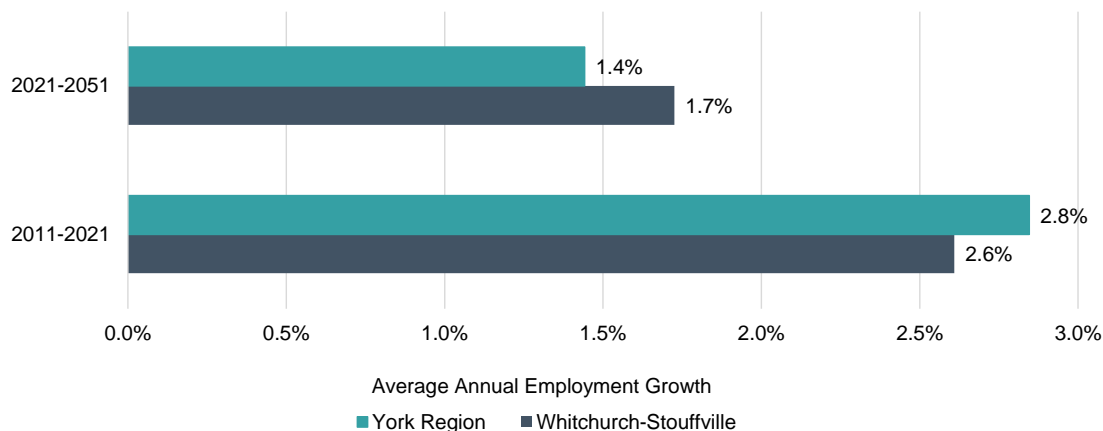


Note: Activity rate is calculated based on population that includes a net Census undercount, estimated at approximately 3.1%.

Source: Derived from Statistics Canada Census Data from 2011 to 2021, and York Region's 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023) for 2021 to 2051, by Watson & Associates Economists Ltd., 2023.



Figure 39
Town of Whitchurch-Stouffville and York Region
Historical, and Forecast Employment Growth Rates, 2011 to 2051



Note: Figures include work at home and N.F.P.O.W.

Source: 2011 employment figure derived from Statistics Canada Place of Work data, 2021 to 2051, employment figures from York Region’s 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023) by Watson & Associates Economists Ltd., 2023.

5.2.3 Employment Forecast by Employment Category

Figure 40 provides the employment growth forecast in 10-year increments over the 2021 to 2051 period, based on York Region’s growth projection allocations for the Town of Whitchurch-Stouffville. Population-Related Employment (P.R.E.) growth is forecast to account for most of the Town’s employment growth (55%) from 2021 to 2051, followed by Employment Lands Employment (E.L.E.) (34%) and Major Office Employment (M.O.E.) (8%), while Rural Employment growth is expected to be limited (3%).

The following provides a summary of employment growth by land use category.

Population-Related Employment

P.R.E. includes employment in institutional and commercial sectors such as retail and services that generally serve the local population base. P.R.E. is largely accommodated in downtown areas, commercial corridors and mixed-use nodes, neighbourhood plazas, and standalone institutional and retail buildings. Typically, as the population grows, the demand for this employment increases to serve the needs of the Town. P.R.E. also captures work from home employment.



Whitchurch-Stouffville's population is anticipated to increase by approximately 52,100 people between 2021 and 2051.^[41] Forecast population growth in Whitchurch-Stouffville is anticipated to drive demand for future P.R.E. growth in the Town. This includes employment growth in retail, personal services, accommodation and food, health and social services, and educational service sectors. P.R.E. growth over the 2021 to 2051 period is expected to total 6,300 jobs, representing 55% of overall employment growth in Whitchurch-Stouffville.

Major Office Employment

Major Office Employment (M.O.E.) comprises employment accommodated in free-standing office buildings greater than 1,900 sq.m (20,000 sq.ft.). Major office functions are often concentrated in downtown areas or prestige Employment Areas.

M.O.E. in Whitchurch-Stouffville is forecast to increase by approximately 900 jobs over the 2021 to 2051 period, representing 8% of the Town's total employment growth over the forecast period. M.O.E. growth in Whitchurch-Stouffville will be driven largely by growth in key knowledge-based top-traded industry clusters, including professional and scientific and technical services, real estate, and finance and insurance. This results in the forecast M.O.E. share of Town-wide employment increasing from 4% in 2021 to 5.0% in 2051.

Employment Lands Employment

Employment Lands Employment (E.L.E.) represents jobs accommodated in industrial-type buildings. This includes largely industrial-sector employment comprising manufacturing, wholesale trade, transportation and warehousing, construction and utilities as well as a limited amount of employment associated with office commercial and employment-supportive uses.

Over the forecast period, E.L.E. is expected to account for 34% of total employment growth (3,900 jobs) over the 2021 to 2051 period and reflects growth largely in industrial-based sectors. The growth in E.L.E. is expected to be driven largely by a number of top-traded industry clusters including construction, transportation and

^[41] York Region's 2022 approved Official Plan. 2021 Population includes net Census undercount estimated at approximately 3.1%.



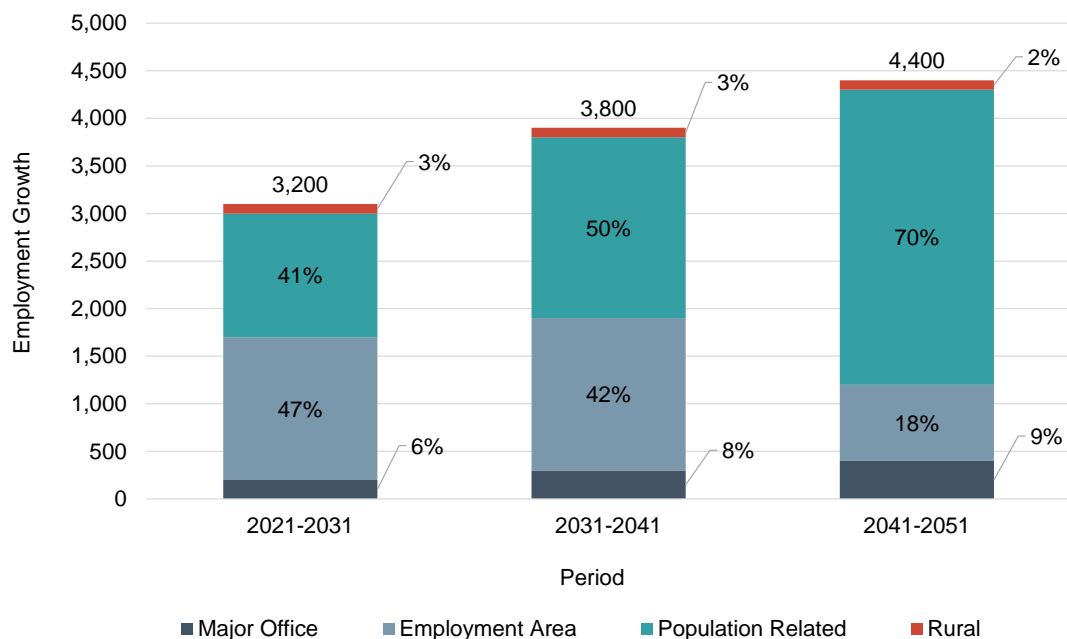
warehousing, wholesale trade and manufacturing. The E.L.E. share of Whitchurch-Stouffville’s employment is forecast to increase from 22% in 2021 to 27% in 2051.

Rural Employment

Rural-based employment reflects jobs accommodated in locations outside the Town’s settlement areas and consists mostly of primary sectors (e.g., agriculture, mineral aggregate extraction).

Rural-based employment is anticipated to represent 3% (300 jobs) of Whitchurch-Stouffville’s employment growth over the 2021 and 2051 period. This results in the rural-based share of forecast Town-wide employment remaining relatively stable with 5,800 jobs in 2021 and 6,100 jobs in 2051.

Figure 40
Town of Whitchurch-Stouffville
Employment Forecast by Employment Category, Employment Growth
in 10-Year Increments to 2051



Note: Figures include work at home and N.F.P.O.W. Numbers may not add precisely due to rounding.

Source: Employment figures derived from York Region’s 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023), summarized by Watson & Associates Economists Ltd., 2023.



5.3 Observations

The long-term (i.e., 2051) population, household and employment growth forecast for the Town of Whitchurch-Stouffville presented herein represents an appropriate minimum growth allocation within the context of local and regional trends.

Based on broader regional growth and the amount of active housing development in the supply pipeline, the residential growth forecast allocation for the Town over the 10-year forecast period (2021 to 2031) is understated. It is critical that the Town's forecast reflect a balanced housing outlook over the short to medium term so that the Region and the Town can be positioned to proactively plan, service and develop their urban structure and not unduly constrain local growth.



6. Urban Land Needs Analysis

This chapter summarizes the Town's anticipated urban land needs to 2051. In accordance with the Growth Plan, 2020 and the L.N.A. methodology for the G.G.H., land needs are assessed across both Community Areas and Employment Areas, as identified in section 1.3.

The L.N.A. methodology provides municipalities and other land use planning decision-makers with the requirements that must be completed as part of an M.C.R. to determine the total quantity of urban lands needed to accommodate forecast growth to the 2051 planning horizon, including:

- The need for any settlement area boundary expansions;
- Employment Area conversions; and
- The quantity of any surplus lands.

This assessment builds on the opportunities to accommodate growth identified in Chapter 4 and the population and employment growth forecast summarized in Chapter 5. The L.N.A. is based on the 2022 R.O.P., as approved by the Province with modifications, which specifies that all whitebelt lands in Whitchurch-Stouffville be designated as Community Areas and utilized to accommodate growth through 2051.^[42] The following analysis assesses the adequacy of urban lands to accommodate long-term demand which satisfies the Town's longer-term employment and population growth objectives.

6.1 Community Land Needs Analysis

This section provides a summary of Community Area urban land needs for the Town of Whitchurch-Stouffville based on a review of available D.G.A. land supply and forecast land demand to the year 2051 in accordance with the methodology discussed in section 1.3.

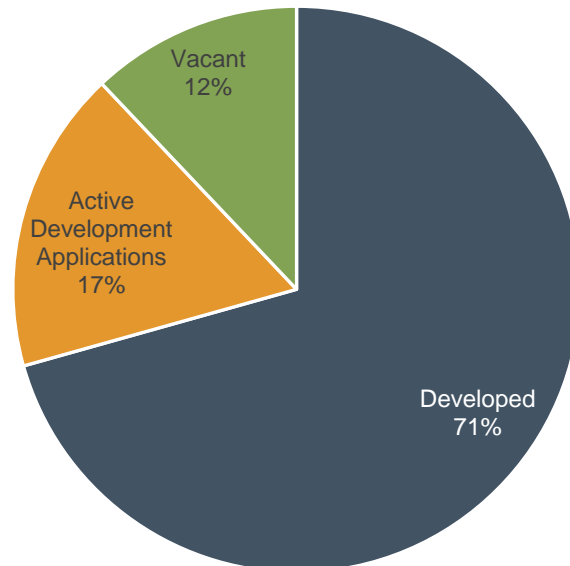
^[42] Inclusion of all whitebelt lands in Whitchurch-Stouffville comprises the three recently approved M.Z.O.s. In addition to the existing whitebelt lands, future Community Areas includes the lands removed from the Greenbelt based on the Province's E.R.O. number 019-6216.



6.1.1 D.G.A. Community Areas – Existing Conditions

At present, the Town has a total D.G.A. land supply of 722 gross hectares. It is estimated that approximately 71% of D.G.A. lands are developed, totalling approximately 510 gross hectares. Figure 41 summarizes the Town’s D.G.A. land area supply by approval status. As summarized in the figure, vacant D.G.A. lands that are either draft approved or registered unbuilt account for 17% of the D.G.A. land supply, while vacant D.G.A. lands with no draft-approved development applications represent 12% of the D.G.A. land supply.

Figure 41
Town of Whitchurch-Stouffville
Community Area Land Supply by Development Approval Status



Source: G.I.S. data shared by the Town of Whitchurch-Stouffville, presented by Watson & Associates Economists Ltd., 2022.

As of 2021, there are approximately 22,735 people residing in the D.G.A. and 3,060 jobs, as shown in Figure 42. Collectively, it is estimated that the Community Area D.G.A. accommodates approximately 25,795 people and jobs, generating an average D.G.A. density of 51 people and jobs per hectare (refer to Figure 42). It is important to recognize that the Town’s current D.G.A. density has been achieved with a housing mix largely comprising ground-oriented housing, with low-density housing (i.e., singles and



semi-detached) representing approximately 81% of the total housing developed in the D.G.A. as of 2021.^[43]

Figure 42
Town of Whitchurch-Stouffville
Designated Greenfield Area Density at 2021

| Parameter | Ref. | Developed D.G.A. |
|--|-----------|------------------|
| Developed Community Lands (Gross Hectares) | (A) | 510 |
| 2021 Population on Developed Community Lands | (B) | 22,735 |
| 2021 Jobs on Developed Community Lands | (C) | 3,060 |
| 2021 Population and Jobs on Developed Lands | D = B + C | 25,795 |
| 2021 Population and Jobs Density | E = D / A | 51 |

Source: Watson & Associates Economists Ltd.

6.1.2 Community Area – Population and Jobs to 2051 and Land Needs

In accordance with York Region’s growth forecast presented in Section 5, the Town of Whitchurch-Stouffville is expected to add approximately 18,020 housing units between 2021 and 2051. Of these, there are about 3,660 units allocated within the Town’s B.U.A.^[44] Additionally, there are about 370 units allocated to rural areas and 13,990 housing units within the Town’s D.G.A. lands (including existing D.G.A. and future urban and expansion areas) from 2021 to 2051. Based on the P.P.U. estimates provided by York Region, this translates into an estimated overall population of 64,300 within the Town’s D.G.A. lands by 2051.

^[43] Watson & Associates Economists Ltd. estimate based on 2021 Census data.

^[44] Based on Table 6 – York Region Residential Intensification Targets by Local Municipality 2016-2051, Whitchurch-Stouffville has an intensification target of 4,200 units. This has been adjusted to account for development activity in the B.U.A. between 2016 and 2020.



In addition to this, the D.G.A. lands will include a portion of P.R.E. growth. By 2051, the Town’s D.G.A. lands are estimated to accommodate a total of 8,100 jobs, bringing the expected people and jobs estimate within the Town’s proposed D.G.A. to about 72,400.

As highlighted previously, Whitchurch-Stouffville has approximately 722 gross hectares (1,784 gross acres) of developable D.G.A. lands, as well as sites approved for employment conversion.^[45] Furthermore, within the 2022 approved R.O.P., it is assumed that all the Town’s whitebelt lands identified for Community Areas would be included in the Urban Boundary Expansion which consists of the three approved M.Z.O.s discussed in Chapter 4. These lands, including the new Community Areas identified through the conversion of employment lands, would add a combined area of 430 hectares (1,065 acres) to the Town’s D.G.A. by 2051, as shown in Figure 43.

Figure 43
Town of Whitchurch-Stouffville
Potential D.G.A. Expansion Areas

| Potential Expansion Areas | ha |
|---|------------|
| Employment Conversions | 38 |
| Whitebelt Community Area lands identified by YROP for urban expansion | 392 |
| Total | 430 |

Source: Watson & Associates Economists Ltd.

Note: The Whitebelt Community Area lands include the 376 hectares of existing Greenbelt lands and 5 hectares of additional area removed from the Greenbelt Area boundary mapping as per the decision at: <https://ero.ontario.ca/notice/019-6216>

Figure 44 summarizes the Community Area land needs for the Town to accommodate an increase of 46,590 people and jobs between 2021 and 2051 and a combined 72,400 population and jobs within the Town’s D.G.A. lands in 2051. This analysis reflects a target D.G.A. density of approximately 63 people and jobs per hectare in 2051 for the overall D.G.A., comprising 62 people and jobs per hectare on existing D.G.A lands and

^[45] This land area is exclusive of Natural Heritage features, key infrastructure corridors and private open spaces.



65 people and jobs per hectare within urban expansion areas.^[46] Based on this anticipated growth and density assumptions, the Town is expected to have sufficient D.G.A. lands through 2051.

Figure 44
Town of Whitchurch-Stouffville
D.G.A. Community Area Land Needs to 2051

| Parameter | Ref. | Existing D.G.A. Community Area Lands | Urban Expansion Areas | Total Community Areas at 2051 |
|--|-------------|--------------------------------------|-----------------------|-------------------------------|
| 2051 Population on Developed Community Lands | (A) | 40,020 | 24,280 | 64,300 |
| 2051 Jobs on Developed Community Lands | (B) | 4,380 | 3,720 | 8,100 |
| 2051 Population and Jobs on Developed Lands | $C = A + B$ | 44,400 | 28,000 | 72,400 |
| 2051 Population and Job Density | D | 62 | 65 | 63 |
| Community Area Land Need (hectares) | $E = C / D$ | 722 | 430 | 1,152 |
| Available Community Area Land (hectares) | F | 722 | 430 | 1,152 |
| Community Area Surplus/Deficit (hectares) | $G = F - E$ | 0 | 0 | 0 |

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd., 2023.

^[46] According to Policy 4.2.20 of the 2022 approved R.O.P., New Community Areas shall be designed to meet or exceed a minimum density of 65 residents and jobs per hectare.



6.1.3 Community Area Land Needs Observations

Based on the analysis above, it is estimated that the Town's D.G.A. will achieve an average density of 63 people and jobs per hectare by 2051. This consists of 62 people and jobs per hectare accommodated on existing D.G.A. lands, which is moderately higher than the existing density of 51 people and jobs per hectare (21 people and jobs per acre) discussed in subsection 6.1.1. For the urban expansion areas, a density of 65 people and jobs per hectare is targeted, which is consistent with the minimum density target for new Community Areas identified in the 2022 R.O.P. Based on the quantum of forecast growth to be accommodated within the Town's existing D.G.A., the target densities and the amount of urban expansion area lands available, it is estimated that the Town will have sufficient community lands by 2051 (no surplus/deficit).

6.2 Employment Area Land Needs Analysis

6.2.1 Forecast Employment Allocations to Employment Areas

The following provides an assessment of the Town's Employment Area land needs, in accordance with the methodology presented in section 1.3. Demand for Employment Area lands within Whitchurch-Stouffville is ultimately driven by the amount and type of future employment growth. As illustrated in Figure 45, Employment Areas in Whitchurch-Stouffville are anticipated to accommodate 4,340 jobs. This represents approximately 38% of the Town's total employment growth of 11,400 jobs over that period. It is estimated that 85% (approximately 3,690 jobs) of these jobs will be accommodated in the Urban Employment Areas (including the Community of Stouffville and Gormley), as well as any future potential urban expansion areas needed to accommodate employment growth to 2051. The remaining 15% (approximately 650 jobs) is anticipated to be accommodated in the remaining Employment Areas including Vandorf-Preston Lake and Cardico.

Anticipated employment growth within Employment Areas over the 2021 to 2051 period and the corresponding land demand forecast, presented herein, are based on York Region's adopted 2051 employment L.N.A. prepared as part of the broader M.C.R.



Figure 45
Town of Whitchurch-Stouffville
Employment Growth by Sector and Location, 2021 to 2051

| Parameter | Town-wide Employment | Employment in Employment Areas | Share of Town-wide Employment Growth in Employment Areas (2021 to 2051) | Employment in Urban Employment Areas (Stouffville, Gormley, Future Employment Areas) |
|---|----------------------|--------------------------------|---|--|
| Total Employment Growth 2021 to 2051 | 11,400 | 4,340 | 38% | 3,690 |

Note: Numbers may not add precisely due to rounding.

Source: Employment figures based on York Region’s 2022 approved Official Plan (with updates to the forecast made by York Region in May 2023), summarized by Watson & Associates Economists Ltd., 2023.

Employment Lands Density Targets

There are several macro-economic trends that are influencing average density levels of employment lands. Generally, average density levels on employment lands are declining in the manufacturing sector, as domestic manufacturers focus efforts on increased efficiency and competitiveness through automation. This trend is coupled with increasing demand for large, land-extensive, warehousing and logistics facilities to support distribution and transportation of goods throughout the expanding urban population base.

The evolving form of industrial and non-industrial development on employment lands is influencing average density levels of employment lands. As previously noted, major employers accommodated in Employment Areas are increasingly integrating industrial, office, and training facilities on site. These sites require significant land area to accommodate surface parking and, in some cases, future expansion potential. On average, employment density levels for integrated office/distribution and training facilities are much lower than stand-alone major office developments.

On the other hand, the growing demand within the multi-tenant and stand-alone office sector, combined with on-site and off-site employment amenities, is anticipated to have an upward influence on the average employment densities of employment lands.



Subsection 4.3.21 of the 2022 R.O.P. identifies that the Urban Employment Areas in the community of Stouffville should be planned for an overall minimum density of 35 jobs per hectare. Furthermore, according to Appendix 1 of the 2022 approved R.O.P., Highway 404 North employment lands (including Gormley employment lands) are expected to be planned at an overall minimum density of 55 jobs per hectare.^[47] As per the data analysis conducted by York Region as a part of its M.C.R., the existing density on Whitchurch-Stouffville's Employment Areas is 30 jobs per hectare (12 jobs per acre). Reflective of anticipated trends in employment growth and employment density by sub-sector, as previously discussed, it is anticipated that forecast employment growth within Employment Areas over the 2021 to 2051 period will average 50 jobs per net hectare (20 jobs per net acre).

Employment Land Demand, 2021 to 2051

As summarized in Figure 46, over the 2021 to 2051 forecast period, approximately 10% of employment growth on employment lands is anticipated to be accommodated through intensification, such as expansions of existing buildings, additional development on already occupied parcels and infill on partially vacant lots. Adjusted for intensification, it is anticipated that Whitchurch-Stouffville will require 23 net hectares (57 net acres) of additional vacant employment lands.

^[47] The 2022 R.O.P. density targets apply on an average basis, not on an Employment Area by Employment Area or parcel-by-parcel basis. As per subsection 4.3.22 of the R.O.P., local municipalities, in consultation with York Region, are expected to prepare secondary plans or equivalent comprehensive planning studies for new Employment Areas that meet or exceed the minimum density targets and are in accordance with applicable policies of the Plan.



Figure 46
Town of Whitchurch-Stouffville
Forecast Employment Area Land Needs Assessment, 2021 to 2051^[48]

| Parameter | Employment Land Demand 2021 to 2051 |
|---|-------------------------------------|
| Employment Lands Employment Growth | 3,680 |
| Employment Growth Accommodated by Intensification (10%) | 370 |
| Total Employment Growth Adjusted for Intensification | 3,310 |
| Employment Land Density (jobs per net hectare) | 42 |
| Employment Land Demand (net hectares) | 78 |
| Designated Vacant Employment Area Land Supply Adjusted for Recommended Conversions (net hectares) | 55 |
| Employment Area Deficit (net hectares) | 23 |
| Employment Area Deficit (gross hectares) | 30 |

Note: Figures have been rounded and may not add precisely.
Source: Watson & Associates Economists Ltd., 2023.

As noted earlier, the 2022 R.O.P., as approved by the Province, specifies that all whitebelt lands in Whitchurch-Stouffville be designated as Community Areas and utilized to accommodate growth through 2051. Based on the approved R.O.P., however, none of the expansion areas have been identified as Employment Areas.

Whitchurch-Stouffville's designated Employment Areas provide 55 net hectares of vacant developable land, reflecting a 10% market vacancy adjustment and recommended Employment Area conversions.

In accordance with the L.N.A. methodology, Figure 46 summarizes Whitchurch-Stouffville's Employment Area land needs to 2051 based on forecast employment land demand and supply identified above. As highlighted in the figure, based on a 10% intensification target and a target Employment Area density of 42 jobs per net hectare

^[48] Includes Employment Areas designated as a part of the York Region 2022 R.O.P.



(17 jobs per net acre), the Town has a need for 30 net hectares (69 net acres) or 30 gross hectares (74 gross acres) of additional Employment Area Lands to accommodate the forecast growth to 2051.

6.3 Observations

This section has assessed the long-term demand and need for Community Area and Employment Area land needs for the Town over the 2021 to 2051 period. Based on the Town's anticipated long-term growth, it is forecast that the Town will have sufficient quantum of D.G.A. Community Area lands and a deficit of about 23 net hectares (57 acres) of Employment Area lands by 2051. As such, the Town will need to consider options for expansion of its employment lands to address the anticipated deficit in Employment Area lands by 2051.



7. Policy Directions

The following policy directions should be considered with respect to updating the Town's O.P.

7.1 Growth Management

Subsection 1.3.3.1, Population and Employment, establishes the population and employment forecasts upon which the O.P. is based. These should be revised to reflect the updated forecast. The current forecast for population and employment is only to the year 2031. Subsection 1.3.3.1 and section 1.5, Planning Period, will need to be revised to reflect a planning period to the year 2051.

7.1.1 Encourage Development of Compact and Mixed-Use Communities

As discussed in Chapter 2, over the past decade (i.e., 2011 to 2020), most of the housing development comprised low-density units, representing 60% of building permits issued over the period. This is compared to 25% and 15% for medium- and high-density units, respectively. The Town's housing supply is still predominantly ground-oriented single detached units, although it is more diverse than in the past.

The P.P.S., 2020 now includes a definition for "housing options" that provides more clarity on the range of housing forms and tenures to be accounted for by municipalities. The P.P.S., 2020 also provides more flexible language which would allow municipalities to strengthen policies to encourage a more compact form and a mix of uses and densities and establish and implement phasing policies.

Whitchurch-Stouffville is served by a well-established GO rail commuter system centred around the Stouffville GO and Old Elm GO (formerly Lincolnville GO) M.T.S.A.s. Provincial policy directs growth to M.T.S.A.s through intensification within locations along Priority Transit Corridors, areas which are required to meet a minimum density target of 150 jobs and persons per hectare. Whitchurch-Stouffville M.T.S.A.s represents a significant opportunity to accommodate future population and employment growth in a more diversified capacity. Given the strong employment growth identified for the Region that is increasingly oriented to knowledge-based sectors, the M.T.S.A.s offer strong market attributes to accommodate these high-growth sectors.



Recommended Actions

- As part of the O.P. review and update, the Town may want to consider policies and strategies that encourage and support the development of a broader range of housing options.
- Given the extent and diversity of residential, office and mixed-use development opportunities identified within the M.T.S.A.s, the Town needs to prioritize its efforts to encourage and promote residential, office and mixed-use development where the potential is highest. This includes ensuring that planning policies and regulations are supportive of intensification initiatives and the economic objectives of the Town, and possibly utilizing financial tools/incentives to facilitate development where fiscally sustainable.

7.1.2 Housing and Intensification Targets

The Town's housing mix is expected to shift increasingly to higher-density housing forms over the planning horizon. The 2022 R.O.P. (with updates by York Region as of May 2023) identifies that a minimum of 21% of residential development between 2021 to 2051 should occur through intensification within the Town's B.U.A.

Consistent with this principle, the Region has allocated a total of approximately 3,660 new households (approximately 122 annually) across the B.U.A. in Whitchurch-Stouffville for which the Town will need to plan between 2021 and 2051. In terms of absolute housing growth, this planned housing intensification target is marginally higher than the achieved level of annual residential building permit activity (new units only) within the B.U.A. (1,150 units per year) between 2011 and 2020. It is noted that the residential intensification target for Whitchurch-Stouffville is a minimum and does not impede greater levels of intensification should demand exist, in particular for higher-density forms of development.

The Town undertook a Housing Strategy, 2022 to help ensure that Whitchurch-Stouffville has sufficient housing options to meet forecast demand through 2051.^[49] The study is intended to inform the Town's O.P. review with respect to policy directions regarding housing mix and affordability targets.

[49] www.cometogetherws.ca/housing



Recommended Actions

- Section 6.2, Housing, in the Town's O.P. currently provides direction with respect to the housing mix target through 2031. This should be updated to reflect the housing mix target for the Town of 42% low density, 27% medium density and 32% high density, as well as a housing unit target of 34,730 through 2051 in accordance with the Region's growth allocations for Whitchurch-Stouffville.
- The Town should plan for a minimum intensification target of 21% in the B.U.A. in accordance with the 2022 approved R.O.P.
- The Town should implement policies to support a shift towards higher-density housing forms in the B.U.A., which may include a housing mix target, investment in the public realm, and mobility and community amenities to support higher density, urban living.

7.1.3 Prioritizing and Phasing Growth

Whitchurch-Stouffville has a number of intensification and emerging growth areas. These areas provide an abundant supply opportunity for intensification and greenfield development within the Town; however, capacity and market demand are not homogenous. Certain areas have the capacity to play a more significant role in accommodating growth.

As identified in the 2022 approved R.O.P., the Town should consider developing phasing policies and/or plans that sequence development in these nodes in an orderly way, coordinated with water, wastewater, and transportation capacity, residential/non-residential development thresholds, the provision of human services, community facilities, and other infrastructure. Furthermore, the Region and the Town should identify infrastructure projects and investments that can unlock or remove barriers to achieve forecast growth potential in strategic growth areas and other priority growth areas.

Recommended Actions

- The Town should refine policies that support investment to enable growth, specifically recognizing that the important roles of M.T.S.A.s and emerging growth areas, will be key to accommodating growth, achieving intensification targets in the Town and encouraging compact built form. This will require



refinements to policies that inform and phase investment decisions to enable growth and development in these areas.

7.1.4 Plan for Settlement Area Boundary Expansion

In accordance with the 2022 R.O.P., the Town's population and its employment base are anticipated to reach 1035 people and 28,400 jobs, respectively, by 2051. In order to accommodate this population and employment growth, Whitchurch-Stouffville will need to plan for a Community Area urban settlement boundary expansion and an Employment Area urban settlement boundary expansion as explored in Chapter 6.

Recommended Actions

- The Town should plan for a settlement area boundary expansion for its Community Area land needs, in accordance with approvals and direction provided by the Province and York Region.

7.1.5 Monitoring of Housing and Intensification Targets

The York Region L.N.A. states that, going forward, staff will carefully monitor the intensification rate, greenfield supply, and phasing of new communities to ensure that the pace of growth is consistent with 2022 R.O.P. objectives while maintaining the Region's financial sustainability. The Town should continue to work with York Region to prepare a robust framework for monitoring various growth targets. Some of the parameters that can be monitored include:

- Residential intensification rates and D.G.A. housing and population density levels against forecast targets;
- Actual development trends against the planned density of the M.T.S.A.s;
- Vacant Community and Employment Area lands; and
- Alignment of existing and planned infrastructure investments against annual residential and non-residential development by geographic area.

Recommended Actions

- The Town should consider various tools for monitoring housing growth, including comprehensive and interactive growth tracking models to monitor population,



housing and employment growth as well as performance measures by planning policy area, settlement area and small geographic unit on an annual basis.

7.2 Employment Areas

7.2.1 *Planning for Employment Areas in an Evolving Economy*

The physical characteristics that make Employment Areas successful are changing as a result of the evolving knowledge-based economy. As such, land use planning policies must anticipate the evolving nature of the local and regional economies and reflect the diverse needs of established and emerging industries. As previously mentioned, it is important to recognize that structural changes in the broader economy continue to alter the nature of economic activities in Employment Areas as well as impact the built form (i.e., siting requirements), integration of uses, and character of these lands. Given the evolving trends in the G.G.H. economy towards knowledge-based sectors, the Town will need to encourage and accommodate a wide range of business service and office uses, as well as employment-supportive uses in Employment Areas, where appropriate.

Recommended Actions

- The Town should recognize the importance of employment lands in accommodating knowledge-based sectors in addition to traditional industrial sectors. In accordance with direction provided through the 2022 R.O.P., the Town should identify core Employment Areas which are intended to accommodate traditional employment uses.
- The Town should ensure Employment Areas are planned to accommodate opportunities for knowledge-based sectors, as well as a range of office uses and integrated uses which can be appropriately sited within Employment Areas (e.g., a site with integrated distribution and corporate office uses).
- The Town should enable Employment Areas to offer a broad range of building space market choice (e.g., business centres and incubators) for a range of business sizes (including small businesses) that have proximity to employment-supportive uses and access to public transit and active modes of transport. The Town should plan to accommodate prestige employment uses in areas that back onto open space and parks, as well as strategically position these uses at gateway locations and along the Highway 404 Corridor that are amenity rich and located within proximity to a growing labour force.



7.2.2 Provide Stronger Direction Regarding Employment-Supportive and Mixed-Use Development in Employment Areas

As the regional economy continues to evolve, there are increasing pressures on employment lands to accommodate commercial service, retail and community/institutional uses. Through land use designations and zoning by-law provisions, municipalities have responded by permitting a range of commercial, community and institutional uses on employment lands.

Accommodating an adequate mix of supportive uses on employment lands, such as retail and personal services, can strengthen such areas by providing amenities and services to employees/employers. Accommodating too many non-employment-supportive uses, however, can lead to land use conflicts, influence land values, and eventually contribute to the erosion of employment lands.

Recognizing the recent structural changes in the regional economy, there has been a need for Whitchurch-Stouffville's Employment Areas to provide for a wider range of amenities and employment-supportive uses that complement both knowledge-based and traditional industrial sectors. The intention of employment-supportive uses in Employment Areas should be to serve the needs of employers and employees within the Employment Areas as opposed to the broader population.

Recommended Actions

- More defined policy direction should be introduced in the Town's O.P. to outline the goals and objectives related to employment-supportive uses in Employment Areas (e.g., non-industrial, non-office uses should be of limited scale, or focused on serving businesses and employees in the Employment Areas). Such uses should minimize potential land use conflicts and support a viable mix of commercial and industrial land uses. To help guide this, the Town should identify supporting Employment Areas in accordance with direction from the 2022 R.O.P., which are intended to accommodate a broader range of uses beyond traditional employment uses.
- The Town should consider introducing more defined criteria or descriptions in subsection 12.3.8 of the O.P. regarding the appropriate type, size and location of complementary non-industrial uses in Employment Areas that are service oriented, e.g., eating establishments, personal and health care services, leasing/



rental equipment sales and services (excluding automotive sales) and fitness centres at strategic and accessible locations in existing and future Employment Areas, where appropriate.

- The definition should stress that employment-supportive uses are those providing commercial services. Retail establishments that sell new or used products (e.g., food stores, drug stores, hardware/building materials stores, thrift stores, household goods stores and apparel stores), including automotive sales should be directed to designated commercial areas.
- Standalone retail, which is largely population serving and not compatible with industrial uses, should not be permitted.

7.2.3 Protecting Employment Areas and Employment Area Conversions

Employment uses in Employment Areas (e.g., manufacturing, warehousing and logistics) typically require large tracts of land with good access to trade corridors near major highway interchanges and other major transportation facilities such as ports, rail yards, intermodal facilities, and airports. As discussed in Chapter 2, both the P.P.S., 2020 and the Growth Plan, 2019 contain policies that protect Employment Areas in proximity to major Goods Movement facilities and corridors which require those locations.

Employment Areas primarily accommodate industries that require adequate separation from sensitive land uses (e.g., residential uses, education and health care facilities, day care centres). Designating new Employment Areas in a municipality becomes challenging without adequate consideration for the requirements that support their success. For these reasons, it becomes increasingly important to protect existing Employment Areas, because they provide the opportunity to accommodate employment uses that cannot be easily accommodated in other areas of the Town.

If not carefully evaluated, the conversion of Employment Areas to non-employment uses can potentially lead to negative impacts on the Town's economy in several ways. Firstly, inappropriate Employment Area conversions can reduce employment opportunities, particularly in export-based sectors, creating local imbalances between population and employment. Secondly, employment conversions can potentially erode Whitchurch-Stouffville's employment land supply and lead to further conversion pressure as a result of encroachment of non-employment uses within, or adjacent to,



Employment Areas. Finally, inappropriate Employment Area conversions can potentially fragment existing Employment Areas and/or reduce their size (i.e., critical mass), undermining their functionality and competitive position. Ultimately, inappropriate Employment Area conversions may reduce the Town's ability to attract and accommodate certain industries.

Given the potential negative impacts resulting from the inappropriate conversion of Employment Areas, it is recognized that there is a need to preserve such designated lands within the Town for employment uses. It is also recognized that under some circumstances, an Employment Area conversion may be justified for planning and economic reasons, provided such decisions are made through using a systematic approach and methodology as set out herein.

Recommended Actions

Given the importance of planning for and protecting Employment Areas, a series of considerations, as listed below, for approaching the evaluation of employment conversions has been identified. These considerations should be applied within the context of the four specific principles and associated assessment considerations identified for conversion evaluations. They were developed recognizing the evolving nature of Employment Areas with respect to land use plans, market, and context.

- Protect Employment Areas in proximity to major transportation corridors and Goods Movement infrastructure to ensure businesses have access to a transportation network that safely and efficiently moves goods and services. As such, consideration should be given to reserving strategically important land for future employment purposes in Whitchurch-Stouffville well beyond the Town's O.P. horizon, including potential future Employment Areas along the Highway 404 corridor.
- Maintain the configuration, location, and contiguous nature of Employment Areas in order to prevent fragmentation and provide business-supportive environments.
- Provide a variety of Employment Area lands in order to improve market supply potential and attractiveness to a variety of employment sectors and business sizes.
- Maintain or improve the employment function and job potential of Employment Areas.
- Align with municipal interests and policies related to Employment Areas.



- Limit and/or mitigate land use incompatibilities where necessary.

The Town should update Employment Area conversion policies in the Town's O.P. to conform with the Region of York's conversion policies. With respect to the Town's designated Employment Areas, which do not fall within the Region's defined Employment Areas, it is recommended that the Town embrace a protectionist approach to Employment Area conversion in accordance with the broader employment conversion considerations set out above.

7.2.4 Accommodating Future Growth Within Developed Employment Areas

As discussed in Chapter 5, a share of Whitchurch-Stouffville's employment lands is underutilized and has future intensification potential. Future redevelopment, expansion, and infill opportunities will continue to grow in Whitchurch-Stouffville's Employment Areas as they mature and evolve.

The infill and redevelopment of existing developed lands are expected to continue to increase over time, largely driven by rising employment land values and related development costs, and the continued buildout of Whitchurch-Stouffville's Employment Areas, especially in the most marketable locations.

Recommended Actions

- The Town should encourage intensification of existing Employment Areas.
- It is recommended that the Town explore and monitor opportunities for infill and redevelopment in mature Employment Areas. Furthermore, it is recommended that the Town promote and encourage the further intensification of Employment Areas provided that the scale and type of intensification is consistent with the planned function of the area.

7.2.5 Continue to Plan for Future Employment Area Lands Development and Strategically Plan New Employment Areas

Employment Areas form a vital component of Whitchurch-Stouffville's land use structure and are an integral part of the local economic development potential of the Town. Through development of its Employment Area land base, Whitchurch-Stouffville is better positioned to build more balanced, complete, and competitive communities.



Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the Town.

As demonstrated in Chapter 6, the Town has an insufficient supply of urban Employment Area lands to accommodate forecast urban land demand in Employment Areas to the year 2051. It is important to recognize that the forecast anticipates a significant amount of employment growth with a spectrum of employment uses and sectors over the long-term horizon. The Town will need to ensure that new Employment Areas are phased in and strategically planned for an evolving economy.

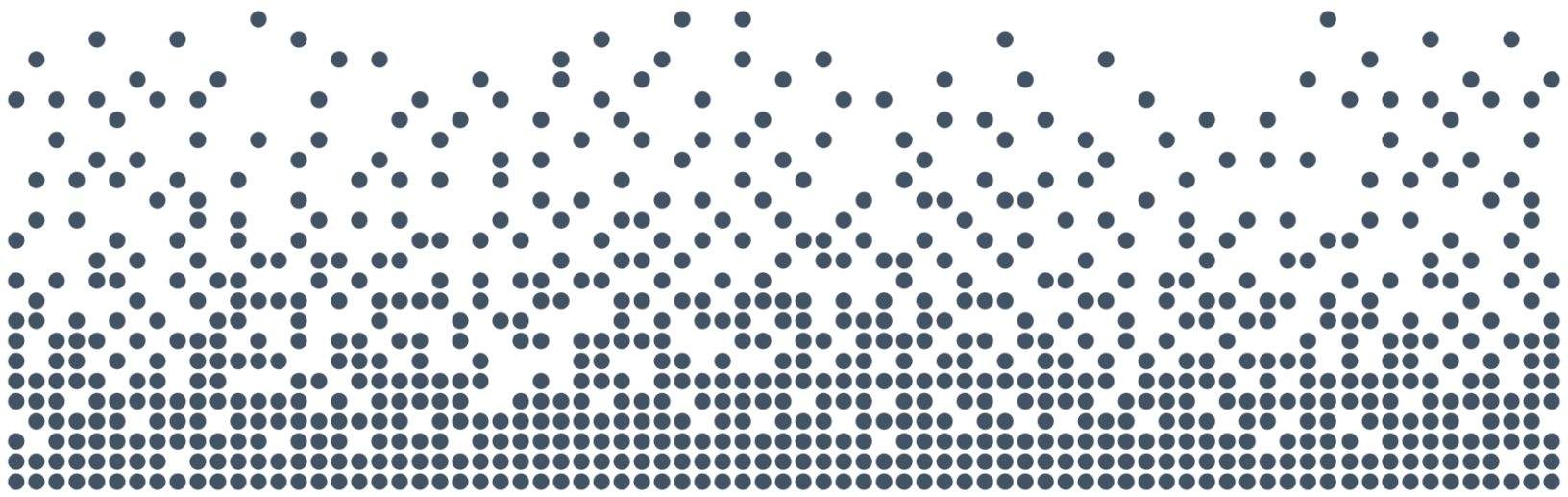
A key policy objective of the Growth Plan, 2019, the 2022 R.O.P., and the Whitchurch-Stouffville O.P. is to ensure that the Town's existing settlement areas and settlement area boundary expansion lands are developed as complete communities that are well-balanced between residential and non-residential land uses. As such, it is critical that Whitchurch-Stouffville's Employment Areas and other urban non-residential lands are planned in a manner that aims to promote economic competitiveness, attract employment growth, and maximize employment density and land utilization, where appropriate. Phasing policies that require the servicing of greenfield employment lands to be completed prior to, or in parallel with, the servicing and development of Community Area settlement area boundary expansion lands should also be explored.

Recommended Actions

- The Town should explore options for expansion of its Employment Areas to address the deficit of 30 gross hectares by 2051 identified in Chapter 6. Consideration should be given to designating available lands for employment uses near the Highway 404 corridor and the adjacent Employment Areas in the City of Markham.



- Regularly monitor employment land absorption and employment density levels.
- Strive to maintain a five-year supply of shovel-ready Employment Area lands.
- Undertake Secondary Plans that establish the broader long-term vision, phasing and development guidelines for new Employment Areas. Secondary Plans should provide further details including the intensity of the employment use, built form and urban design, traffic impacts and other planning considerations.
- Explore phasing policies that require the servicing of greenfield employment lands prior to, or in parallel with, the servicing and development of Community Area settlement area boundary expansion lands.



Appendix A

Population, Housing and Employment Forecast



Figure A-1
Population Forecast: York Region M.C.R. (May 2023)

| Area Municipality | 2021 | 2026 | 2031 | 2036 | 2041 | 2046 | 2051 |
|-------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Aurora | 64,000 | 67,400 | 71,900 | 75,700 | 79,600 | 82,800 | 85,800 |
| East Gwillimbury | 35,700 | 45,200 | 57,100 | 72,700 | 88,700 | 102,700 | 128,600 |
| Georgina | 49,100 | 52,700 | 56,500 | 61,400 | 65,500 | 68,200 | 70,500 |
| King | 28,200 | 32,000 | 38,200 | 48,100 | 56,900 | 61,600 | 66,400 |
| Markham | 349,000 | 379,200 | 416,300 | 454,000 | 496,700 | 551,900 | 618,000 |
| Newmarket | 90,700 | 94,700 | 98,900 | 103,000 | 107,200 | 112,600 | 118,500 |
| Richmond Hill | 208,300 | 231,500 | 251,900 | 268,300 | 284,100 | 301,700 | 320,400 |
| Vaughan | 333,100 | 364,900 | 398,600 | 437,600 | 479,200 | 523,100 | 576,200 |
| Whitchurch-Stouffville | 51,400 | 55,300 | 60,800 | 67,300 | 73,900 | 87,300 | 103,500 |
| York Region | 1,209,300 | 1,322,800 | 1,450,100 | 1,588,200 | 1,731,700 | 1,891,900 | 2,088,000 |

Source: Derived from York Region's L.N.A. (May 2023), presented by Watson & Associates Economists Ltd., 2023.



Figure A-2
Housing Forecast by Planning Policy Area: York Region M.C.R. (May 2023)

B.U.A.

| Time Period | Singles | Semis | Rows | Stacked | Apts. | Duplex | Total |
|-------------|---------|-------|-------|---------|-------|--------|-------|
| 2016 | 3,420 | 110 | 480 | 150 | 660 | 290 | 5,110 |
| 2021 | 3,420 | 100 | 540 | 150 | 980 | 310 | 5,500 |
| 2026 | 3,440 | 100 | 750 | 150 | 1,160 | 320 | 5,920 |
| 2031 | 3,440 | 100 | 870 | 170 | 1,540 | 330 | 6,450 |
| 2036 | 3,450 | 100 | 960 | 190 | 2,000 | 340 | 7,040 |
| 2041 | 3,460 | 100 | 1,050 | 220 | 2,490 | 350 | 7,670 |
| 2046 | 3,480 | 100 | 1,190 | 260 | 2,990 | 370 | 8,390 |
| 2051 | 3,490 | 100 | 1,320 | 290 | 3,570 | 390 | 9,160 |

D.G.A.

| Time Period | Singles | Semis | Rows | Stacked | Apts. | Duplex | Total D.G.A. Units |
|-------------|---------|-------|-------|---------|-------|--------|--------------------|
| 2016 | 5,680 | 680 | 1,050 | 0 | 20 | 30 | 7,460 |
| 2021 | 6,310 | 680 | 1,280 | 0 | 30 | 60 | 8,360 |
| 2026 | 6,920 | 690 | 1,430 | 0 | 30 | 80 | 9,150 |
| 2031 | 7,550 | 720 | 1,740 | 90 | 370 | 100 | 10,570 |
| 2036 | 8,320 | 750 | 2,220 | 190 | 760 | 130 | 12,370 |
| 2041 | 8,890 | 790 | 2,760 | 400 | 1,120 | 150 | 14,110 |
| 2046 | 8,930 | 790 | 3,130 | 710 | 1,780 | 180 | 15,520 |
| 2051 | 8,950 | 840 | 3,470 | 920 | 2,180 | 210 | 16,570 |

Whitebelt

| Time Period | Singles | Semis | Rows | Stacked | Apts. | Duplex | Total Whitebelt Units |
|-------------|---------|-------|-------|---------|-------|--------|-----------------------|
| 2016 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2021 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2026 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2031 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2036 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2041 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2046 | 1,480 | 90 | 370 | 100 | 170 | 0 | 2,210 |
| 2051 | 3,470 | 290 | 1,160 | 280 | 580 | 0 | 5,780 |



Rural

| Time Period | Singles | Semis | Rows | Stacked | Apts. | Duplex | Total Rural Units |
|-------------|---------|-------|------|---------|-------|--------|-------------------|
| 2016 | 2,640 | 40 | 0 | 0 | 50 | 80 | 2,810 |
| 2021 | 2,680 | 40 | 0 | 0 | 50 | 80 | 2,850 |
| 2026 | 2,700 | 40 | 0 | 0 | 50 | 80 | 2,870 |
| 2031 | 2,720 | 40 | 0 | 0 | 50 | 80 | 2,890 |
| 2036 | 2,740 | 40 | 0 | 0 | 50 | 80 | 2,910 |
| 2041 | 2,780 | 40 | 0 | 0 | 50 | 80 | 2,950 |
| 2046 | 2,930 | 50 | 30 | 10 | 70 | 80 | 3,170 |
| 2051 | 2,980 | 50 | 30 | 10 | 70 | 80 | 3,220 |

Total

| Time Period | Singles | Semis | Rows | Stacked | Apts. | Duplex | Total Units |
|-------------|---------|-------|-------|---------|-------|--------|-------------|
| 2016 | 11,740 | 830 | 1,530 | 150 | 730 | 400 | 15,380 |
| 2021 | 12,410 | 820 | 1,820 | 150 | 1,060 | 450 | 16,710 |
| 2026 | 13,060 | 830 | 2,180 | 150 | 1,240 | 480 | 17,940 |
| 2031 | 13,710 | 860 | 2,610 | 260 | 1,960 | 510 | 19,910 |
| 2036 | 14,510 | 890 | 3,180 | 380 | 2,810 | 550 | 22,320 |
| 2041 | 15,130 | 930 | 3,810 | 620 | 3,660 | 580 | 24,730 |
| 2046 | 16,820 | 1,030 | 4,720 | 1,080 | 5,010 | 630 | 29,290 |
| 2051 | 18,890 | 1,280 | 5,980 | 1,500 | 6,400 | 680 | 34,730 |



Figure A-3
Employment Forecast: York Region M.C.R. (May 2023)

| Municipality | 2021 | 2026 | 2031 | 2036 | 2041 | 2046 | 2051 |
|------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Aurora | 29,600 | 31,800 | 34,100 | 36,300 | 38,300 | 40,200 | 41,600 |
| East Gwillimbury | 10,600 | 13,400 | 16,500 | 21,600 | 27,500 | 35,200 | 44,300 |
| Georgina | 9,400 | 10,800 | 12,900 | 15,200 | 17,300 | 19,200 | 20,700 |
| King | 10,000 | 10,900 | 12,200 | 13,900 | 15,800 | 17,100 | 18,300 |
| Markham | 190,300 | 205,600 | 221,200 | 238,900 | 258,600 | 279,800 | 302,200 |
| Newmarket | 47,500 | 49,200 | 50,700 | 52,200 | 54,000 | 56,000 | 58,100 |
| Richmond Hill | 83,400 | 90,600 | 96,600 | 102,400 | 108,500 | 115,500 | 122,600 |
| Vaughan | 243,700 | 263,200 | 280,600 | 298,200 | 315,800 | 334,700 | 354,400 |
| Whitchurch-Stouffville | 17,000 | 18,400 | 20,200 | 22,600 | 24,000 | 26,100 | 28,400 |
| York Region | 641,600 | 693,900 | 744,800 | 801,300 | 859,800 | 923,800 | 990,600 |

Source: Derived from York Region's L.N.A. (May 2023), presented by Watson & Associates Economists Ltd., 2023.