



2021 Growth Analysis by Traffic Zone

City of Richmond Hill

Final Report

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Executive Summary

Watson & Associates Economists Ltd. was retained in 2021 by the City of Richmond Hill to prepare an update to the City's long-term population, household and employment forecast. This update has been prepared to inform a number of on-going studies currently underway, or anticipated to commence in the near-term, by the City of Richmond Hill, including several City Master Plans: Transportation, Urban MESP, Parks, Recreational; and the Development Charges (DC) Background Study update. This growth forecast update has been necessitated by conformity requirements to the Growth Plan for the Greater Golden Horseshoe (GGH), as amended in 2020. As required by the Growth Plan, York Region is currently preparing an update to its OP as part the Municipal Comprehensive Review (MCR) process. In accordance with the results of York Region MCR, the City of Richmond Hill is also preparing an update to its OP, which will conform to, and implement the York Region OP for the City of Richmond Hill. The following report provides a brief summary of the key findings associated with the City of Richmond Hill 2021 Growth Analysis Update.

The City of Richmond Hill 2021 Growth Analysis by Traffic Zone provides a review and analysis of the City of Richmond Hill population, household and employment projections by traffic zone to the year 2051 and "buildout". This update has been derived from the draft population, household and employment growth forecast allocations for the City of Richmond Hill prepared by York Region through its recent Municipal Comprehensive Review (MCR) process, hereafter referred to as the York Region 2021 MCR growth forecast.¹

The key findings of the Richmond Hill 2021 Growth Analysis by Traffic Zone are summarized below.

¹ The City of Richmond Hill 2021 Growth Analysis uses the York Region 2021 Draft MCR Forecast from April, 2021. Since then in December 2021, a modest change to the overall Richmond Hill forecast has been proposed wherein the total population by 2051 would increase to 319,600 and employment to 122,800. The changes do not substantially change the outcome or conclusions of the forecast in this document.



City of Richmond Hill Permanent Population and Housing Growth Outlook to 2051

- The City of Richmond Hill 2021 long-term growth forecast aligns with the 2051 total households, population and employment in the York Region 2021 MCR. It is noted that variations to the population growth allocations exist by traffic zone.
- The City is forecast to grow by 103,300 people from 2021 to 2051, and 237,200 people from 2021 to “buildout”, reaching a population of 317,000 in 2051 and 450,900 at “buildout”.¹ This represents an annual growth rate of 1.3% over the 30-year period.
- The City-wide long-term housing occupancy, or average persons per unit (PPU) is anticipated to decline from 3.14 in 2016 to 2.97 in 2051, largely due to the aging of the population and shift towards medium and high-density housing forms.
- The City is forecast to accommodate 106,600 total households by 2051, and 159,900 households at “buildout”. Over the 2021 to 2051 period, the City will accommodate an additional 37,300 units of which 12% are defined as low-density (single and semi-detached), 26% medium-density (townhomes, back-to-back-townhomes and apartments in duplexes) and 61% high-density households (all other apartments). From 2021 to “buildout” the City is forecast to add an additional 90,500 housing units, with 82% of anticipated housing growth in high-density forms. This shift towards a greater share of medium and high-density households is due to the impact and needs of the aging population, declining housing affordability as well as other demographic and socio-economic factors which are anticipated to influence housing preferences and lifestyle.²
- As of April 2021, through Council approved amendments to the zoning by-law, secondary units (i.e. additional residential units) are permitted in most locations

¹ “Buildout” represents the total population, housing and employment potential of the City a mature state assuming the full development of all DGA lands and development within the built-up area (BUA) in accordance with long-term planned density targets for Growth Centre Study Areas (refer to Figure 13, herein) as well as modest residential intensification within stable residential neighbourhoods.

² This largely relates to forecast housing trends regarding family versus non-family households and trends in family structure.



of the City where ground related housing is permitted. For the purposes of this analysis, all secondary units are captured as high density. In total, 2,900 secondary units are forecast to be accommodated in the City from 2021 to 2051, and 3,600 from 2021 to “buildout”.

- The rate of population and housing growth during the 2021 to 2031 period is higher in the City’s 2021 growth analysis compared to the York Region 2021 MCR, largely due to faster absorption of Designated Greenfield Area (DGA) lands associated with the Leslie and West Gormley Secondary Plan Areas.
- Between 2021 to 2051, 76% of housing growth has been allocated to the Built-Up Area (BUA). Over the longer-term, housing growth is forecast to be increasingly accommodated in the BUA (87% from 2021 to “buildout”), as the City’s remaining vacant DGA lands are anticipated to be fully developed by 2041.

City of Richmond Hill Employment Growth Outlook to 2051

- The employment forecast prepared as part of the City of Richmond Hill 2021 Growth Analysis aligns with the York Region MCR employment forecast by 2051. However, the timing and type of employment has been updated to reflect residential and non-residential growth trends. As previously noted, the employment allocations by traffic zone prepared as part of the City of Richmond Hill 2021 Growth Analysis vary from the York Region MCR employment forecast.
- The City is forecast to grow by 36,600 jobs from 2021 to 2051, and 86,300 jobs from 2021 to “buildout”, reaching 317,000 jobs in 2051 and 450,900 jobs at “buildout”. This represents a growth rate of 1.2% over the 30-year period.
- Over the 30-year period, Major Office employment (MOE) is forecast to add the most jobs (34% of total), followed by Population-Related Employment (PRE) (31%), work at home (23%) and Employment Land Employment (ELE) (12%).
- PRE is forecast to grow slightly faster in the 2021 Richmond Hill Growth Analysis compared to the York Region MCR due to increased demand for population-related employment driven by stronger population growth in the City’s DGA.



- Work at Home employment, which is attributed to people who work from home on a full-time basis, is anticipated to increase at faster pace than the York Region 2021 MCR due to remote work trends accelerated by COVID-19.
- Major Office employment (MOE) has been slowed relative to the York Region MCR forecast for the City of Richmond Hill, reflecting anticipated market trends over the near-term forecast period. However, it is anticipated that there will be strong demand for MOE in the City over the medium to long-term (i.e. next 3+ years) as COVID-19 restrictions are eased driven by the Richmond Hill's proximity to the City of Toronto and transit connectivity.
- ELE is anticipated to be largely “buildout” by 2041. ELE job growth is forecast to be driven by strong demand for industrial-type development (currently industrial vacancy rates are at historical lows). Over the longer-term, a diminishing supply of vacant available lands to accommodate ELE development are anticipated to slow the rate of ELE job growth in the City of Richmond Hill.

City of Richmond Hill Housing Forecast by Growth Centre Study Area, Secondary Plan Area and Remaining DGA Lands

- This report provides a geographical illustration of the geographic distribution of housing growth within the City of Richmond Hill over 10-year, 20-year, 30-year and buildout time horizon by Growth Centre Study Areas by Traffic Zone (refer to Figures 13 to 17, herein).
- Growth Centre Study Areas largely represent areas where changes to the OP are proposed as per the City's Key Directions Report.¹ Additional development identified through a Ministerial Zoning Order (MZO) are also anticipated to result in significant changes to the forecast at a traffic zone level relative to the 2018 Growth Analysis. Over the 2021 to 2041 period growth is largely concentrated along the Yonge Street, Highway-7 and Major Mackenzie Corridors, in addition to the Leslie and West Gormley Secondary Plan Areas and remaining DGA. Over the longer-term forecast period from 2041 to “buildout”, urban development is

¹ City Plan 2041. Key Directions Report for the City of Richmond Hill Official Plan Update. November 2021.



anticipated to increasingly shift towards the major corridors in the BUA as the majority of the City's DGA lands are built-out by 2041.



1. Introduction

Watson & Associates Economists Ltd. was retained in 2021 by the City of Richmond Hill to prepare an update to the City's long-term population, household and employment forecast. This update has been prepared to inform a number of on-going studies currently underway, or anticipated to commence in the near-term, by the City of Richmond Hill, including several City Master Plans: Transportation, Urban MESP, Parks, Recreational; and the Development Charges (DC) Background Study update. This growth forecast update has been necessitated by conformity requirements to the Growth Plan for the Greater Golden Horseshoe (GGH), as amended in 2020. As required by the Growth Plan, York Region is currently preparing an update to its OP as part the Municipal Comprehensive Review (MCR) process. In accordance with the results of York Region MCR, the City of Richmond Hill is also preparing an update to its OP, which will conform to and implement to the York Region OP for the City of Richmond Hill. The following report provides a brief summary of the key findings associated with the City of Richmond Hill 2021 Growth Analysis Update.

2. Residential Forecast

Figure 1 compares population, household and employment growth forecasts from the City of Richmond Hill 2021 Growth Analysis, York Region 2021 Municipal Comprehensive Review (MCR) forecast for the City of Richmond Hill and City of Richmond Hill 2018 Growth Analysis.¹ Key observations include:

- The City of Richmond Hill 2021 Growth forecast aligns with the 2051 total households, population and employment forecast prepared by York Region as part of the 2021 MCR growth forecast. It is noted that variations to the growth allocations exist by traffic zone. The rate of population and housing growth during the 2021 to 2031 period is higher in the City's 2021 growth analysis compared to the York Region 2021 MCR, largely due to faster absorption of

¹ The City of Richmond Hill 2021 Growth Analysis uses the York Region 2021 Draft MCR Forecast from April, 2021. Since then in December 2021, a modest change to the overall Richmond Hill forecast has been proposed wherein the total population by 2051 would increase to 319,600 and employment to 122,800. The changes do not substantially change the outcome or conclusions of the forecast in this document.



Designated Greenfield Area(DGA) lands associated with the Leslie and West Gormley Secondary Plan Areas.

- Anticipated trends in long-term housing occupancy, or average persons per unit (PPU), are anticipated to gradually decline from 3.14 in 2016, to 2.97 in 2051 and to 2.82 by “buildout” in the City of Richmond Hill 2021 Growth Analysis. The forecast PPU decline is largely a result of the aging of the City’s population combined with a shift towards medium- and high-density housing forms. The long-term PPU forecast prepared under City of Richmond Hill 2021 Growth Analysis is generally consistent with the York Region 2021 MCR growth forecast.
- As part of the 2021 City of Richmond Growth Analysis, “buildout” represents the total population, housing and employment potential of the City at a mature state assuming the full development of all DGA lands and development within the built-up area (BUA) in accordance with long-term planned density targets for Growth Centre Study Areas (refer to Figure 13, herein) as well as modest residential intensification within stable residential neighbourhoods. “Buildout” has been informed by a detailed review of housing unit development potential within active plans, long-term residential intensification/redevelopment opportunities within the BUA (see figure 6) and long-term employment potential in Employment Areas on both vacant lands as well as through employment intensification. This analysis represents an update from the 2018 City of Richmond Hill Growth Analysis. The data compiled to inform the City’s “buildout” analysis was collected mid-2021 and represents a snapshot of the City’s long-term urban development potential at the time of writing.



Figure 1
City of Richmond Hill
City-wide Growth Comparison (Population, Households and Employment)

Scenario	Households	Population ¹	Employment	Persons Per Unit (PPU) ²
	2016			
Richmond Hill 2018 Growth Analysis	64,100	201,300	80,800	3.14
York Region 2021 MCR	64,100	201,000	78,800	3.14
Richmond Hill 2021 Growth Analysis	64,100	201,000	78,800	3.14
Scenario	2021			
Richmond Hill 2018 Growth Analysis	72,300	223,300	89,600	3.09
York Region 2021 MCR	69,400	213,700	85,900	3.08
Richmond Hill 2021 Growth Analysis	69,400	213,700	85,900	3.08
Scenario	2031			
Richmond Hill 2018 Growth Analysis	87,400	262,500	117,900	3.00
York Region 2021 MCR	82,400	248,500	96,900	3.02
Richmond Hill 2021 Growth Analysis	84,100	253,000	97,400	3.01
Scenario	2041			
Richmond Hill 2018 Growth Analysis	100,500	296,200	117,900	2.95
York Region 2021 MCR	95,200	282,800	108,900	2.97
Richmond Hill 2021 Growth Analysis	96,500	286,800	109,900	2.97
Scenario	2051			
Richmond Hill 2018 Growth Analysis	-	-	-	-
York Region 2021 MCR	106,600	317,000	122,500	2.97
Richmond Hill 2021 Growth Analysis	106,600	317,000	122,500	2.97
Scenario	Buildout			
Richmond Hill 2018 Growth Analysis	122,600	350,800	137,100	2.86
York Region 2021 MCR	-	-	-	-
Richmond Hill 2021 Growth Analysis	159,900	450,900	172,200	2.82

¹ Population includes net Census undercount of approximately 3%.

² Persons per unit includes net Census undercount.

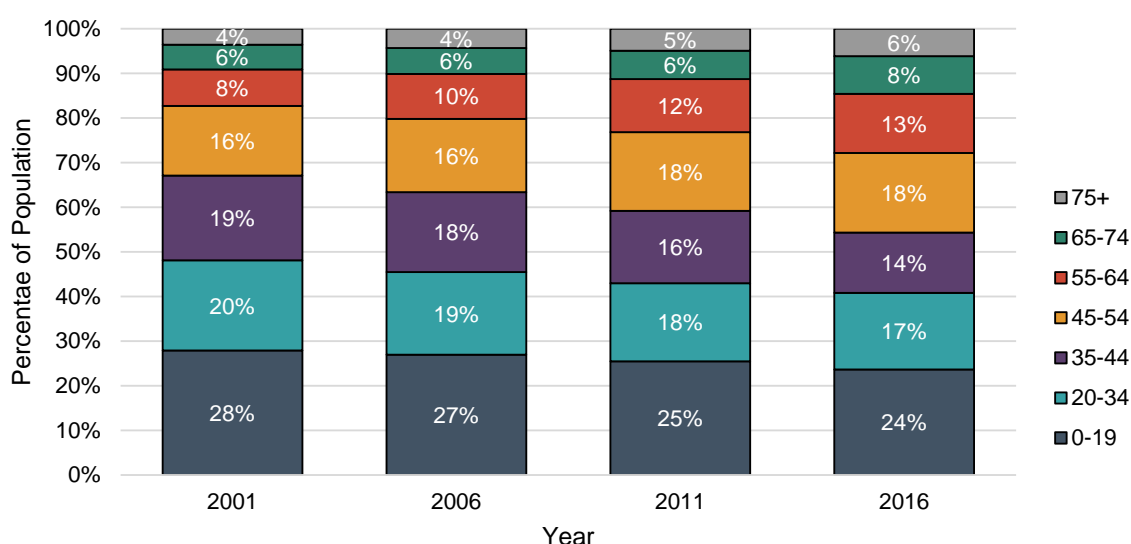
Note: Figures have been rounded.

Source: Richmond Hill 2018 Growth Analysis and Richmond Hill 2021 Growth Analysis by Watson & Associates Economists Ltd. York Region 2021 MCR received from City of Richmond Hill staff.



Figure 2 summarizes historical trends in permanent population structure by major age group over the 2001 to 2016 period for the City of Richmond Hill. As illustrated, the City's population is aging. Between 2001 to 2016 the percentage of persons 55+ years of age or older has increased from 18% to 27%. Looking forward, this trend is anticipated to continue and place increasing demand on the need for seniors' housing, affordable housing, as well as community and social services to support the City of Richmond Hill's growing seniors' population.

Figure 2
City of Richmond Hill
Historical Population by Major Age Cohort, 2001 to 2016



Note: Population excludes net Census undercount.

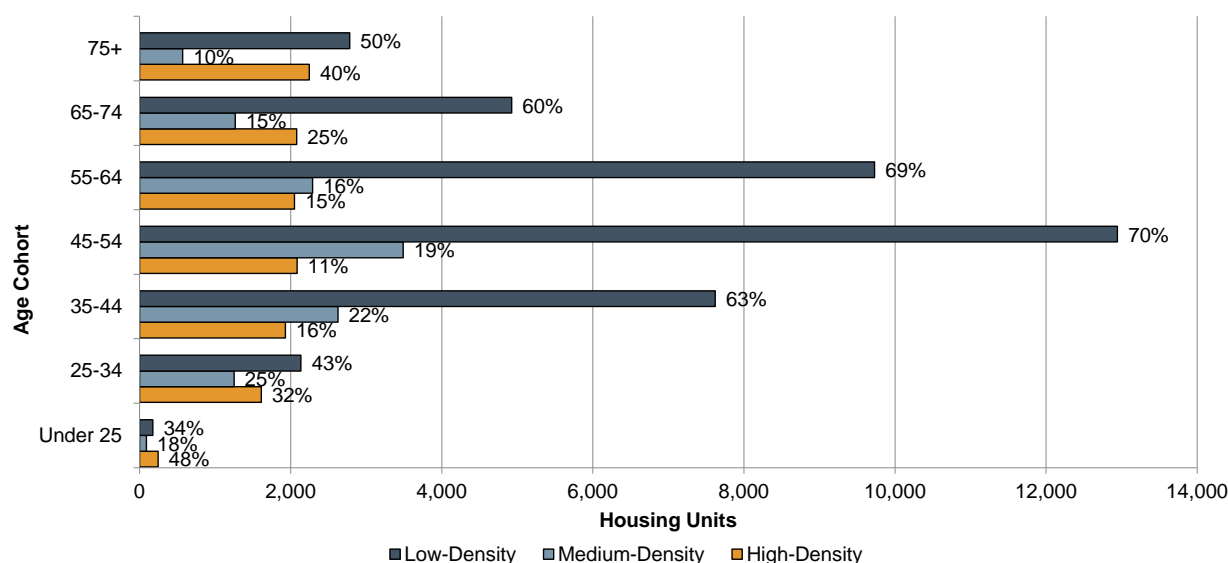
Source: Derived from 2001 to 2016 Statistics Canada Census data, by Watson & Associates Economists Ltd.

Figure 3 summarizes historical housing propensity (i.e., demand) trends by structure type for Census households (private dwellings occupied by usual residents) in the City of Richmond Hill based on 2016 Statistics Canada Census data. Age specific propensities measure housing demand by dwelling structure type, by age of household maintainer. The socio-economic characteristics of the City's population related to income/ affordability, lifestyle, family size, lifestyle decisions, health and mobility vary by population age, which in turn, influences the demand for housing by structure type. Key observations include:



- Housing propensities for grade-related housing are highest for the population aged 35 to 64, which are generally the age groups which fall into family-occupied households and higher income brackets which would be seeking grade-related housing options; and
- Propensities for high-density housing are strongest amongst the young population groups under 35 years of age, and the 65+ seniors' population. Due to housing affordability and lifestyle choices, the population under 35 has stronger demand for high-density housing. The socio-economic and physical characteristics of the older population age groups related to income, mobility and health represent key drivers behind their higher propensity for high-density housing forms (including seniors' housing) that are in proximity to urban amenities, health care services and other community facilities.

Figure 3
City of Richmond Hill
2016 Housing Propensity by Age and Dwelling Type



Low-density includes singles and semis.
Medium-density includes towns and apartments in duplexes.
High-density includes bachelor, 1 bedroom and 2 bedroom+ apartments.
Source: Data from Statistics Canada Census 2016 by Watson & Associates Economists Ltd.



Figure 4 summarizes housing price trends for the City of Richmond Hill and surrounding municipalities from 2016 to 2020. Figure 5 summarizes trends in average household income from 2001 to 2016 for the City of Richmond Hill and Province of Ontario. Key observations are as follows:

- Average household income growth has not kept pace with rising housing prices. As a result, housing affordability has been steadily eroded over the past decade; and
- Accordingly, this is expected to place increasing demand for a wider range of medium and high-density housing options that are affordable to all ages and incomes levels (including rental housing).

Figure 4
Comparative Historical Trends in GTA Housing Prices

Municipality	Single Detached Price, 2016	Single Detached Price, 2020	Townhouse Price, 2020	Condominium Apartment Price, 2020	Annual Price Increase in Single Detached Housing Unit, 2016-2020
City of Vaughan	\$1,088,000	\$1,502,000	\$993,000	\$579,000	8%
Town of Whitchurch-Stouffville	\$884,000	\$1,155,000	\$779,000	\$647,000	7%
City of Richmond Hill	\$1,271,000	\$1,591,000	\$987,000	\$520,000	6%
City of Toronto	\$1,287,000	\$1,476,000	\$1,126,000	\$626,000	3%
City of Newmarket	\$983,000	\$1,039,000	\$828,000	\$516,000	1%
Town of Aurora	\$1,318,000	\$1,388,000	\$852,000	\$574,000	1%
City of Markham	\$1,418,000	\$1,454,000	\$1,000,000	\$572,000	1%

Note: Figures have been rounded.

Source: Housing prices derived from Toronto Regional Real Estate Board (TRREB) with Annual Price Increase calculated by Watson & Associates Economists Ltd., 2021



Figure 5
Average Household Income Trends

Census Year	City of Richmond Hill Average Household Income	Province of Ontario Average Household Income
2001	\$87,600	\$66,800
2006	\$105,100	\$78,000
2011	\$108,900	\$85,800
2016	\$115,600	\$97,900

Census Year	City of Richmond Hill Average Household Income Growth	Province of Ontario Average Household Income Annual Growth
2001-2006	\$3,500	\$2,240
2006-2011	\$760	\$1,560
2011-2016	\$1,340	\$2,420

Census Year	City of Richmond Hill Average Household Income Annual Growth Rate	Province of Ontario Average Household Income Annual Growth Rate
2001-2006	3.7%	3.1%
2006-2011	0.7%	1.9%
2011-2016	1.2%	2.7%

Source: All income statistics derived from 2001, 2006, 2011 and 2016 household Census' by Statistics Canada with Annual Growth Rates calculated by Watson & Associates Economists Inc., 2021

Figure 6 summarizes the City's total residential supply potential by stage of development, location and housing structure type. Total housing potential identified herein represents a long-term guide with respect to total housing potential for "buildout", but may vary slightly with respect to long-term housing demand. Secondary units, which are part of future housing growth, are not captured in Figure 6. It is important to note that the supply data in Figure 6 captures stacked townhouses in the multiple dwellings category, but for the purposes of the growth forecast they are captured as high-density which is consistent with the current City of Richmond Hill DC By-law.



Figure 6
City of Richmond Hill
Total Housing Potential

	Singles and Semis	Multiple Dwellings ¹	Apartments ²	Total
Units in Development Approvals Process	4,400	8,500	21,700	34,600
Neighbourhood Infill Opportunities ²	500	800	0	1,300
Corridor Intensification Opportunities ²	100	400	16,500	16,900
Emerging Centre Redevelopment Opportunities ²	0	2,200	28,900	31,100
Total	5,000	11,900	67,000	83,900

¹ Includes rows, apartments in duplexes and stacked townhouses for the purposes of this table.

² Housing potential excluding units in the development approvals process.

Notes:

- Total housing potential in table excludes secondary unit potential.
- Total housing potential at buildout may vary from figures above.
- The total housing potential identified herein represents a long-term guide with respect to total housing potential, but may vary slightly with respect to long-term housing demand by density type.
- Figures have been rounded.

Source: Derived from City of Richmond Hill data, by Watson & Associates Economists Ltd.

Figure 7 summarizes the long-term population and housing forecast for the City of Richmond Hill as part of the 2021 Growth Analysis Study in five-year increments from 2021 to 2051. The population and housing yield at “buildout” is also provided. By 2051 the City’s population base is forecast to reach 317,000, which represents an increase of 103,300 people for 2021.

Over the long-term forecast period, housing demand for high-density housing forms is anticipated to strengthen within the City, particularly within the BUA. By 2036, the City’s DGA lands are anticipated to be almost fully developed, resulting in a decrease in overall annual housing growth from 2036 to 2051.

It is also important to note that secondary units have an assumed high-density occupancy but are a grade-related housing form. For reporting purposes, all secondary units are captured as high density. It is estimated that approximately 5% grade-related housing units forecast by “buildout” in the City of Richmond Hill would accommodate secondary units. Based on this assumption, approximately 3,600 second units are anticipated to be accommodated in the City by “buildout”. This represents an increase of 700 secondary units during post-2051, with the 2021 to 2051 period anticipated to accommodate 2,900 secondary units or 97 units annually. As of April 2021, through Council approved amendments to the zoning by-law, secondary units (i.e. additional residential units) are permitted in most locations where ground related housing is permitted.



Figure 7
City of Richmond Hill
City-wide Population and Housing by Structure Type Growth

Year		Population (Including Census Undercount) ¹	Population (Excluding Census Undercount)	Housing Units					Person Per Unit (P.P.U.): Total Population Including Undercount/ Total Households
				Low Density ²	Medium Density ³	High Density ⁴	Other	Total Households	
	<i>Mid 2016</i>	201,000	195,000	40,200	11,600	12,200	55	64,100	3.136
Forecast	<i>Mid 2021</i>	213,700	207,300	41,600	12,900	14,800	55	69,400	3.080
	<i>Mid 2026</i>	233,100	226,200	43,300	15,300	17,700	55	76,400	3.052
	<i>Mid 2031</i>	253,000	245,400	44,900	17,600	21,500	55	84,100	3.009
	<i>Mid 2036</i>	271,900	263,800	45,600	19,800	25,700	55	91,200	2.982
	<i>Mid 2041</i>	286,800	278,200	45,800	20,900	29,700	55	96,500	2.972
	<i>Mid 2046</i>	301,600	292,600	46,000	21,800	33,700	55	101,500	2.972
	<i>Mid 2051</i>	317,000	307,600	46,200	22,700	37,700	55	106,600	2.973
	<i>Buildout</i>	450,900	437,500	47,100	24,100	88,700	55	159,900	2.820
Incremental	Mid 2016 - Mid 2021	12,700	12,300	1,400	1,300	2,600	0	5,300	
	Mid 2021 - Mid 2031	39,300	38,100	3,300	4,700	6,700	0	14,700	
	Mid 2021 - Mid 2041	73,100	70,900	4,300	7,900	14,900	0	27,100	
	Mid 2021 - Mid 2051	103,300	100,200	4,600	9,800	22,900	0	37,300	
	Mid 2021 - Buildout	237,200	230,200	5,500	11,100	73,900	0	90,500	

Source: Watson & Associates Economists Ltd.

¹ Census undercount estimated at approximately 3.1%. Note: Population including the undercount has been rounded.

² Includes single and semis.

³ Includes townhouses (excluding stacked townhouses) and apartments in duplexes.

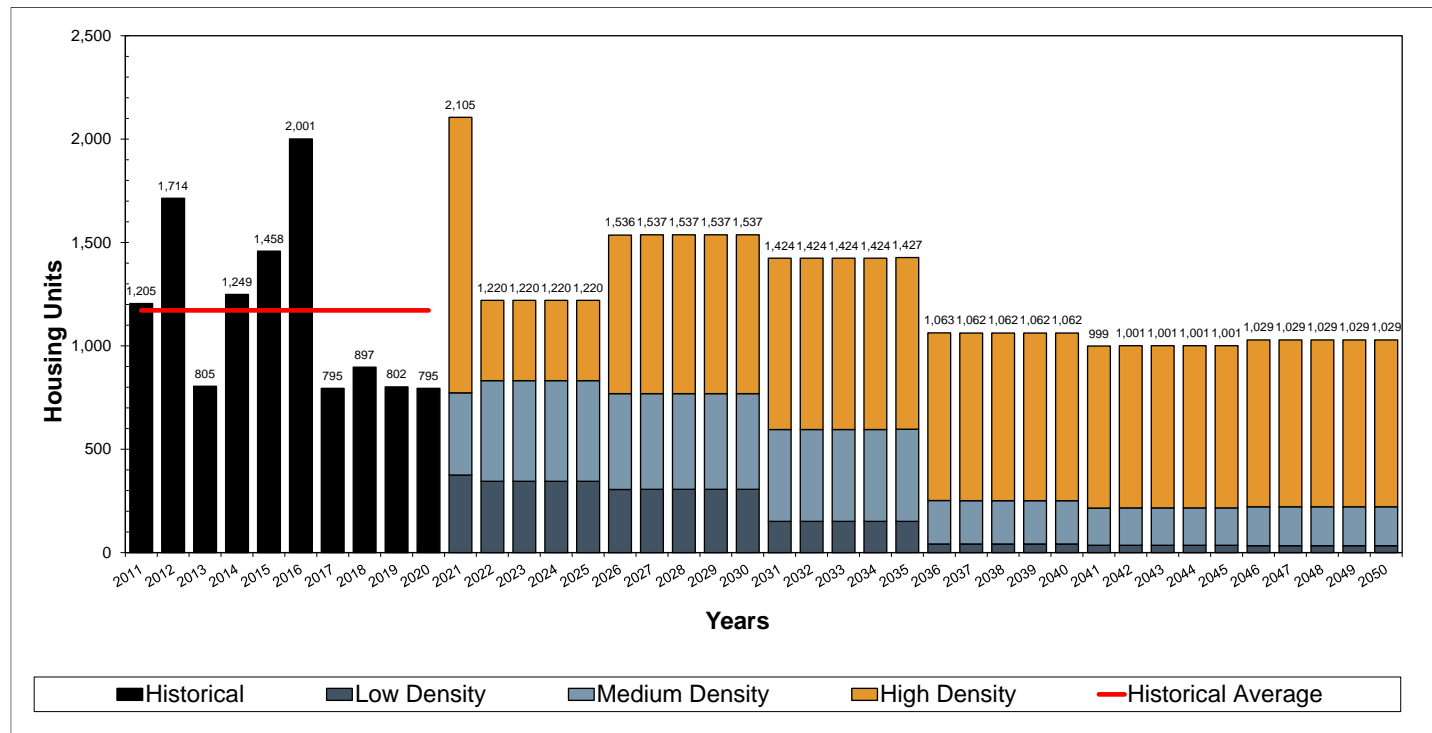
⁴ Includes bachelor, 1-bedroom and 2-bedroom+ apartments and stacked townhouses.

Note: Accessory unit growth of 3,600 units from 2021 to buildout is captured under high density for the purposes of this table.

Figure 8 provides a conceptual illustration of annual housing growth potential for the City by dwelling type from 2021 to 2051. Annual residential building permits (new units only) are also provided in Figure 8 from 2011 to 2020 for historical context. It is noted that 2021 was a very strong year for the City regarding residential development activity. While near-term housing demand is anticipated to remain strong for the City of Richmond Hill, there are currently a number of headwinds which may moderate housing growth over the next several years, including rising mortgage rates from recent historical lows experienced during the 2019 to 2021 period, cost of living pressure associated with persistently high inflation and geo-political tensions which are currently impacting commodity prices and global supply chains.



Figure 8
City of Richmond Hill
Annual Housing Forecast



Note:

- Growth forecast represents calendar year.
- Low density includes singles and semis.
- Medium density includes townhouses (excluding stacked townhouses) and apartments in duplexes.
- High density includes stacked townhouses and apartments.
- 2021 total units are estimated based on building permit information received as of June 2021.
- Accessory unit growth from 2021 to 2051 is captured under high density for the purposes of this figure.

Source: Historical housing activity from City of Richmond Hill building permit data, 2011 to 2020, and 2021 estimated from June 2021 year-to-date buildings permit data by Watson & Associates Economists Ltd.



Figure 9 summarizes the PPU assumptions for new dwelling by type used for the City of Richmond Hill 2021 Growth Analysis. It is noted that the new unit PPU figures are summarized with and without the net Census undercount (i.e. net population missed during Census enumeration). For the purposes of long-term planning in the York Region 2021 MCR and City of Richmond Hill 2021 Growth Analysis, the population includes the net Census undercount which is consistent with the Provincial Land Needs Assessment Methodology (LNA)¹ and Growth Plan for the GGH. For the purposes of City of Richmond Hill DC Background Study, the new unit PPU figures and total population exclude the net Census undercount.

Figure 9
City of Richmond Hill
New Unit Person Per Unit (PPU) Assumptions
Including the Net Census Undercount

Period	Including Net Census Undercount ⁴			Excluding Net Census Undercount		
	Low-Density ¹	Medium-Density ²	High-Density ³	Low-Density ¹	Medium-Density ²	High-Density ³
10-Year: 2021 to 2031 PPU	3.72	3.07	2.02	3.61	2.98	1.96
30-Year: 2021 to 2051 PPU	3.54	3.00	2.30	3.44	2.91	2.23
Buildout: 2021 to Buildout PPU	3.54	3.00	2.40	3.44	2.91	2.33

¹ Includes singles and semis.

² Includes towns, and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

⁴ Net Census undercount estimated at approximately 3.1%.

Note: PPUs have been adjusted based on historical trends. PPUs do not include Statistics Canada data classified as 'Other'. PPUs are not calculated for samples less than or equal to 50 dwelling units, and does not include institutional population. PPUs include the net Census undercount.

Source: Statistics Canada Custom Data by Watson & Associates Economists Ltd.

Figure 10 illustrates population and housing growth by planning policy area. Between 2021 and 2051 approximately 76% of housing growth is anticipated to be accommodated in the BUA. Over the longer-term (2021 to “buildout”), growth is forecast to be increasingly accommodated in the BUA (87%), as vacant land development opportunities diminish in the DGA.²

¹ A Place to Grow. Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario.

² Please refer to the City of Richmond Hill Official Plan, Office Consolidation to August 2021, Schedule A3, Settlement Area, for a map with boundaries of the BUA and DGA.



Figure 10
City of Richmond Hill
Summary of Housing and Population Growth by Planning Policy Area

Planning Policy Area	Housing Units				Population Including Undercount	Intensification
	Low Density ¹	Medium Density ²	High Density ³	Total		
2021 to 2051						
BUA	1,700	5,200	21,400	28,300	74,700	76%
DGA	2,900	4,500	1,500	9,000	28,623	
Rural	0	0	0	0	0	
Total	4,600	9,800	22,900	37,300	103,300	
2021 to Buildout						
BUA	2,600	6,300	70,200	79,000	202,600	87%
DGA	2,900	4,900	3,700	11,500	34,600	
Rural	0	0	0	0	0	
Total	5,500	11,100	73,900	90,500	237,200	

¹ Includes singles and semis.

² Includes towns (except stacked townhouses) and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments, stacked townhouses and accessory units.

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.



3. Employment Forecast

Figure 11 illustrates the City of Richmond Hill 2021 Growth Analysis employment forecast from 2016 to buildout, while Figure 12 compares the 2021 Growth Analysis employment forecast to the York Region 2021 MCR employment forecast for the City of Richmond Hill and 2018 Growth Analysis forecast. Key observations include:

- The long-term employment forecast prepared through the City of Richmond Hill 2021 Growth Analysis aligns with the York Region MCR employment total. However, the timing and type of employment has been updated to reflect residential and non-residential growth trends;
- Population-Related Employment (PRE) and Work at Home employment is largely driven by increased demand from the needs of population growth. The rate of employment within these categories between 2021 and 2041 has been increased relative to the York Region MCR forecast to reflect faster anticipated population growth in the DGA;
- Work at Home employment, which is attributed to people who work from home on a full-time basis, has been increased overall due to remote work trends accelerated by COVID-19, as well as longer-term trends associated with hybrid at home/at office workplace models;
- Major Office employment (MOE) has been slowed relative to the York Region MCR forecast for the City of Richmond Hill, reflecting anticipated market trends over the near-term. However, demand for MOE is anticipated to strengthen over the medium to long-term (i.e. 3+ years) as most businesses are expected to have a physical office presence as COVID-19 policy restrictions with respect to physical distancing continue to ease. Richmond Hill's proximity to the City of Toronto, connectivity to GO Transit and future Yonge North Subway extension also represent a long-term driver of increase MOE demand for the City over the medium to long-term planning horizon; and
- Employment Land Employment (ELE) employment is largely tied to the demand in industrial sector employment such as manufacturing, wholesale trade, transportation and warehousing. Future ELE demand is anticipated to be strong



as industrial vacancy rates within the Greater Toronto Area (GTA) and City of Richmond Hill are currently at all-time lows, at 0.3% and 0.5%, respectively.¹ ELE employment is largely tied to the availability of vacant Employment Area lands. It is forecast that by 2041 the majority of vacant Employment Area lands in the City will be developed, with some employment intensification potential identified for the post-2051 period.

¹ Colliers Toronto Industrial Market Report, Q4 2021.



Figure 11
City of Richmond Hill
Employment by Employment Category Forecast

Year	Population Including Undercount	Employment Activity Rates							Total Employment by Employment Category						
		Major Office ¹	Employment Land Employment ²	Population-Related Employment ³	Rural Employment ⁴	Subtotal	Work at Home ⁵	Total	Major Office ¹	Employment Land Employment ²	Population-Related Employment ³	Rural Employment ⁴	Subtotal	Work at Home ⁵	Total
2016	201,000	5%	13%	16%	0%	34%	5%	39%	10,900	26,000	31,500	500	68,800	10,000	78,800
2021	213,700	5%	13%	16%	0%	35%	5%	40%	11,200	28,600	34,900	500	75,200	10,700	85,900
2031	252,950	5%	12%	16%	0%	33%	5%	39%	12,900	30,700	40,100	500	84,200	13,200	97,400
2041	286,780	6%	11%	15%	0%	33%	6%	38%	17,100	32,100	44,000	500	93,800	16,100	109,900
2051	317,000	8%	10%	15%	0%	33%	6%	39%	23,800	32,800	46,300	500	103,400	19,100	122,500
Buildout	450,900	9%	7%	15%	0%	31%	7%	38%	41,300	33,500	65,400	500	140,600	31,600	172,200
Incremental Employment Growth															
2016-2021	12,700	0%	0%	1%	0%	1%	0%	1%	300	2,600	3,400	0	6,400	700	7,100
2021-2031	39,250	0%	-1%	0%	0%	-2%	0%	-2%	1,700	2,200	5,200	0	9,000	2,500	11,500
2021-2041	73,080	1%	-2%	-1%	0%	-2%	1%	-2%	5,900	3,600	9,200	0	18,600	5,400	24,000
2021-2051	103,300	2%	-3%	-2%	0%	-3%	1%	-2%	12,600	4,200	11,400	0	28,200	8,400	36,600
2021-Buildout	237,200	4%	-6%	-2%	0%	-4%	2%	-2%	30,100	4,900	30,500	0	65,500	20,800	86,300

¹ In the Growth Plan, major office is described as "freestanding office buildings of approximately 4,000 square metres of floor space or greater, or with approximately 200 jobs or more." Major office employment (MOE) is comprised of employment accommodated in office buildings greater than 1,900 sq.m (20,000 sq.ft.). In this report, the phrase "major office" is generally used in regard to buildings that accommodate MOE and are aligned with office inventories. Major office functions are often concentrated in downtown areas or established suburban office park. Typically, MOE includes knowledge-based sectors found in standalone multi-storey buildings including finance and insurance; information and cultural industries; management of companies; professional, scientific and technical services; and real estate, rental and leasing sectors.

² Employment Lands Employment (ELE) represents jobs accommodated in industrial-type buildings. This includes largely industrial-sector employment including 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. ELE includes population-related employment but excludes major office.

³ Population-related Employment (PRE) includes employment in institutional and commercial sectors not accommodated in major office buildings (MOE) or within industrial buildings (ELE). Work at home employment is also captured as PRE. PRE is located within the City's urban areas and largely accommodated in downtown areas, commercial corridors and nodes, neighbourhood plazas, institutional campuses and schools, and standalone institutional and retail buildings. A limited share of PRE is accommodated in Employment Areas within standalone institutional and retail commercial buildings.

⁴ Rural-based employment reflects jobs accommodated in locations outside of the urban area. Rural Employment consists primarily of primary sectors (e.g. agriculture, mineral aggregate extraction) within the countryside as well as PRE outside urban areas.

⁵ Work at home employment reflects people who work from home on a full-time basis.

Note: No fixed place of work employment is embedded within the employment categories (excluding work at home).

Source: 2016 and 2021 adapted from York Region 2021 MCR. 2026 to buildout forecast by Watson & Associates Economists Ltd.



Figure 12
City of Richmond Hill
Employment Forecast Comparison

Richmond Hill 2018 Growth Analysis

Year	Employment Category						
	Major Office ¹	Employment Land Employment	Population-Related Employment	Rural Employment	Subtotal	Work at Home	Total
2021	11,300	33,100	34,000	0	78,400	11,200	89,600
2031	16,000	35,100	38,500	0	89,600	13,000	102,600
2041	21,800	36,200	44,700	0	102,700	15,300	117,900
Buildout	27,200	37,200	54,700	0	119,100	18,000	137,100
Incremental Growth							
2021-2031	4,700	2,000	4,500	0	11,200	1,800	13,000
2021-2041	10,500	3,100	10,700	0	24,300	4,100	28,300
2021-Buildout	15,900	4,100	20,700	0	40,700	6,800	47,500

¹ Major Office includes employment in office buildings 20,000 sq.ft. and greater.

Source: Watson & Associates Economists Ltd.

York Region 2021 MCR

Year	Employment Category						
	Major Office ¹	Employment Land Employment	Population-Related Employment	Rural Employment	Subtotal	Work at Home	Total
2021	11,200	28,600	34,900	500	75,200	10,700	85,900
2031	13,600	31,900	38,600	500	84,600	12,400	96,900
2041	18,900	33,300	42,100	500	95,000	14,000	108,900
2051	26,700	33,500	45,600	500	106,400	16,100	122,500
Incremental Growth							
2021-2031	2,400	3,300	3,700	0	9,400	1,700	11,000
2021-2041	7,700	4,700	7,200	0	19,800	3,300	23,000
2021-2051	15,500	4,900	10,700	0	31,200	5,400	36,600

¹ Major Office includes employment in office buildings 20,000 sq.ft. and greater.

Source: Adapted from York Region 2021 MCR.

Richmond Hill 2021 Growth Analysis

Year	Employment Category						
	Major Office ¹	Employment Land Employment	Population-Related Employment	Rural Employment	Subtotal	Work at Home	Total
2021	11,200	28,600	34,900	500	75,200	10,700	85,900
2031	12,900	30,700	40,100	500	84,200	13,200	97,400
2041	17,100	32,100	44,000	500	93,800	16,100	109,900
2051	23,800	32,800	46,300	500	103,400	19,100	122,500
Buildout	41,300	33,500	65,400	500	140,600	31,600	172,200
Incremental Growth							
2021-2031	1,700	2,100	5,200	0	9,000	2,500	11,500
2021-2041	5,900	3,500	9,100	0	18,600	5,400	24,000
2021-2051	12,600	4,200	11,400	0	28,200	8,400	36,600
2021-Buildout	30,100	4,900	30,500	0	65,400	20,900	86,300

¹ Major Office includes employment in office buildings 20,000 sq.ft. and greater.

Source: Watson & Associates Economists Ltd.

Please note there is no 2051 forecast horizon provided for the 2018 Growth Analysis as that forecast had a 2041 long-term forecast horizon. The York Region 2021 MCR and Richmond Hill 2021 Growth Analysis forecasts include a 2051 forecast horizon.



4. City of Richmond Hill Housing Forecast by Growth Centre Study Area, Secondary Plan Area and Remaining DGA Lands

Figures 13 to 17 illustrate the geographic distribution of housing growth within the City of Richmond Hill over 10-year, 20-year, 30-year and buildout time horizon by Growth Centre Study Areas by Traffic Zone. Growth Centre Study Areas largely represent areas where changes to the OP are proposed as per the City's Key Directions Report.¹ Additional development identified through a Ministerial Zoning Order (MZO) are also anticipated to result in significant changes to the forecast at a traffic zone level relative to the 2018 Growth Analysis. Over the 2021 to 2041 period growth is largely concentrated along the Yonge Street, Highway-7 and Major Mackenzie Corridors, in addition to the Leslie and West Gormley Secondary Plan Areas and remaining DGA. Over the longer-term forecast period from 2041 to buildout, urban development is anticipated to increasingly shift towards the major corridors in the BUA as the majority of the City's DGA lands are built-out by 2041.

¹ City Plan 2041. Key Directions Report for the City of Richmond Hill Official Plan Update. November 2021.



Figure 13

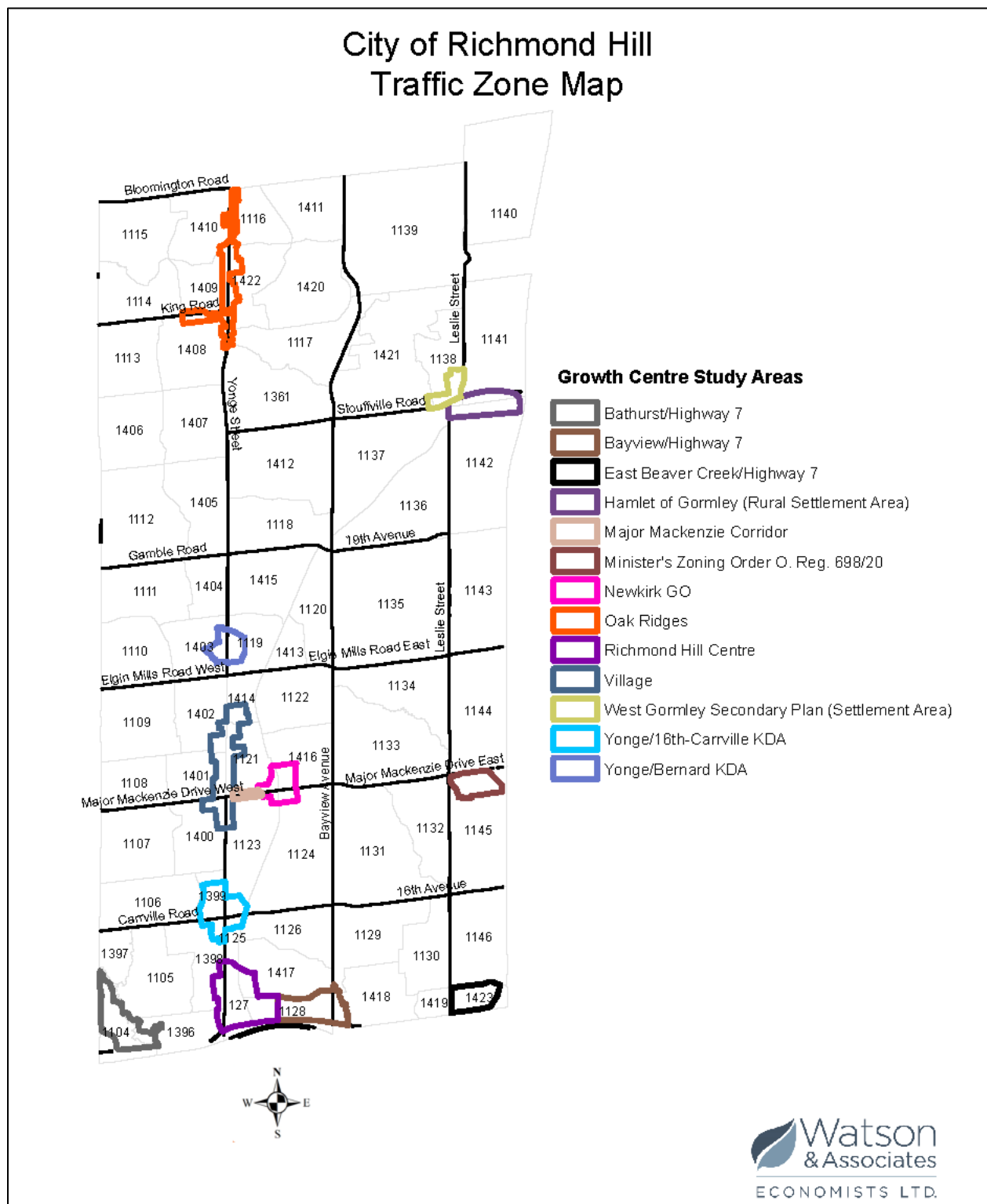




Figure 14

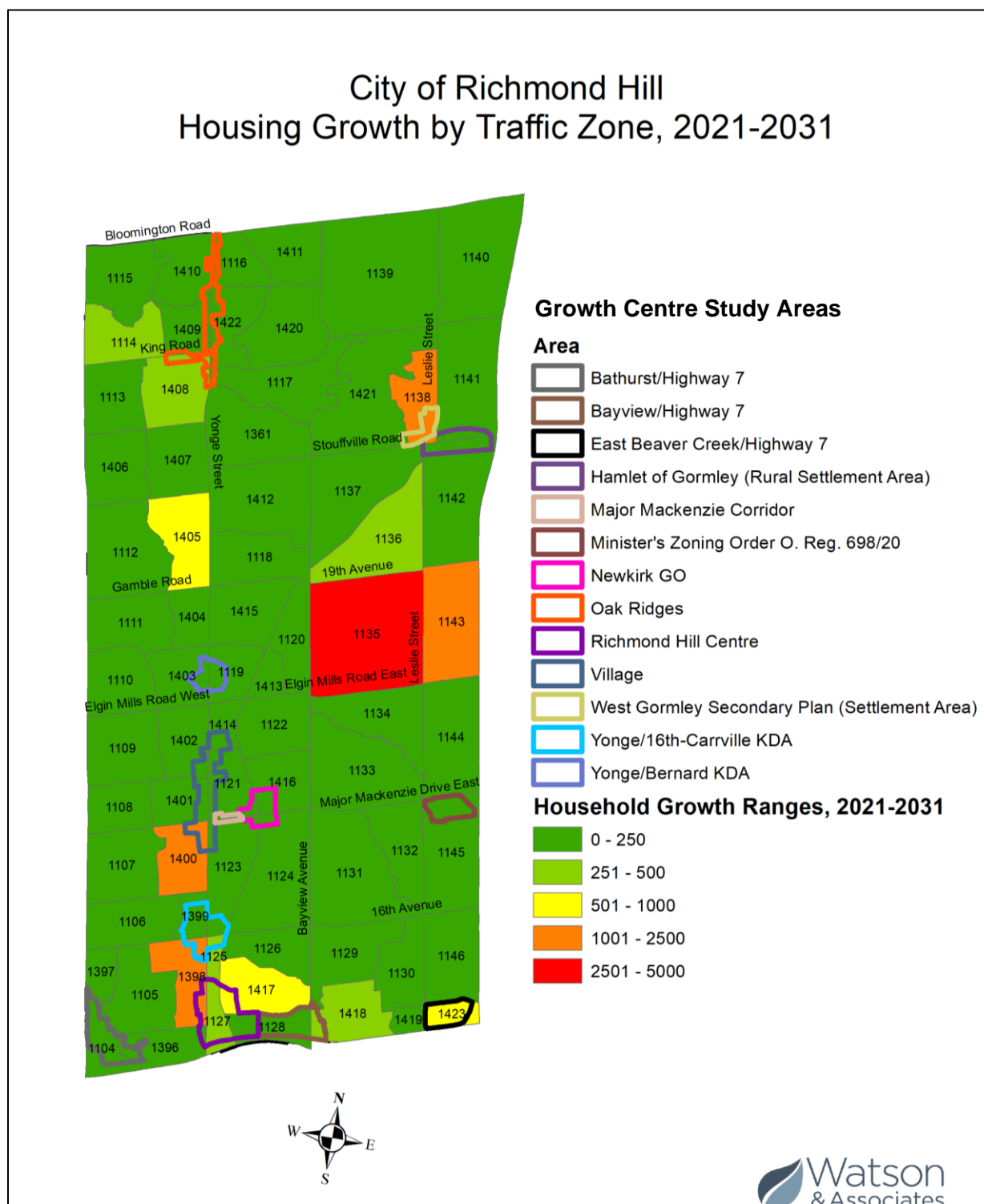




Figure 15

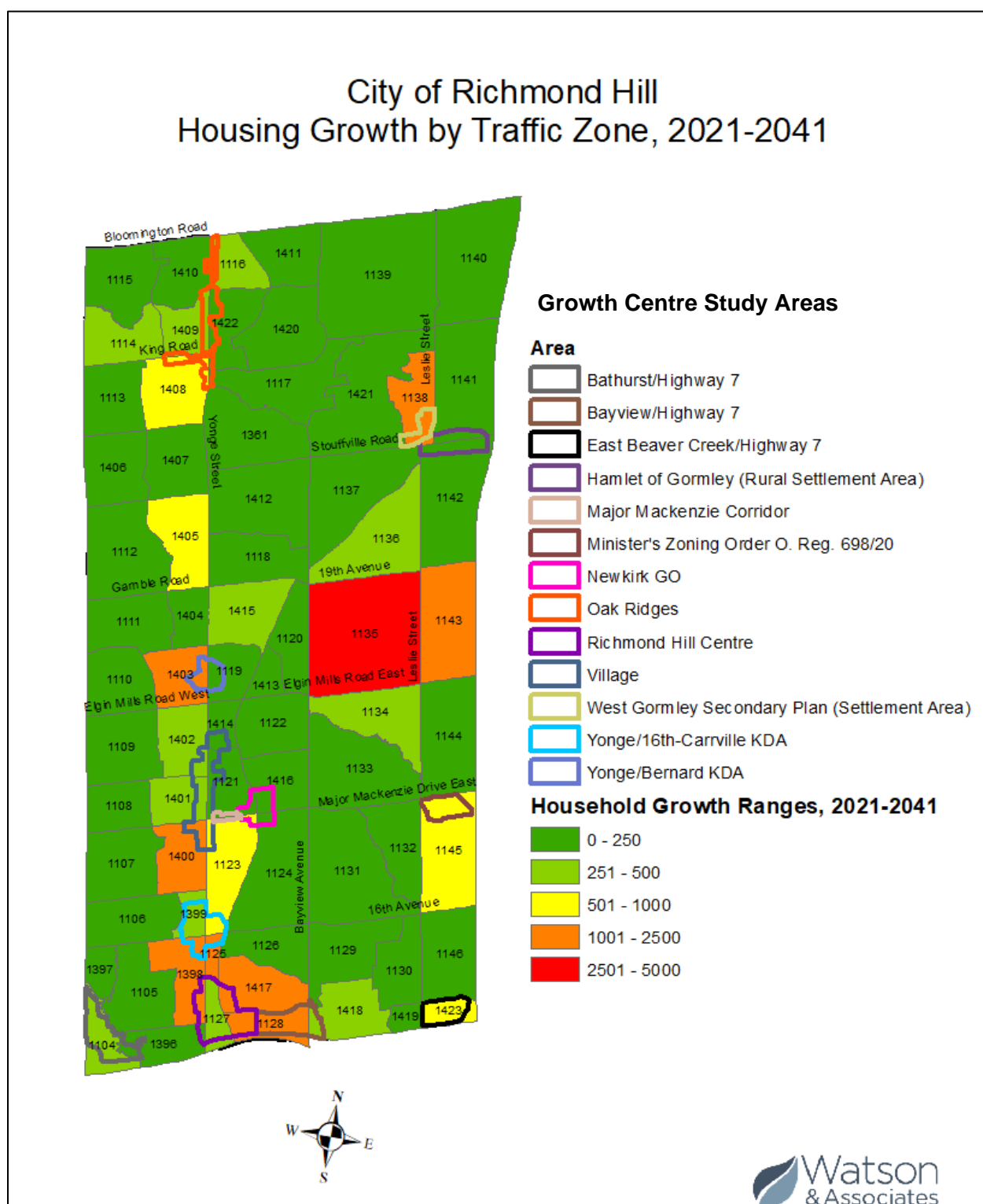




Figure 16

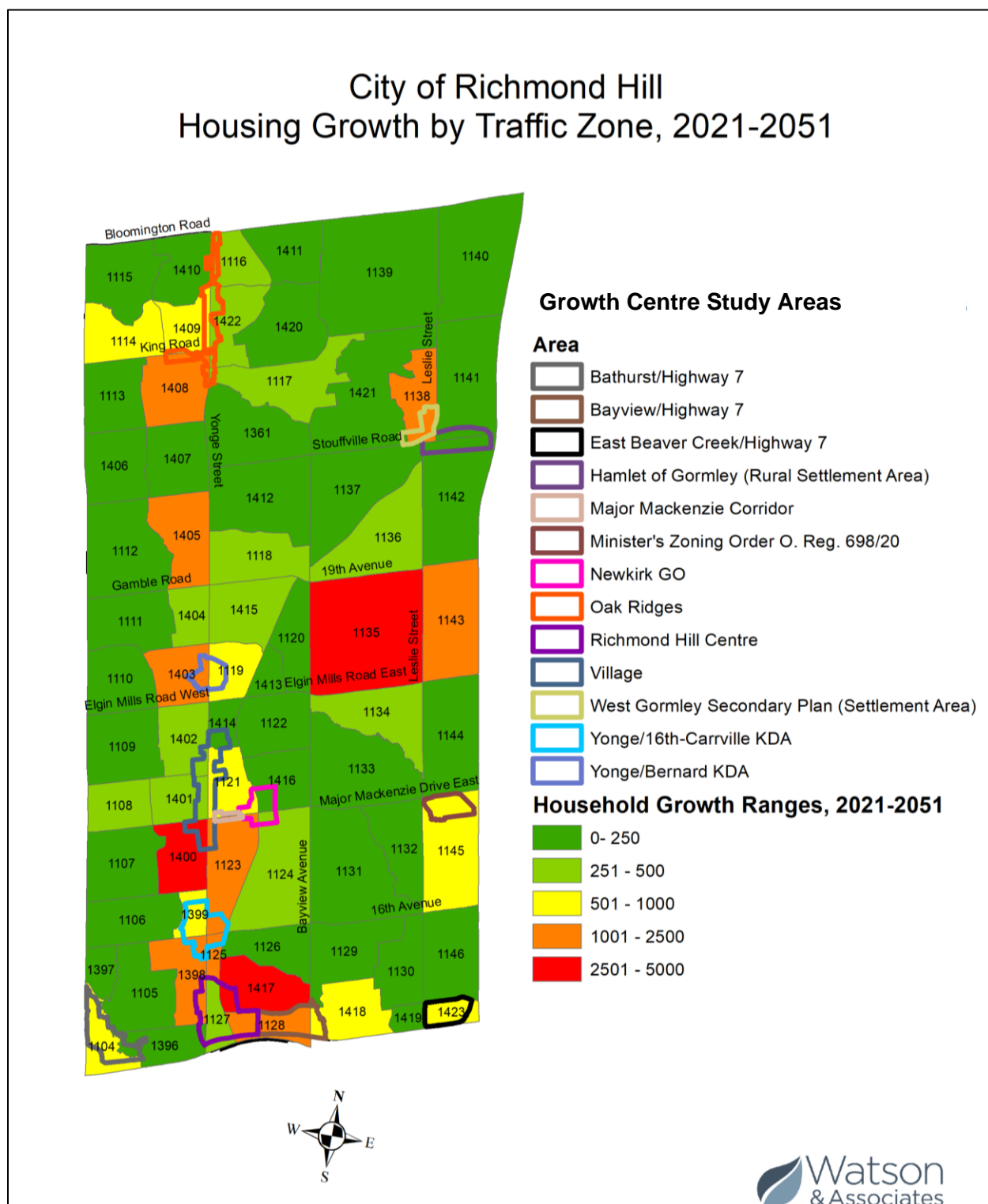




Figure 17

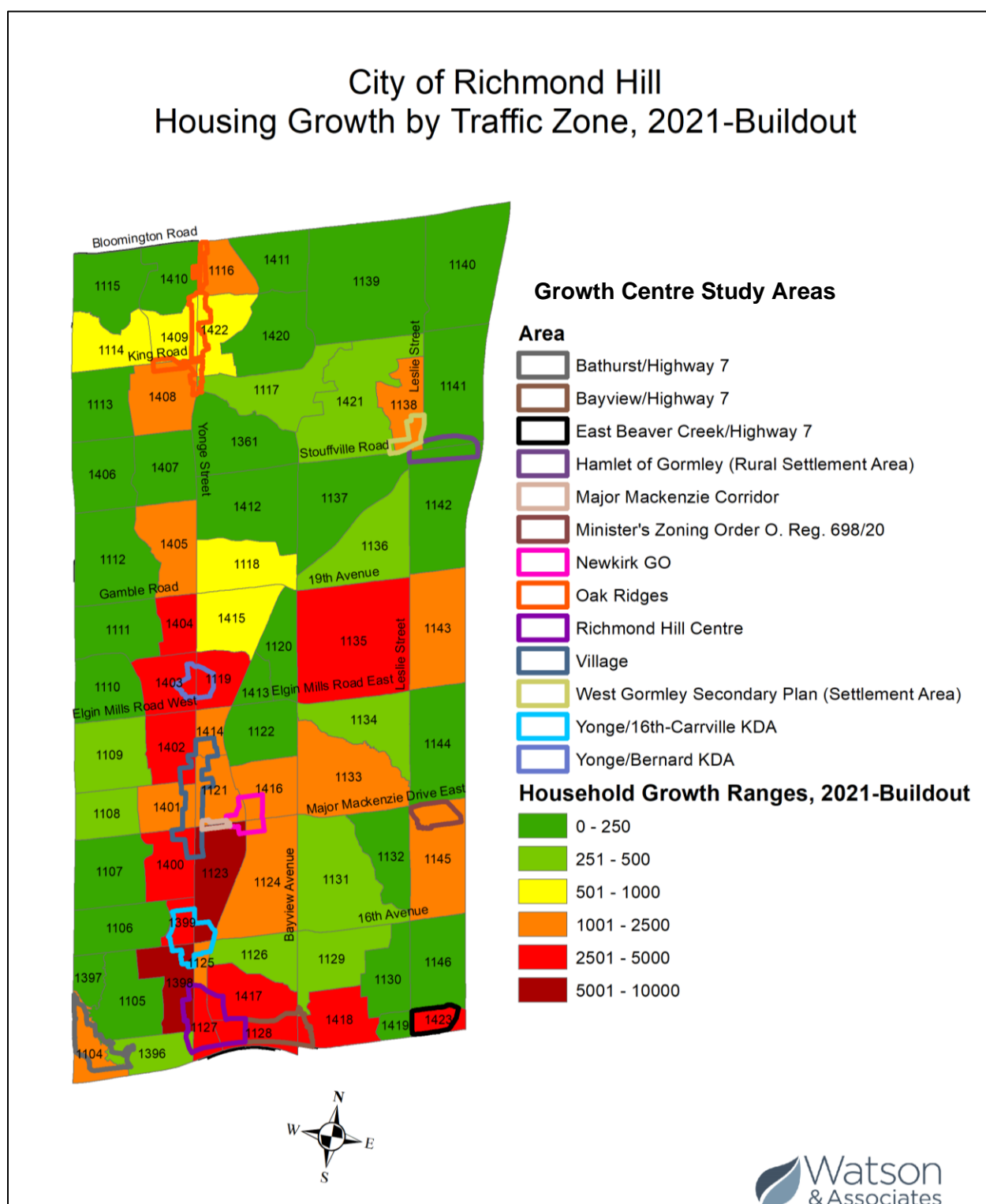




Figure 18 summarizes the growth potential for the Growth Centre Study Areas in the City of Richmond Hill (refer to Figure 13 for a map of these areas). These areas represent over half (53%) of all household growth from 2021 to buildout for the City of Richmond Hill. The remaining growth is forecast to occur largely in corridor areas, infill areas and the DGA.

Figure 18
City of Richmond Hill
Growth Centre Study Areas

Growth Centre Study Area	Traffic Zones Part of Growth Centre Study Area	Growth Centre Study Area Units in the Development Approvals Process	Growth Centre Study Area Units Outside the Development Approvals Process	Growth Centre Study Area Total Unit Potential	Share of Growth Centre Study Area Total Unit Potential in the Development Approvals Process	Total Growth Centre Study Area Share of City of Richmond Hill Total Housing Unit Growth, 2021 to buildout
Richmond Hill Centre	1127, 1128, 1396, 1417, 1398	4,010	8,490	12,500	32%	14%
Yonge / 16th-Carrville KDA	1123, 1125, 1398, 1399	3,150	5,760	8,910	35%	10%
Yonge / Bernard KDA	1119, 1403	2,720	2,330	5,050	54%	6%
Village	1400, 1401, 1402, 1123, 1121, 1414	2,800	2,420	5,210	54%	6%
Newkirk LDA (RH GO station)	1121, 1123, 1124, 1416	90	2,130	2,220	4%	2%
Major Mackenzie Corridor	1121, 1123	150	220	370	41%	0%
Oak Ridges	1408, 1409, 1410, 1116, 1422, 1117	2,190	870	3,060	72%	3%
Bathurst / Highway 7	1104	400	1,700	2,100	19%	2%
Bayview / Hwy 7	1418, 1128	1,130	1,140	2,270	50%	3%
East Beaver Creek / Hwy 7	1423	620	2,510	3,120	20%	3%
Gormely GO Station-Urban	1138	290	580	870	33%	1%
Gormely GO Station-Rural	1141, 1142	0	130	130	0%	0%
Minister's Zoning Order O. Reg. 698/20	1145	240	1,690	1,930	12%	2%
Total		17,780	29,960	47,730	37%	53%

Source: Units in the development approvals process derived from City of Richmond Hill data, and total unit potential adapted from City of Richmond Hill Emerging Centre growth potential data by Watson & Associates Economists Ltd.



Figure 19 summarizes household growth potential for the City of Richmond Hill DGA. For the purposes of this summary, the DGA has been summarized by the North Leslie Secondary Plan Area, West Gormley Secondary Plan Area, and the Remaining DGA. Key observations include:

- The North Leslie Secondary Plan Area is forecast to be largely developed by 2036, with modest potential for secondary unit growth thereafter;
- The majority of the West Gormley Secondary Plan Area is anticipated to be largely developed by 2041, with potential for secondary units and high-density households post-2051 that require an OPA; and
- Over one-third of the remaining DGA area is forecast to be developed by 2041, with the remaining growth occurring post-2051 for residential development applications that require an OPA.

Figure 19
City of Richmond Hill
DGA Secondary Plan Area Growth – North Leslie and West Gormley

North Leslie Secondary Plan Area

Period	Low Density ¹	Medium Density ²	High Density ³	Total
2021-2026	871	1,318	480	2,670
2026-2031	610	1,273	281	2,164
2031-2036	437	1,033	229	1,698
2036-2041	0	0	0	0
2041-2046	0	0	0	0
2046-2051	0	0	0	0
2051-Buildout	0	0	160	160
2021-2051	1,918	3,624	990	6,532
2021-Buildout	1,918	3,624	1,150	6,692

Note: All housing growth post-2051 are accessory units.

¹ Includes single and semis.

² Includes townhouses (excluding stacked townhouses) and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments and stacked townhouses.

Source: Watson & Associates Economists Ltd.



West Gormley Secondary Plan Area

	Low Density ¹	Medium Density ²	High Density ³	Total
2021-2026	400	45	5	450
2026-2031	550	91	9	650
2031-2036	50	136	14	200
2036-2041	0	30	3	33
2041-2046	0	0	0	0
2046-2051	0	0	0	0
2051-Buildout	0	0	477	477
2021-2051	1,000	303	30	1,333
2021-Buildout	1,000	303	507	1,810

Note: Housing growth post-2051 is comprised of 400 high density units which are in the development approvals process requiring an OPA and are not likely to develop, however their potential is captured for buildout purposes. The remaining high density growth post-2051 is in the form of accessory units.

¹ Includes single and semis.

² Includes townhouses (excluding stacked townhouses) and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments and stacked townhouses.

Source: Watson & Associates Economists Ltd.

Remaining DGA Area

	Low Density ¹	Medium Density ²	High Density ³	Total
2021-2026	25	100	0	125
2026-2031	0	200	0	200
2031-2036	0	250	180	430
2036-2041	0	155	216	371
2041-2046	0	0	0	0
2046-2051	0	0	0	0
2051-Buildout	0	370	1,527	1,897
2021-2051	25	705	396	1,126
2021-Buildout	25	1,075	1,923	3,023

Note: Housing growth post-2051 is comprised of units which are in the development approvals process requiring an OPA and are not likely to develop, however their potential is captured for buildout purposes.

¹ Includes single and semis.

² Includes townhouses (excluding stacked townhouses) and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments and stacked townhouses.

Source: Watson & Associates Economists Ltd.



5. Supplementary Growth Forecast Information

The following additional details for the City of Richmond Hill 2021 Growth Analysis forecast have been provided in Excel format to the City of Richmond Hill:

- Total development potential (Figure 6) by traffic zone and housing by structure type;
- Population forecast by traffic zone from 2021 to 2051 in five-year increments, and buildout;
- Household forecast by structure type from 2021 to 2051 in five-year increments, and buildout; and
- employment by land-use forecast by traffic zone from 2021 to 2051 in five-year increments, and buildout.