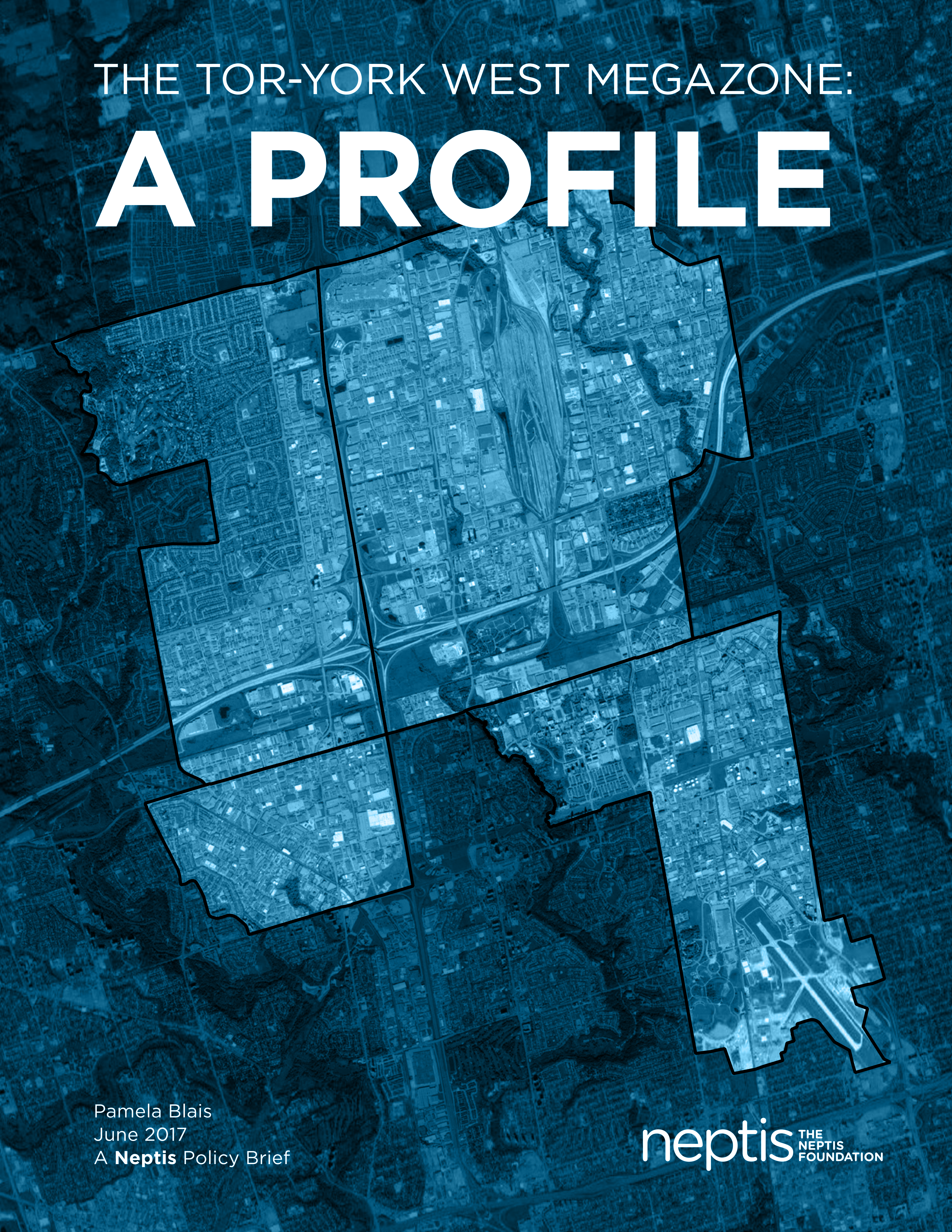

THE TOR-YORK WEST MEGAZONE:

A PROFILE

Pamela Blais

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A **Neptis** Policy Brief

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PREFACE

Planning for Prosperity: Globalization, Competitiveness, and the Growth Plan for the Greater Golden Horseshoe was released by the Neptis Foundation in late 2015. It was intended to contribute to the Province of Ontario's Coordinated Review of the *Growth Plan for the Greater Golden Horseshoe*, Greenbelt Plan, Oak Ridges Moraine Plan, and Niagara Escarpment Plan. The report described the changing economic landscape of the Greater Golden Horseshoe, highlighting important considerations for the Growth Plan.

Among other things, *Planning for Prosperity* identified three major suburban regional employment "megazones." These large, economically significant employment areas had not been recognized in nor addressed by the Growth Plan. Given the importance of these megazones to the regional, provincial, and national economies, as well as their role in achieving key Growth Plan objectives, Neptis sponsored further research on these areas to inform planning and policy development. This policy brief provides additional detail on the Tor-York West megazone. Companion policy briefs provide similar profiles of the other two megazones: Airport and Tor-York East.

EXECUTIVE SUMMARY

This Policy Brief defines and describes the Tor-York West megazone (TYW), one of three regionally, provincially, and nationally significant employment zones identified in the Neptis Foundation report *Planning for Prosperity*.

TYW covers a large area in the City of Vaughan and the City of Toronto. Of the megazone's approximately 140,000 jobs, 45,000 are in manufacturing, and more than 11,000 in construction, making this the region's workshop. More than 20,000 jobs are in wholesale trade and transportation – not surprising, given the presence of a CN multimodal facility. There are also almost 20,000 jobs in finance and business services.

Between 2001 and 2011, the TYW megazone lost almost 13,000 manufacturing jobs, but compensated for the loss with employment growth in construction, business services, higher education (mainly at York University), and population-related work (jobs in retail, schools, and personal services). However, the northern part of the megazone in the City of Vaughan fared better than the southern part in the City of Toronto. The latter attracted little new growth to offset manufacturing job losses.

The area is changing with the development of the Vaughan Metropolitan Centre (VMC) and the replanning of the Downsview Airport site, as well as major transit investments in the extension of the Spadina subway line to Vaughan, the addition of bus rapid transit on the Highway 7 corridor, and improvements to GO train service on the Barrie line. These initiatives may help address the megazone's current high level of auto dependence: at present, more than 230,000 daily work trips are made by automobile to jobs in the megazone. There is also potential to add jobs along the Highway 7 corridor by developing what are now surface parking lots into office uses. Redevelopment could add 11,000 to 15,000 workers (west of Highway 400 and in addition to the VMC), in areas within walking distance of bus rapid transit.

The TYW megazone represents significant potential for fostering economic development, reducing regional congestion, and achieving Growth Plan objectives and provincial greenhouse gas reduction targets. Yet along with the two other megazones identified in *Planning for Prosperity*, TYW is not currently identified in the *Growth Plan for the Greater Golden Horseshoe*. This omission makes it difficult to ensure the alignment of land use and transit planning, as the Regional Transportation Plan uses the Growth Plan as its starting point.

Realizing the potential of TYW will require:

- Acknowledging the TYW megazone in the Growth Plan and Regional Transportation Plan, by prioritizing transit to existing employment concentrations.
- Focusing on reurbanization, and taking a comprehensive planning approach to the megazone as a whole, by leveraging its existing employment base and economic assets, and integrating proactive planning, placemaking, economic development, and improved access by transit, walking, and cycling.
- Directing new office uses to transit-accessible locations and severely restricting or prohibiting them in auto-dependent areas.
- In the megazone's industrial areas, building upon the existing manufacturing cluster to strengthen and diversify the area's role as the region's workshop.

THE DEVELOPMENT OF THE VAUGHAN METROPOLITAN CENTRE AND DOWNSVIEW AIRPORT SITE, AS WELL AS MAJOR TRANSIT INVESTMENTS AND IMPROVEMENTS TO GO TRAIN SERVICE, MAY HELP ADDRESS THE MEGAZONE'S CURRENT HIGH LEVEL OF AUTO DEPENDENCE.

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THE BASICS

The Tor-York West (TYW) megazone covers 6,800 hectares. This area, more than two and a half times as large as downtown Toronto, contained approximately 140,000[1] jobs in 2011. This compares with 464,650 jobs in downtown Toronto, almost 300,000 in the Airport megazone, and just over 100,000 in the Tor-York East megazone.

The TYW megazone is an expansive, contiguous employment area, located around the intersection of Highway 400 and Highway 407. A large CN intermodal facility is in the area bounded by Highway 7 to the south, Keele Street to the east, Rutherford Road to the north, and Jane Street to the west. The megazone also includes the emerging Vaughan Metropolitan Centre, a formerly industrial area planned for high-density residential and office development, served by a subway station on the extended Spadina line, due to open in late 2017.

The TYW megazone extends from the City of Vaughan south of Steeles Avenue into the City of Toronto. It is due in part to this jurisdictional fragmentation that the TYW megazone has not been recognized nor planned for in the Growth Plan as the significant economic and urban district that it is.

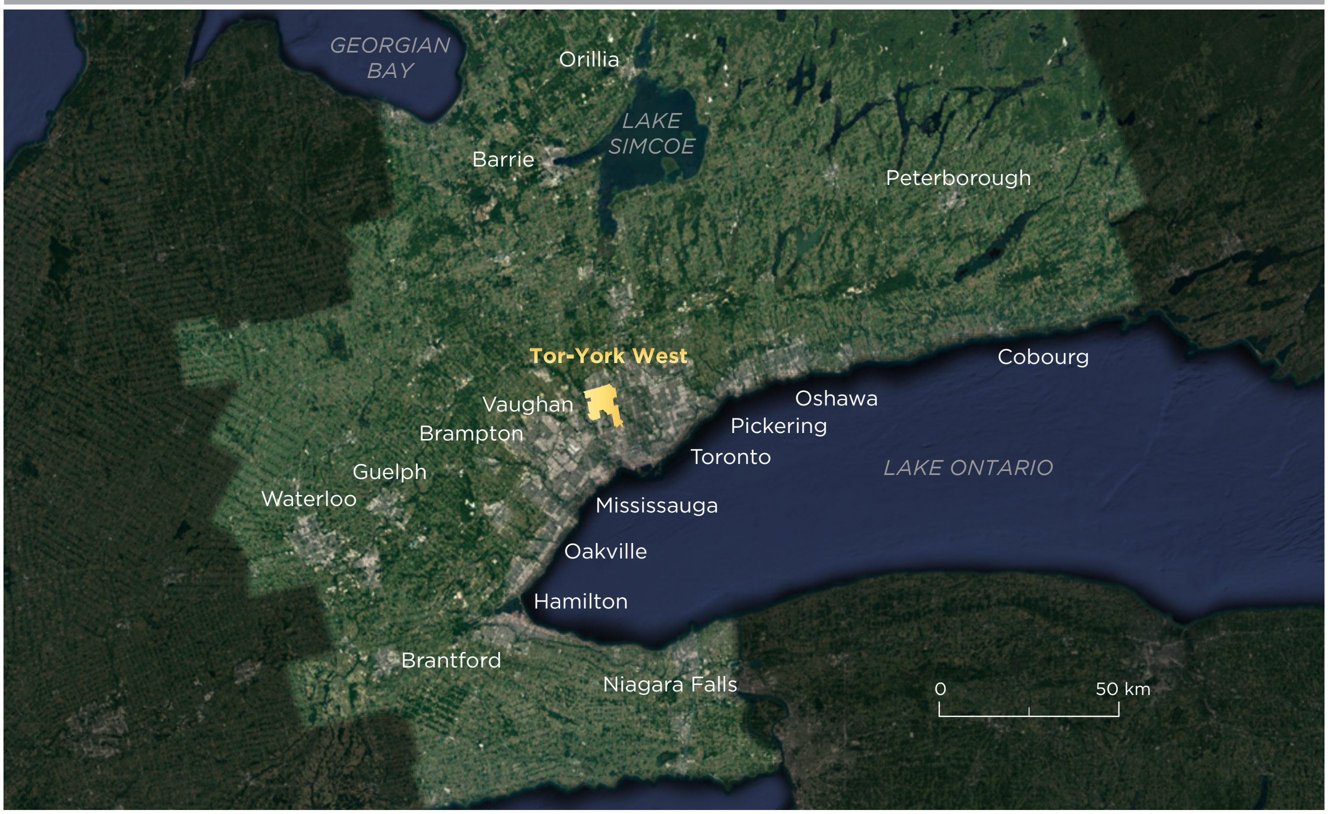
Employment in the district grew by more than 7,000 jobs between 2001 and 2011. This represents 2% of the growth in jobs across the entire Greater Golden Horseshoe (GGH) during that period.

Most of the jobs found in the megazone are in "core" employment – that is, employment in tradeable goods and services that drive the regional economy and bring in revenues from outside the region.[2] There were 112,705 core jobs in the megazone in 2011. However, this total represents an overall loss of about 500 core jobs between 2001 and 2011, reflecting the pattern for the GGH as a whole, which experienced a net loss of approximately 3,000 core jobs in that period, largely due to deindustrialization. (See Table 1 in the Appendix.) The manufacturing sector alone lost 183,925 jobs. Much of region's growth since 2001 has been in non-core (that is, population-related) sectors, which grew by approximately 77,000 jobs.

1 Unless otherwise noted, all employment numbers quoted in this brief represent employment with a usual place of work only – jobs without a usual place of work and home-based jobs are not included. The data are drawn from the Census of Canada place of work data.

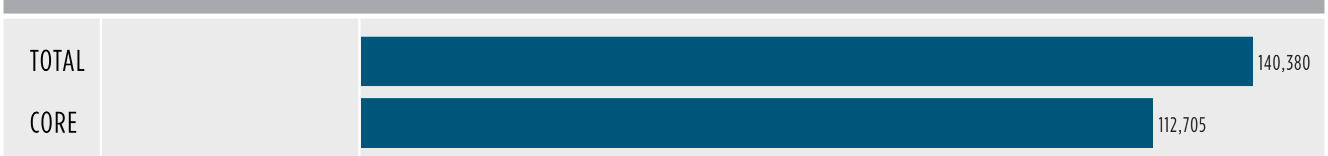
2 As distinct from "population-related" employment that serves local population, such as retail, personal services, and local schools.

LOCATION OF THE TYW MEGAZONE IN THE GGH

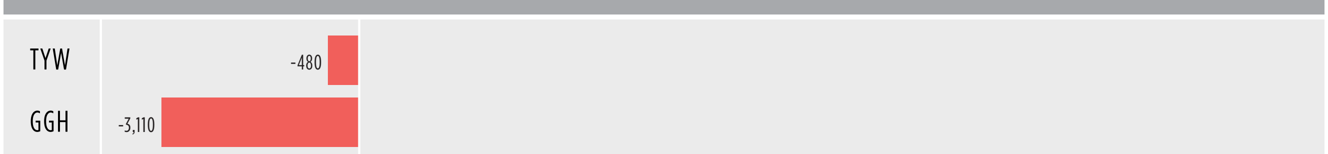


AREA OF THE TYW MEGAZONE

TYW EMPLOYMENT, 2011



CORE EMPLOYMENT CHANGE, 2001-2011



TYPES OF EMPLOYMENT

"Core" employment accounts for 80% of jobs in the TYW megazone. This compares with 62% for the Greater Golden Horseshoe as a whole, suggesting that the TYW is relatively concentrated in core, tradeable activities. Employment by planning category and sector[3] is shown in Table 2 in the Appendix.

The data indicate significant numbers of jobs in the manufacturing, construction, and utilities sector, as well as in the warehousing and transportation sector. Indeed, given the predominance of the core industrial activities of manufacturing, distribution, wholesaling, transportation, and construction, the district could be considered the region's workshop.

Whereas manufacturing, construction, and utilities employment represents 17% of all jobs for the Greater Golden Horseshoe as a whole, in the TYW megazone they represent 41% of all jobs. Similarly, warehousing and transportation account for 10% of all jobs in the region, but 17% of jobs in the TYW megazone, indicating a strong regional specialization in all of these activities.

Manufacturing is by far the most significant industry in the district. Of the 57,990 jobs in the manufacturing, construction, and utilities sector, 77% (44,480 jobs) are in manufacturing. Key manufacturing industries include transportation equipment (9,490 jobs); furniture and related (6,535 jobs); fabricated metal products (4,740 jobs); food (3,505 jobs) and plastics and rubber (3,250 jobs).

The remaining jobs in the manufacturing, construction, and utilities category are almost entirely found in construction. With 11,515 jobs in 2011, this industry has a strong presence in the megazone.

The warehousing and transportation sector comprises 15,905 jobs in wholesale trade, 4,005 in transportation, 1,815 jobs in postal service and couriers, and 1,210 in warehousing and storage. Perhaps surprisingly, given the presence of the CN multimodal facility, of more than 4,000 transportation jobs, only 840 are directly in rail transportation.

In the wholesale category, the most significant sub-sectors are personal and household goods (4,625 jobs), machinery and equipment (3,345 jobs), and building materials and supplies (2,680 jobs).

In addition, the TYW megazone includes 19,500 jobs in the finance and business services sector. Most of these are in business services rather than finance. The most significant category is administrative and business support services, with a total of 4,050 jobs. These are

3 The planning categories used here (industrial, offices, etc.) are designed to link processes of economic restructuring and change with built environment characteristics relevant to planning. Shares do not necessarily add to 100% as a result of data suppression associated with breaking down data by NAICS code and census tracts.

typically "back-office" uses, including employment services, services to buildings, and business support (such as payroll).

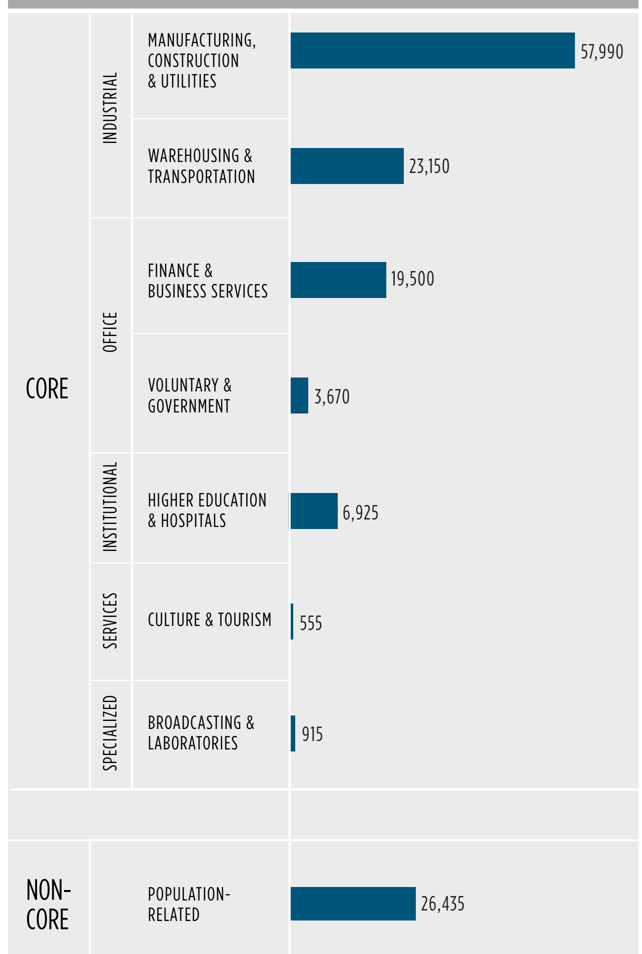
Other business services include 2,040 jobs in architecture and engineering, 1,455 jobs in legal services, 1,285 jobs in computer systems, and 1,170 in accounting services.

Among finance and related employment, 1,405 jobs are in finance, 990 in insurance, and 1,845 in real estate.

Of the 6,925 jobs in the higher education and hospital sector, most are employment related to York University.

The TYW is more industrially oriented than the two other megazones, and has a diversified industrial base rather than specific industry clusters. Many manufacturing jobs are in traditional sectors, such as food and furniture. There are fewer jobs in the finance and business services sector compared with the other two GGH megazones.

2011 EMPLOYMENT BY SECTOR



EMPLOYMENT CHANGE

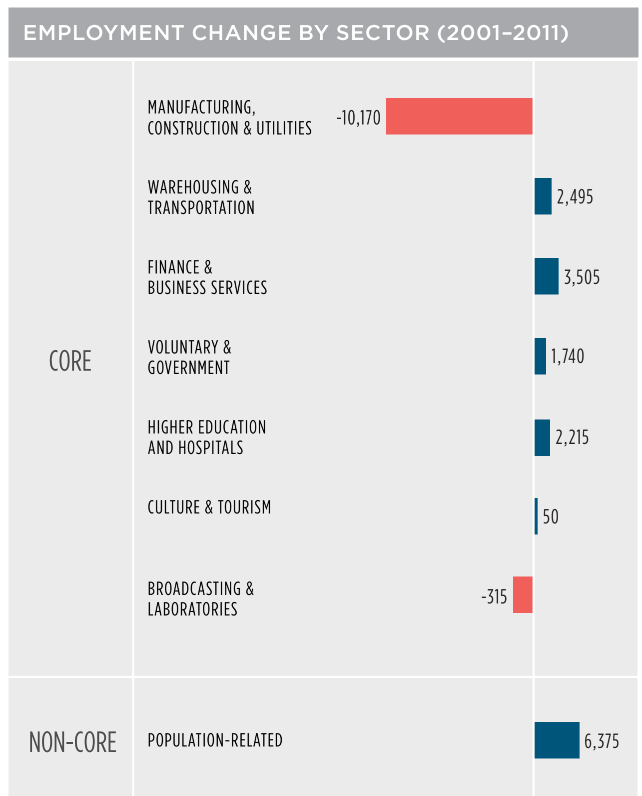
Between 2001 and 2011, the TYW megazone added 7,170 jobs overall, but there was a net loss of 480 jobs in core employment.

However, as elsewhere in the region, these numbers mask change and transition in the megazone. The loss of 12,875 jobs in manufacturing was offset by growth in other core industries, including 2,705 jobs in construction and utilities (primarily construction), 2,495 jobs in the warehousing and transportation category, and over 3,000 jobs in business services. In addition, there was job growth in higher education (2,215 jobs) and more than 1,700 jobs were added in the voluntary and government category.

While the two other megazones experienced net growth in core jobs during the period, the TYW megazone did not. This is largely due to the relatively high proportion of manufacturing employment in the district. The megazone also attracted fewer new jobs in other growth sectors. For example, while the TYW zone gained about 3,500 jobs in the finance and business services sector, only 190 of these were in the rapidly expanding finance industry. Other megazones experienced much more significant growth in finance – almost 6,000 jobs in the AMZ and more than 3,700 jobs in the TYE megazone.

However, a net loss in core employment in the TYW megazone mirrors the pattern in the GGH as a whole, which also experienced a net loss in core employment.

In addition, more than 6,000 population-related jobs were added to the zone between 2001 and 2011. (See Table 3 in the Appendix.)



THE EMPLOYMENT GEOGRAPHY OF THE MEGAZONE

We have divided the TYW into four subzones, corresponding to the four quadrants defined by the intersection of Highway 400 and Steeles Avenue.

DISTRIBUTION OF EMPLOYMENT

Of the four subzones, the northeast quadrant, centred on the CN intermodal terminal, is the largest and has the largest number of jobs: 62,355. The area in the southeast quadrant, which includes industrial areas, York University, and Downsview Airport, contains the second highest number, at 39,005 jobs.

Manufacturing, which is by far the dominant economic activity in the TYW megazone, is not relegated to certain areas, but is found across the whole megazone and is the predominant activity in each subzone and census tract.

Warehousing and transportation activities are also found across the district but, not surprisingly, are most significant in the northeast quadrant close to the CN intermodal terminal. There are more than 13,000 warehousing and transportation jobs in this sub-zone.

Although manufacturing employment also dominates in the southeast subzone, York University and the Downsview Airport lands are located in this subarea, reflected in the presence of almost 3,000 jobs in higher education and government services.

Finance and business services jobs are found throughout the entire megazone, although in fewer numbers than jobs in manufacturing or in the warehousing and transportation category. (See Table 4 in the Appendix.)

Vaughan Metropolitan Centre (VMC) is in the northeast subzone. The area is currently under development, and while some office uses have located there recently (notably a KPMG office building), these jobs were not captured in the 2011 census data. In 2011, the VMC contained only 2,215 jobs.[4]

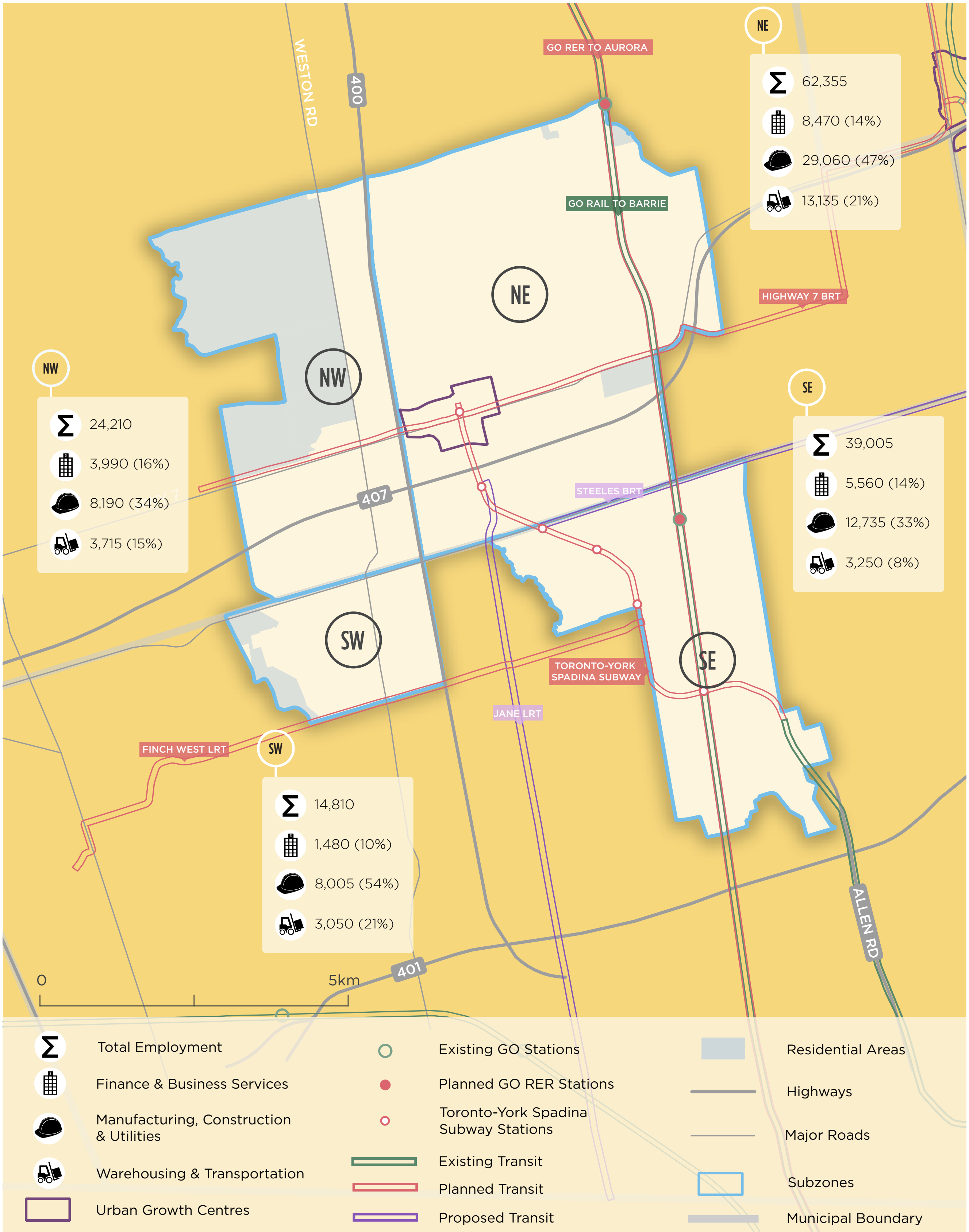
GEOGRAPHY OF EMPLOYMENT CHANGE

Employment change has not been uniform across the TYW Megazone. The areas to the north of Steeles Avenue (in Vaughan) have seen overall employment growth between 2001 and 2011. The northeast subzone experienced the greatest amount of growth, adding more than 9,000 jobs, while the northwest subzone added more than 4,000.

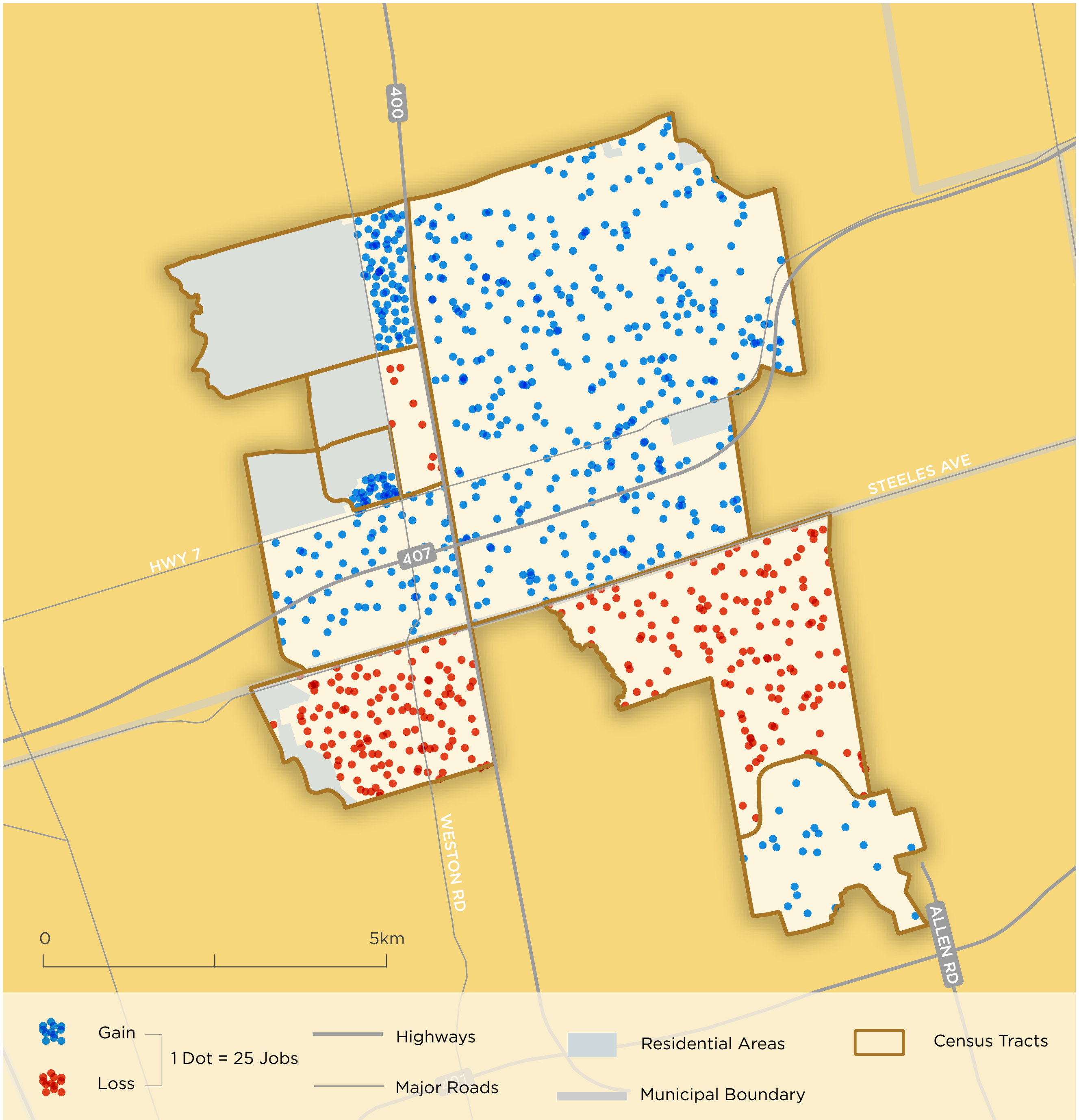
South of Steeles Avenue (in the City of Toronto), the picture was different; the two subzones each experienced a net loss of about 3,100 jobs.

4 Ontario Ministry of Municipal Affairs and Housing, Technical Report on Preliminary Performance Indicators for the Growth Plan for the Greater Golden Horseshoe, 2006.

EMPLOYMENT IN TOP THREE SECTORS, 2011



EMPLOYMENT CHANGE, 2001–2011



EMPLOYMENT CHANGE BY SECTOR

With the exception of the more newly urbanizing employment areas north of Highway 7 and west of Highway 400, the remaining areas of the TYW megazone all experienced a loss of manufacturing employment between 2001 and 2011. However, in the areas south of Steeles Avenue (that is, in Toronto), more manufacturing jobs were lost (more than 8,800 in total). In addition, the southeast subzone also experienced a net loss of employment in the warehousing and transportation sector, of more than 1,300 jobs.

Although the northeast subzone also lost close to 1,700 manufacturing jobs during the same period, it attracted more than 2,000 new jobs in warehousing and transportation, about 2,400 in finance and business services, and 5,800 population-related jobs. The northwest subzone also attracted new jobs in warehousing and transportation, and in business services.

South of Steeles Avenue, relatively little new employment was created in other sectors to compensate for lost manufacturing jobs. The main mitigating factor was an increase in employment of more than 2,000 jobs in the higher education and hospitals sector, presumably at York University. In short, employment areas in the City of Toronto not only lost more jobs in manufacturing, but also attracted fewer new jobs in other sectors, compared with employment areas in the City of Vaughan. (See Table 5 in the Appendix.)

It may be that the industry mix south of Steeles Avenue was more weighted toward industries vulnerable to globalization and technological change. But why did those areas attract fewer new jobs in other sectors? More research would be needed to answer this question.

DENSITY PATTERNS

The TYW megazone is strongly oriented toward activities such as manufacturing, wholesaling, and transportation that tend to have lower employment densities compared with office-related activities, such as finance and business services.

The large census tract surrounding the CN intermodal facility has an employment density of 24 jobs per hectare.[5] This is at the lower end of the spectrum for employment densities in the more mature, industrially oriented areas, which tend to fall within the range of 25 to 35 jobs per hectare of employment land.[6] Newer areas that are still under development, or those slated for redevelopment, such as the Downsview area, still have vacant sites and therefore their current densities are lower than this range. (See Table 6 in the Appendix.)

As of 2011, the Vaughan Metropolitan Centre had not yet begun to attract new, denser employment uses. Under the Growth Plan, the target density for the Centre is 200 people plus jobs per hectare. As it consisted primarily of industrial uses in 2011, the VMC's employment density was just 21 jobs per hectare[7] (there was no residential development there in 2011, so that number also represented people-plus-jobs per hectare).

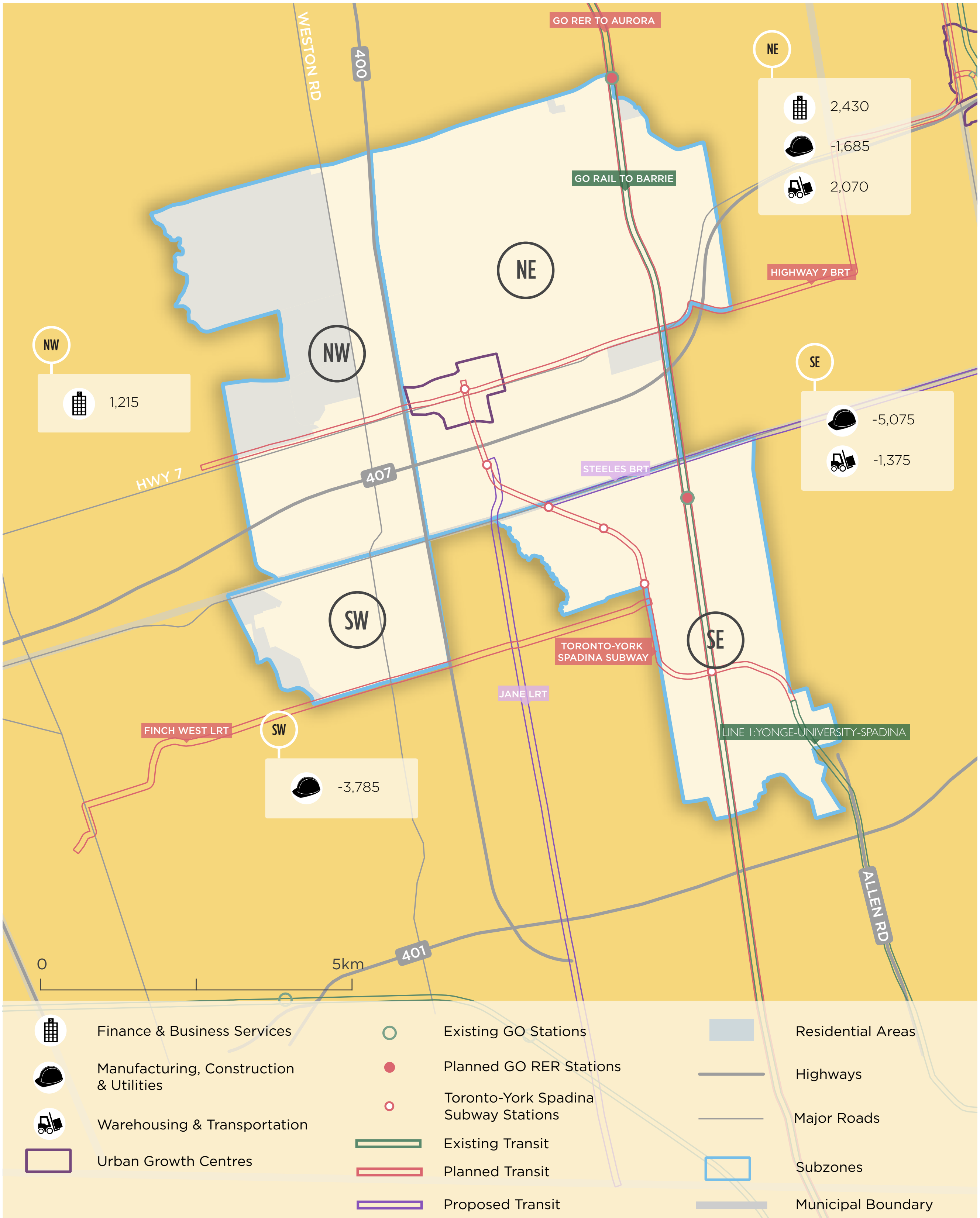
TYW IS ORIENTED TOWARD MANUFACTURING, WHOLESALING, AND TRANSPORTATION, WHICH HAVE LOWER EMPLOYMENT DENSITIES THAN OFFICE-RELATED ACTIVITIES.

5 Large non-developable areas have been deleted from the land base estimation: major expressway interchanges, major parks, the Downsview Airport runway area, and the functional area of the CN intermodal facility.

6 Excluding the land associated with residential areas gives a more accurate representation of employment densities, particularly when residential and employment uses are rigorously separated, as they are in the TYW megazone.

7 MMAH, Technical Report on Preliminary Performance Indicators for the *Growth Plan for the Greater Golden Horseshoe*, 2006.

SIGNIFICANT EMPLOYMENT CHANGE BY SECTOR, 2001–2011



DEVELOPMENT POTENTIAL

Significant transit investments have already been made in TYW – notably the construction of Highway 7 bus rapid transit, and the extension of the Spadina subway line to the Vaughan Metropolitan Centre, due to open in late 2017. More investments are planned, so it is critical to ensure that the area generates as many transit riders as possible. Reducing auto dependence, increasing transit ridership, providing improved access to the thousands of jobs in the area, and integrating land use with transportation means identifying opportunities to increase density.

Highway 7 is identified as a regional corridor in the York Region Official Plan, which includes policies aimed at creating higher-density mixed uses along this thoroughfare. For example, many surface parking lots flanking Highway 7 west of Highway 400 could be redeveloped. We estimate approximately 25 hectares of potentially redevelopable surface parking in these locations. If these parcels were to be developed at a modest office floor space index[8] of 1.0 times the lot area (equivalent to, for example, a two-storey building covering 50% of the lot), almost 250,000 square metres of new employment space could be created. At typical office occupancy rates[9] this new development could accommodate 11,000 to 15,000 additional workers. These sites are all within one kilometre of Highway 7 bus rapid transit, providing a key opportunity to support transit investments and locate office uses in places that are not auto-dependent.

The City of Vaughan is anticipating denser, mixed-use development in this area. Most of these parcels are within the area covered by the Weston Road and Highway 7 Primary Centre Community Improvement Plan, which provides incentives for office development.

In addition to the development potential associated with surface parking, there are at present 96 hectares of vacant sites elsewhere in the megazone.[10] This includes some as-yet undeveloped sites at the still-urbanizing northern edge, near Highway 400.

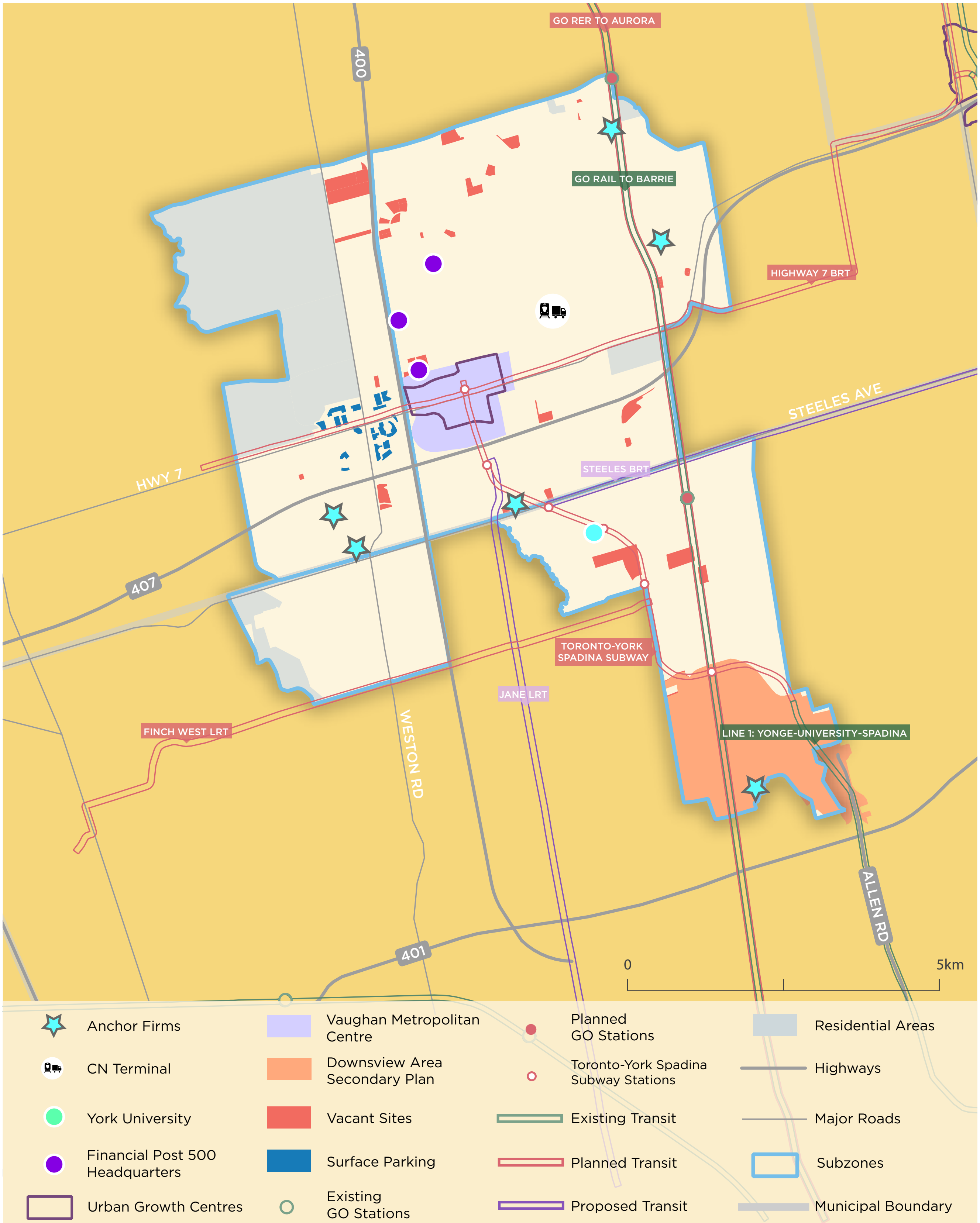
Two key areas are planned for redevelopment – the Vaughan Metropolitan Centre (VMC) and the Downsview lands. The VMC is planned as a denser, mixed-use centre. It has an employment target of 11,500 jobs (of which 5,000 would be new office jobs) and a minimum office space target of 1.5 million square feet. It currently has financial incentives in place to attract office development.[11] In addition, the centre is planned to accommodate 12,000 residential units and 25,000 residents. The plan for the Downsview lands also anticipates denser, mixed land uses around a large park, accommodating up to 42,000 residents and workers.[12] Both areas will be served by subway stops on the extended University-Spadina line.

Otherwise, development opportunities in the industrial areas that make up most of the zone's remaining territory may be limited in the short term. Industrial areas tend to have large-footprint, single-storey buildings covering a relatively high portion of the lot. This form does not lend itself easily to the insertion of new buildings, though additions to existing buildings may be feasible.

The interactions and synergies between continued economic restructuring, development opportunities, and major infrastructure investments need to be better understood for the successful planning of the megazone.

8 A floor space index is the measure of the floor area of a building divided by the area of its lot.
9 A very conservative 23 sq. m per worker is assumed to arrive at the lower number. Many facilities have lower floor space per worker. A figure of 17 sq. m per worker was used to arrive at the higher number.
10 Vacant sites were identified using the York Region Vacant Employment Land Inventory and measured using the Parcels dataset from York Region Open Data.
11 See City of Vaughan By-law Number 176-2015 for the provisions for both the Vaughan Metropolitan Centre and the Weston Road and Highway 7 Community Improvement Project Areas.
12 City of Toronto, Downsview Area Secondary Plan. See http://downsviewlands.ca/plans

DEVELOPMENT POTENTIAL AND ECONOMIC ASSETS



ECONOMIC ASSETS

In addition to its 140,000 jobs, the TYW megazone contains important economic assets that can be strategically leveraged to promote economic development in the zone and beyond. They include "anchor" firms, head offices, major institutions, and infrastructure assets. Leveraging these assets would mean acknowledging, planning for, and actively promoting the contributions of urban environments and of agglomeration economies – sometimes characterized as "sharing, learning, and matching"[13] – to competitiveness. Other jurisdictions are employing deliberate strategies to take maximum advantage of these economic assets.[14]

For example, in the Downsview area, Bombardier's presence represents a significant advanced manufacturing asset in the aerospace industry. This asset is being leveraged by the creation of an aerospace hub, with the relocation of Centennial College's aerospace technology programs from Scarborough to a new Aerospace Campus in Downsview, where aircraft and avionics technicians will receive training. In addition, the area will anchor the Downsview Aerospace Innovation and Research (DAIR) cluster, which will bring together aerospace firms such as Bombardier with the University of Toronto, Ryerson University, and York University.[15]

The TYW megazone also includes a major knowledge economy asset in York University, with more than 7,000 employees and more than 50,000 students.[16]

The CN intermodal facility is a regionally significant transportation facility, with links to firms in transportation, wholesaling, distribution, and logistics. CN is a major employer in the area, as are firms such as Ganz, a wholesaling firm, and United Parcel Services.

Other major employers with over 500 workers include Mytox, a division of auto parts manufacturer Magna, and Bondfield, in the construction sector.

However, TYW is not a major focus for company headquarters. There are only three Financial Post 500 company headquarters in TYW: Martinrea International (an automotive parts supplier), Calloway Real Estate Investment, and Progressive Waste Solutions.

The dense and diverse collection of manufacturing industries in the megazone represents a significant cluster, however, with opportunities to leverage, strengthen, and further diversify.

TYW IS BECOMING AN AEROSPACE TRAINING AND RESEARCH HUB, WITH THE RELOCATION OF CENTENNIAL COLLEGE'S AEROSPACE TECHNOLOGY PROGRAMS TO THE MEGAZONE AND THE CREATION OF THE DOWNSVIEW AEROSPACE INNOVATION AND RESEARCH CLUSTER.

13 G. Duranton and D. Puga, "Micro-Foundations of Urban Agglomeration Economies." In *Handbook of Regional and Urban Economics*, ed. J.V. Henderson and J.F. Thisse, Amsterdam: Elsevier, 2004.

14 See, for example, Brooking Institution's Bass Initiative on Innovation and Placemaking, http://www.brookings.edu/about/projects/innovation-and-placemaking

15 For more information, see www.dairhub.com

16 http://about.yorku.ca

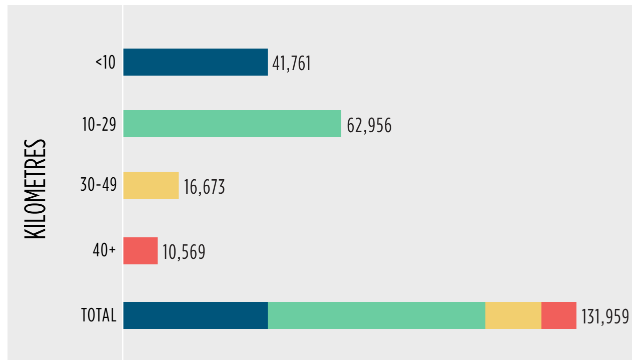
TRAVEL

The TYW megazone provides employment for 140,000 workers. On a typical weekday, more than 130,000 trips to work are destined for the TYW employment area. Of these, almost 90% are made by automobile. This represents roughly 118,000 auto work trips to the area per day – plus another 118,000 return trips, for a total of roughly 236,000 daily car work trips associated with the district.

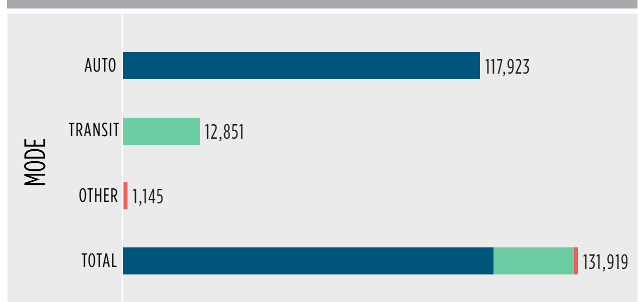
This figure does not include non-work trips to the megazone. When travel for all purposes is considered, TYW attracts more than 321,000 trips per day. Assuming a similar number of return trips from the megazone, we can conclude that it generates more than 600,000 trips daily – almost all of them by car.

The TYW megazone is a major source of congestion on the region's roads. Only about 13,000 of the 130,000 daily work trips taken to the TYW are made by transit. By comparison, downtown Toronto, with 464,650 total jobs, attracts 133,287 all-day auto work trips, as 60% of workers there take transit and another 11% use active transportation (walking, cycling). (See Tables 7 and 8 in the Appendix.)

ALL-DAY WORK TRIPS TO TYW BY DISTANCE



ALL-DAY WORK TRIPS TO TYW BY MODE



WHERE ARE TYW MEGAZONE WORKERS COMING FROM?

Not surprisingly, as a major regional employment concentration, the TYW attracts workers from a wide area. Only about one-third of all-day work trips, or about 41,000, originate within less than 10 kilometres of their TYW work destination. Just under half of TYW workers (63,000) travel between 10 and 29 kilometres to their jobs.

Workers travel from all directions to jobs in the TYW. All-day work trips are relatively equally split between north, south, east, and west origins, with trips from the south being slightly more numerous (38,000, or about 29%).

But in the morning peak period, the predominant origin shifts to the east, where 31% of the almost 81,000 daily morning work trips originate. The shares of travel from the west and south in the morning are 19% and 25%, respectively. (See Table 9 in the Appendix.)

Travel by transit to the TYW megazone represents slightly less than 10% of all-day work trips for the district as a whole. The highest transit modal share is from the south, at 17% of trips, presumably because the City of Toronto has more extensive transit service than the other regions surrounding the TYW, and because important Toronto work destinations, such as York University, are included. Transit represents 12% of all-day work trips from the east. For travel from the north and west, transit accounts for only 3% and 5% of trips, respectively. (See Table 10 in the Appendix.)

Though south-originating trips are most likely to be made by transit, trips from the north are the most likely to be shorter; 36% of all work trips to the TYW from the north are less than 10 kilometres. Trips from the north are also the most likely to be very long, with 13% more than 50 kilometres.[17] About one-third of trips from the south and west are short, under 10 kilometres.

The greatest number of short trips comes from the north and south – roughly 11,000 from each direction. For trips in the 10–29 kilometre range, the greatest numbers originate to the east and south, at approximately 19,000 each. This suggests the potential for increased transit from the south in particular, to address auto-dependency and the congestion this area generates. (See Table 11 in the Appendix.)

17 This travel pattern reflects the area's urban geography. Since Vaughan's current northern urbanized edge is just north of the TYW megazone, trips from this area will be short. Farther north, trips will emanate from more distant settlements.

TRANSIT TO AND WITHIN THE TYW

Considerable investment is being made to improve transit service to the area, and more is planned.

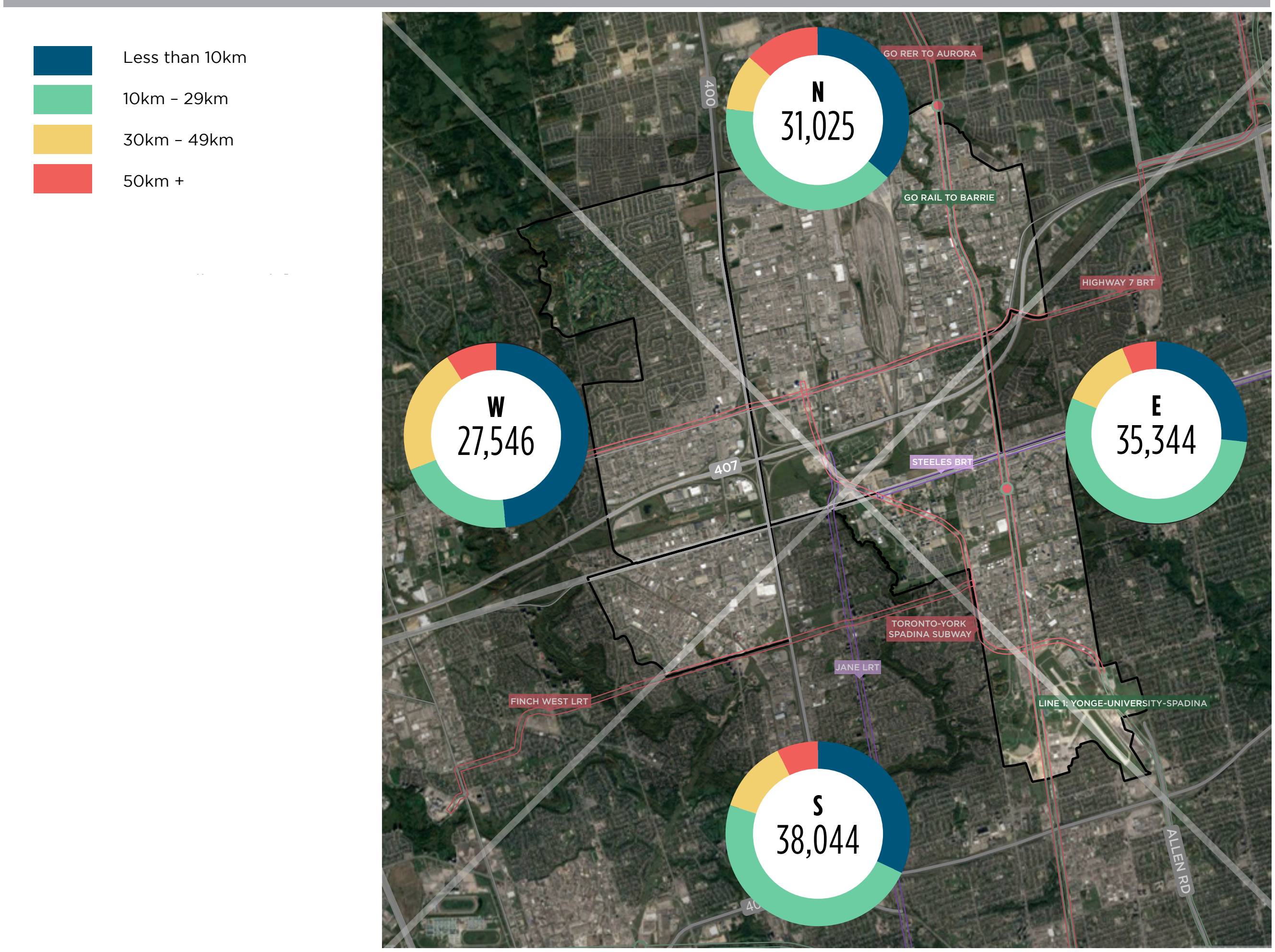
Most transit – existing and planned – approaches TYW from the south. This includes the soon-to-be-operational Spadina-University line subway extension to York University and the Vaughan Metropolitan Centre, with five stops in the megazone. Since the greatest number of short and medium-length work trips to the TYW megazone (about 30,000 a day) originate from the south, this investment should increase transit use in the megazone.

York Region's Viva Bus Rapid Transit along Highway 7 will improve access to the zone from the east, the source of 29,000 short and medium-length work trips daily. A bus rapid transit line is also proposed along Steeles, connecting the extended Spadina subway line to the Yonge subway line and beyond.

Although the area is served by two GO rail stations (York University and Rutherford on the Barrie line), only about 100 work trips a day are currently made to the zone using this mode.

The key is to leverage transit investments strategically – the subway extension, Highway 7 Bus Rapid Transit and the existing GO transit lines – to reduce the high proportion of auto trips associated with the area.

ALL-DAY WORK TRIPS TO THE TYW MEGAZONE BY ORIGIN AND DISTANCE



CONCLUSIONS

With a specialization in tradeable goods and services that drive the regional economy, the TYW megazone represents a diversified economic profile and almost 140,000 jobs. This makes it one of the most significant employment areas in the GGH. To put it in perspective, the TYW area has almost as many jobs as all of the Urban Growth Centres outside the City of Toronto combined.[18]

Manufacturing is the dominant activity, representing a regionally significant cluster. Indeed, the area could be thought of as the region's workshop. As well, wholesaling and transportation activities figure prominently, given the presence of the CN intermodal terminal. The zone contains other regionally significant economic assets, such as York University.

In recent years, the area has been undergoing a significant transformation related to the ongoing restructuring of the GGH economy. Almost 13,000 manufacturing jobs have disappeared, largely replaced with jobs in warehousing and transportation, business services, and higher education. In addition, almost 6,000 population-related jobs were added to the area.

The creation of the Vaughan Metropolitan Centre and the replanning of Downsview, as well as major transit investments in the extension of the Spadina subway and Highway 7 BRT, signal the further evolution of the area and have the potential to help address the auto-dependence of the megazone.

Of particular importance is ensuring that major public investments in transit are having a meaningful impact on reducing auto dependence and supporting densification. The potential success of initiatives such as the Vaughan Metropolitan Centre must be understood in the context of a restructuring regional economy, which affects the mix of firms, their locational requirements, and their expectations with respect to the nature of the built environment.

The challenges should not be underestimated, highlighting the need for reurbanization strategies that integrate planning, placemaking, transit investments, and economic development. The Vaughan Metropolitan Centre exemplifies this approach, but even with a direct connection to the newly extended subway, substantial financial incentives have been required to attract office development.

Moreover, it will be critical to ensure that office uses – the single most important source of higher density employment uses – are directed to transit-accessible locations.

18 TYW had 140,380 jobs as of 2011, while the UGCs outside of the City of Toronto had a combined total of 151,535 jobs.

APPENDIX – TABLES

TABLE 1: TYW MEGAZONE STATISTICS	
ALL EMPLOYMENT, 2011	140,380
TYW SHARE OF GGH EMPLOYMENT, 2011	4%
EMPLOYMENT CHANGE 2001-2011	7,170
TYW SHARE OF GGH EMPLOYMENT CHANGE	2%
CORE EMPLOYMENT, 2011	112,705
TYW SHARE OF GGH CORE EMPLOYMENT, 2011	5%
TYW CORE EMPLOYMENT CHANGE 2001-2011	-480
GGH CORE EMPLOYMENT CHANGE 2001-2011	-3,110

TABLE 2: EMPLOYMENT BY PLANNING CATEGORY, TYW MEGAZONE, 2011

	CORE EMPLOYMENT								POPULATION-RELATED
		INDUSTRIAL		OFFICE		INSTITUTIONAL	SERVICES	SPECIALIZED	
	CORE	MANUFACTURING, CONSTRUCTION & UTILITIES	WAREHOUSING & TRANSPORTATION	FINANCE & BUSINESS SERVICES	VOLUNTARY & GOVERNMENT	HIGHER EDUCATION & HOSPITALS	CULTURE & TOURISM	BROADCASTING & LABORATORIES	
TYW EMPLOYMENT	112,705	57,990	23,150	19,500	3,670	6,925	555	915	26,435
GGH EMPLOYMENT FOR EACH PLANNING CATEGORY, 2011	2,198,555	607,295	336,030	763,570	217,715	182,155	51,915	39,875	1,106,985
TYW SHARE OF GGH EMPLOYMENT FOR EACH PLANNING CATEGORY, 2011 (%)	5	10	7	3	2	4	1	2	2
TYW EMPLOYMENT BY PLANNING CATEGORY (% SHARE)	80	41	17	14	3	5	<1	1	19
GGH EMPLOYMENT BY PLANNING CATEGORY (% SHARE)	62	17	10	22	6	5	2	1	31

TABLE 3: EMPLOYMENT CHANGE IN THE TYW MEGAZONE			
	2001-2006	**2006-2011**	**2001-2011**
CORE EMPLOYMENT	6,745	-7,225	-480
MANUFACTURING, CONSTRUCTION & UTILITIES	-545	-9,625	-10,170
MANUFACTURING	-3,350	-9,525	-12,875
WAREHOUSING & TRANSPORTATION	2,370	125	2,495
FINANCE & BUSINESS SERVICES	2,595	910	3,505
FINANCE	80	110	190
VOLUNTARY & GOVERNMENT	1,365	375	1,740
HIGHER EDUCATION & HOSPITALS	1,490	725	2,215
CULTURE & TOURISM	-30	80	50
BROADCASTING & LABORATORIES	-500	185	-315
NON-CORE (POPULATION-RELATED)	5,505	870	6,375
TOTAL EMPLOYMENT	12,355	-5,185	7,170

TABLE 4: CORE EMPLOYMENT BY PLANNING CATEGORY AND CENSUS TRACT, 2011							
	INDUSTRIAL		**OFFICE**		**INSTITUTIONAL**	**SERVICES**	**SPECIALIZED**
CENSUS TRACT	MANUFACTURING, CONSTRUCTION & UTILITIES	WAREHOUSING & TRANSPORTATION	FINANCE & BUSINESS SERVICES	VOLUNTARY & GOVERNMENT	HIGHER EDUCATION & HOSPITALS	CULTURE & TOURISM	BROADCASTING & LABORATORIES
(1) 5350412.18	795	255	245	25	0	0	0
(2) 5350412.13	1,650	520	615	0	0	0	20
(3) 5350412.12	0	0	40	70	0	0	0
(4) 5350412.04	5,745	2,940	3,090	145	50	0	130
(5) 5350411.08	29,060	13,135	8,470	390	125	365	155
(6) 5350315.03	8,005	3,050	1,480	135	0	0	180
(7) 5350311.06	8,475	2,980	5,280	1,695	6,750	170	355
(8) 5350296.00	4,260	270	280	1,210	0	20	75
NW	8,190	3,175	3,990	240	50	0	150
NE	29,060	13,135	8,470	390	125	365	155
SW	8,005	3,050	1,480	135	0	0	180
SE	12,735	3,250	5,560	2,905	6,750	190	430

TABLE 5: EMPLOYMENT CHANGE BY PLANNING CATEGORY AND CENSUS TRACT, 2001–2011

	CORE							POPULATION-RELATED	TOTAL
CENSUS TRACT	MANUFACTURING, CONSTRUCTION & UTILITIES	WAREHOUSING & TRANSPORTATION	FINANCE & BUSINESS SERVICES	VOLUNTARY & GOVERNMENT	HIGHER EDUCATION & HOSPITALS	CULTURE & TOURISM	BROADCASTING & LABORATORIES		
(1) 5350412.18	680	215	110	25	0	-90	0	625	1,820
(2) 5350412.13	110	-30	50	0	-15	-20	-20	-420	-215
(3) 5350412.12	0	-10	40	40	0	0	0	595	750
(4) 5350412.04	-415	770	1,015	105	35	-30	-45	285	1,840
(5) 5350411.08	-1,685	2,070	2,430	165	95	230	0	5,800	9,220
(6) 5350315.03	-3,785	855	70	40	-10	-30	-300	-250	-3,150
(7) 5350311.06	-4,360	-1,485	-280	430	2,125	-20	145	-365	-3,685
(8) 5350296.00	-715	110	70	935	-15	10	-95	105	590
NW	375	945	1,215	170	20	-140	-65	1,085	4,195
NE	-1,685	2,070	2,430	170	95	230	0	5,800	9,220
SW	-3,785	855	70	40	-10	-30	-300	-250	-3,150
SE	-5,075	-1,375	-210	1,365	2,110	-10	50	-260	-3,095

TABLE 6: EMPLOYMENT DENSITY BY CENSUS TRACT, 2011[19]

CENSUS TRACT	SUBZONE AND MUNICIPALITY	POPULATION +JOBS	AREA (HA)(1)	POPULATION+ JOBS/HA	TOTAL JOBS	JOBS/EMP. HA.(2)
(1) 5350412.18	NORTHWEST, VAUGHAN	10,554	679	15.5	2,480	16.3
(2) 5350412.13	NORTHWEST, VAUGHAN	8,851	247	35.8	4,545	34.4
(3) 5350412.12	NORTHWEST, VAUGHAN	5,746	104	55.3	1,495	50.9
(4) 5350412.04	NORTHWEST, VAUGHAN	20,408	633	32.2	15,690	30.7
(5) 5350411.08	NORTHEAST, VAUGHAN	64,483	2,701	23.9	62,355	23.6
(6) 5350315.03	SOUTHWEST, TORONTO	20,336	600	33.9	14,810	28.1
(7) 5350311.06	SOUTHEAST, TORONTO	38,130	1,009	37.8	32,435	32.1
(8) 5350296.00	SOUTHEAST, TORONTO	6,701	282	23.8	6,570	23.3

(1) Non-developable areas have been deleted.
(2) Employment divided by developable employment lands (excluding residential-only lands).

TABLE 7: ALL-DAY TRIPS TO THE TOR-YORK WEST MEGAZONE AND IN THE GGH

	ALL-DAY TRIPS TO TYE	ALL-DAY TRIPS IN THE GGH
FOR ALL PURPOSES	321,822	17,924,261
TRIPS TO WORK ONLY	132,056	3,114,064
MORNING PEAK	80,907	–

19 Large non-developable areas have been deleted from the land base estimation: major expressway interchanges, major parks, the Downsview Airport runway area, and the functional area of the CN intermodal facility.

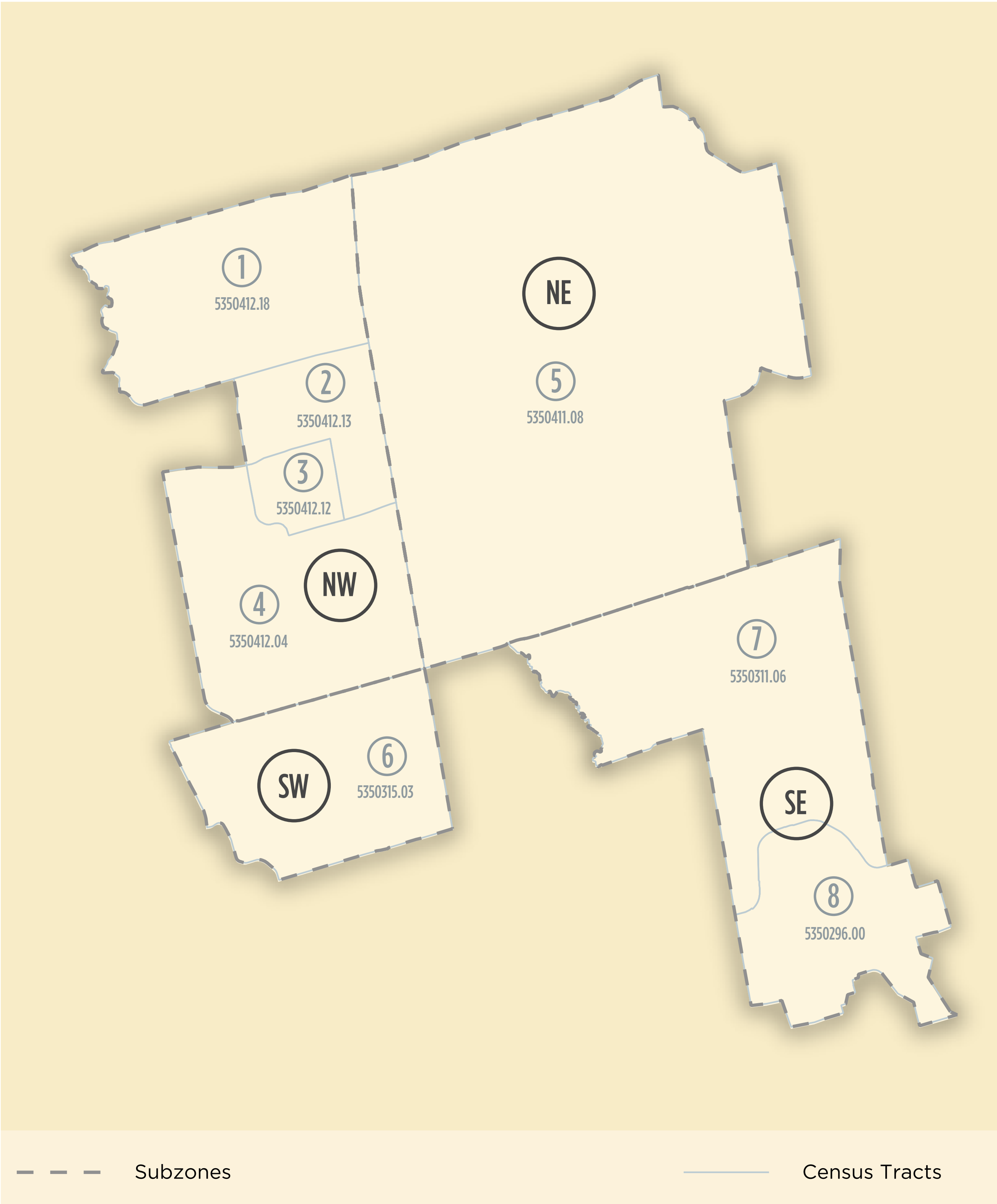
TABLE 8: WORK TRIPS TO THE TOR-YORK WEST MEGAZONE, BY MODE AND DISTANCE			
		NO.	SHARE OF ALL TRIPS
ALL-DAY BY MODE	AUTO	117,923	89%
	TRANSIT	12,851	10%
	OTHER	1,145	1%
ALL-DAY BY DISTANCE TRAVELLED	LESS THAN 10 KM	41,761	32%
	10 – 29 KM	62,956	48%
	30 – 49 KM	16,673	13%
	50+ KM	10,569	8%

TABLE 9: DIRECTION OF ORIGIN FOR TRIPS TO THE TOR-YORK WEST MEGAZONE								
	NORTH		EAST		SOUTH		WEST	
	NO.	%	NO.	%	NO.	%	NO.	%
ALL PURPOSES, ALL-DAY	78,931	25	77,593	24	84,596	26	80,688	25
WORK TRIPS ONLY, ALL-DAY	31,025	24	35,341	27	38,046	29	27,507	21
WORK TRIPS ONLY, MORNING PEAK	20,131	25	24,951	31	20,158	25	15,667	19

TABLE 10: DIRECTION OF ORIGIN OF TRAVEL TO THE TOR-YORK WEST MEGAZONE BY MODE WORK TRIPS, ALL-DAY								
	NORTH		EAST		SOUTH		WEST	
	NO.	%	NO.	%	NO.	%	NO.	%
AUTO	29,903	96	30,803	87	31,222	82	25,995	95
TRANSIT	915	3	4,274	12	6,388	17	1,274	5
ACTIVE	207	1	264	1	436	1	238	1
TOTAL	31,025	100	35,341	100	38,046	100	27,507	100

TABLE 11: DIRECTION OF ORIGIN OF TRAVEL TO THE TOR-YORK WEST MEGAZONE BY DISTANCE, WORK TRIPS, ALL-DAY								
	NORTH		EAST		SOUTH		WEST	
	NO.	%	NO.	%	NO.	%	NO.	%
LESS THAN 10KM	11,208	36	9,378	27	11,985	32	9,190	33
10KM– 29KM	12,515	40	19,408	55	18,411	48	12,622	46
30KM– 49KM	3,116	10	4,489	13	4,914	13	4,154	15
50KM +	4,186	13	2,069	6	2,734	7	1,580	6
TOTAL	31,025	100	35,344	100	38,044	100	27,546	100

TYW MEGAZONE CENSUS TRACT NUMBERS



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