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LONG-RANGE FORECASTS
CITY OF MISSISSAUGA 2006 – 2031

MISSISSAUGA

MISSISSAUGA PLAN REVIEW

HEMSON
Consulting Ltd.

December 2008

HEMSON

Consulting Ltd.

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December 16, 2008

Ms. Angela Dietrich
Manager, Research and Special Projects
Policy Planning Division
City of Mississauga
300 City Centre Drive
Mississauga, Ontario
L5B 3C1

Dear Ms. Dietrich:

Re: Population, Household and Employment Forecast Update for the City of Mississauga

Hemson Consulting is pleased to submit our report, *Long-Range Forecasts, City of Mississauga, 2006–2031*. This report provides an update of the 2005 forecasts prepared for the City based on recent demographic and economic trends and results of the 2006 Census. More importantly, it accounts for policy both at the Provincial and City level which seek to concentrate significant additional development in Mississauga through intensification in the Urban Growth Centre (incorporating the City Centre) and in other appropriate locations in the City.

Mississauga has now moved beyond the period where it is primarily relying on greenfield lands to accommodate growth and development. The transition to a more mature and slower-growing urban area means an increased municipal focus on higher density housing, office development and transit investment.

We hope that this report will assist City department decision-makers in understanding the planning, financial and service delivery implications of future growth in Mississauga and in the preparation of the new official plan.

Yours Truly,

HEMSON CONSULTING LTD.

Russell B. Mathew, MRICS, MCIP, RPP, PLE
Partner

EXECUTIVE SUMMARY

This report provides the results of the long-term population, housing and employment forecasts for the City of Mississauga to 2031. The assignment is an update of previous Mississauga forecasts and takes into account the most recent 2006 Census and other relevant information. Two growth scenarios have been prepared, reflecting varying degrees of intensification and redevelopment in the community:

- The "reference" scenario is considered the most likely growth scenario and is consistent with Provincial vision for growth set out in the Growth Plan for the Greater Golden Horseshoe (the Growth Plan);

- The "high" scenario reflects a reasonable upper range that could be achieved through a more significant shift to metropolitan-wide demand for higher density forms and policy and financial support to improve the City's competitiveness for such development.

The key findings are as follows:

- Under the reference growth scenario, the City of Mississauga is forecast to grow to a total population of approximately 780,000 by 2031. In the short term, most of the population growth will occur in areas with remaining greenfield land supply, such as Central Erin Mills, Churchill Meadows, Hurontario and East Credit.

- After the City's greenfield land supply is built-out in approximately 2011, however, population growth will be accommodated primarily through intensification. Mississauga will become more focussed on non-family households and higher density housing forms, particularly apartment development in the City Centre and Urban Growth Centre (UGC).

- Average household size is forecast to decline over the forecast period, with the result that many of the City's older residential communities will experience a loss of population to 2031. Some communities, however, may begin to "turn over" as younger families replace the elderly in existing ground-related units. Others are also likely to experience rising demand for intensification and redevelopment, particularly some of the older communities along the lakeshore.

- Under the high growth forecast, the City of Mississauga could potentially grow to a total population of approximately 815,000 by 2031. If the City of Mississauga is interested in targeting such a high population forecast, a greater shift towards higher density units would need to be achieved since there are few initiatives that could reasonably be implemented to increase the greenfield land supply.

- Under the reference employment growth scenario, the City of Mississauga is forecast to grow to over 500,000 jobs by 2031. As with population growth, in the short term the most rapid employment growth is forecast to occur in areas with an available land supply to accommodate development.

- The most rapid employment growth is anticipated to occur in the Meadowvale Business Park, Gateway and Airport Corporate. After 2011, the rate of employment growth will slow and its composition will shift towards a greater proportion of major office development accommodated in the Employment Districts and City Centre. Some of the City's older employment areas are anticipated to experience a gradual decline in employment.

- Under the high employment growth scenario, the City of Mississauga could potentially grow to approximately 520,000 jobs by 2031. If the City of Mississauga is interested in targeting such a high employment forecast, a higher level of major office development would need to be accommodated.

- The high growth scenario would involve more growth in population-related employment activities, primarily related to Mississauga's evolving role as a central place. The high growth scenario also anticipates a greater level of employment intensification, particularly in the large and established areas around the Lester B. Pearson International Airport (LBPIA).

Both the reference population and employment forecast are based on the same underlying principle — that growth will occur most rapidly in areas where land is available. Older areas with little or no opportunities for greenfield development will experience slow or declining levels of growth. For the City of Mississauga to target the high growth, specific actions will need to be taken:

- In order to attract additional residential development to the City, the appeal of high density living will need to be enhanced. All aspects of the urban environment will need to be maintained and upgraded, including the transportation system, parks, open space, streetscapes, cultural amenities and the arts; and

- In order to retain and improve the City's economic competitiveness, strong policy and financial support will need to be provided. Employment intensification, in particular, will require more than just planning policy — significant investment will be required to ease congestion and put redevelopment sites on an equal competitive footing with greenfield land.

Should the City choose to target the high growth forecast, it is clear that senior levels of government will need to be a partner in implementation. Provincial investment in transportation infrastructure will be required, particularly in the areas around LBPIA. Provincial investment in community infrastructure will also be required, including hospitals, health care and social service facilities.

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I INTRODUCTION

Hemson Consulting Ltd., was retained in May 2008 to update the population, housing and employment forecasts for the City of Mississauga to 2031. The forecasts have been updated within the context of the forecasts shown for the Region of Peel in the Provincial *Growth Plan for the Greater Golden Horseshoe* (the *Growth Plan*), updated information from the 2006 Census and forecasts prepared by Hemson Consulting for the City of Mississauga in the past.[1]

As described in previous reports, the City of Mississauga is entering a period of transition from the rapidly growing suburban community of the past to the more mature, fully developed urban community of its future. Making this transition will have many effects on the municipal corporation and land use planning, in particular a greater reliance on more intensive forms of development. These forecasts have been prepared to provide the City of Mississauga staff and Council with an information base that will help to plan ahead for these changes.

A. ASSIGNMENT IS AN UPDATE OF PREVIOUS MISSISSAUGA FORECASTS

The 2008 forecast assignment is an update of previous forecasts prepared by Hemson Consulting for the City of Mississauga including:

- The 2005 Forecast Update, which provided City staff with updated forecast information but no report was prepared at that time;
- *Growth in a Maturing Community: Population, Household and Employment Forecasts 2001-2031*, prepared in 2003;
- *Long Range Forecasts: City of Mississauga 1996 to 2031* , prepared in 1998; and
- A set of long-range forecasts prepared for the Region of Peel, City of Mississauga and City of Brampton in 1995 as a joint effort to provide the Region and member municipalities with a consistent information base.

The 2008 forecasts are being prepared to provide input to the current official plan update which will bring planning in Mississauga into conformity with the *Growth Plan*. In addition, the forecast results are to be used as input to a number of other City initiatives, such as the current Development Charge By-Law update and other long-term infrastructure planning.

[1] *The most recent forecast update is contained in* Growth in a Maturing Community: Population, Household and Employment Forecasts 2001-2031, *prepared in November 2003*.

B. FORECAST SCENARIOS REFLECT VARYING DEGREES OF INTENSIFICATION AND REDEVELOPMENT

Typically in our long-range forecasting work a low, high and reference forecasts are prepared, with the low and high forecast scenarios reflecting deliberately pessimistic or optimistic assumptions about the economic future. In the City of Mississauga, however, the growth outlook is driven more by the community's ability to accommodate more intensive forms of development — and market demand for such development — than by the outlook for growth in the broader economic region.

As a result, the two growth scenarios prepared for the 2008 forecast reflect varying degrees of intensification and redevelopment over the planning period:

- The "reference" scenario is in keeping with the *Growth Plan* objectives regarding intensification and the City's role meeting *Growth Plan* targets set for the Region of Peel; and

- The "high" scenario assumes a more significant shift to metropolitan-wide demand for higher density forms or the City of Mississauga capturing a larger share of such development.

The Reference forecast should be considered the most likely scenario and the one that has the best fit to the various requirements of the *Growth Plan*, recognizing that many of the *Growth Plan* rules apply at the Regional level. Meeting these rules overall will also depend on the *Growth Plan* conformity work currently being undertaken in Brampton and Caledon.

If the City were interested in targeting a higher level of growth than indicated by the Reference Scenario, the High Scenario could be adopted as such a target. The High Scenario is constructed to reflect a reasonable upper range that could be achieved by the City if a number of policies and investments toward this end were undertaken *and* the market responded appropriately.

It is very important that both of these forecast scenarios be distinguished from a theoretical capacity for development. As described in more detail later in the report, the theoretical development capacity in the City of Mississauga is unlikely to ever be achieved, and certainly not within any predictable time period — redevelopment is always a slow and difficult process in urban development.

C. KEY FACTOR AFFECTING FUTURE GROWTH IN THE CITY OF MISSISSAUGA IS LAND SUPPLY

As identified in our previous forecast reports, the central issue in forecasting for the City of Mississauga is the pending build out of the greenfield land supply, which has a number of key planning implications:

- The City of Mississauga has traditionally been one of the fastest growing communities in the GTAH, accommodating a large share of both population and employment growth in the GTAH.
- One of the main reasons for the City's rapid growth has been a large and competitive land supply for ground-related housing and employment uses. However, as the remaining greenfield land supply builds out, the overall rate of growth will slow and the City will shift to a more mature urban community.
- New housing and employment will still be provided, but through more intense built forms such as apartments and major office buildings. Over the planning period, the focus of building activity will shift increasingly to redevelopment and intensification as opposed to greenfield land development.
- The population will also be aging, which affects the types of services to be delivered and also results in a declining household size, which will have a significant effect on existing communities.

The forecasts are have been prepared to 2031 at a City-wide, planning district and traffic zone level. Only the City-wide and planning district forecasts are addressed in this report to assist staff and Council in their consideration of broader, strategic planning issues. To assist City staff and Council with specific infrastructure and service planning issues, the forecasts by traffic zone, watershed and other geographies are provided in the form of digital data, similar in fashion to the 2005 Forecast Update.

Throughout the report, all population figures, unless otherwise noted, use "total population" — persons counted by the Census of Canada plus a net undercoverage factor estimated at 4% for the 2001 and subsequent Census years.

The following report provides a summary of the updated population, household and employment forecasts for the City of Mississauga. As in the past, this report and the forecast that it describes will be a key tool to assist the City in planning for its evolution towards a more mature urban community. It is organized into four chapters.

- Following this introduction, Chapter 2 describes in more detail the key factors shaping the growth outlook in the City of Mississauga, in particular the central role that intensification will play in accommodating both population and employment growth.

- Chapters 3 and 4 describe the resulting population and employment forecasts at a City and planning district level.

- The final chapter discusses some of the implications of the forecasts, and highlights some of the key planning issues that will need to be addressed and suggests an implementation strategy to encourage higher levels of growth in the community.

As noted in our previous forecast reports, there is inherent uncertainty in forecasting because it involves looking into the future. Decisions that are made on the basis of these forecasts must be undertaken with care and judgement and incorporate the most up-to-date and certain information possible. At the same time the forecasts and the resultant planning decisions must also remain focussed on the long-term trends and the long-term outlook.

It is important to note that, as this report is being prepared, the global and national economies are in a period of great uncertainty. Reflecting current economic conditions, the forecasts incorporate an expected period of slower growth in the short-term, which affects the forecast results for the remainder of the 2006 to 2011 Census period. Over the long term, however, in our view it is important to continue planning for growth and to not let short-term cyclical trends unduly influence the longer-term outlook.

II INTENSIFICATION WILL PLAY A MAJOR ROLE IN ACCOMMODATING FUTURE GROWTH IN THE CITY OF MISSISSAUGA

As described in the *Growth Plan*, the Greater Toronto Area and Hamilton (GTAH) is anticipated to continue to grow steadily in population and employment to 2031. Notwithstanding the current short-term economic slowdown, the principal assumption underlying the forecast is that Canada, Ontario, the Greater Golden Horseshoe (GGH) and the GTAH will remain attractive locations for growth and investment over the long-term.[1]

Within the GTAH, the distribution of population and employment growth is based on the community's ability to accommodate new housing, and land extensive employment uses. In the City of Mississauga, the greenfield land supply is nearly built out, meaning that growth will be determined largely by the supply of land to accommodate more intensive forms of development. The population will also continue to age, which will be a critical demographic force affecting household size, housing choices and labour force participation rates, which has enormous implications for growth and planning.

[1] The Growth Outlook for the Greater Golden Horseshoe, *Hemson Consulting Ltd, January 2005*.

A. GTAH IS FORECAST TO GROW STEADILY IN POPULATION AND EMPLOYMENT

The *Growth Plan* contains a set of population and employment allocations that municipalities in the GGH must use for long-range planning and managing growth. In total, the *Growth Plan* forecasts a total of approximately 11.5 million people and and 5.6 million jobs for the GGH. This represents growth of approximately 3.7 million people and 1.8 million jobs between 2001 and 2031, or from today's base, about 2.8 million people and 1.5 million jobs.

Under the *Growth Plan*, future population and employment is concentrated mainly in the GTAH, where most of the population and employment already resides. Approximately 75% of the total population growth and 80% of the employment growth has been allocated to the GTAH, which includes the Region of Peel.

While overall employment growth fell somewhat short of expectations during the 2001 to 2006 period, the *Growth Plan* forecasts incorporate the cyclical nature of the economy. Over the period to 2031, there is no indication that the *Growth Plan* forecasts are fundamentally off-track.

B. FUTURE GROWTH POTENTIAL IN MISSISSAUGA IS DETERMINED LARGELY BY LAND SUPPLY

The distribution of population and employment within the GTAH is determined by the ability of each community to accommodate certain types of development. Built form is the primary factor which influences the distribution of growth, in particular a community's ability to accommodate ground-related housing and the industrial-type facilities on large sites in suburban business park settings.

1. New Housing Growth Will Increasingly be Focussed on Medium and Higher Density Forms

The ability of a community to accommodate population growth is a function of its ability to accommodate different types of housing units, particularly ground-related housing and apartment units:

- Ground-related housing types require the most land for development, in particular single detached and semi-detached units on greenfield sites.
- Most apartment development does not occur on new greenfield land but rather as redevelopment and intensification in planned nodes.
- Rowhouse development is typically split between these two types of locations and is an increasingly popular built form given that the cost of wood-frame construction is far lower than poured-concrete apartments blocks.

The long-term expectation for housing demand in the GTAH indicates a housing preference dominated by ground-related units. Because the City of Mississauga's land supply for ground-related housing is nearly depleted, new housing growth will increasingly be accommodated through apartment construction on vacant sites, and other medium and higher density forms through intensification.

Like any community, there is a significant *potential* for sites where apartments and other, denser forms of housing can be built through redevelopment and intensification. However, the amount of such development that actually occurs is driven by the market — the number of people that want to live in apartments *and* the economics of existing uses on sites. In the City of Mississauga, the regional demand for apartments will be focussed in locations such as the Urban Growth Centre (UGC), including the City Centre, other smaller nodes in the City and in other areas with intensification potential such as the main street areas close to Lake Ontario.

2. Employment Growth Will be Increasingly Focussed on Major Office Development

Similar to residential growth, the City of Mississauga's ability to accommodate employment growth depends on land use and built form, and the structure of the regional economy.

As explained in our previous reports describing future employment growth in the Greater Golden Horseshoe, the Region of Peel and the City of Mississauga, the structure of the GTAH economy is overwhelmingly industrial in nature, which gives rise to strong demand for land-extensive industrial-type facilities engaged in a wide variety of economic activities including manufacturing, distribution and warehousing.

Accordingly, the location of employment growth in the GTAH is driven strongly by the availability of well-located greenfield employment land, to accommodate the range of industrial-type buildings that dominate the land use profile of the regional economy. It is for this reason that the key bases for employment forecasting are the three land-use based categories of employment activities:

- Major office employment is defined as employment in free-standing office buildings of 20,000 sq.ft. or greater;[1]
- Population-related employment is defined as employment which provides services to a resident population in retail and institutional establishments, including those who work from home; and
- Employment land employment is the range of employment uses in industrial-type buildings, typically concentrated in business parks and other designated employment areas.

Because the City of Mississauga's supply of employment land is nearly fully developed, new employment growth will increasingly be accommodated through major office development. Similarly, the rate of population-related employment growth will slow in concert with slower rates of population growth resulting from the pending build out of the supply for ground-related units. Reduced growth rates in population-related employment will be tempered somewhat by growth in metropolitan-wide population-related

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[1] *For employment forecasting and most land-use planning purposes, major offices are traditionally defined as freestanding office buildings greater than 20,000 net sq. ft. in size. The* Growth Plan *uses the same expression — major office — for a different purpose. In the* Growth Plan, *major office policies address the desire to locate office buildings of 10,000 m^2 or greater in transit-oriented locations to encourage greater transit use. Except as otherwise noted, this report's use of major office is the 20,000 sq.ft. or more definition.*

employment, consistent with the evolving central place functions of the City.

The City of Mississauga already has a large office market and an established position in the regional market. Conditions are in place for the City to continue to perform well in the GTAH office market, including a large and competitive economic base, many prestigious office and business parks, a central location within the GTAH and the presence of major transportation infrastructure.

Nevertheless, it will be important for the City of Mississauga to protect its competitive position for major offices and other types of employment in order to maintain and expand the economic base.

One of the major challenges for the City in the office market is the location of the demand within the City. As noted in the City's recent office market strategy, nearly all of the new office development since the early 1990s has been occurring in the employment districts, particularly Airport Corporate (and abutting areas in Northeast) and in Meadowvale Business Park. As the City is well aware from the office strategy and other work done on planning the City Centre, there are significant challenges in trying to encourage more office development in the UGC and other nodes and corridors.

3. Demographic Change Will Also Have Significant Planning Implications

The City of Mississauga and GTA have traditionally had a younger population than the rest of Ontario because of the influx of migrants. In the City of Mississauga, however, the aging of population will become more pronounced over time because it will not longer be offset by large numbers of younger families moving into ground-related housing.

This transition to a more "mature" community will have a number of implications, including declining household size. Household size declines for a number of reasons including growing wealth and shifting family structures, however, the major reason for the declining average household sizes lies in the age structure of the population.[1]

Declines in average household size will have a significant impact on the existing population base, mainly that some older residential neighbourhoods will experience a slow

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[1] *This phenomena is best understood by an example. The nearly 30,000 households added to Mississauga during the rapid growth period between 1986 and 1991 was dominated by younger families. The peak number of children at home in this group likely occurred in the late 1990s and, today, some adult children will have left home, others still remain. However, in another 10 years virtually all of the children will have left home, leaving "empty-nester" households. These households are then unlikely to move from the family home until they are in their 70s, meaning sometime in the 2020s. The average household size which will have peaked at about 4 persons per unit, will be a little less than 2 persons per unit (owing to divorce and some "early deaths") for an extended period of time.*

population decline through the forecast period. This shift will have implications for service delivery in a range of areas such as parks and recreation, transit and community planning. Declining household sizes will also mean that additional housing units will need to be added to simply *maintain* the existing population. Proportionally, even more housing units will need to be added to accommodate growth.

From a planning and development perspective, the City's shift to a mature urban community is a key consideration for the long-term growth forecast. From a housing perspective, the key feature of the shift is that population growth will increasingly need to be accommodated in medium and higher density forms through redevelopment and intensification. From an employment perspective, new jobs will increasingly be accommodated through major office development, although given the size of the existing economic base other types of employment will also play a role in maintaining and growing the City's employment.

C. TWO GROWTH SCENARIOS HAVE BEEN PREPARED FOR CONSIDERATION BY THE CITY

Under the policies of the *Growth Plan*, municipalities in the GTAH are directed to plan for, among other matters, a more compact urban form, "complete communities" and a greater reliance on intensification and redevelopment. These objectives are reflected in a set of specific intensification and density targets that are to be achieved on a *Region-wide* basis:

- A minimum of 40% of all residential units must be accommodated within the built-up area after 2015; and
- New greenfield development must achieve a density of 50 residents and jobs combined per ha.

The *Growth Plan* density and intensification targets are not particularly relevant for the City of Mississauga, because there is little greenfield land remaining. Nearly 100% of the City's new units after 2015 will be accommodated through intensification within the built boundary. These units, however, will play a major role in achieving the 40% intensification objective for the Region of Peel.

However, of specific relevance to the City of Mississauga is the *Growth Plan*'s identification of the UGC as a focus for new investment, high density employment and major transit infrastructure. Within the Region of Peel, the *Growth Plan* identifies two UGCs — the Mississauga City Centre and Downtown Brampton. Both UGCs are required to achieve a density of 200 jobs and residents combined per ha. The Mississauga UGC includes the City Centre planning district as well as a corridor extending southwards along Hurontario Street to the Queen Elizabeth Way.

The *Growth Plan* objectives are consistent with many of the City of Mississauga's existing planning goals to promote growth within existing communities and within the City Centre. As a result, for the 2008 forecast update, two growth scenarios have been prepared:

- The "reference" growth forecast scenario involves increasing intensification activity over time to a level consistent with the role that the City of Mississauga is anticipated to play in achieving the Regional *Growth Plan* intensification targets and UGC objectives. The reference forecast illustrates the implications of achieving the *Growth Plan* objectives.

- The "high" growth forecast scenario anticipates a much more significant shift to higher density types of development in the GTAH and in Mississauga, and a resulting widespread increase of intensification activity across the City. The high growth scenario illustrates the implications of a level of growth that would exceed the *Growth Plan* objectives.

The following chapter provides the resulting population and housing outlook for the City of Mississauga.

III THE POPULATION OF THE CITY OF MISSISSAUGA IS FORECAST TO GROW TO 780,000 IN 2031

This chapter provides the results of the updated population forecasts for the City of Mississauga, beginning with a discussion of the population forecast for the broader metropolitan region. This is followed by a discussion of the outlook for the City of Mississauga under both the reference and high population growth scenarios.

A. GROWTH OUTLOOK IN MISSISSAUGA PREPARED IN METROPOLITAN CONTEXT

The forces that affect the GTAH will similarly affect the City of Mississauga, so the timing of future development in the City is closely tied to the development outlook for the GTAH.

The forecasts for the City of Mississauga are therefore prepared in the context of the growth outlook for the GTAH as a whole. The forecasts for the GTAH and the City of Mississauga are based on the well-established forecast models used by Hemson in the past, including the forecasts prepared for the *Growth Plan*.[1]

1. Forecast Based on Established Methods Used in the Past for Mississauga

As explained in more detail in previous reports, the forecast approach is structured as a "top-down" model so that the Mississauga forecasts can reflect trends occurring across the economic region. A number of "bottom-up" factors, however, are also incorporated in the forecasts, the most important of which for the City of Mississauga are the limitations presented by land supply. The forecast has been updated to include the following;

- All 2006 Census data for the GTAH and Mississauga;
- City's housing and employment data to current;
- Most current CMHC housing data to provide best estimates of housing unit growth and housing market shares for the 2006 to 2011 Census period;
- Updated information for office space construction and employment land development to make appropriate adjustments to 2006 employment and to estimate 2006 to 2011 employment growth.

A schematic diagram of the forecast method to the City of Mississauga level is shown on the page following.

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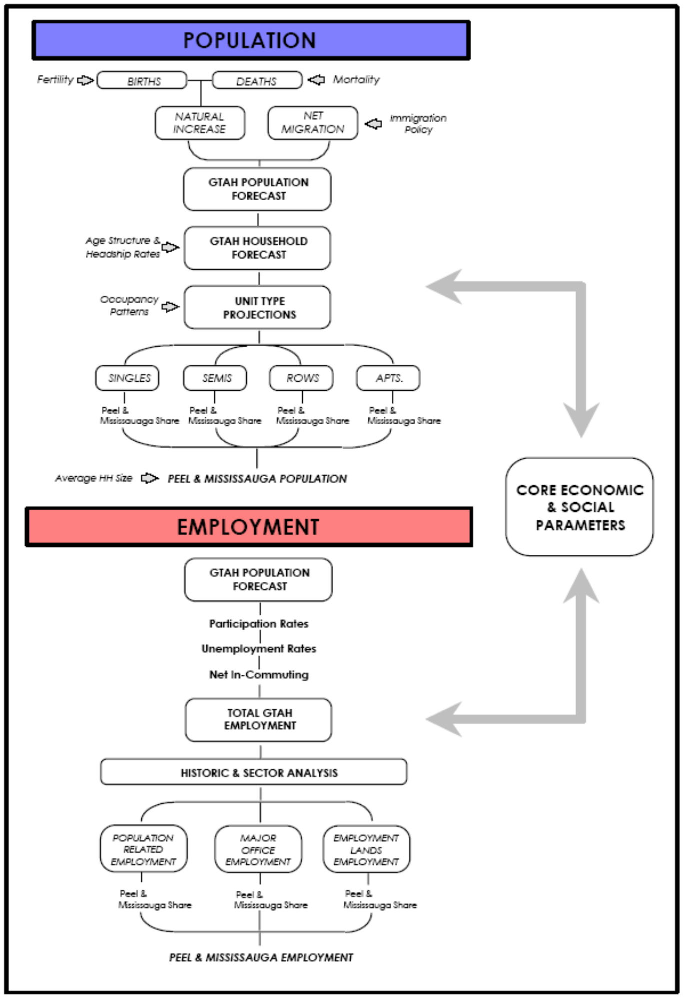
[1] *For detail, see* The Growth Outlook for the Greater Golden Horseshoe, *prepared by Hemson Consulting Ltd., 2005*.

GTAH FORECAST METHOD



2. GTAH Forecast to Grow to a Population of Approximately 8.6 Million by 2031

The population forecast for the GTAH is the result of the combination of assumptions for natural increase (including fertility and mortality rates) and the assumptions regarding the amount and age structure of migrants. Table 1 provides the forecast results.

Table 1

Historic and Forecast Total Population GTAH, 1986 to 2031

Census Year	Total Population (Including Net Undercoverage)	Growth
1986	4,340,000	—
1991	4,840,000	500,000
1996	5,260,000	420,000
2001	5,810,000	550,000
2006	6,320,000	510,000
2011	6,810,000	490,000
2016	7,280,000	470,000
2021	7,740,000	460,000
2026	8,200,000	450,000
2031	8,620,000	420,000

Source: Statistics Canada and Hemson Consulting Ltd., 2008

As shown, the total population forecast for 2031 is the same as the forecast in the *Growth Plan*, although there is some variation in the interim years as a result of updating the 2006 Census information. The *Growth Plan* population forecast for the GTAH remains a sound long-term outlook.

3. Household Growth in GTAH Remains Primarily Family Households Seeking Ground-Related Housing

Based on the age structure of the population, development economics and longer-term trends in housing occupancy, most of the demand for housing units in the GTAH will be family households seeking ground-related housing. Continued gradual shifts in housing growth by type in favour of medium and higher density housing, however, are also included in the forecast update in accordance with the *Growth Plan* forecasts and the City of Mississauga 2003 and 2005 forecast updates.[1]

The forecast housing growth for the GTAH includes a higher proportion of growth in rowhouse and apartments, consistent with the *Growth Plan* policy directions to encourage a more compact form and growth through intensification.

The results of the GTAH housing forecast are shown in the following Tables 2 and 3 — the first showing the historical and forecast housing units and the second showing shares of housing growth by type. The forecast varies somewhat from previous forecasts but this results from the application of the same long-term trend assumptions to the updated 2006 base data.

Table 2
Historic and Forecast Total Housing Unit Growth GTAH, 1986 to 2031

Census Period	Single and Semi Detached	Rows	Apts.	Total
1986-91	112,000	16,000	71,000	198,000
1991-96	64,000	17,000	52,000	133,000
1996-01	99,000	31,000	37,000	167,000
2001-06	144,000	38,000	58,000	240,000
2006-11	86,000	32,000	78,000	196,000
2011-16	90,000	35,000	73,000	198,000
2016-21	91,000	35,000	71,000	198,000
2021-26	88,000	37,000	65,000	190,000
2026-31	78,000	38,000	55,000	171,000

Source: Statistics Canada Census of Canada 2006 and Hemson Consulting Ltd.

Note: Due to a change in definition and collection method for housing data in the 2006 Census, a major "data discontinuity" was created between housing data up to 2001 and the 2006 data. The historic growth shown in the table is "period of construction" data, that is the year built for housing as recorded in the 2006 Census. Observers comparing these data to other earlier reports will note a variation in the historical numbers but the same pattern of growth in unit types overall.

[1] *For detail, see* The Growth Outlook for the Greater Golden Horseshoe, *prepared by Hemson Consulting Ltd., 2005.*

Table 3
Historic and Forecast Shares of Housing Growth GTAH, By Type, 1991 to 2031

Census Period	Single and Semi Detached	Rows	Apts.	Total
1986-91	56.3%	7.9%	35.9%	100.0%
1991-96	48.0%	12.6%	39.4%	100.0%
1996-01	59.3%	18.4%	22.3%	100.0%
2001-06	59.9%	15.8%	24.3%	100.0%
2006-11	43.9%	16.2%	39.9%	100.0%
2011-16	45.4%	17.9%	36.7%	100.0%
2016-21	46.0%	17.9%	36.1%	100.0%
2021-26	46.5%	19.5%	34.0%	100.0%
2026-31	45.7%	22.1%	32.2%	100.0%
Longer-term Averages				
1986-2006	56.7%	13.7%	29.6%	100.0%
2006-2031	45.5%	18.6%	35.9%	100.0%

Source: Statistics Canada Census of Canada 2006 and Hemson Consulting Ltd.

The housing mix suggested for the 2006 to 2011 period shows a significant shift in unit type preferences between the 2001–06 period and the 2006–11 period. The 2006–11 housing forecast is based on known completions and units under construction through to mid-2008 which means that about three-quarters of the forecast housing for the period has been realized[1].

While the change in the 2001–06 period undoubtedly represents some larger market shifts, it is important not to misinterpret these results. The high share of lower density housing in 2001–06 and the high share of apartments in the same period are a product of the current housing market cycle peaking for low density housing earlier (2002) than for high density housing (2006). This phenomenon has been observed in the previous market cycle that occurred in the late 1980s, when single-detached completions peaked in 1987-88 and apartments completions peaked in 1989-90.

Within the longer-term trends, the share of new housing among the housing types can be more volatile from one period to the next as a result both of demographic and housing market cycles. Overall, the historic average market share of single and semi detached units is forecast to decline from a long term of almost 57% of the market down to just over 45% of the market over the next 25 years, as the *Growth Plan* is implemented. A "business-as-usual" forecast would have had an increasing low density housing forecast (up to about 52% of growth by end of the period) and a compensating reduced medium and higher density housing forecast.

[1] *At an average of 6 months construction for wood frame ground-related housing, mid-2008 under construction data approximate housing completions to the end of 2008. For poured-concrete apartments a typical 30 month construction means that mid-2008 under construction indicates completions through to the end of 2010.*

Considering Mississauga's reliance on apartments for future growth, it should be noted the long-term historic average market share of under 30% is forecast to average 36% over the coming 25 years, largely in response to the *Growth Plan*. Given the rate of growth and the overall size of the GTAH market, this is a very significant shift in housing demand being forecast.

As described, these forecasts remain based on a market outlook adjusted by current policies in order to achieve the targeted Regional population in the *Growth Plan*. Further policy-induced shifts in the housing mix in favour of high density are likely to be needed elsewhere in order for other Regions to meet the *Growth Plan* rules.

B. GROWTH IN MISSISSAUGA IS BASED ON BOTH SUPPLY POTENTIAL AND ON MARKET DEMAND

The population forecast for the City of Mississauga begins with the preparation of a housing forecast; future housing growth is determined by applying market shares to the overall GTAH housing growth; and a forecast of average household size is then applied to the housing forecast to determine the overall population.

The results — consistent with our previous forecasts — are for a gradual slowing of population growth as a result of the depletion of the ground-related housing supply and a shift to smaller households in higher density units.

The population will also become more diverse over time as new housing attracts more single person and non-family households in a wider age range than new housing did in the past, when new units were primarily ground-related family-oriented housing.

1. Remaining Lower Density Supply is Limited; Enormous Potential for Higher Density Housing

Given that the supply for lower density housing units in Mississauga is limited, the forecast incorporates different types of intensification, including: infill, redevelopment and higher density development on existing designated sites. The potential housing supply includes the limited remaining supply of greenfield ground-related housing plus an estimated supply of intensification opportunities; including some medium density units and a large supply of high density units. The potential housing supply includes:

- An estimate of the vacant land potential;
- An estimate of intensification potential in the UGC and identified nodes and corridors; and
- Other identified redevelopment sites, including non-conforming sites (sites "grandfathered" from previous zoning with higher density than permitted by the zoning today).

The City of Mississauga's future housing potential is shown in Table 4.

Table 4

Future Housing Potential
City of Mississauga 2008

		Single & Semi	Rows	Apts.	Total
Existing Units		124,200	34,700	69,300	228,300
Future Supply Potential	Vacant Land Potential (excluding UGC and Nodes)	3,280	2,310	5,590	11,170
	Urban Growth Centre (Vacant and Intensification)	10	370	20,070	20,450
	Nodes (Vacant and Intensification)	10	1,210	28,110	29,330
	Intensification in Identified Corridors	0	0	45,930	45,930
	Identified Redevelopment Sites (legal non-conforming)	40	5,200	7,740	12,980
	Sub-Total Future Supply Potential	3,300	9,100	107,400	119,900
Total Supply Potential		127,500	43,800	176,700	348,200

Source: City of Mississauga Planning and Building Department and Hemson Consulting Ltd.

From the table it is clear that the City has a diminishing supply of low density units and a very significant potential supply of apartment units. This is not unusual for a community nearing full development of greenfield land. Since there are virtually no land supply constraints on apartment development — other than planning policy — opportunities for such development are tremendous. However, the amount of intensification that actually occurs is driven by the market — or in other words, by the number of households that want to live in an apartment in Mississauga versus other housing forms and locations.

Intensification and redevelopment are also typically very slow processes, for which a large supply does not necessarily mean that more apartment development is likely. The supply will only be absorbed as fast as the market dictates. Other neighbouring communities such as Toronto also have a very large supply potential for redevelopment, but, like Mississauga are limited by market demand rather than supply potential. It is unlikely that the entire potential supply of high density sites in Mississauga will ever fully develop and a very large share of the redevelopment that does will eventually occur beyond the planning horizon of 2031.

2. Mississauga Will Accommodate A Significant Share of GTAH Apartment Growth

The forecast of housing growth by type in the City of Mississauga is based on the City's future housing potential, the anticipated timing and level of intensification and trends in other neighbouring communities:

- The market shares of single and semi-detached units are forecast to decline significantly over the forecast period, reflecting the build out of the greenfield land supply.

- The market shares of rowhouses are also forecast to decline somewhat as a result of competition from other communities, such as Brampton and Halton Region, to attract this type of development. Most of the vacant land rowhouse supply potential will be exhausted within the next 10 years, meaning that growth beyond 2016 will be highly dependant on redevelopment; and

- The City of Mississauga will continue to have a large market share of the higher density housing market, resulting in apartments accounting for a growing share of the City's housing market.

The decline in the apartment market share in Mississauga (something which also is forecast to occur in Toronto), is the result of the apartment market becoming established in other parts of the GTAH, such as Brampton or the Region of Halton, where the market is currently very small. This shift in share to other locations is not only a normally expected pattern for other communities as they mature, but also a policy necessity if the *Growth Plan* targets are to be met.

The forecast shares of the GTAH housing market is shown in Table 5.

Table 5
Mississauga Historic and Forecast Housing Market Shares of GTAH, by Housing Unit Type

Period	Single and Semi Detached	Rowhouses	Apartments
1986-91	23.6%	19.4%	17.0%
1991-96	54.0%	21.0%	10.6%
1996-01	40.7%	15.8%	3.2%
2001-06	29.9%	14.2%	8.8%
2006-11	14.3%	9.1%	10.5%
2011-16	2.7%	7.7%	8.5%
2016-21	1.0%	5.8%	7.2%
2021-26	0.7%	5.3%	6.8%
2026-31	0.5%	4.7%	6.8%

Source: Statistics Canada and Hemson Consulting Ltd., 2008

Tables 6 and 7 provide the forecast housing growth by type and housing mix for the City of Mississauga. Based on the updated unit forecast:

- All of the single and semi-detached supply will be exhausted by 2031;

- All of the vacant land supply for rowhouses will be consumed along with some of the additional estimated intensification potential for these units; and

- The potential supply of apartment units is sufficiently large to accommodate growth over the very long term. Over the planning period to 2031, the total demand for apartments falls well short of the total vacant supply potential before even accounting for additional estimated intensification potential

Table 6
Historic and Forecast Total Housing Growth City of Mississauga 1986 to 2031

Census Period	Single and Semi Detached	Rows	Apts	Total
1986-91	17,200	3,100	11,100	31,400
1991-96	11,700	3,700	3,900	19,200
1996-01	14,900	5,000	800	20,700
2001-06	13,500	5,000	5,300	23,800
2006-11	4,900	2,900	8,200	16,000
2011-16	700	2,700	6,100	9,600
2016-21	300	2,000	5,100	7,500
2021-26	200	2,000	4,400	6,500
2026-31	200	1,800	3,700	5,600

Source: Statistics Canada and Hemson Consulting Ltd., 2008

The City of Mississauga, as a more urban community, will become more focussed on non-family households and higher density housing forms than elsewhere in the 905 region over the planning period. Over time, the City will accommodate the largest share of apartment growth in the GTAH outside of the City of Toronto.

Table 7
Mississauga Historic and Forecast Housing Market Shares of GTAH, by Housing Unit Type

Period	Single and Semi Detached	Rowhouses	Apartments
1986-91	54.5%	12.3%	33.2%
1991-96	45.8%	13.4%	40.8%
1996-01	53.1%	18.9%	27.9%
2001-06	62.4%	23.0%	14.6%
2006-11	14.3%	9.1%	10.5%
2011-16	2.7%	7.7%	8.5%
2016-21	1.0%	5.8%	7.2%
2021-26	0.7%	5.3%	6.8%
2026-31	0.5%	4.7%	6.8%
Longer-term Averages			
1986-2006	53.7%	16.7%	29.6%
2006-2031	14.1%	25.1%	60.8%

Source: Statistics Canada and Hemson Consulting Ltd., 2008

The share of the single and semi-detached housing is forecast to decline significantly over the planning period, resulting from the depletion of the greenfield land supply. Applying the market shares to the GTAH and Regional housing market results in a forecast of housing unit by type.

As can be seen from the table, total housing unit growth declines through the forecast period, especially for the ground-related types. Growth in new apartments remains relatively constant in the reference forecast and increases under the high growth forecast.

3. Declining Average Household Sizes Mean Slower Population Growth than Housing Growth

The population forecast is determined by applying a projected average household size to the housing forecast. Like all communities in the GTAH, average household size is anticipated to decline gradually over time as a result of a number of factors, but mainly associated with the aging of the population, as described in the previous chapter.

The decline in average household size will have a significant impact on the existing population base and the future growth forecast, especially in a City as large as Mississauga. The forecast person per unit factors by unit type are show in Table 8.

The data in the table indicate a continuation of a slow downward trend in average household sizes, both historic and forecast. The exception has been greater volatility in the person per unit in apartments as different types of households and types of units come to market. In particular, the occupants of apartments historically were more senior households and fewer young families than today. This pattern in apartments moderates the overall declining trend and is expected to continue in the future. In the context of an overall average household size decline of 7.5% between 1986 and 2031, apartment average household size is forecast to still be 6.3% above the 1986 level.

Table 8

Historic and Forecast Persons Per Unit City of Mississauga 1986 to 2031

Census Year	Singles	Semi	Rows	Apts	All Units
1986	3.49	3.83	3.36	2.22	3.09
1991	3.55	3.73	3.16	2.28	3.10
1996	3.52	3.63	3.21	2.47	3.14
2001	3.51	3.47	3.13	2.41	3.13
2006	3.48	3.44	3.08	2.50	3.09
2011	3.43	3.40	3.04	2.48	3.04
2016	3.37	3.35	2.99	2.44	2.98
2021	3.33	3.30	2.96	2.41	2.93
2026	3.29	3.27	2.93	2.38	2.89
2031	3.27	3.23	2.91	2.36	2.86

Source: Statistics Canada and Hemson Consulting Ltd., 2008

The person per unit projection combined with the housing outlook for the City of Mississauga results in the reference population forecast in Tables 9 and 10. Table 9 provides the components of the Census definition of population. The figures in Table 10 add the Census net undercoverage to provide a total population for the City. The pattern of slowing population growth in the City is clear from Table 10, where the final build out of the greenfield housing supply means much slower growth.

Table 9

Forecast of Total Population
City of Mississauga 1986 to 2031

Census Year	Household Population	Non-Household Population	Census Population
1986	371,000	3,000	374,000
1991	460,000	3,000	463,000
1996	542,000	2,000	544,000
2001	610,000	3,000	613,000
2006	664,000	5,000	669,000
2011	701,000	5,000	706,000
2016	716,000	5,000	721,000
2021	726,000	5,000	731,000
2026	735,000	5,000	740,000
2031	745,000	5,000	750,000

Source: Statistics Canada and Hemson Consulting Ltd., 2008

4. Most of the City's Growth Will Occur in Urban Growth Centre

The growth forecast by planning district is shown in Table 11. At the planning district level, most growth in the short term will be focussed in remaining areas with with greenfield supply, including Central Erin Mills, Churchill Meadows, Hurontario and East Credit. Once the land supply for lower density housing is built out in a few short years, growth will still be accommodated primarily through higher density housing on remaining vacant sites as well as in identified intensification areas.

Table 10

Forecast of Total Population
City of Mississauga 1986 to 2031
Including Net Undercoverage

Census Year	Census Population	Total Population (Including Net Undercoverage)	Growth
1986	374,000	389,000	—
1991	463,000	480,000	91,000
1996	544,000	561,000	81,000
2001	613,000	640,000	79,000
2006	670,000	698,000	58,000
2011	706,000	737,000	39,000
2016	721,000	753,000	16,000
2021	731,000	763,000	10,000
2026	740,000	773,000	10,000
2031	750,000	783,000	10,000

Source: Statistics Canada and Hemson Consulting Ltd., 2008

Many of the City's older communities will begin to experience population decline as a result of declining average household size in the existing base and where there is little new development to compensate. These include Malton, Meadowvale, Erindale, Sheridan and Rathwood. At most, however, the decline is only 5% in Malton over 23 years, which should not be considered large over such a long period of time.

Some communities, however, will experience some growth as older housing stock begins to "turn over" with younger families replacing the elderly in ground-related housing. The bulk of the communities between the rapid growth areas at the top and the declining populations near the bottom, will be experiencing moderate growth through intensification and redevelopment. High amenity areas in older established communities such as Streetsville and along the lakeshore such as Port Credit and Lakeview will be attractive locations for this type of development.

Most of the City's population growth, however, is anticipated to occur in the UGC, which incorporates the City Centre and portions of Cooksville, Fairview and Mississauga Valleys. The high demand for apartment units in this area is expected to continue through the forecast period, particularly as further major transportation investments are made.

The population forecast for the City Centre is also accompanied by an expectation of commercial and institutional growth supporting its role as a focus for commercial office and cultural, civic and recreational facilities, but, in turn, reinforcing the attractiveness of the City Centre for residential growth.

This is discussed in more detail in Chapter IV, which describes the employment forecast for the City.

Table 11
Mississauga Planning District Population Forecast
Total Population, 2008 to 2031

District	2008	2031	Growth
UGC (incl. City Centre)	70,990	102,260	31,270
Churchill Meadows	36,790	43,450	6,660
Central Erin Mills	34,820	40,440	5,620
Meadowvale Village	26,780	32,160	5,380
East Credit	64,580	68,300	3,720
Hurontario	62,890	66,260	3,370
Erin Mills	48,030	49,710	1,680
Lakeview	22,640	24,100	1,460
Streetsville	12,160	13,090	930
Port Credit	11,830	12,650	820
Clarkson-Lorne Park	40,320	41,070	750
Applewood	39,530	39,910	380
Fairview (exl. UGC)	7,630	7,990	360
Dixie	410	700	290
Mineola	9,700	9,850	150
Lisgar	31,410	31,540	130
Creditview	10,980	11,110	130
Cooksville (exl. UGC)	25,270	25,390	120
Mississauga Valleys (exl. UGC)	13,430	13,550	120
Rathwood	31,280	31,080	(200)
Sheridan	17,950	17,630	(320)
Erindale	23,160	22,530	(630)
Meadowvale	41,990	41,110	(880)
Malton	38,520	36,670	(1,850)
Employment Districts	140	130	(10)
Total City	723,200	782,700	59,500

Source: Hemson Consulting Ltd., 2008

C. HIGH GROWTH FORECAST IS BASED ON THE CITY ATTRACTING MORE INTENSIFICATION

In order to provide a range on the forecast results, this section describes a high population growth forecast to 2031, which is based on the City of Mississauga attracting a higher level of intensification. The high forecast could result from one of two future events:

- A broad, metropolitan-wide shift in favour of higher density housing in the GTAH, with Mississauga maintaining a similar market share as anticipated under the reference forecast; or

- The more likely event that the City of Mississauga would be successful in attracting a higher share of the high density market as a result of efforts to improve the market attraction of the community for accommodating demand for such development. This result would generally be contrary to the Growth Plan which expresses a clear interest in greater amounts of higher density housing development in many locations across the Greater Golden Horseshoe.

The results of the high forecast are summarized in the following tables. Under the high growth scenario, an even larger increase in the City of Mississauga's share of apartments is forecast. The shares of the single and semi-detached unit market decline as in the reference forecast, since the land supply for this type of development is constrained and there are few initiatives that the City can reasonably implement to affect this condition.

Table 12

High Forecast Scenario
Historic and Forecast Total Housing Growth
City of Mississauga 1986 to 2031

Census Period	Single and Semi Detached	Rows	Apts	Total
1986-91	17,200	3,100	11,100	31,400
1991-96	11,700	3,700	3,900	19,200
1996-01	14,900	5,000	800	20,700
2001-06	13,500	5,000	5,300	23,800
2006-11	4,900	3,100	8,200	16,300
2011-16	800	2,900	7,500	11,200
2016-21	400	2,300	7,700	10,400
2021-26	200	2,400	7,400	10,000
2026-31	100	2,500	6,300	8,900

Source: Statistics Canada and Hemson Consulting Ltd., 2008

Table 13

High Forecast Scenario
Forecast of Total Population
City of Mississauga 1986 to 2031

Census Period	Household Population	Non-Household Population	Total
1986	371,000	3,000	374,000
1991	460,000	3,000	463,000
1996	542,000	2,000	544,000
2001	610,000	3,000	613,000
2006	664,000	5,000	669,000
2011	702,000	5,000	707,000
2016	721,000	5,000	726,000
2021	737,000	5,000	742,000
2026	755,000	5,000	760,000
2031	772,000	6,000	778,000

Source: Statistics Canada and Hemson Consulting Ltd., 2008

Table 14

High Forecast Scenario
Total Population (Including Net Undercoverage)
City of Mississauga, 1986 to 2031

Census Period	Census Population	Total Population (Including Net Undercoverage)	Growth
1986	374,000	389,000	—
1991	463,000	480,000	91,000
1996	544,000	561,000	81,000
2001	613,000	640,000	79,000
2006	670,000	698,000	58,000
2011	707,000	738,000	40,000
2016	726,000	757,000	19,000
2021	742,000	775,000	18,000
2026	760,000	794,000	19,000
2031	778,000	812,000	18,000

D. POTENTIAL CAPACITY FAR EXCEEDS ANY REASONABLE EXPECTATION OF DEVELOPMENT

Based on the supply information described earlier in this chapter, the City has a *theoretical* ultimate development capacity that far exceeds any reasonable expectations for the amount of growth that may actually occur. This is true in broader market demand: however successful the Growth Plan may be in shifting housing preferences, many households will still choose the ground-related housing being provided in other jurisdictions.

Theoretical supply far exceeding actual development is also a product of the characteristics of redevelopment. Unlike greenfield development which can be delivered predictably and rapidly, redevelopment tends to be a slow process, typically only occurring when the useful economic life of existing buildings is complete. For example, a dated-looking low density strip mall can be an economically viable operation for the owner far longer than most casual observers would imagine.

With such a large stock of newer buildings in Mississauga, the redevelopment process will be very long term in nature. A 25 year time frame for these forecasts to 2031 is simply not all that long in terms of accommodating redevelopment.

E. OTHER DEMOGRAPHIC CHARACTERISTICS INDICATE GRADUAL CHANGE

Although it is difficult to predict with a great deal of accuracy, it is also anticipated that the City's population will become more diverse over time.

- The ethnic composition of the City will continue to become more diverse over time. The City will likely continue and increase its role as an initial destination for immigrants, meaning a continued diversification of the ethnic profile of the population.

- The City will also likely see some shifts in the average income. While currently the City is somewhat higher than the Toronto Census Metropolitan Area (CMA) average, over time it is anticipated to trend towards the CMA average. This trend will be the result of an increasing proportion of growth in higher density households and aging of the population, which tends to put downward pressure on overall average income.

- Higher density housing tends also to be occupied by more non-family and lower income households and a good portion of the elderly population who are beyond working age and in many cases on fixed incomes.

Overall, the pace of population growth in the City of Mississauga will slow and become increasingly oriented towards higher density forms. The ethnic composition of the City's population is also anticipated to become increasingly diverse over time, with other demographic characteristics also demonstrating gradual change.[1]

This increasing diversity in the population will have an effect on many elements of the municipal corporation, particularly with respect to the services that are required and how they will be delivered. It will also have an effect on the employment outlook, as discussed in the next chapter.

F. MISSISSAUGA NEEDS TO UNDERTAKE LONG TERM PLANNING FOR AGING OF POPULATION

The aging of the population is a phenomena common to most areas in Ontario. The largest age cohort in Canada's population is the "baby boom" generation. This term refers to people born between the years of 1946 and 1966. Because the period of rapid development of Mississauga since the 1980s was based largely on attracting young families, the age structure of Mississauga is substantially younger today than in Ontario or Canada; the peak 35– 39 age group in 2006 being born in the late 1960s. As the City enters a period of slower

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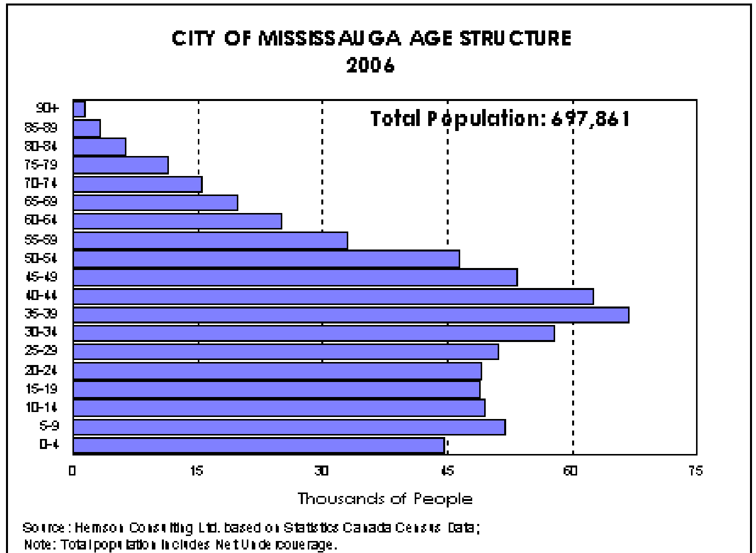
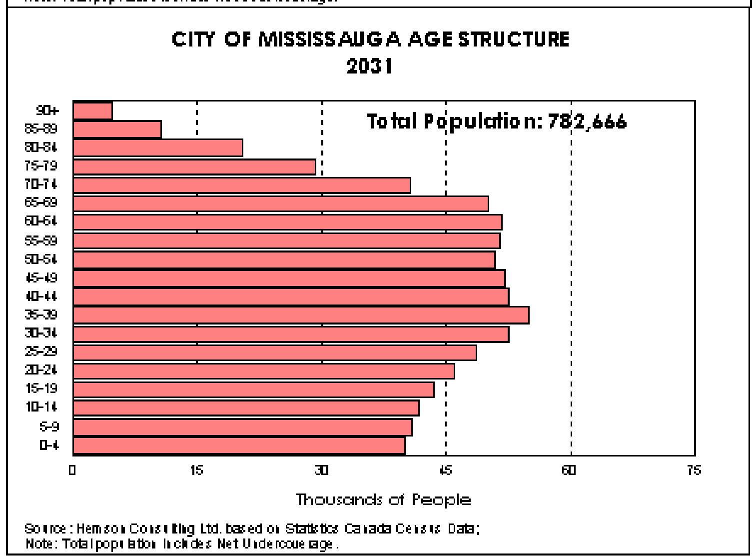
[1]*For detail, see* Growth in a Maturing Community: Population, Household and Employment Forecasts 2001-2031, *prepared in November 2003*.

growth, the aging of Mississauga's peak age groups will become the dominant trend in the population age structure.

In 2006, those 65 and over comprised about 8% of the population in Mississauga. By 2031, the forecast projects that this age cohort will account for about 20% of the total population; this means nearly a tripling of the seniors population in the City. At the same time the school age population will be stable or declining in most parts of the City which will have significant implicaitons for the school boards.

The transition from a fast growing and relatively young population to a more stable and older population has important implications for service delivery across a wide range of departments including those responsible for parks and recreation, transit, community planning and others.





IV EMPLOYMENT IS FORECAST TO GROW TO OVER 500,000 JOBS BY 2031

This chapter provides the results of the updated employment forecasts for the City of Mississauga, beginning with a discussion of the employment forecast for the broader metropolitan region. This is followed by a discussion of the outlook for the City of Mississauga under both reference and high growth scenarios.

Like growth in population, the nature of employment growth in Mississauga is also affected strongly by land supply. As the supply of land for industrial-type uses is diminished, the overall rate of growth will slow and a greater share of employment will be accommodated in major offices. Mississauga will also continue to accommodate employment growth in the form of retail and institutional services to the resident population.

Like the previous forecast, the 2008 forecast update anticipates continued employment growth for the GTAH and that the City of Mississauga will remain a major employment centre within the GTAH. Notwithstanding the current economic slow-down, the long-term economic outlook for both the GTAH and Mississauga is positive.

A. EMPLOYMENT IN THE GTAH IS ANTICIPATED TO GROW STEADILY TO 2031

The *Growth Plan* anticipates that 1.8 million jobs will be added to the GGH between 2001 and 2031, the majority of which — 1.4 million jobs — will be in the GTAH. Notwithstanding that employment growth in the 2001 to 2006 Census period fell somewhat short of expectations and the 2006 to 2011 period will also likely do so, the fundamentals do remain in place for continued, long-term growth.

1. A Shift from Expected Employment Growth Pattens Occurred Between 2001 and 2006

One of the more interesting features of the 2006 Census is the pattern of employment growth that is shown during the 2001 to 2006 period:

- Overall, employment in the GTAH grew by only 8.4% over the five years, compared to a forecast of 11.7%., so was much lower than expected.

- Within the GTAH, the Cities of Toronto and Hamilton and the Region of Durham all met or exceeded expectations. Within the Outer Ring, the Counties and regions such as Simcoe, Waterloo, Wellington and Brant also met or exceeded growth expectations.

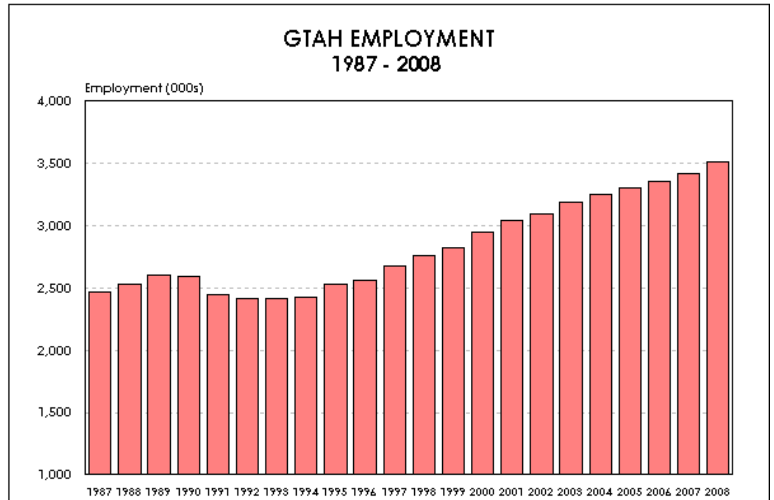
- At the same time the areas where the fastest growth had been expected — Peel, York and Halton — were the farthest below expectations.

More recent data is now indicating why this pattern occurred. Less employment has occurred in employment lands than had been expected, and somewhat more occurred in other locations in communities in the form of community-related employment such as retail, health, education and public administration.

While the industrial-type activities had little net growth in employment, GTAH-wide, there was a significant increase in building space. The combination of little employment growth and the addition of new space indicates a decline in employment density in employment areas. This density decline goes a long way toward explaining the geographical distribution of growth.

2. Despite Current Economic Slowdown, GTAH Employment is Forecast to Grow to 4.3 Million Jobs by 2031

As shown in the graph following, since the end of the recession of the early and mid-1990s, employment in the GTAH has grown rapidly and steadily. Notwithstanding the pattern of employment growth during the 2001 to 2006 period, and the current period of economic uncertainty, on an



Source: Statistics Canada, Labour Force Historical Review 2007; Note: GTAH defined as Toronto, Hamilton & Oshawa CMA's

annualized basis the pattern of long-term sustained employment growth in the GTAH is clear.

There is no question that the current economic showdown in the United States and Canada will yield declines in both manufacturing output and manufacturing employment. And, in turn, the economic slowdown is likely to have some short-term effects on the non-residential and real estate sector in the GTAH. The slowdown is also likely to have indirect effects through the financial markets, as nervous buyers and investors become more cautious.

Reflecting current economic conditions, it is anticipated that overall employment growth during the 2006 to 2011 period will be somewhat slower than anticipated. However, over the longer term, the fundamentals remain in place for continued strong economic performance and employment growth over the planning period to 2031. The global financial crisis is quite recent and government actions are being taken.

However, it remains highly uncertain as to the degree of impact that these events will have on the overall economy either nationally or in the GTAH. And, great uncertainty exists as to how long such effects will be felt.

The GTAH is anticipated to remain the primary economic engine in Ontario, with economic output anticipated to continue to grow over the long-term, accompanied by associated growth in employment and income. The forecast results are shown in the following table. As with the population forecast, the 2031 total is consistent with the *Growth Plan* although intervening periods may vary.

Table 15

Historic and Forecast Total Employment GTAH, 1986 to 2031

Census Year	Total Employment	Growth	Growth Rate
1986	2,270,000	—	—
1991	2,500,000	220,000	1.9%
1996	2,530,000	30,000	0.3%
2001	2,940,000	410,000	3.1%
2006	3,190,000	250,000	1.6%
2011	3,430,000	240,000	1.5%
2016	3,760,000	330,000	1.9%
2021	4,010,000	250,000	1.3%
2026	4,160,000	150,000	0.7%
2031	4,320,000	160,000	0.8%

Source: Statistics Canada and Hemson Consulting Ltd., 2008

3. Employment Land Will Play a Major Role in Accommodating Future Growth

The nature of the GTAH economic base is such that a significant share of employment is accommodated in land-extensive, single-storey, industrial-type buildings on employment land. This built form is related to the structure of the GTAH economy and is not anticipated to change rapidly or significantly through the forecast period.

As shown in Table 16, approximately 37% of the total employment growth forecast for the 2006 to 2031 period will be employment land employment, which is forecast to grow by approximately 420,000 jobs. About a quarter of the forecast job growth will be accommodated in major offices, with the remainder in scattered locations throughout the community, including those that work from home.

Table 16

Employment Forecast By Major Type GTAH 2006 to 2031 (in 000s)

Type	2006	2031	Growth	Share
Major Office	790	1,070	280	25%
Population Related	1,130	1,560	430	38%
Employment Land	1,270	1,690	420	37%
Total Employment	3,190	4,320	1,130	100%

Source: *The Growth Outlook for the Greater Golden Horseshoe*, Hemson Consulting Ltd., Compact Growth Scenario Reference Forecast, updated with 2006 Census Employment information. May not add due to rounding

Most of the employment growth in the GTAH, therefore, will be accommodated primarily within suburban industrial business park environments, which has significant implications for the City of Mississauga.

B. GROWTH IN MISSISSAUGA IS BASED ON LAND SUPPLY AND MARKET POTENTIAL

Currently, the City of Mississauga plays a major role in the GTAH employment market. The City's 2006 employment is estimated to be nearly 431,000 jobs, which includes major concentrations of economic activity in the manufacturing, trade and transportation sectors. One of the main reasons for the City's economic success has been a large and competitive supply of employment land.

Over the coming years, however, the City of Mississauga's role in the GTAH employment land market will begin to shift as its supply of greenfield development land is depleted. The combination of continued employment growth in the GTAH and Mississauga's continued appeal as an employment location suggest that Mississauga's employment land supply will be built-out in the next 5 to 10 years.

As a result, other communities in the GTAH such as Brampton, Oakville and Milton will attract Mississauga's historic share of employment land market and employment in Mississauga will increasingly be focussed in higher density forms, particularly major offices.

1. Mississauga's Role in the GTAH Employment Land Market Will Change Over Time

Historically, the City of Mississauga has accounted for a large share of the GTAH employment land building activity and land absorption. However, nearly all of the City's employment land supply is developed, the result of a combination of the City's age, locational advantages and good employment land planning.[1]

The pattern of development for employment land mirrors the pattern of build-out of ground-related housing and will certainly occur. The only issue is that of the exact timing of depletion. The observed pattern in other communities is that the development tends to tail off as the supply approaches depletion, with the last segment of absorption occurring slowly over a long time period. The City of Mississauga will continue to maintain a large employment base over the forecast period but the rate of growth will slow and nature of employment growth will shift.

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[1] *For detail, see* City of Mississauga Employment Land Review Study, *prepared by Hemson Consulting Ltd. in June 2008.*

2. Employment is Forecast to be Concentrated in the Major Office Sectors

For the City of Mississauga, employment in major offices is forecast to grow from a 2006 employment of approximately 90,000 jobs to nearly 140,000 jobs by 2031, translating into growth of nearly 50,000 jobs. Population-related and employment land employment are forecast to grow by 19,000 and 7, 000 jobs, respectively. The forecast of employment by type is shown in the following table.

Table 17

Historic and Forecast Total Employment By Type City of Mississauga 1986 to 2031

Census Year	Major Office	Population Related	Employment Land	Total
1986	23,000	62,000	132,000	217,000
1991	47,000	77,000	150,000	274,000
1996	50,000	84,000	168,000	303,000
2001	70,000	96,000	217,000	382,000
2006	91,000	107,000	233,000	431,000
2011	102,000	115,000	237,000	454,000
2016	117,000	122,000	239,000	478,000
2021	127,000	125,000	240,000	492,000
2026	133,000	125,000	240,000	497,000
2031	139,000	126,000	240,000	504,000
Growth 2006-31	48,000	19,000	7,000	73,000

Source: Statistics Canada and Hemson Consulting Ltd., 2008

The following are some key points regarding the growth outlook for employment by type:

- In recent years, the City of Mississauga has accommodated most of the major office development outside of the City of Toronto, primarily within the Airport Corporate District. After 2011, the growth rate for major office in the GTAH slows somewhat, however Mississauga will continue to retain its dominant position in the 905 market.

- The rate of population-related employment will slow as a result of the pending build out of the supply for ground-related units, although this may be balanced somewhat by growth in metropolitan-wide population-related employment, consistent with the evolving central place functions of the City; and

- Employment land employment will continue to grow in the short-term as the remaining supply of land is absorbed. Employment land employment is forecast to near its peak of 240,000 jobs by 2021(including 22,000 jobs on the LPBIA site).

Overall, continued rapid growth in City-wide employment is anticipated to occur to 2011 as the remaining greenfield employment land supply is developed. After 2011, employment growth slows and its composition will shift towards major offices. Over the forecast period, the City will continue to maintain a dominant position in the GTAH 905 office market and will continue to accommodate population-related employment.

3. Employment Growth Will be Concentrated in the Employment Districts and City Centre

Employment in Mississauga's designated Employment Districts currently accounts for the majority of the City's employment, as shown in Table 18. Like the population forecast, a large share of the employment growth in the short term is anticipated to occur in the areas with an available land supply to accommodate development.

The most rapid employment growth is forecast to occur in the Meadowvale Business Park, Gateway and Airport Corporate, where office growth is expected to be focussed. Employment in the UGC is forecast to grow by approximately 6,700 jobs to 2031, reflecting both City and Provincial policy objectives.

One of the key challenges to forecasting employment growth in the City Centre, and other planning districts, however, is the extent to which the City can direct major offices:

- Historically, most of the office space that has been built in the City of Mississauga has been accommodated in greenfield business park locations, primarily in the Airport Corporate District and Meadowvale.

- Once the capacity of these areas is exhausted, however, a shift in the market will need to occur towards the City Centre and other planned transit nodes. The extent to which this shift can be achieved will be a significant challenge. The forecast for the UGC has some shift, but is somewhat conservative with respect to future office market share in the UGC.

Table 18
Mississauga Planning District Employment Forecast, 2008 to 2031

District	2008	2031	Growth
UGC (incl. City Centre)	35,030	43,270	8,250
Meadowvale Business	42,720	54,290	11,570
Gateway	57,830	66,830	9,000
Airport Corporate	24,630	31,490	6,860
Western Business Park	12,470	14,440	1,980
Airport	21,870	23,750	1,880
Sheridan Park	6,010	7,560	1,560
Southdown	15,930	17,370	1,440
Dixie	18,100	18,750	650
Mavis-Erindale	9,120	9,730	610
Northeast	125,700	125,810	110
Employment Districts Total	**334,360**	**370,010**	**35,660**
Central Erin Mills	9,340	11,160	1,810
Churchill Meadows	2,010	3,520	1,510
East Credit	6,100	7,290	1,190
Hurontario	6,110	7,090	980
Erin Mills	5,740	6,580	840
Meadowvale Village	2,310	3,080	770
Port Credit	3,370	4,060	690
Streetsville	3,180	3,730	550
Clarkson-Lorne Park	5,270	5,730	470
Lakeview	5,940	6,350	410
Cooksville (exl. UGC)	4,130	4,470	340
Applewood	3,830	4,150	320
Sheridan	3,780	4,090	310
Rathwood	3,020	3,320	300
Malton	3,580	3,870	300
Meadowvale	3,720	3,990	270
Erindale	2,320	2,550	230
Lisgar	1,930	2,120	190
Fairview (exl. UGC)	1,790	1,960	170
Mineola	1,350	1,470	120
Mississauga Valleys (exl. UGC)	1,090	1,210	110
Creditview	800	880	80
Residential Districts total	**80,720**	**92,660**	**11,940**
Total	**450,100**	**505,950**	**55,850**

Source: Statistics Canada and Hemson Consulting Ltd., 2008

- Historically, planning has had a weak influence on the location of major offices. And, despite Mississauga's success in attracting offices, few have actually been built in the City Centre or other planned nodes.

As a result, the forecast of employment by district anticipates that the Employment Districts will continue to accommodate the majority of employment in major offices, with a gradual shift to the City Centre over time. The forecast results by planning district are shown in Table 18.

C. HIGH GROWTH FORECAST IS BASED ON THE CITY ATTRACTING MORE OFFICES

In order to provide a range on the forecast results, this section describes a high population growth forecast to 2031. The high growth forecast is based primarily on the City attracting a higher level of major office employment, both to existing greenfield locations and over time to the City Centre, as shown in Table 19.

The high growth forecast also anticipates a greater level of growth in population-related activities, primarily related to the City's evolving role as a central place and the provision of more, metropolitan-wide services. The high growth forecast also anticipates a greater level of employment intensification, particularly in the large employment areas around the LBPIA.

The results of the high forecast are summarized in the following tables. Under the high growth scenario, an even larger increase in the City of Mississauga's share of major office development is anticipated, as well as a more efficient use of the existing land and building supply.

Table 19

High Forecast
Historic and Forecast Employment By Type
City of Mississauga 1986 to 2031

Census Period	Major Office	Population Related	Employment Land	Total
1986	23,000	62,000	132,000	217,000
1991	47,000	77,000	150,000	274,000
1996	50,000	84,000	168,000	303,000
2001	70,000	96,000	217,000	382,000
2006	91,000	107,000	233,000	431,000
2011	102,000	115,000	237,000	454,000
2016	119,000	123,000	241,000	483,000
2021	131,000	127,000	242,000	500,000
2026	138,000	128,000	242,000	509,000
2031	146,000	131,000	243,000	519,000
Growth 2006-31	55,000	24,000	10,000	88,000

Source: Statistics Canada and Hemson Consulting Ltd., 2008

The forecast of population and employment for the planning districts is based largely on the same principles as the overall City population — mainly that most of the growth will occur in areas where land is available. Older areas with little opportunity for new development will likely be characterized by slow or declining levels of growth. In order to achieve higher levels of growth, it is clear that actions will need to be taken to shift this land use pattern and make the City even more attractive for growth.

V ACTIONS NEED TO BE TAKEN TO ENSURE THAT THE CITY OF MISSISSAUGA REMAINS AN ATTRACTIVE ENVIRONMENT FOR HIGH DENSITY DEVELOPMENT

The results of the 2008 forecast update indicate some clear shifts in the structure of both population and employment growth over time. The City's transition from a rapidly-growing suburban community has a number of key implications for the amount of and type of growth that will occur over the planning period:

- The "reference" forecast is the most likely growth outlook, in keeping with the *Growth Plan* objectives regarding intensification and the City's role meeting *Growth Plan* targets set for the Region of Peel.

- The high forecast scenario should be considered to be a "target" of what could be achieved as a result of efforts to improve the market attraction of the community for higher-density forms, though attracting additional development to this degree may run contrary to the intentions of *Growth Plan*.

As a general planning objective, it would be advisable for the City of Mississauga to take actions, as it has in the past, to maintain and improve the appeal of the community for growth and investment. Taking such actions will be even more important if the City is interested in accommodating a level of population and employment growth that is beyond what may be considered "most likely".

A. APPEAL OF HIGH DENSITY LIVING WILL NEED TO BE ENHANCED

To achieve a higher level of growth in Mississauga, and perhaps even to achieve the Reference Scenario, the first step that will need to be taken is to ensure that the appeal of high density living is enhanced. In order to attract additional development in the City, higher density urban living needs to be more attractive to more households than either other locations or ground-related housing types. Some of the key planning considerations to this end are as follows:

- Planning for community services will increasingly need to cater to an aging population, including planning for better transit service, health care and for better access and mobility throughout the community.

- Financial planning will increasingly need to focus on maintenance issues and the task of keeping in good repair existing urban infrastructure. Key financial challenges will include declining Development Charge revenue and a shifting assessment base; and

- Investment in the public realm will be critical. In order to maintain — and enhance — the appeal of high density living, all aspects of the urban environment will need to be well maintained and upgraded, including the transportation system (transit, roads and rail), parks, streetscapes, cultural amenities and the arts.

B. POLICY AND FINANCIAL SUPPORT IS REQUIRED TO IMPROVE ECONOMIC COMPETITIVENESS

The larger challenge to achieving the high growth forecast will be with employment, where the market will dictate most of the amount and location of future economic development. In order to remain and improve the City's competitiveness in the GTAH employment market, strong policy and financial support will need to be provided. The following key points are worth noting to this end:

- As the supply of land for all types of urban uses in Mississauga becomes increasingly constrained, redevelopment and intensification projects will become more contentious. Given that there may be some community resistance to planned intensification, Provincial assistance may be required to support the *Growth Plan* policies.

- Protecting employment land will also become increasingly challenging. The value gap between employment and residential use will continue to drive conversion pressure, and the shift to major office employment will be increasingly interpreted as a reason to convert. Again, *Growth Plan* policies encouraging higher levels of intensification will serve to compound this challenge.

- While there may be good potential for employment intensification around the LBPIA, achieving this objective will require more than just planning policy. A significant investment in the area's transportation system will be required, including potential transit solutions to ease congestion.[1]

- Experience from the City of Toronto indicates that employment intensification can achieved. However, significant program and policy support along with a full range of financial incentives is required to put most redevelopment sites on an equal competitive footing with greenfield development sites.

- Equally, the task of directing major offices to planned transit nodes will also require policy and financial support. Contrary to popular planning objectives, most major office development has occurred not in planned nodes but in greenfield business park environments with good transportation access.

[1] *For additional detail on the potential for employment intensific-ation in the employment areas around the LBPIA, see* Understanding Employment Land in the Region of Peel, *prepared by Hemson Consulting Ltd., in November 2005.*

- Significant redevelopment for office use is also unlikely to occur in Mississauga. Most of the potential redevelopment sites in the City will not pass beyond their economic life within the period of the forecast, such as retail strip malls.

C. SENIOR LEVELS OF GOVERNMENT NEED TO BE A PARTNER IN IMPLEMENTATION

As the City of Mississauga plans for a new future in which it will increasingly accommodate more intensive development and provide metropolitan-wide services, it is clear that senior levels of government will need to provide some assistance in implementation. Especially, should the City choose to set the high growth forecast as a long-range planning target, such assistance would ideally include:

- Investment in the transportation infrastructure, particularly in the areas around the LBPIA and other planned transit nodes, to implement *Growth Plan* policies for transit-supportive development.

- Investment in other Provincially-funded facilities such as hospitals and other health care facilities;

- Assistance in ensuring that a full range of urban amenities are provided to enhance the appeal of high density living, within the context of declining revenues and shifts in the assessment base associated with Mississauga's evolution to a central place within the Region of Peel Region and GTAH; and

- Participation in potential Ontario Municipal Board hearings regarding applications to convert employment land to other uses or implementing intensification proposals where there may be strong community resistance.

The City of Mississauga is entering an exciting period of change. The shift to a more mature community will mean a number of challenges and opportunities for the municipal corporation, principal among which will be the need to accommodate more growth through more intense built forms. The community's ability to maintain its market appeal for such types of higher density development will be a major long-term planning consideration.

In addition to planning locally — which by its nature will become more complex — the growth outlook for the City of Mississauga engages other issues related to how the forecasts will be implemented, particularly regarding investment in the urban environment. We trust that the forecast information provided in this report is of assistance to City staff and Council as they make plans for the future.