

LONG-RANGE FORECASTS CITY OF MISSISSAUGA 2011-2051



HEMSON Consulting Ltd.

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TABLE OF CONTENTS

EXECUTIVE SUMMARY	I
I FORECASTS REFLECT <i>GROWTH PLAN</i> AMENDMENT 2 AND MATURE URBAN COMMUNITY	8
A. MISSISSAUGA HAS ENTERED A NEW PLANNING ENVIRONMENT.....	8
B. ASSIGNMENT UPDATES PREVIOUS MISSISSAUGA GROWTH FORECASTS	10
C. THREE GROWTH SCENARIOS HAVE BEEN PREPARED FOR THE CITY..	11
II RESIDENTIAL INTENSIFICATION AND OFFICE DEVELOPMENT KEY TO MISSISSAUGA’S NEW ROLE	14
A. GTAH FORECAST TO GROW STEADILY IN POPULATION AND EMPLOYMENT	15
B. POPULATION GROWTH IN MISSISSAUGA DETERMINED BY INTENSIFICATION POTENTIAL.....	15
C. OFFICE MARKET IS KEY TO MISSISSAUGA’S EMPLOYMENT GROWTH	17
III THE POPULATION OF THE CITY OF MISSISSAUGA IS FORECAST TO GROW TO NEARLY 910,000 IN 2051	19
A. MISSISSAUGA’S GROWTH CONSIDERED WITHIN THE LARGER URBAN REGION.....	19
B. SIGNIFICANT CAPACITY FOR INFILL, REDEVELOPMENT AND HIGHER DENSITY HOUSING IS SOURCE OF NEW HOUSING GROWTH IN THE CITY.....	23
C. CITY HOUSING AND POPULATION GROWTH FORECAST BASED ON SHARES OF GTAH AND PEEL GROWTH.....	25
D. TWO HIGHER SCENARIOS BASED ON GREATER MARKET SHIFT TO HIGHER DENSITY HOUSING AND MORE INTENSIFICATION DEVELOPMENT IN THE CITY	30
E. INTENSIFICATION AREAS WILL BE FOCUS OF HOUSING GROWTH ...	34
IV EMPLOYMENT IS FORECAST TO GROW TO OVER 580,000 JOBS IN 2051 ...	38
A. GTAH EMPLOYMENT GROWTH TO 2041 WILL SEE A CONTINUED SHIFT TOWARDS THE SERVICE SECTOR SUPPORTING MISSISSAUGA’S GROWTH.....	38
B. MAJOR OFFICE GROWTH REFLECTS MISSISSAUGA’S ROLE AS A MATURE CITY	41
C. LOCATION OF GROWTH WITHIN IN THE CITY PRIMARILY BUILDS ON EXISTING EMPLOYMENT CONCENTRATIONS.....	44
V CONCLUSION	47

LIST OF EXHIBITS

Exhibit 1: Forecast Method

Table 1: Historic & Forecast Population, GTAH, 1991-2041

Table 2: Exiting & Future Housing Unit Potential, City of Mississauga, 2013

Table 3: Historic & Forecast Housing Growth by Unit Type, GTAH, 1991-2041

Table 4: Historic & Forecast Share of Housing Growth by Unit Type, GTAH, 1991-2041

Table 5: Historic & Forecast Housing Unit Growth by Unit Type, City of Mississauga, 1991-2051

Table 6: Historic & Forecast Persons Per Unit, GTAH and City of Mississauga, 1991-2041

Table 7: Historic & Forecast Total Population, Conservative Growth Scenario, 1991-2051

Table 8: Historic & Forecast Housing Growth by Unit Type, Steady Growth Scenario, 1991-2051

Table 9: Historic & Forecast Total Population, Steady Growth Scenario, 1991-2051

Table 10: Historic & Forecast Housing Growth by Unit Type, Progressive Growth Scenario, 1991-2051

Table 11: Historic & Forecast Total Population, Progressive Growth Scenario, 1991-2051

Table 12: Housing Forecast by Urban Structure Category, Conservative Growth Scenario, 1991-2051

Table 13: Population Forecast by Urban Structure Category, Conservative Growth Scenario, 1991-2051

Table 14: Housing Forecast by Urban Structure Category, Steady Growth Scenario, 1991-2051

Table 15: Population Forecast by Urban Structure Category, Steady Growth Scenario, 1991-2051

Table 16: Housing Forecast by Urban Structure Category, Progressive Growth Scenario, 1991-2051

Table 17: Population Forecast by Urban Structure Category, Steady Growth Scenario, 1991-2051

Exhibit 2: Change in Resident Employed Labour Force by NAICS, GTAHA, 2006-2011

Table 18: Historic & Forecast Employment, GTAHA, 1991-2041

Table 19: Historic & Forecast Employment by Type, Conservative Growth Scenario, 1991-2051

Table 20: Historic & Forecast Employment by Type, Steady Growth Scenario, 1991-2051

Table 21: Historic & Forecast Employment by Type, Progressive Growth Scenario, 1991-2051

Table 22: Total Employment Forecast by Urban Structure Category, Conservative Growth Scenario, 2011-2051

Table 22: Total Employment Forecast by Urban Structure Category, Steady Growth Scenario, 2011-2051

Table 24: Total Employment Forecast by Urban Structure Category, Progressive Growth Scenario, 2011-2051

EXECUTIVE SUMMARY

This report provides the results of the long-term population, housing and employment forecasts for the City of Mississauga to 2051. The assignment is an update of previous Mississauga forecasts in 2008 and takes into account the most recent 2011 Census and other relevant information, including the recently released Amendment 2 to the *Growth Plan*, which updates the Schedule 3 forecasts and extends them to a 2041 horizon. Three growth forecast scenarios have been prepared for the City of Mississauga which incorporate *Growth Plan* policy direction and reflect varying degrees of intensification and redevelopment in the community:

- Conservative – based on ROPA 24 direction which requires market shifts in favour of higher density living and investment in supporting infrastructure;
- Steady – based on achievement of higher intensification within the Region of Peel and Mississauga capturing greater shares of the GTAH high density residential and office employment markets; and
- Progressive – based on a significant market shift and much greater investment in infrastructure to support even higher levels of intensification.

The key findings are as follows:

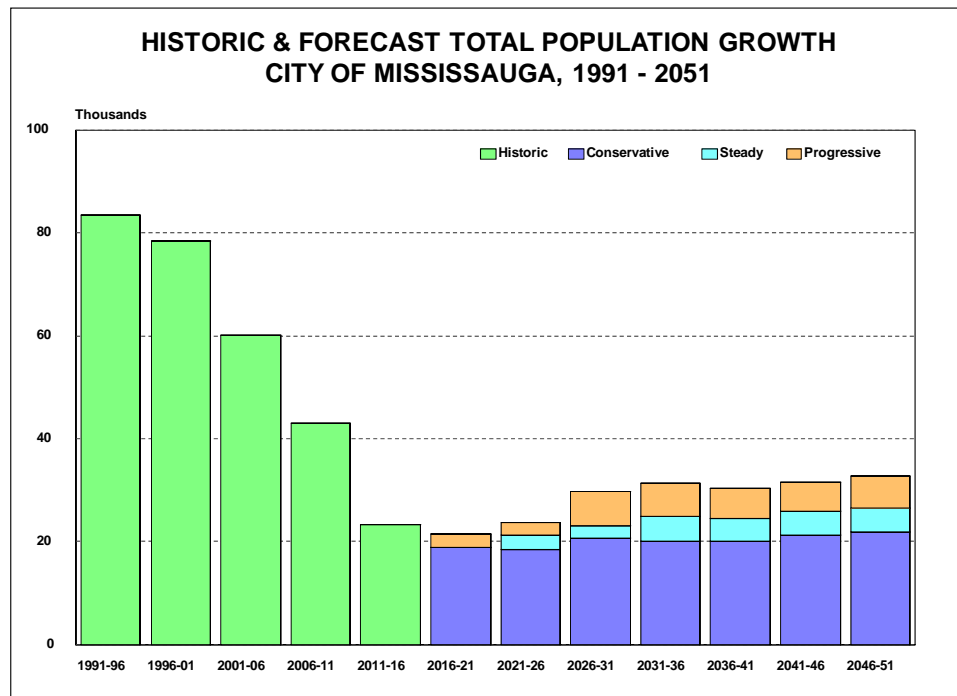
- The City is now in a post-greenfield phase. Population growth will be accommodated through intensification and redevelopment within the existing built up area and Mississauga will continue to become more focussed on higher density housing forms, particularly apartment development in the Downtown Core, infill in Major and Community Nodes and through redevelopment along intensification corridors.
- Employment growth will also primarily be concentrated in higher density forms. Most of the future employment growth will be in large office buildings. A smaller amount of future growth will be attributable to the build out of remaining employment lands and new commercial and institutional growth to support the growing population.
- Under the Conservative Growth scenario, the City of Mississauga is forecast to grow to a total population of approximately 824,000 by 2031 and 907,000 by 2051; and total employment will grow to 525,000 by 2031 and 582,000 by 2051.

City-wide results of the Conservative, Steady and Progressive growth forecast scenarios are provided below.

- This population growth is achieved by adding housing units in the range of 36,000 to 41,000 by 2031 and then an additional 27,000 to 41,000 units in the following 20 years to 2051.

Historic & Forecast Total Population City of Mississauga, 1991 - 2051			
	Conservative	Steady	Progressive
1991	478,000	478,000	478,000
1996	561,000	561,000	561,000
2001	640,000	640,000	640,000
2006	700,000	700,000	700,000
2011	743,000	743,000	743,000
2016	766,000	766,000	766,000
2021	785,000	785,000	787,000
2026	803,000	806,000	811,000
2031	824,000	829,000	841,000
2036	844,000	854,000	872,000
2041	864,000	878,000	902,000
2046	885,000	904,000	934,000
2051	907,000	931,000	967,000

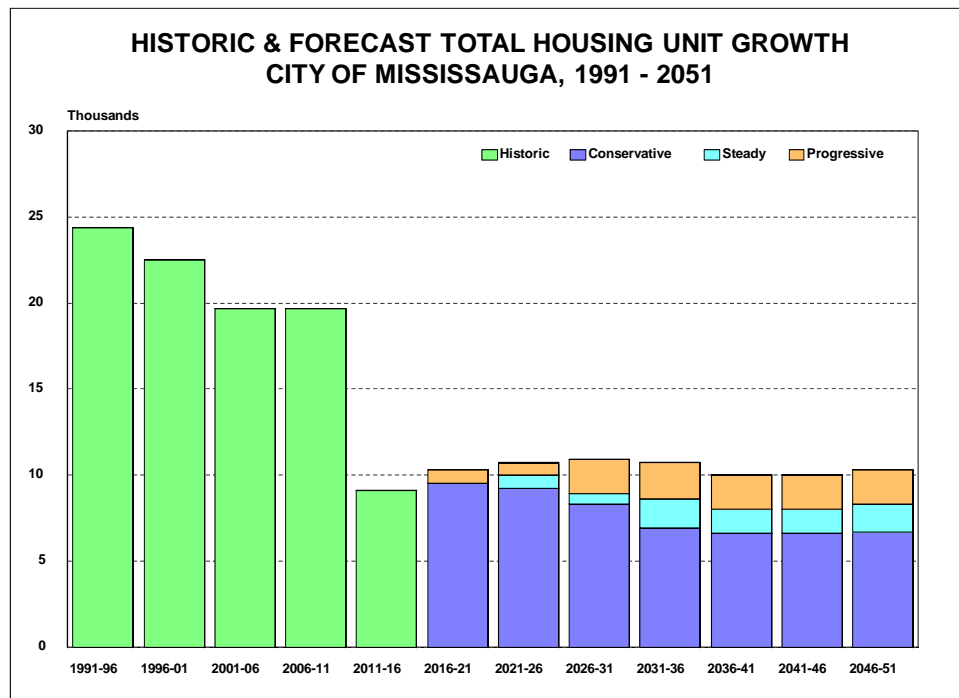
Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada & Annual Demographic Statistics.



Source: Hemson Consulting Ltd. based on Statistics Canada, Census of Canada.

Historic & Forecast Total Housing Units City of Mississauga, 1991 - 2051			
	Conservative	Steady	Progressive
1991	148,300	148,300	148,300
1996	172,700	172,700	172,700
2001	195,200	195,200	195,200
2006	214,900	214,900	214,900
2011	234,600	234,600	234,600
2016	243,700	243,700	243,700
2021	253,200	253,200	254,000
2026	262,400	263,200	264,700
2031	270,700	272,100	275,600
2036	277,600	280,700	286,300
2041	284,200	288,700	296,300
2046	290,800	296,700	306,300
2051	297,500	305,000	316,600

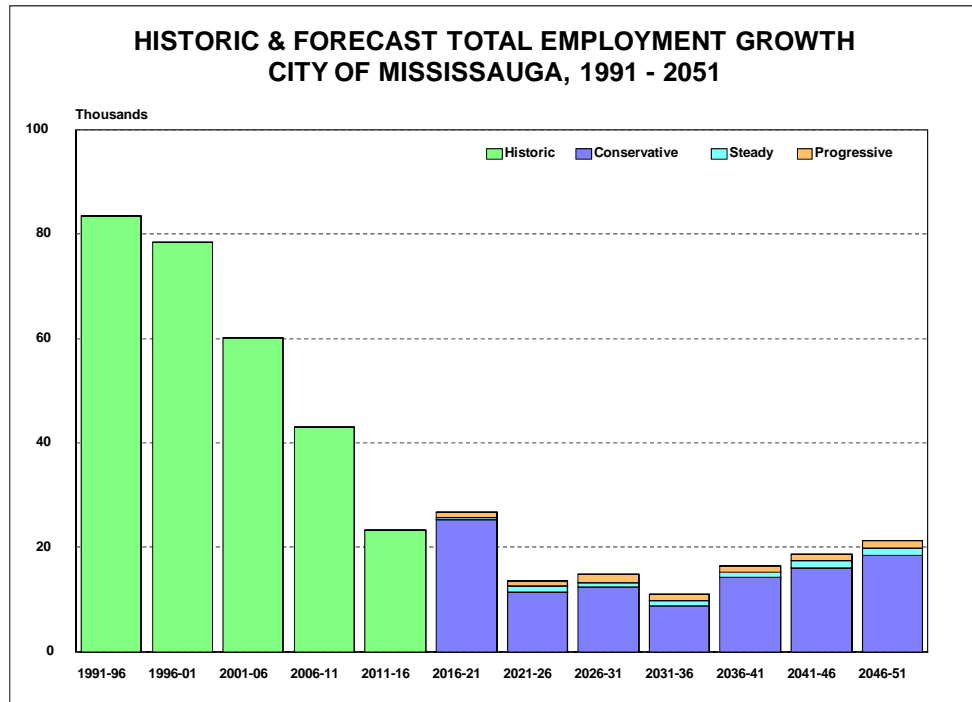
Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.



Source: Hemson Consulting Ltd. based on Statistics Canada, Census of Canada.

Historic & Forecast Total Employment City of Mississauga, 1991 - 2051			
	Conservative	Steady	Progressive
1991	279,000	279,000	279,000
1996	307,000	307,000	307,000
2001	382,000	382,000	382,000
2006	431,000	431,000	431,000
2011	448,000	448,000	448,000
2016	476,000	476,000	476,000
2021	501,000	501,000	502,000
2026	512,000	514,000	516,000
2031	525,000	527,000	531,000
2036	533,000	537,000	542,000
2041	548,000	552,000	558,000
2046	564,000	569,000	577,000
2051	582,000	589,000	598,000

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.



Source: Hemson Consulting Ltd. based on Statistics Canada, Census of Canada.

I FORECASTS REFLECT *GROWTH PLAN* AMENDMENT 2 AND MATURE URBAN COMMUNITY

Hemson Consulting Ltd. was retained by the City of Mississauga to update its population, housing and employment forecasts for the City to 2051. The forecasts have been updated within the context of the Region of Peel forecasts prepared as input to Amendment 2 to the *Provincial Growth Plan for the Greater Golden Horseshoe* (the *Growth Plan*), updated information from the 2011 Census and prior forecasts prepared by Hemson for the City.

As was anticipated in previous reports prepared for the City, Mississauga has effectively transitioned from a rapidly growing suburban community to a mature urban community. The first wave of growth reflected lifestyle trends of the suburban era and Mississauga's historic location at the gateway to the Toronto economic region. This transition from a developing to a developed community is reflected in the shift in its housing market to intensive forms of development, for which the City has been actively planning for some time. These forecasts have been prepared to provide City of Mississauga staff and Council with an information base and range of forecasts that will continue to help the City plan for its post-greenfield era.

A. MISSISSAUGA HAS ENTERED A NEW PLANNING ENVIRONMENT

Hemson recently prepared updated long range forecasts for the Greater Golden Horseshoe (GGH) as input to Amendment 2 to the *Growth Plan*, which updates the Schedule 3 forecasts. The Amendment came into effect on June 17, 2013. Municipalities are now required to plan for growth to 2041 in their official plans using the updated Schedule 3 forecasts, subject to transition policies set out in Section 5 of the *Growth Plan*. The Province has set a date of June 17, 2018 for municipalities within the GGH to bring their official plans into conformity with the updated Plan. Increased forecast growth estimates are reflected in Amendment 2 to the *Growth Plan* and heighten the pressure for good planning in the GGH and Peel Region. Peel Region and area municipalities have recently begun the process of updating the Peel Regional Plan with new forecasts.

Some key considerations with respect to Amendment 2:

- Forecast horizon has been extended to 2041;
- Higher overall forecast growth to 2031 than was previously anticipated for the entire GGH;
- Higher population and employment growth in Peel Region than was previously forecast;
- Immigration is still the most important component of population growth in the GGH;
- GGH has experienced higher fertility rates and longer life expectancy than anticipated when the 2006 Growth Plan forecasts were prepared; and,
- Higher household sizes than were previously anticipated, owing to changes in fertility and life expectancy.

The result of the higher person per unit in the forecast is that the higher population in Peel Region in 2031 in Amendment 2 does not require a proportionate increase in housing units or the planned urban development area in the Region.

Further discussion of the basis for the updated forecasts for the GGH can be found in the *Greater Golden Horseshoe Forecasts to 2041 Technical Report* (November 2012).

In addition to an updated planning and growth outlook for the GGH through Amendment 2 to the *Growth Plan*, the City of Mississauga has entered a new post-greenfield planning era in which growth will be accommodated through intensification. The City has taken a major key step in planning for its more mature urban state with a new Official Plan, adopted by Council in 2010 and approved at the Region of Peel in 2011. The updated official plan includes a number of new directions for the City:

- The new official plan recognizes that Mississauga has evolved from a largely suburban into an urban centre in its own right, with an emphasis on intensification, redevelopment and transit;
- The plan introduces a new urban hierarchy including Downtown, Major Nodes, Community Nodes, Corporate Centres, Neighbourhoods and

Employment Areas. Planning areas have been re-defined, with Planning Districts now re-organized into 52 'Character Areas'. Growth is directed to the nodes, intensification corridors and major transit station areas.

This assignment has also involved the allocation of growth into 'Mississauga Projection Zones' (MPZs), as recently updated.

B. ASSIGNMENT UPDATES PREVIOUS MISSISSAUGA GROWTH FORECASTS

The 2013 forecast assignment is an update of several previous forecasts prepared by Hemson for the City of Mississauga including:

- *Long Range Forecasts: City of Mississauga 2006 – 2031*, prepared in 2008 as input to the official plan update to bring the City's planning into conformity with the *Growth Plan*;
- The 2005 Forecast Update, which provided City staff with updated forecast information—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 new updated forecasts are based on all currently available data on existing development, population and employment in the City. The main basis for the City-wide forecasts is the available data from the 2011 Census, but also includes sources such as CMHC housing data. As well, the City's employment survey and the City's records of existing building stock are also considered.

The forecasts are based on Amendment 2 and its key underlying assumptions. The other major updates to the forecast are:

- The updated supply of urban land for future development determined on the basis of intensification potential; and

- Allocation of growth to MPZs. The forecasts have been prepared to 2051 at a City-wide, Character Area and Mississauga Projection Zone (MPZ) level. In this report, the City-wide forecasts and forecasts by urban structure category (Downtown Core, Major and Community Nodes, Neighbourhoods and Corporate Centres and Employment Areas) are discussed 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 MPZ are provided in the form of digital data, similar in fashion to the 2008 Forecast Update.

Throughout the report, all population figures, unless otherwise noted, use “total population” i.e. persons counted by the Census of Canada plus an allowance for a net undercoverage factor estimated at 4%.¹

C. THREE GROWTH SCENARIOS HAVE BEEN PREPARED FOR THE CITY

In order to provide a range on Mississauga’s future growth outlook, three forecast scenarios have been prepared for consideration by the City reflecting varying degrees of policy intervention and market demand shares.

The scenarios are prepared in the context of overall *Growth Plan* conformity, in particular, meeting – and through the higher growth scenarios, exceeding – *Growth Plan* targets for density and intensification as implemented through the Region’s ROPA 24 and the City’s new official plan. Meeting *Growth Plan* targets, as anticipated under the Conservative Growth scenario will require a shift to higher density housing as a preference within the GTAH marketplace accompanied by the fiscal capacity and investment to support the development and maintenance of growth-related infrastructure. Achieving the higher levels of growth anticipated through the Steady and Progressive growth scenarios would require an even greater shift in market preference to higher density living coupled with significant

¹ The forecasts are based on data collected every 5 years by Statistics Canada as part of the national Census. Though a 100% survey, some people are missed in the Census and some people are counted twice (or otherwise should not have been counted). Based on studies conducted after the Census, in Canada about 4% of persons were missed (under-coverage) and 1% over covered, yielding a net under-coverage of about 3%. In Ontario, the net under-coverage is higher at about 4%.

infrastructure investment and policy intervention put in place to increase efficiencies in the development approvals process.

With respect to employment, the scenarios are prepared in the context of policy direction from the City of Mississauga, notably the Downtown21 Master Plan which anticipates significant office development within the Downtown Core. The Conservative Growth scenario assumes meeting policy objectives for office market development, whilst the Steady and Progressive scenarios would necessitate a significant shift in the location preferences for major office, away from employment areas and business parks towards increased office development in the Downtown Core and along intensification corridors, a trend not currently widely observed within the GTA market. The Steady and Progressive scenarios also incorporate significant growth in population-related employment relative to the Conservative scenario, reflecting the City's evolving role as a central place within the GTA market, and contingent upon meeting the conditions needed to achieve the higher scenarios for housing and population growth.

With a common total for the Region of Peel, three forecast scenarios have been prepared that distribute different levels of Regional growth to the City of Mississauga:

- **Scenario 1: Conservative Growth** — reflects the current policy direction under the *Growth Plan* and ROPA 24, with a shift in market demand in favour of higher density housing supported by appropriate infrastructure. Under the Conservative Growth Scenario, Peel reaches 50% intensification by the late 2020s and remains at that level for the remainder of the forecast period to 2051. At this level of development, some of the identified supply potential in medium and high density housing still remains for the post-2051 period.
- **Scenario 2: Steady Growth** — reflects increased levels of intensification relative to current trends. Under the Steady Growth Scenario, the rate of development in Mississauga is increased compared to the Conservative Growth Scenario, raising Peel's intensification rate to 55% after 2031.
- **Scenario 3: Progressive Growth** — significantly increases the rate of development in Mississauga compared to the Conservative and Steady Growth scenarios, going beyond ROPA 24 by raising Peel's intensification rate to 55% by the late 2020's and to 65% by the late 2030's and thereafter.

Achievement of the Progressive Growth scenario would necessitate a significant market demand shift to high density housing in Mississauga and substantive infrastructure investment.

The remainder of this report sets out the updated population, household and employment forecasts for the City of Mississauga. The forecasts described in this report will be a key tool to assist the City in planning for its continued evolution as an urban community. The balance of the report is organized into three chapters.

- Chapter 2 describes in more detail the key factors shaping the growth outlook for 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 population and employment forecasts City-wide and by urban structure category.

As noted in our previous forecast reports, there is inherent uncertainty in forecasting. Forecasts involve a complex methodology which involves the combination of past demographic and market trends and sound assumptions about those trends as they extend into the future. Estimating the magnitude, rate and timing of growth is challenging but, for land use planning within the GGH, the distribution of growth within the GGH depends not only upon historic patterns but also upon the planning policy context. Key among these are *Growth Plan* policies that seek to encourage higher density housing forms and intensification where possible depending upon a given municipality's environmental and infrastructure capacity. Decisions regarding the basis of these forecasts require care and judgement and must take into account the most up-to-date information possible. At the same time the forecasts are intended to support informed, long-term planning and infrastructure decisions.

II RESIDENTIAL INTENSIFICATION AND OFFICE DEVELOPMENT KEY TO MISSISSAUGA'S NEW ROLE

Population and employment in the Greater Toronto Area and Hamilton (GTAH) is anticipated to grow steadily into 2041 based on the principal assumptions that Canada, Ontario, the GGH and the GTAH will continue to be attractive locations for growth and investment over the long-term.

Within the GTAH, the distribution of population and employment growth has traditionally been based on a community's ability to accommodate new housing on greenfields and land extensive employment uses. In the City of Mississauga, the greenfield land supply has been built out. Thus future growth will be through intensification and redevelopment and will largely be determined by the supply and marketability of land for infill, redevelopment and more intensive forms of development.

In prior forecasting assignments, future residential growth through intensification was given less attention as the focus of growth was largely on greenfield lands. Although additional information on intensification has been incorporated into the forecasts since 2008, the potential for small-scale infill development of singles, semis and rows may have been under-estimated owing to a more conservative approach taken at the time. Conversely, an enormous apartment unit potential that likely exceeds a reasonable expectation of either the volume or timing was identified in nodes, corridors and on retail sites. This current forecast update refines the approach to intensification by incorporating work undertaken by the City, through official plan and other planning policy directions, as well as detailed site reviews giving consideration to the likelihood, amount and timing of development.

The updated forecasts also reflect the fact that population will also continue to age, a critical demographic shift affecting household size, housing choices and labour force participation rates. This shift will continue to have significant implications for growth and planning for Mississauga and the broader GTAH.

A. GTAH FORECAST TO GROW STEADILY IN POPULATION AND EMPLOYMENT

The recent Amendment 2 to the *Growth Plan* forecasts that the GGH will reach a total of nearly 13.5 million people and 6.3 million jobs by 2041. This represents growth of approximately 4.4 million people and 1.6 million jobs in 30 years from 2011, significant rates of growth within the North American context. Under Amendment 2 to the *Growth Plan*, future GGH population and employment is mainly concentrated in the GTAH where most of the population and employment already resides. Through Amendment 2, approximately 75% of the total population and employment growth has been allocated to the GTAH. Within the GTAH, the Region of Peel accounts for 20% of total 2041 population and employment, and 15% within the GGH.

B. POPULATION GROWTH IN MISSISSAUGA DETERMINED BY INTENSIFICATION POTENTIAL

The long-term expectation for housing demand in the GTAH indicates a continued demand for ground-related housing units. Because the City of Mississauga's land supply for conventional ground-related housing is nearly exhausted, new housing growth will be accommodated through a combination of high density development, notably apartment construction on vacant sites, and other medium and higher density forms through intensification, notably rowhouse infill on apartment sites and redevelopment in nodes.

Population growth in any community is dependent on the types of housing units that it can provide:

- Ground-related housing types require the most land for development, in particular single and semi-detached units on greenfield sites.
- Most apartment development does not occur on new greenfield land (although it may be designated as such) but rather as redevelopment and intensification of lower-density housing forms or other land uses in planned nodes.
- Rowhouse development is more evenly split between greenfield and intensification. It is an increasingly popular form in greenfield environments as a smaller more affordable version of single detached housing. It is also well

suiting to infill locations, given that the cost of wood-frame construction is lower than poured-concrete structures required of apartment buildings over four storeys high.

Mississauga has a significant potential for the development or redevelopment of sites where apartments and other, denser forms of housing can be built. However, the amount of such development that actually occur will be driven by the market — the number of people who choose to live in apartments and the property development economics of retaining existing uses on sites versus redeveloping. In the City of Mississauga, the regional demand for apartments will be focussed in locations such as the Downtown Core and Major Nodes. However, significant opportunity for infill and redevelopment of detached to row units to meet demand for ground-related housing, also exists in the Nodes and in some Neighbourhood sites.

The updated forecast assumes that Mississauga will continue to be an attractive, liveable community. While provision of infrastructure to support intensification will be important, Mississauga's enviable road network and access to highways and higher-order will already attract many new residents and jobs and the Conservative Growth scenario is achievable.

C. OFFICE MARKET IS KEY TO MISSISSAUGA'S EMPLOYMENT GROWTH

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

Previous reports prepared by Hemson concerning future employment growth in the GGH, the Region of Peel and the City of Mississauga, describe how the structure of the GTA/H economy, although increasingly a mixed-economy, still has a very large industrial component. This creates strong demand for land-extensive industrial-type facilities to accommodate a wide variety of industrial type activities including manufacturing, distribution and warehousing.

A significant decline in manufacturing has occurred through the recent recession suggesting a further shift to a less industrially focussed economy. However, the location of employment growth in the GTA/H is still driven largely by the availability of well-located greenfield employment land, required to accommodate the range of industrial-type buildings. This in turn has had a significant influence on the urban structure and land use profile of the entire region. It is for this reason that the employment forecasting employs three land-use based categories of employment activities²:

- *Major office* employment is defined as employment in free-standing office buildings of 20,000 sq.ft. or greater;
- *Population-related* employment is defined as employment providing services to a resident population in retail and institutional establishments, including the jobs of those who work from home; and
- *Employment land* employment includes 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

² A fourth category – Rural-based employment is considered at the GGH and GTA/H level, but none of this type of employment exists in Mississauga.

major office development. Similarly, the rate of demand for population-related employment land will slow in concert with slower rates of population growth resulting from the built-out of ground-related units on greenfields. New population-related development is also shifting from the provision of space to serve local population to regional population-related development, consistent with the evolving “central place” functions of the City.

The City of Mississauga has a large well-established office market and a strong competitive position in the regional market. Conditions are in place for the City to continue to perform at the top of the GTAH office market. These conditions include 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 its economic base.

One of the major challenges for the City in the office market is the location of demand within the City. With the exception of downtown Toronto, nearly all new office development in the GTAH since the 1990s has occurred in business parks and employment areas, in Mississauga this has been largely focussed in the Airport Corporate Centre and in Meadowvale Business Park. Most of Mississauga’s employment areas are now built-out and new development will require intensification of existing business parks or increased development in other areas, notably the Downtown Core and along intensification corridors. However, planning policy alone will not encourage more office development in the core and other nodes and corridors – this will require a conducive combination of policy and market factors.

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 NEARLY 910,000 IN 2051

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 urban region. This is followed by a discussion of the outlook for the City under each of the Conservative, Steady and Progressive growth scenarios.

The City of Mississauga forecasts are set within the context of GTA and Peel Region forecasts recently prepared as part of the *Greater Golden Horseshoe Growth Forecasts to 2041*. These forecasts are up-to-date and include 2011 Census data as well as other updates to the long-term outlook for fertility, mortality and migration, generally consistent with the Ontario Ministry of Finance forecasts at the GGH level.

A. MISSISSAUGA'S GROWTH CONSIDERED WITHIN THE LARGER URBAN REGION

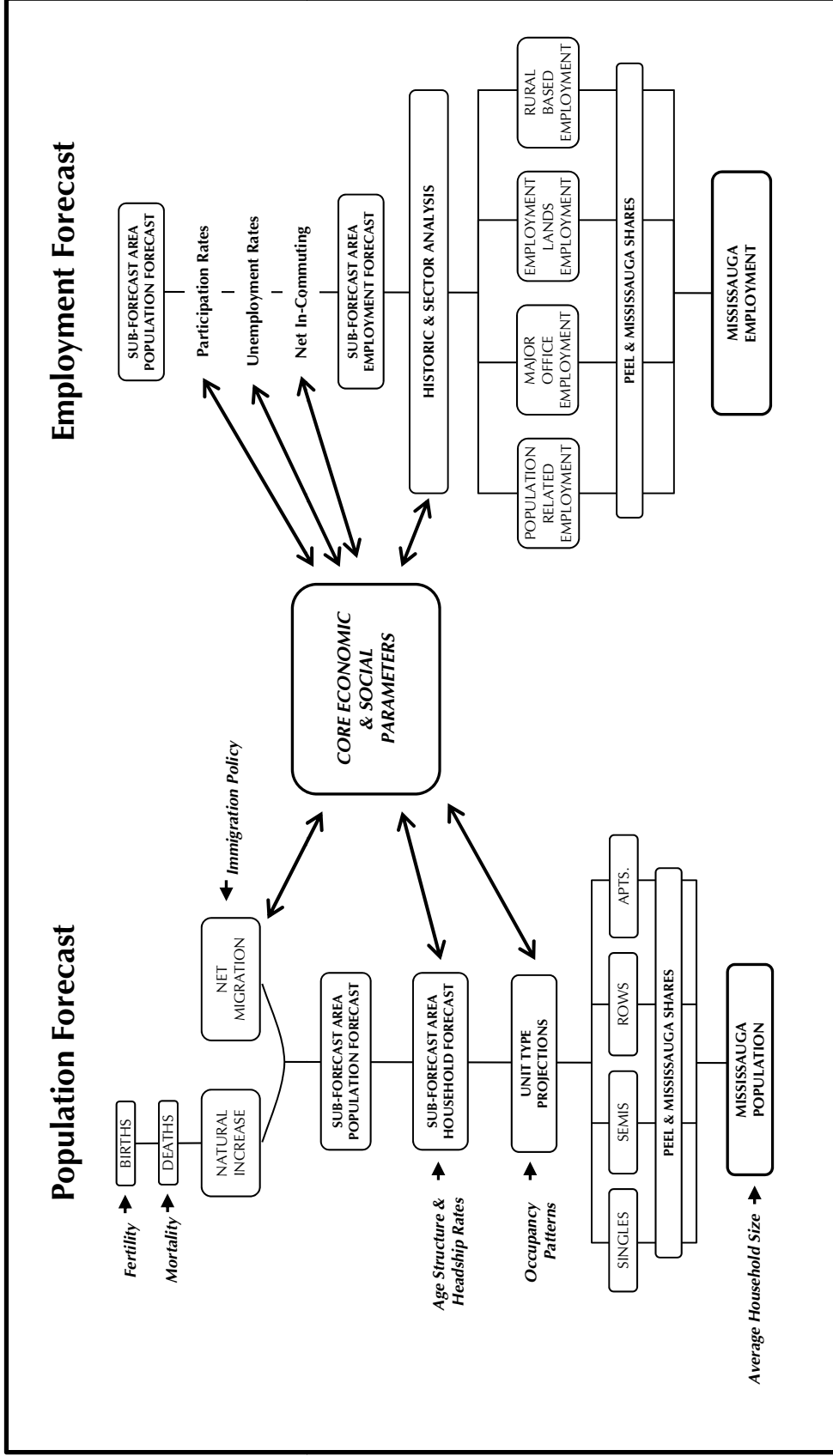
The forecasts for Mississauga are prepared in a metropolitan context. The forces that affect demographic and economic change in the GTA also affect the City of Mississauga, so the nature and timing of future development in the City is closely tied to the development outlook for the entire GTA. Accordingly, the forecasts for Mississauga are prepared in the context of the growth outlook for the GTA as a whole. The forecasts are based on the well-established forecast models used by Hemson in the past, including the forecasts prepared for the *Growth Plan* in 2006 and 2013.

The forecast approach employs a “top-down” model in which the Mississauga forecasts are considered within the larger context of trends influencing growth and change across the economic region. A number of “bottom-up” factors, however, are also incorporated in the forecasts, the most important of which is the shift in the types of residential, commercial and employment growth accommodated on greenfield lands to those types more typically developed through intensification and redevelopment. The forecast has been updated to include the following;

- Available 2011 Census data for the GTAH and Mississauga;
- City's housing and employment data to current;
- Most current CMHC housing data;
- Updated supply information, based on the potential development capacity through intensification; and
- Updated information for office space construction and employment land development.

The forecast method to the City of Mississauga level is illustrated in Exhibit 1 on the following page.

Exhibit 1: Forecast Method



The City of Mississauga forecasts have been prepared to 2051. This is a decade beyond the time horizon of the GTA and Regional forecasts. For consistency with the previously published documents, GTA and Regional level forecasts have been prepared to 2041. For modelling purposes the GTA and Regional forecasts have been extended to 2051 by extending the forecast assumptions from the 2040s. The City of Mississauga forecast results are provided through to 2051.

The GTA is forecast to grow to a population of over 10 million by 2041. The population forecast for the GTA is the result of the combination of assumptions regarding natural increase (including fertility and mortality rates) and the amount and age structure of migrants. Table 1 provides the forecast results.

Table 1		
Historic & Forecast Population		
Greater Toronto Area & Hamilton, 1991 - 2041		
	Total	Growth
1991	4,843,000	
1996	5,250,000	407,000
2001	5,807,000	557,000
2006	6,322,000	515,000
2011	6,837,000	515,000
2016	7,353,000	516,000
2021	7,881,000	528,000
2026	8,427,000	546,000
2031	9,011,000	584,000
2036	9,591,000	580,000
2041	10,127,000	536,000

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada, Annual Demographic Statistics and *Greater Golden Horseshoe Forecasts to 2041 Technical Report*, Hemson Consulting Ltd., November 2012.

Growth in the City of Mississauga is based on shares of GTA market demand. The population forecast for Mississauga is based on the distribution of the GTA forecast to upper-tier and then lower-tier municipalities. It begins with the preparation of a housing forecast; future housing growth is determined by applying market shares to the overall GTA housing growth; and a forecast of average household size is then applied to the housing forecast to determine the overall population.

The outlook — consistent with previous forecasts prepared by Hemson — is 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.

B. SIGNIFICANT CAPACITY FOR INFILL, REDEVELOPMENT AND HIGHER DENSITY HOUSING IS SOURCE OF NEW HOUSING GROWTH IN THE CITY

A key component of the forecast update was the development of an intensification model and a determination of the ultimate development capacity potential within the City of Mississauga.

The analysis considered various factors starting with Provincial and City policy direction. Also considered were individual site reviews and available information from current or pending development applications. Finally, work undertaken by the City, including the identification of an initial site inventory for review as well as some preliminary estimates of intensification potential were taken into account. The potential for residential intensification within City of Mississauga MPZs was determined on a site-by-site basis considering:

- appropriate unit types and densities of future development based on a combination of official plan, zoning bylaw direction and area and individual site reviews;
- a review of planned densities reflected in pending development applications and observed in existing built densities, and
- input from City staff to confirm or refine assumptions about the development potential on a number of specific sites.

Generally, unit types and densities were applied at the higher end of official plan permitted ranges. Attention was paid to surrounding uses and densities in order to ensure an appropriate transition and fit between existing and future development, especially in ‘Neighbourhood’ Character Areas.

Additional direction was taken from the Downtown 21 Master Plan in determining an appropriate mix of uses and densities of sites identified in the Downtown Core. Higher densities were estimated throughout the *Growth Plan*-designated Urban Growth Centre, including the Downtown Core, Downtown Fairview, Downtown Cooksville and Downtown Hospital Character Areas.

Analysis of the likely timing of development was also undertaken with the identified sites being categorized in terms of short-term and medium-term opportunities.

- Generally, short-term opportunities are anticipated to occur in the 2011 to 2021 timeframe. They include identified vacant or intensification sites for which there are active applications or known development interest. Medium-term development opportunities are largely sites anticipated to be available in the 2021 to 2031 period. The inventory identified comprises vacant and intensification sites which do not have development applications but which are assumed to be available to meet market demand as needed over time.
- Long-term redevelopment opportunities are not anticipated to be available until the post-2031 period. These include opportunities for apartment tower site infill, redevelopment of sites containing older strip retail, parking areas and older residential uses and development and redevelopment of key sites identified along the Lakeshore and in Special Study Areas.

Given that the supply of sites for lower density housing units in Mississauga is close to being exhausted, the forecast assumes various different types of intensification, including: infill, redevelopment and higher density development on existing designated sites. Thus the potential housing supply comprises 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 vacant land potential and the results of the intensification capacity analysis. The City of Mississauga's estimated future housing potential is shown in Table 2.

Table 2					
Existing & Future Housing Unit Potential					
City of Mississauga, 2013					
	Single	Semi	Row	Apts	Total
Existing	96,100	31,000	36,600	75,400	239,100
Potential	800	2,200	13,100	57,300	73,400
Total	96,900	33,200	49,700	132,700	312,500

Source: Hemson Consulting Ltd., based on City of Mississauga data.

The City of Mississauga is anticipated to accommodate a significant share of GTA/H apartment and rowhouse 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 GTA/H communities:

- The market shares of single and semi-detached units will continue to decline over the forecast period, as new development is only provided through infill and redevelopment³.
- Row houses are anticipated to comprise an increasing share of housing unit growth in the City, owing to significant potential identified for rowhouse development through infill and redevelopment. This has resulted in a higher forecast growth in this type of housing than was anticipated in prior forecasting assignments; and
- The City of Mississauga will continue to have a large market share of the higher density housing market, resulting in apartments maintaining a significant share of the City's housing market.

C. CITY HOUSING AND POPULATION GROWTH FORECAST BASED ON SHARES OF GTA/H AND PEEL GROWTH

As described earlier in the report, the Mississauga forecasts are based on shares of GTA/H and Region of Peel growth and reflect the City's role as an urban centre within the broader economy as well as the ultimate capacity of the City to

³ Assumptions on the future potential for single and semi-detached infill development have been based on identified likely locations this type of development. This is a conservative estimate, given the experience of the City of Toronto where, 30 years after exhausting its greenfield lands, several hundred units per year continue to be accommodated through infill development.

accommodate housing and population growth through more intensive forms of development than in its suburban past.

Most housing growth in the GTAH over the 2011 to 2041 period will be focussed on single family dwellings and apartment units, the latter of which will be concentrated largely in the urban markets of Toronto, Mississauga and other more urban GTAH communities. Table 3 shows the historic and forecast total housing growth by type for the GTAH.

Table 3					
Historic & Forecast Housing Growth by Unit Type					
Greater Toronto Area & Hamilton, 1991 - 2041					
	Single	Semi	Rows	Apmts	Total
1991-96	54,000	5,000	17,000	37,000	113,000
1996-01	83,000	18,000	32,000	25,000	158,000
2001-06	111,000	24,000	35,000	60,000	230,000
2006-11	72,000	12,000	28,000	70,000	182,000
2011-16	57,000	10,000	31,000	86,000	184,000
2016-21	74,000	12,000	33,000	86,000	205,000
2021-26	77,000	12,000	34,000	90,000	213,000
2026-31	77,000	13,000	32,000	88,000	210,000
2031-36	73,000	12,000	32,000	86,000	203,000
2036-41	62,000	10,000	30,000	82,000	184,000
2011-41	420,000	69,000	192,000	518,000	1,199,000

Source: Hemson Consulting Ltd., based on historic CMHC data and *Greater Golden Horseshoe Forecasts to 2041 Technical Report*, Hemson Consulting Ltd., November 2012.

Historic and forecast shares of the GTAH housing market by housing type are shown in Table 4. As shown, over the forecast period the shares of single and semi-detached housing units continue to increase, most notably post 2031, while shares of row houses and apartments decline, most significantly after 2031. These forecasts are based on anticipated market demand. Future *Growth Plan* conformity work in GTAH municipalities may require assumptions of shifts in high mix.

Table 4					
Historic & Forecast Share of Housing Growth by Unit Type					
Greater Toronto Area & Hamilton, 1991 - 2041					
	Single	Semi	Rows	Apartments	Total
1991-96	47.7%	4.1%	15.4%	32.9%	100.0%
1996-01	52.5%	11.3%	20.2%	16.0%	100.0%
2001-06	48.1%	10.4%	15.3%	26.2%	100.0%
2006-11	39.6%	6.8%	15.3%	38.3%	100.0%
2011-16	30.8%	5.7%	16.6%	46.9%	100.0%
2016-21	36.0%	6.1%	16.0%	41.9%	100.0%
2021-26	36.1%	5.8%	15.8%	42.3%	100.0%
2026-31	36.8%	6.1%	15.2%	42.0%	100.0%
2031-36	36.0%	5.7%	15.9%	42.4%	100.0%
2036-41	33.8%	5.6%	16.2%	44.4%	100.0%

Source: Hemson Consulting Ltd., based on historic CMHC data and *Greater Golden Horseshoe Forecasts to 2041 Technical Report*, Hemson Consulting Ltd., November 2012.

The City of Mississauga, now being a more urban community, will accommodate a higher share of non-family households and higher density housing forms than other municipalities in the 905 region over the forecast horizon. The City will continue to accommodate the largest share of apartment growth in the GTAH outside of the City of Toronto.

The background work to Amendment 2 to the *Growth Plan* provides forecasts of housing and population to the geographic level of the Region of Peel. Applying market shares to housing growth within Peel establishes the Conservative Growth forecast scenario for the City of Mississauga. The forecast market shares take account of the growth allocations recently concluded in ROPA 24 and take account of planned growth within the City of Brampton and Town of Caledon. Table 5 provides the forecast of Mississauga total housing unit growth to 2051. Forecast total unit growth will be comparatively lower in the coming years than in the 2001 to 2011 period as the City becomes reliant only on intensification, largely in an apartment form for all future growth. Mississauga's forecast housing unit growth by type is shown in Table 5.

Table 5					
Historic & Forecast Housing Growth by Unit Type					
City of Mississauga, 1991 - 2051					
	Single	Semi	Rows	Apmts	Total
1991-96	10,000	2,000	4,000	4,000	20,000
1996-01	10,000	5,000	5,000	1,000	21,000
2001-06	8,000	5,000	5,000	5,000	23,000
2006-11	3,000	2,000	3,000	7,000	15,000
2011-16	1,110	1,000	1,180	5,820	9,110
2016-21	140	400	1,300	7,710	9,550
2021-26	60	320	1,260	7,550	9,190
2026-31	60	250	1,350	6,570	8,230
2031-36	60	220	1,490	5,210	6,980
2036-41	50	160	1,360	4,950	6,520
2041-46	40	150	1,340	5,070	6,600
2046-51	50	130	1,390	5,130	6,700
2011-51	1,570	2,630	10,670	48,010	62,880

Source: Hemson Consulting Ltd., based on historic CMHC data and *Greater Golden Horseshoe Forecasts to 2041 Technical Report*, Hemson Consulting Ltd., November 2012.

The person per unit forecasts for the City of Mississauga is provided in Table 6. A comparison is provided to the GTAH averages which indicate that, throughout the forecast period, the City of Mississauga is predicted to have a higher average household size for all unit types, which is a continuation of the current patterns. The person per unit projection combined with the housing growth forecast shown above in Table 6 results in the population forecast shown in Table 7.

Table 6										
Historic & Forecast Persons Per Unit										
Greater Toronto Area & Hamilton & City of Mississauga, 1991 - 2041										
	Greater Toronto Area & Hamilton					City of Mississauga				
	Single	Semi	Rows	Apmts	Total	Single	Semi	Rows	Apmts	Total
1991	3.23	3.32	3.17	2.04	2.79	3.55	3.73	3.16	2.28	3.10
1996	3.23	3.28	3.18	2.14	2.80	3.52	3.63	3.21	2.47	3.14
2001	3.20	3.17	3.04	2.13	2.80	3.51	3.47	3.13	2.41	3.13
2006	3.20	3.14	2.93	2.18	2.77	3.48	3.44	3.08	2.50	3.09
2011	3.19	3.12	2.88	2.13	2.74	3.40	3.44	3.06	2.45	3.02
2016	3.19	3.13	2.89	2.14	2.73	3.40	3.48	3.17	2.36	3.00
2021	3.17	3.11	2.87	2.12	2.71	3.37	3.45	3.14	2.34	2.96
2026	3.15	3.09	2.85	2.11	2.69	3.35	3.43	3.12	2.33	2.92
2031	3.15	3.08	2.85	2.11	2.69	3.34	3.43	3.12	2.33	2.90
2036	3.15	3.09	2.85	2.11	2.69	3.35	3.43	3.12	2.33	2.90
2041	3.16	3.10	2.86	2.11	2.70	3.36	3.45	3.13	2.33	2.90

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

As shown in Table 7, the housing unit forecast results in Mississauga growing by nearly 165,000 residents to a 2051 population of 907,000 under the Conservative Growth Scenario.

Table 7		
Historic & Forecast Population		
Conservative Growth Forecast Scenario, 1991 - 2051		
	Total Population	Growth
1991	478,000	
1996	561,000	83,000
2001	640,000	79,000
2006	700,000	60,000
2011	743,000	43,000
2016	766,000	23,000
2021	785,000	19,000
2026	803,000	18,000
2031	824,000	21,000
2036	844,000	20,000
2041	864,000	20,000
2046	885,000	21,000
2051	907,000	22,000
2011-51		164,000

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada & Annual Demographic Statistics.

The level of growth anticipated under the Conservative scenario is achievable under current Provincial, Region of Peel and City of Mississauga planning policy regimes assuming a market shift continues towards higher density living and that the appropriate level of supportive infrastructure be put in place.

D. TWO HIGHER SCENARIOS BASED ON GREATER MARKET SHIFT TO HIGHER DENSITY HOUSING AND MORE INTENSIFICATION DEVELOPMENT IN THE CITY

As described earlier in the report, three forecast scenarios have been prepared in order to provide a range on the City's future growth. The *Growth Plan* provides the policy basis for the forecasts with each of the higher growth scenarios assuming greater levels of intensification (and the infrastructure investment to support it) coupled with increased market demand for higher density living. The higher growth forecast scenarios involve shifting the housing mix at the Regional level to more row houses and apartments and fewer singles and semis, in order to achieve the desired level of intensification. It is noted that, from both a demand and supply perspective, the greater the level of intensification the greater the challenge to meet forecast growth. From a demand perspective it presumes a market shift in choices about the type of unit to occupy. From a supply perspective, redevelopment can be a very slow process due to factors involving planning approvals, land assembly, environmental clean-up, community infrastructure and appropriately capitalized developers.

The results of the City of Mississauga housing and population forecasts under the Steady and Progressive growth scenarios are provided in Tables 8 through 11 on the following pages.

- Under the Steady Growth scenario, the City of Mississauga would add over 70,000 housing units over the 2011 to 2051 forecast period.

Table 8					
Historic & Forecast Housing Growth by Unit Type Steady Growth Forecast Scenario, 1991 - 2051					
	City of Mississauga				
	Single	Semi	Rows	Apmts	Total
1991-96	10,000	2,000	4,000	4,000	20,000
1996-01	10,000	5,000	5,000	1,000	21,000
2001-06	8,000	5,000	5,000	5,000	23,000
2006-11	3,000	2,000	3,000	7,000	15,000
2011-16	1,110	1,000	1,180	5,820	9,110
2016-21	140	400	1,300	7,710	9,550
2021-26	110	290	1,560	8,030	9,990
2026-31	50	230	1,650	6,970	8,900
2031-36	50	210	1,910	6,390	8,560
2036-41	40	160	1,730	6,050	7,980
2041-46	40	160	1,700	6,170	8,070
2046-51	40	180	1,750	6,250	8,220
2011-51	1,580	2,630	12,780	53,390	70,380

Source: Hemson Consulting Ltd., based on historic CMHC data.

- The housing unit forecast translates to population growth of nearly 190,000 residents between 2011 and 2051 to a total population of 931,000, as shown in Table 9.

Table 9		
Historic & Forecast Total Population Steady Growth Forecast Scenario, 1991 - 2051		
	City of Mississauga	
	Total	Growth
1991	477,700	
1996	561,200	83,500
2001	639,600	78,400
2006	699,700	60,100
2011	742,700	43,000
2016	765,900	23,200
2021	784,800	18,900
2026	806,000	21,200
2031	829,100	23,100
2036	854,000	24,900
2041	878,400	24,400
2046	904,200	25,800
2051	930,800	26,600
2011-51		188,100

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada & Annual Demographic Statistics.

- As shown in Table 10, under the Progressive Growth forecast, the City of Mississauga would accommodate an additional 82,000 housing units over the 2011 to 2051 period. As indicated earlier in the report, achieving this level of housing growth for the City would necessitate a significant shift in market preference to higher density housing in Mississauga coupled with significant policy intervention and infrastructure investment.

Table 10					
Historic & Forecast Housing Growth by Unit Type					
Progressive Growth Forecast Scenario, 1991 - 2051					
	City of Mississauga				
	Single	Semi	Rows	Apmts	Total
1991-96	10,000	2,000	4,000	4,000	20,000
1996-01	10,000	5,000	5,000	1,000	21,000
2001-06	8,000	5,000	5,000	5,000	23,000
2006-11	3,000	2,000	3,000	7,000	15,000
2011-16	1,110	1,000	1,180	5,820	9,110
2016-21	120	360	1,490	8,300	10,270
2021-26	100	280	1,820	8,510	10,710
2026-31	40	210	2,170	8,480	10,900
2031-36	40	210	2,260	8,250	10,760
2036-41	30	180	2,030	7,720	9,960
2041-46	30	180	2,000	7,840	10,050
2046-51	30	200	2,060	7,950	10,240
2011-51	1,500	2,620	15,010	62,870	82,000

Source: Hemson Consulting Ltd., based on historic CMHC data.

- The housing unit forecast results in the City of Mississauga adding 224,000 residents under the Progressive Growth forecast to a total population of nearly 970,000 at 2051, as shown in Table 11. Achievement of this level of growth would necessitate a greater than currently anticipated shift to higher density living coupled with significant and ongoing growth supportive infrastructure investment.

Table 11		
Historic & Forecast Total Population		
Progressive Growth Forecast Scenario, 1991 - 2051		
	City of Mississauga	
	Total	Growth
1991	477,700	
1996	561,200	83,500
2001	639,600	78,400
2006	699,700	60,100
2011	742,700	43,000
2016	765,900	23,200
2021	787,400	21,500
2026	811,100	23,700
2031	840,800	29,700
2036	872,100	31,300
2041	902,400	30,300
2046	934,000	31,600
2051	966,800	32,800
2011-51		224,100

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada & Annual Demographic Statistics.

E. INTENSIFICATION AREAS WILL BE FOCUS OF HOUSING GROWTH

As discussed earlier, the City of Mississauga has almost no remaining greenfield land supply, but ample capacity potential through intensification. The City has been progressive in its planning for intensification and the development of complete communities. Most housing growth over the forecast period is anticipated to occur within the City's Intensification Areas and corridors, with a significant level of infill and redevelopment anticipated in Major and Community Nodes, along the lakeshore and at identified key redevelopment sites.

Reflecting a policy emphasis on intensification growth is concentrated in the City's downtown, Major and Community Nodes and along intensification corridors under each of the three growth scenarios. The distribution of housing units and population to urban structure categories within the City of Mississauga under the Conservative, Steady and Progressive growth scenarios are shown in Tables 12 through 17 on the following pages.

- As shown in Table 12, under the Conservative scenario, Mississauga's intensification nodes will accommodate growth of nearly 40,000 units, representing over 60% of forecast housing unit over the 2011-2051 period.

Housing Forecast												Table 12
Conservative Growth Forecast Scenario, 2011 - 2051												
City of Mississauga Urban Structure Categories												
	Downtown		Major Nodes		Community Nodes		NHBD's		Remaining Areas		City Wide	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth
2011	29,100		5,900		12,200		187,300		500		235,000	
2016	31,900	2,800	6,600	700	12,400	200	193,900	6,600	600	100	245,400	10,400
2021	36,900	5,000	8,100	1,500	12,600	200	196,500	2,600	800	200	254,900	9,500
2026	41,700	4,800	9,600	1,500	12,900	300	198,500	2,000	1,000	200	263,700	8,800
2031	45,400	3,700	10,700	1,100	13,400	500	200,300	1,800	1,200	200	271,000	7,300
2036	47,800	2,400	11,800	1,100	13,800	400	201,900	1,600	2,400	1,200	277,700	6,700
2041	50,400	2,600	12,600	800	14,400	600	203,400	1,500	3,600	1,200	284,400	6,700
2046	53,000	2,600	13,400	800	14,900	500	204,900	1,500	4,800	1,200	291,000	6,600
2051	55,600	2,600	14,200	800	15,400	500	206,300	1,400	6,100	1,300	297,600	6,600
2011-51	26,500		8,300		3,200		19,000		5,600		62,600	

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

- As shown in Table 13, the housing unit forecast results in the addition of nearly 100,000 residents to City of Mississauga intensification nodes over the 2011-2051 forecast period.

Population Forecast												Table 13
Conservative Growth Forecast Scenario, 2011 - 2051												
City of Mississauga Urban Structure Categories												
	Downtown		Major Nodes		Community Nodes		NHBD's		Remaining Areas		City Wide	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth
2011	70,400		11,100		29,300		630,200		1,700		742,700	
2016	77,600	7,200	13,200	2,100	30,000	700	643,100	12,900	2,000	300	765,900	23,200
2021	89,400	11,800	17,000	3,800	30,300	300	645,200	2,100	2,800	800	784,700	18,800
2026	101,000	11,600	20,900	3,900	30,900	600	646,900	1,700	3,500	700	803,200	18,500
2031	110,100	9,100	23,800	2,900	32,000	1,100	653,800	6,900	4,200	700	823,900	20,700
2036	116,200	6,100	26,700	2,900	33,000	1,000	660,500	6,700	7,500	3,300	843,900	20,000
2041	122,800	6,600	28,600	1,900	34,500	1,500	667,200	6,700	10,800	3,300	863,900	20,000
2046	129,700	6,900	30,700	2,100	36,000	1,500	674,600	7,400	14,100	3,300	885,100	21,200
2051	136,800	7,100	32,700	2,000	37,700	1,700	682,300	7,700	17,500	3,400	907,000	21,900
2011-51	66,400		21,600		8,400		52,100		15,800		164,300	

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

Housing Forecast												Table 14
Steady Growth Forecast Scenario, 2011 - 2051												
City of Mississauga Urban Structure Categories												
	Downtown		Major Nodes		Community Nodes		NHBD's		Remaining Areas		City Wide	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth
2011	29,100		5,900		12,200		187,300		500		235,000	
2016	31,900	2,800	6,600	700	12,400	200	193,900	6,600	600	100	245,400	10,400
2021	37,000	5,100	8,100	1,500	12,600	200	196,400	2,500	800	200	254,900	9,500
2026	42,500	5,500	9,700	1,600	13,000	400	198,300	1,900	1,100	300	264,600	9,700
2031	46,900	4,400	10,900	1,200	13,500	500	200,000	1,700	1,200	100	272,500	7,900
2036	49,600	2,700	12,300	1,400	14,000	500	201,700	1,700	3,200	2,000	280,800	8,300
2041	52,100	2,500	13,400	1,100	14,900	900	203,000	1,300	5,400	2,200	288,800	8,000
2046	54,600	2,500	14,500	1,100	15,800	900	204,300	1,300	7,600	2,200	296,800	8,000
2051	57,200	2,600	15,600	1,100	16,700	900	205,600	1,300	9,800	2,200	304,900	8,100
2011-51	28,100		9,700		4,500		18,300		9,300		69,900	

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

Table 15												
Population Forecast												
Steady Growth Forecast Scenario, 2011 - 2051												
City of Mississauga Urban Structure Categories												
	Downtown		Major Nodes		Community Nodes		NHD's		Remaining Areas		City Wide	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth
2011	70,400		11,100		29,300		630,200		1,700		742,700	
2016	77,600	7,200	13,200	2,100	30,000	700	643,100	12,900	2,000	300	765,900	23,200
2021	89,800	12,200	16,900	3,700	30,300	300	644,900	1,800	2,800	800	784,700	18,800
2026	103,100	13,300	21,300	4,400	30,900	600	647,100	2,200	3,500	700	805,900	21,200
2031	114,100	11,000	24,300	3,000	32,300	1,400	654,300	7,200	4,200	700	829,200	23,300
2036	120,900	6,800	27,800	3,500	33,600	1,300	661,900	7,600	9,800	5,600	854,000	24,800
2041	127,400	6,500	30,600	2,800	36,100	2,500	668,300	6,400	16,000	6,200	878,400	24,400
2046	134,200	6,800	33,600	3,000	38,600	2,500	675,500	7,200	22,200	6,200	904,100	25,700
2051	141,200	7,000	36,600	3,000	41,200	2,600	683,100	7,600	28,600	6,400	930,700	26,600
2011-51	70,800		25,500		11,900		52,900		26,900		188,000	

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

Table 16												
Housing Forecast												
Progressive Growth Forecast Scenario, 2011 - 2051												
City of Mississauga Urban Structure Categories												
	Downtown		Major Nodes		Community Nodes		NHD's		Remaining Areas		City Wide	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth
2011	29,100		5,900		12,200		187,300		500		235,000	
2016	31,900	2,800	6,600	700	12,400	200	193,900	6,600	600	100	245,400	10,400
2021	37,400	5,500	8,200	1,600	12,600	200	196,600	2,700	800	200	255,600	10,200
2026	43,300	5,900	9,900	1,700	13,000	400	198,600	2,000	1,100	300	265,900	10,300
2031	48,400	5,100	11,300	1,400	13,600	600	201,100	2,500	1,200	100	275,600	9,700
2036	52,300	3,900	12,800	1,500	14,600	1,000	202,900	1,800	3,400	2,200	286,000	10,400
2041	55,800	3,500	14,300	1,500	15,600	1,000	204,300	1,400	5,900	2,500	295,900	9,900
2046	59,300	3,500	15,700	1,400	16,700	1,100	205,800	1,500	8,500	2,600	306,000	10,100
2051	62,900	3,600	17,100	1,400	17,900	1,200	207,300	1,500	11,100	2,600	316,300	10,300
2011-51	33,800		11,200		5,700		20,000		10,600		81,300	

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

Table 17												
Population Forecast												
Progressive Growth Forecast Scenario, 2011 - 2051												
City of Mississauga Urban Structure Categories												
	Downtown		Major Nodes		Community Nodes		NHD's		Remaining Areas		City Wide	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth
2011	70,400		11,100		29,300		630,200		1,700		742,700	
2016	77,600	7,200	13,200	2,100	30,000	700	643,100	12,900	2,000	300	765,900	23,200
2021	90,900	13,300	17,400	4,200	30,300	300	645,900	2,800	2,800	800	787,300	21,400
2026	105,200	14,300	21,800	4,400	31,100	800	649,300	3,400	3,700	900	811,100	23,800
2031	118,200	13,000	25,400	3,600	32,600	1,500	660,500	11,200	4,100	400	840,800	29,700
2036	128,200	10,000	29,300	3,900	35,200	2,600	668,900	8,400	10,500	6,400	872,100	31,300
2041	137,400	9,200	33,000	3,700	38,100	2,900	676,200	7,300	17,700	7,200	902,400	30,300
2046	146,800	9,400	36,800	3,800	41,200	3,100	684,300	8,100	25,000	7,300	934,100	31,700
2051	156,400	9,600	40,700	3,900	44,400	3,200	692,900	8,600	32,500	7,500	966,900	32,800
2011-51	86,000		29,600		15,100		62,700		30,800		224,200	

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

The City of Mississauga is positioned to maintain a significant share of the GTA and Region of Peel forecast housing and population growth over the 2011- 2051 period. Reflecting the City's evolution as an urban centre, its limited greenfield supply and a strong policy emphasis on intensification, most future housing growth will focus on higher density living in the City's downtown and major and community nodes.

The next chapter describes the outlook for employment in the GTA and provides the results of the City of Mississauga employment forecasts to 2051 under the three growth scenarios.

IV EMPLOYMENT IS FORECAST TO GROW TO OVER 580,000 JOBS IN 2051

To understand the updated employment forecasts for the City of Mississauga, it is important to understand the employment outlook for the broader metropolitan region. The discussion of the broader outlook is followed by a discussion of the outlook for the City of Mississauga under the three forecast scenarios. Similar to the 2008 forecast assignment, the 2013 forecast update anticipates continued employment growth for the GTAH with the City of Mississauga remaining a major economic and employment centre within the Region.

A. GTAH EMPLOYMENT GROWTH TO 2041 WILL SEE A CONTINUED SHIFT TOWARDS THE SERVICE SECTOR SUPPORTING MISSISSAUGA'S GROWTH

The long-term economic outlook for both the GTAH and Mississauga is positive. Both the long-term outlook for population and for employment in the GTAH are based on the same economic fundamentals which see the region continuing to be a major driver of the Ontario and national economies. Like the population outlook, the longer term regional economic and employment outlook on which the City forecasts are based are described in the background work to Amendment 2 in *Growth Forecasts for the Greater Golden Horseshoe to 2041*. The outlook assumes a continued gradual shift in the economic base towards the service sector from the industrial sectors of the economy, though the latter will continue to have an important long-term role in the GTAH economy.

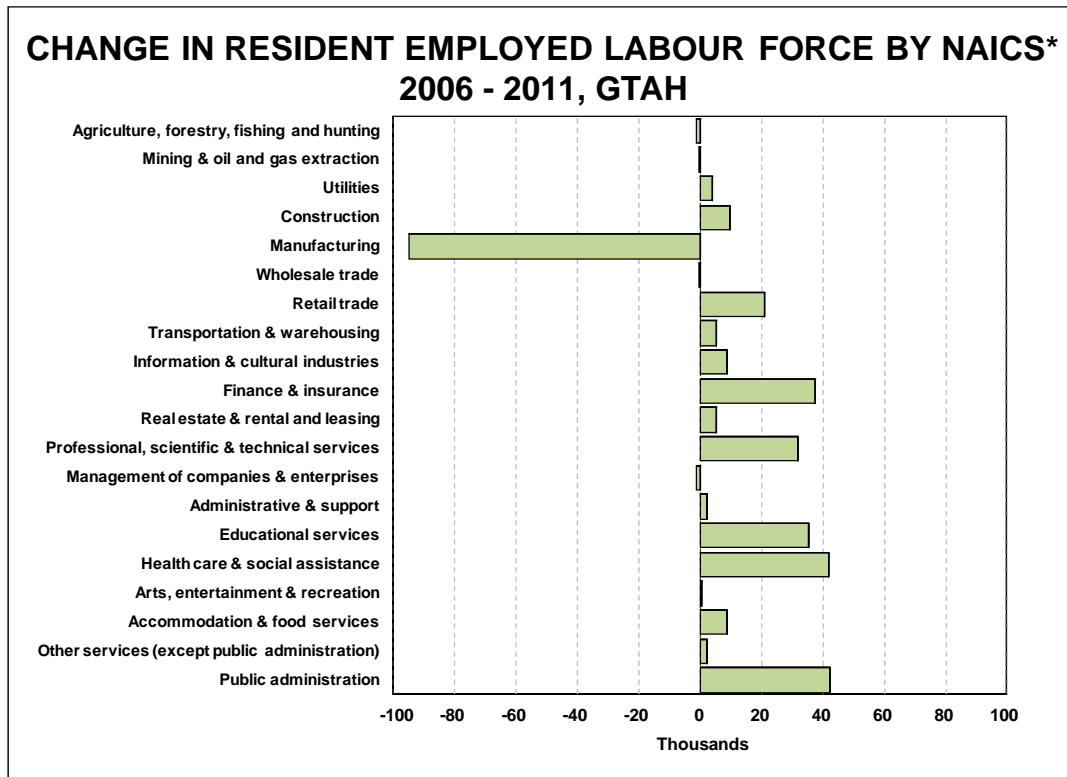
Since GTAH forecasts were prepared some of the employment results from the National Household Survey (NHS) have been released. The NHS is the new voluntary-survey which replaced the long-form Census in 2011. GTAH forecasts had long relied on the Census for labour force and employment information. Having now received some of the data, it appears that there are significant comparability issues between the historic Census data and the NHS. In particular, the NHS appears to have under-reported total employment across the GTAH relative to other sources, such as the Monthly Labour Force Survey and the some of the municipal

employment surveys. The 2011 employment estimates which serve as the basis for the employment forecasts in the *Growth Forecasts for the Greater Golden Horseshoe to 2041* had been based on the Labour Force Survey and thus show a higher total employment in the GTA and the municipalities within it than is now provided by the NHS.

Notwithstanding the concerns with the NHS and its comparability, the NHS remains the only source for economic and employment data gathered across a large sample of households that covers the entire GTA and its municipalities in a standardized way. As a result it should still be used as the standard for 2011 base for forecasting, while understanding its pitfalls. Starting from the new lower 2011 NHS base, the long-term forecasts for the GTA have been maintained, meaning that the forecasts contained in this report imply that the GTA and Peel Region employment will “catch up” to the *Growth Forecasts for the Greater Golden Horseshoe to 2041* through the 2020s.

While the total employment reported in the NHS has raised concerns, the sectoral employment patterns within the data do appear to be consistent with other sources and are seen to be reasonably reliable. Exhibit 2 shows the change in employment from the 2006 Census to the 2011. The data starkly indicate the effect of the 2008–09 recession and subsequent recovery. Manufacturing employment fell significantly during the recession and has not recovered in any significant way since then. Major components of the service sector, in particular public services of health, education and public administration, have compensated for the losses in other sectors and account for all of the growth.

Exhibit 2: Employment Growth by Sector, GTAH 2006-2011



Source: Hemson Consulting Ltd., based on Statistics Canada data 2006 & 2011.

*Note: The North American Industry Classification System (NAICS) is an industry classification system that defines employment.

Over the longer term, conditions are in place for continued strong economic performance and sustained employment growth in the GTAH is anticipated to continue over the forecast period. The GTAH will 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. The forecast results are shown in Table 18 on the following page. As with the population forecast, the 2031 and 2041 totals are consistent with the *Growth Plan*, although intervening periods may vary.

Employment in the GGH has grown substantially over the past two decades, most notably within the GTAH, the economic centre of the region. Under the *Growth Plan Amendment 2* nearly 1.9 million jobs will be added to the GGH between 2011 and 2041. Most of this growth, nearly 1.4 million jobs, will be concentrated in the GTAH.

Table 18		
Historic & Forecast Employment		
Greater Toronto Area & Hamilton, 1991 - 2041		
	Total	Growth
1991	2,496,000	
1996	2,528,000	32,000
2001	2,938,000	410,000
2006	3,185,000	247,000
2011	3,309,000	124,000
2016	3,614,000	305,000
2021	3,933,000	319,000
2026	4,138,000	205,000
2031	4,372,000	234,000
2036	4,573,000	201,000
2041	4,818,000	245,000

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

Accounting for the economic shifts of recent years and the longer term expectations, the current forecasts expect a smaller proportion of regional growth to occur in employment areas and business parks where industrial activities are concentrated. However, it is important to note that a large proportion of employment in employment areas is, in fact, in the service sector. A greater proportion of employment is expected to occur in offices and other commercial locations over the forecast period. This shift is to the advantage of long-term employment growth in the City of Mississauga since the employment land areas are nearing full development so the City must increasingly rely on employment sectors accommodated in offices to provide for growth in the employment base.

B. MAJOR OFFICE GROWTH REFLECTS MISSISSAUGA'S ROLE AS A MATURE CITY

The employment forecast for Mississauga is prepared based on Mississauga's share of growth in Region of Peel and GTAH employment by three land-use-based employment categories described earlier in this report: major office employment, population-related employment and employment land employment.

Mississauga's strategic location within the GTAH will enable major office employment to be the major driver of the City's future growth. The broad long-term employment trends within the GTAH have seen major office employment growing

at a somewhat faster rate than overall employment; a pattern expected to continue over the forecast period. The other categories of employment will also contribute, in a smaller way, to Mississauga's employment growth.

Key components of the City's employment forecast by type are the following:

- The City of Mississauga is the second largest office market in the GTAH after the City of Toronto, a position it is forecast to maintain over the forecast period, though both Toronto and Mississauga will lose some share as new office markets are established in other growing communities in the GTAH. About 60% of Mississauga's long-term employment growth is anticipated to be in major office development.
- Population-related employment is generally forecast to grow in step with the population growth as it is primarily providing services to a resident population as well as some additional growth in metropolitan-wide population-related employment, consistent with the evolving central place functions of the City.
- Generally, employment land employment growth is limited by the availability of new greenfield land for development; the supply of which is largely exhausted in the City. In addition, some growth will occur within existing employment areas during the current period, as the economic recovery leads to higher occupancy of existing space. Finally, growth in employment on the Pearson Airport site, where about a 10% employment growth is forecast, is also within this category. Taken together a growth of about 10,000 is forecast over the long term under each of the three forecast scenarios.

Like population growth, the employment growth in Mississauga will be slower in the future than it has been in the past as its role in the market changes. Under each of the employment forecast scenarios the outlook for employment land employment growth is consistent; there is a small variation between the scenarios attributed to the major office sector and the different levels of population-related employment growth, reflecting the variation in the population forecasts. The employment by type forecasts under the Conservative, Steady and Progressive growth scenarios are shown in Tables 19, 20 and 21 below.

Table 19								
Historic & Forecast Employment by Type								
Conservative Growth Forecast Scenario, 1991 - 2051								
City of Mississauga								
	Major Office		Population Related		Employment Land		Total Employment	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth
1991	46,900		82,000		150,000		278,900	
1996	50,400	3,500	88,700	6,700	168,100	18,100	307,200	28,300
2001	69,700	19,300	95,800	7,100	216,800	48,700	382,300	75,100
2006	88,400	18,700	104,500	8,700	237,800	21,000	430,700	48,400
2011	96,700	8,300	124,200	19,700	226,800	(11,000)	447,700	17,000
2016	111,700	15,000	132,200	8,000	231,500	4,700	475,400	27,700
2021	125,900	14,200	139,700	7,500	235,200	3,700	500,800	25,400
2026	133,800	7,900	142,300	2,600	236,000	800	512,100	11,300
2031	142,100	8,300	146,300	4,000	236,200	200	524,600	12,500
2036	148,500	6,400	148,500	2,200	236,300	100	533,300	8,700
2041	156,300	7,800	154,700	6,200	236,500	200	547,500	14,200
2046	165,800	9,500	161,000	6,300	236,700	200	563,500	16,000
2051	176,000	10,200	169,100	8,100	236,900	200	582,000	18,500
2011-51		79,300		44,900		10,100		134,300

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

Table 20								
Historic & Forecast Employment by Type								
Steady Growth Forecast Scenario, 1991 - 2051								
City of Mississauga								
	Major Office		Population Related		Employment Land		Total Employment	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth
1991	46,900		82,000		150,000		278,900	
1996	50,400	3,500	88,700	6,700	168,100	18,100	307,200	28,300
2001	69,700	19,300	95,800	7,100	216,800	48,700	382,300	75,100
2006	88,400	18,700	104,500	8,700	237,800	21,000	430,700	48,400
2011	96,700	8,300	124,200	19,700	226,800	(11,000)	447,700	17,000
2016	111,700	15,000	132,200	8,000	231,500	4,700	475,400	27,700
2021	126,300	14,600	139,700	7,500	235,200	3,700	501,200	25,800
2026	135,000	8,700	142,700	3,000	236,000	800	513,700	12,500
2031	143,700	8,700	146,900	4,200	236,200	200	526,800	13,100
2036	150,500	6,800	149,800	2,900	236,300	100	536,600	9,800
2041	158,900	8,400	156,700	6,900	236,500	200	552,100	15,500
2046	169,000	10,100	163,600	6,900	236,700	200	569,300	17,200
2051	179,900	10,900	172,400	8,800	236,900	200	589,200	19,900
2011-51		83,200		48,200		10,100		141,500

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

Table 21									
Historic & Forecast Employment by Type									
Progressive Growth Forecast Scenario, 1991 - 2051									
City of Mississauga									
	Major Office		Population Related		Employment Land		Total Employment		
	Total	Growth	Total	Growth	Total	Growth	Total	Growth	
1991	46,900		82,000		150,000		278,900		
1996	50,400	3,500	88,700	6,700	168,100	18,100	307,200	28,300	
2001	69,700	19,300	95,800	7,100	216,800	48,700	382,300	75,100	
2006	88,400	18,700	104,500	8,700	237,800	21,000	430,700	48,400	
2011	96,700	8,300	124,200	19,700	226,800	(11,000)	447,700	17,000	
2016	111,700	15,000	132,200	8,000	231,500	4,700	475,400	27,700	
2021	127,000	15,300	140,000	7,800	235,200	3,700	502,200	26,800	
2026	136,300	9,300	143,400	3,400	236,000	800	515,700	13,500	
2031	145,900	9,600	148,500	5,100	236,200	200	530,600	14,900	
2036	153,000	7,100	152,200	3,700	236,300	100	541,500	10,900	
2041	161,700	8,700	159,900	7,700	236,500	200	558,100	16,600	
2046	172,300	10,600	167,600	7,700	236,700	200	576,600	18,500	
2051	183,600	11,300	177,400	9,800	236,900	200	597,900	21,300	
2011-51		86,900		53,200		10,100		150,200	

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

C. LOCATION OF GROWTH WITHIN IN THE CITY PRIMARILY BUILDS ON EXISTING EMPLOYMENT CONCENTRATIONS

The location of employment growth within the City is primarily built on existing concentrations of employment. Base information for local area employment by type is based on the City's annual employment survey which provides detailed employment information for small geographic areas.

The growth in employment areas is based on adding employment within the existing employment areas and business parks as remaining sites are built out, in particular in Gateway, Meadowvale, Northeast and Southdown. The population-related employment growth is assumed to occur in part where the population growth is forecast to occur, but mainly is assigned to existing concentrations. For example, much of the future retail commercial growth in the City is likely to be added to existing shopping areas and future institutional growth in education and health care in areas where they currently exist.

The one more “footloose” category of employment is major office employment. Historically, there were major office concentrations in Mississauga in both the Downtown area and the Corporate Centres and Business Parks. However, for the past two decades virtually all of the new office development in the City has been in the Corporate Centres and Business Parks, mainly Airport Corporate, Meadowvale and Gateway. Current policy at all levels — the *Growth Plan* and *City of Mississauga Official Plan* — are aimed at directing as much of the future major office growth as possible to the major urban concentrations, such as Downtown Mississauga.

In recognition of this policy, these forecasts direct a significant proportion of major office growth to the Downtown beginning later in this decade and accounting for 25% of the City major office growth from the mid-2020s onward. Currently there is little sign of market interest in substantial new office development in the Downtown area. Achieving the long-term office employment growth in the location shown in these forecasts would require a market shift which, in turn, might require additional policy intervention, incentives or infrastructure investment.

To illustrate the effect of the location assumptions used in the forecast, Tables 22, 23 and 24 provide the resulting forecasts by urban structure area for the three forecast scenarios.

Total Employment Forecast										
Conservative Growth Forecast Scenario, 2011 - 2051										
City of Mississauga Urban Structure Categories										
	Downtown		Nodes		Employment Areas		NHBD's & All Others		City Wide	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth
2011	33,900		23,700		299,800		90,300		447,700	
2016	36,400	2,500	25,700	2,000	320,000	20,200	93,400	3,100	475,500	27,800
2021	42,000	5,600	27,500	1,800	335,500	15,500	95,900	2,500	500,900	25,400
2026	44,400	2,400	28,300	800	342,500	7,000	96,900	1,000	512,100	11,200
2031	47,700	3,300	29,300	1,000	349,100	6,600	98,400	1,500	524,500	12,400
2036	49,900	2,200	30,000	700	354,000	4,900	99,500	1,100	533,400	8,900
2041	53,500	3,600	31,400	1,400	360,900	6,900	101,700	2,200	547,500	14,100
2046	57,100	3,600	33,200	1,800	369,200	8,300	104,000	2,300	563,500	16,000
2051	61,300	4,200	35,600	2,400	378,200	9,000	106,800	2,800	581,900	18,400
2011-51		27,400		11,900		78,400		16,500		134,200

Source: Hemson Consulting Ltd., based on Statistics Canada, Census of Canada.

Total Employment Forecast										
Steady Growth Forecast Scenario, 2011 - 2051										
City of Mississauga Urban Structure Categories										
	Downtown		Nodes		Employment Areas		NHBD's & All Others		City Wide	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth
2011	33,900		23,700		299,800		90,300		447,700	
2016	36,400	2,500	25,700	2,000	320,000	20,200	93,400	3,100	475,500	27,800
2021	42,000	5,600	27,500	1,800	335,800	15,800	95,900	2,500	501,200	25,700
2026	44,800	2,800	28,400	900	343,500	7,700	97,000	1,100	513,700	12,500
2031	48,200	3,400	29,500	1,100	350,500	7,000	98,600	1,600	526,800	13,100
2036	50,700	2,500	30,300	800	355,900	5,400	99,900	1,300	536,800	10,000
2041	54,600	3,900	31,900	1,600	363,300	7,400	102,200	2,300	552,000	15,200
2046	58,500	3,900	33,900	2,000	372,300	9,000	104,600	2,400	569,300	17,300
2051	63,000	4,500	36,500	2,600	382,000	9,700	107,700	3,100	589,200	19,900
2011-51		29,100		12,800		82,200		17,400		141,500

Total Employment Forecast										
Progressive Growth Forecast Scenario, 2011 - 2051										
City of Mississauga Urban Structure Categories										
	Downtown		Nodes		Employment Areas		NHBD's & All Others		City Wide	
	Total	Growth	Total	Growth	Total	Growth	Total	Growth	Total	Growth
2011	33,900		23,700		299,800		90,300		447,700	
2016	36,400	2,500	25,700	2,000	320,000	20,200	93,400	3,100	475,500	27,800
2021	42,200	5,800	27,600	1,900	336,400	16,400	96,000	2,600	502,200	26,700
2026	45,200	3,000	28,600	1,000	344,700	8,300	97,300	1,300	515,800	13,600
2031	49,100	3,900	29,800	1,200	352,500	7,800	99,200	1,900	530,600	14,800
2036	51,900	2,800	30,800	1,000	358,200	5,700	100,700	1,500	541,600	11,000
2041	56,100	4,200	32,600	1,800	366,100	7,900	103,200	2,500	558,000	16,400
2046	60,300	4,200	34,800	2,200	375,600	9,500	105,900	2,700	576,600	18,600
2051	65,200	4,900	37,700	2,900	385,800	10,200	109,200	3,300	597,900	21,300
2011-51		31,300		14,000		86,000		18,900		150,200

V CONCLUSION

This report provides the results of the 2013 update to the City of Mississauga housing, population and employment forecasts for the 2011 to 2051 period. The forecasts have been prepared in the context of the Province's *Growth Plan* Amendment 2, Peel's ROPA 24 and the City's updated official plan. The forecasts recognize Mississauga's evolution from a suburban community characterized by greenfield residential and employment development, to a mature urban centre where growth will primarily be accommodated through intensification moving forward.

Three forecast scenarios have been prepared which reflect varying degrees of new residential intensification: Conservative, Steady and Progressive. Under the Conservative scenario, Mississauga will grow by nearly 165,000 residents between 2011 and 2051 to a total 2051 population of 907,000; the City will also add over 134,000 jobs over the same period to a 2051 total employment of over 580,000 jobs. The Steady growth scenario would result in a 2051 population of over 930,000 and total employment of nearly 590,000 jobs. Under the Progressive scenario Mississauga's population would reach just under 970,000 residents and nearly 600,000 jobs at 2051.

The Conservative scenario is considered the most achievable by the City of Mississauga under current planning policy regimes and will require market shifts towards higher density living and office market development in intensification areas coupled with appropriate growth-related infrastructure investment. In order to achieve the higher growth contemplated under the Steady and Progressive scenarios, an even greater market shift to higher density living will be required along with more significant policy intervention and infrastructure investment.