



Corporate Report

Clerk's Files

Originator's
Files

CD.03.MIS

DATE: December 9, 2008

TO: Chair and Members of Planning and Development Committee
Meeting Date: January 12, 2009

FROM: Edward R. Sajecki
Commissioner of Planning and Building

SUBJECT: **2008 Growth Forecasts – Mississauga Plan Review**

- RECOMMENDATION:**
1. That the High Growth Scenario for the City of Mississauga prepared by Hemson Consulting Ltd. contained in the report titled “*2008 Growth Forecasts – Mississauga Plan Review*” dated December 9, 2008 from the Commissioner of Planning and Building, be adopted.
 2. That the Region of Peel be requested to amend the Regional Official Plan to reflect the High Growth Scenario for the City of Mississauga prepared by Hemson Consulting Ltd. contained in the report titled “*2008 Growth Forecasts – Mississauga Plan Review*” dated December 9, 2008 from the Commissioner of Planning and Building.
 3. That the report titled “*2008 Growth Forecasts – Mississauga Plan Review*” dated December 9, 2008 from the Commissioner of Planning and Building, be circulated for information to the City of Brampton, Town of Caledon and Region of Peel, by the City Clerk.

BACKGROUND:

Attached under separate cover is the report titled “*Long-Range Forecasts City of Mississauga 2006- 2031*” by Hemson Consulting Ltd.

Hemson Consulting Ltd. was retained to update the growth forecasts for Mississauga as part of the Mississauga Plan Review process (see Appendix 1) and to comply with the growth targets of the *Growth Plan for the Greater Golden Horseshoe* (see Appendix 2).

The growth forecasts will be used for a variety of other purposes including by Finance for Capital Budget and Forecast Reviews, Transportation and Works for transportation studies and Community Services for the planning of services such as fire, libraries and parks. Additionally, the forecasts will be of interest to outside agencies and businesses such as the school boards and the development industry.

The forecasts will also be used by the Region of Peel as part of their exercise to allocate the growth mandated by the *Growth Plan for the Greater Golden Horseshoe* for Peel to the area municipalities.

COMMENTS:**Two Growth Scenarios Prepared**

Two growth scenarios have been prepared by Hemson Consulting Ltd. reflecting varying assumptions regarding growth. As Mississauga has nearly completed its greenfield growth, most of the forecast growth will be through intensification and redevelopment.

The “Reference” Scenario is what Hemson Consulting Ltd. considers the most likely scenario for growth; whereas, the “High Growth” Scenario would require a stronger demand for higher density forms. To achieve the High Growth Scenario, policy and financial support to improve the City’s competitiveness for high density development forms would be required.

The following tables present the existing growth forecasts prepared in 2005 and the results of the two new growth scenarios.

Total Population 2006 – 2031						
<i>Including Net Undercoverage</i>						
Census Year	2005 Forecast		Reference Scenario		High Growth Scenario	
	Total Population	Growth	Total Population	Growth	Total Population	Growth
2006	699,000	-	698,000	-	698,000	-
2011	724,000	25,000	737,000	39,000	738,000	40,000
2016	737,000	14,000	753,000	16,000	757,000	19,000
2021	748,000	11,000	763,000	10,000	775,000	18,000
2026	758,000	10,000	773,000	10,000	794,000	19,000
2031	769,000	11,000	783,000	10,000	812,000	18,000
Total	-	71,000	-	85,000	-	114,000
Total Employment 2006 – 2031						
Census Year	2005 Forecast		Reference Scenario		High Growth Scenario	
	Total Employment	Growth	Total Employment	Growth	Total Employment	Growth
2006	426,000	-	431,000	-	431,000	-
2011	472,000	46,000	454,000	23,000	454,000	23,000
2016	487,000	16,000	478,000	24,000	483,000	29,000
2021	495,000	7,000	492,000	14,000	500,000	17,000
2026	498,000	4,000	497,000	5,000	509,000	9,000
2031	502,000	3,000	504,000	7,000	519,000	10,000
Total	-	76,000	-	73,000	-	88,000

The Pace of Growth

Between 1986 and 2006, Mississauga grew at a phenomenal pace – an average of more than 77,000 persons and 53,000 employees per five-year period.

In the next 25 years, growth will continue but at a more modest pace. In the Reference Scenario, an average of about 17,000 persons and 15,000 employees per five-year period is forecast. In the High Growth Scenario, these averages increase to 23,000 persons and 18,000 employees per five-year period.

This growth will be strongest in the first decade as the remaining greenfields are completed and then begin to stabilize as growth shifts entirely to intensification and redevelopment.

Growth Capacity¹

Mississauga has a limited supply of ground-related units but a significant capacity to accommodate future residential growth in apartment units. As the Hemson report notes, “there are virtually no land supply constraints on apartment development – other than planning policy”.

On November 12, 2008, City Council endorsed a new Growth Management Strategy (GMS) as the basis for the preparation of the new Official Plan that directed residential growth to the Downtown, Major Nodes, Community Nodes and Corridors. This policy framework was considered in the preparation of the new growth forecasts.

Housing supply estimates result in the potential for an additional 120,000 residential units, almost 90% of which are apartment units. To accommodate forecast population growth approximately 45,000 units would be required to realize the Reference Scenario and 57,000 units are required in the High Growth Scenario. Therefore, the urban structure proposed in the GSM provides Mississauga with the capacity to accommodate residential growth to 2031 and beyond.

Within the forecast horizon, employment growth ranging between 73,000 jobs and 88,000 jobs is projected. Office employment will account for over 60% of that growth, seeing considerable development occurring within the Corporate Centres identified by the GSM. And, with the development of most remaining greenfield lands by 2011, employment growth in the future will be largely characterized by growth in major offices.

Intensification Requirements

Between 2016 and 2031, 40% of the Region of Peel’s growth must be accommodated through intensification. Other regions must meet the same intensification target but have indicated that this will be difficult for them to achieve. The Region of Peel is in the somewhat unique position of having the potential to exceed this target, largely because of the intensification capacity within Mississauga. (See Appendix 3.)

¹ A growth forecast is a prediction of the amount of growth that is expected and, therefore, reflects *demand*. Growth capacity is the amount of growth that can be accommodated and therefore, reflects *supply*. A growth target reflects the *desired* amount of growth and may need intervention to be achieved.

In the Reference Scenario, Mississauga would add approximately 20,000 dwelling units after 2015. This would account for 55% of the required growth from intensification leaving Caledon and, particularly Brampton, to accommodate the remaining 45%.

In the High Growth Scenario, Mississauga would add almost 30,000 dwelling units after 2015. In this scenario, Mississauga would take 85% of the required intensification growth. This scenario would ease intensification pressures on Brampton and Caledon. Alternatively, the High Growth Scenario would allow the Region to exceed the 40% intensification target and reduce the demand on greenfield growth.

The High Growth Scenario is Recommended

The *Growth Plan for the Greater Golden Horseshoe* is a seminal piece of planning policy that seeks to curtail urban sprawl and transform existing urban areas into more compact and sustainable communities. This will support infrastructure investments and result in more vibrant, mixed use places. Central to the *Growth Plan for the Greater Golden Horseshoe* is that a significant portion of growth be accommodated within existing urban areas.

Locally, Mississauga has recently prepared a draft Strategic Plan that developed a vision of the future for the City. Supporting this vision are the following five Strategic Pillars for Change:

- Developing a Transit-Oriented City
- Ensuring Youth, Older Adults and New Immigrants Thrive
- Completing Our Neighbourhoods
- Cultivating Creative and Innovative Businesses
- Living Green

The High Growth Scenario supports both the Province's vision for more compact and sustainable communities and Mississauga's city-building initiatives as envisioned in the draft Strategic Plan. Higher growth also supports major infrastructure investments such as the Bus Rapid Transit (BRT) system soon to begin construction and proposed higher-order transit on Hurontario and Dundas Streets. It also aligns with the GMS, which proposes that the Downtown and a series of nodes and centres develop into dynamic mixed-use areas that are the

targets for growth and provide services to surrounding stable residential neighbourhoods and employment lands. Finally, it is supportive of the Living Green pillar in terms of transit-supportive development.

As stated in the previous section, adoption of the High Growth Scenario also gives the Region the choice to either ease intensification requirements for Brampton and Caledon or to exceed the 40% intensification target by shifting some greenfield growth, to growth through intensification.

Achieving the High Growth Scenario

The Reference Scenario reflects the amount of growth Mississauga is most easily likely to achieve and would position the Region of Peel to comply with the growth requirements and targets in the *Growth Plan for the Greater Golden Horseshoe*.

The High Growth Scenario would position the Region of Peel to exceed the 40% intensification target or reduce the amount of growth required on greenfield lands in Brampton and Caledon.

Hemson Consulting Ltd. notes that to achieve the High Growth Scenario, higher density living needs to be made appealing. Households will need to choose higher density urban environments within Mississauga over other high density locations in the Greater Toronto Area or over ground-related housing forms.

Some of the key planning considerations to achieve the High Growth Scenario are outlined below.

- Planning services will need to be mindful of the needs of older adults, particularly with regard to transit services, health care and mobility within the community;
- Urban infrastructure will need to be maintained and kept in good repair. This will be a challenge for financial planning in light of declining development charge revenues and a shifting financial base; and

- Public realm investments are critical. Not only must aspects of the urban environment such as transportation systems, parks, streetscapes, cultural amenities and the arts be maintained, they must be enhanced to support the appeal of high density living.

Shifting consumers' preference to high density housing will be challenging and ultimately the City may not be successful. The risk in adopting the High Growth Scenario is over-estimating revenue from development and providing unneeded infrastructure.

The additional 30,000 population and 20,000 jobs is not so great as to warrant major new pieces of infrastructure (e.g. another trunk sewer or higher-order transit line). Further, achievement of the growth scenario would also be monitored and updated on a regular basis allowing for revenue forecasts and infrastructure plans to be adjusted, if necessary.

Current Economic Situation

Hemson Consulting Ltd. has prepared the forecasts to reflect an expected period of slower growth to 2011, consistent with the current economic conditions. Hemson notes that cyclical shifts in the market are normal and, over the long term, they expect the growth anticipated in the Provincial Growth Plan to be realized.

FINANCIAL IMPACT: Not applicable

CONCLUSION: Two new growth scenarios – the Reference Scenario and the High Growth Scenario - have been prepared for the City of Mississauga. Growth between 2006 and 2031 would range from 85,000 to 114,000 persons and 73,000 and 88,000 jobs.

The pace of growth experienced in the past was 77,000 persons and 53,000 jobs per five-year period. This will slow to 17,000 persons and 15,000 jobs in the Reference Scenario and 23,000 persons and 18,000 jobs in the High Growth Scenario.

The City of Mississauga has the capacity to accommodate forecast growth to 2031 and beyond. In support of various city-building initiatives, it is recommended that the City adopt the High Growth Scenario. This would also position the Region of Peel to exceed

minimum Provincial intensification targets and would require less growth on greenfield lands in Brampton and Caledon.

To achieve the High Growth Scenario, the appeal of high density urban living in Mississauga will need to be enhanced. Consideration for the needs of an aging population (e.g. transit services, health care and mobility within the community), maintaining urban infrastructure in good repair and enhancing the public realm (e.g. transportation systems, parks, streetscapes, cultural amenities and the arts) will be critical.

In 2009, the Region of Peel will allocate growth to the area municipalities in order to comply with the *Growth Plan for the Greater Golden Horseshoe*. The Region of Peel should be requested to allocate growth to the City of Mississauga based on the High Growth Scenario.

ATTACHMENTS:

Attached under separate cover: “*Long-Range Forecasts City of Mississauga 2006- 2031*” by Hemson Consulting Ltd.

APPENDIX 1: Mississauga Plan Review - Overview

APPENDIX 2: Places to Grow, Growth Plan for the Greater Golden Horseshoe 2006 - *Schedule 3: Distribution of Population & Employment for the Greater Golden Horseshoe 2001-2031*

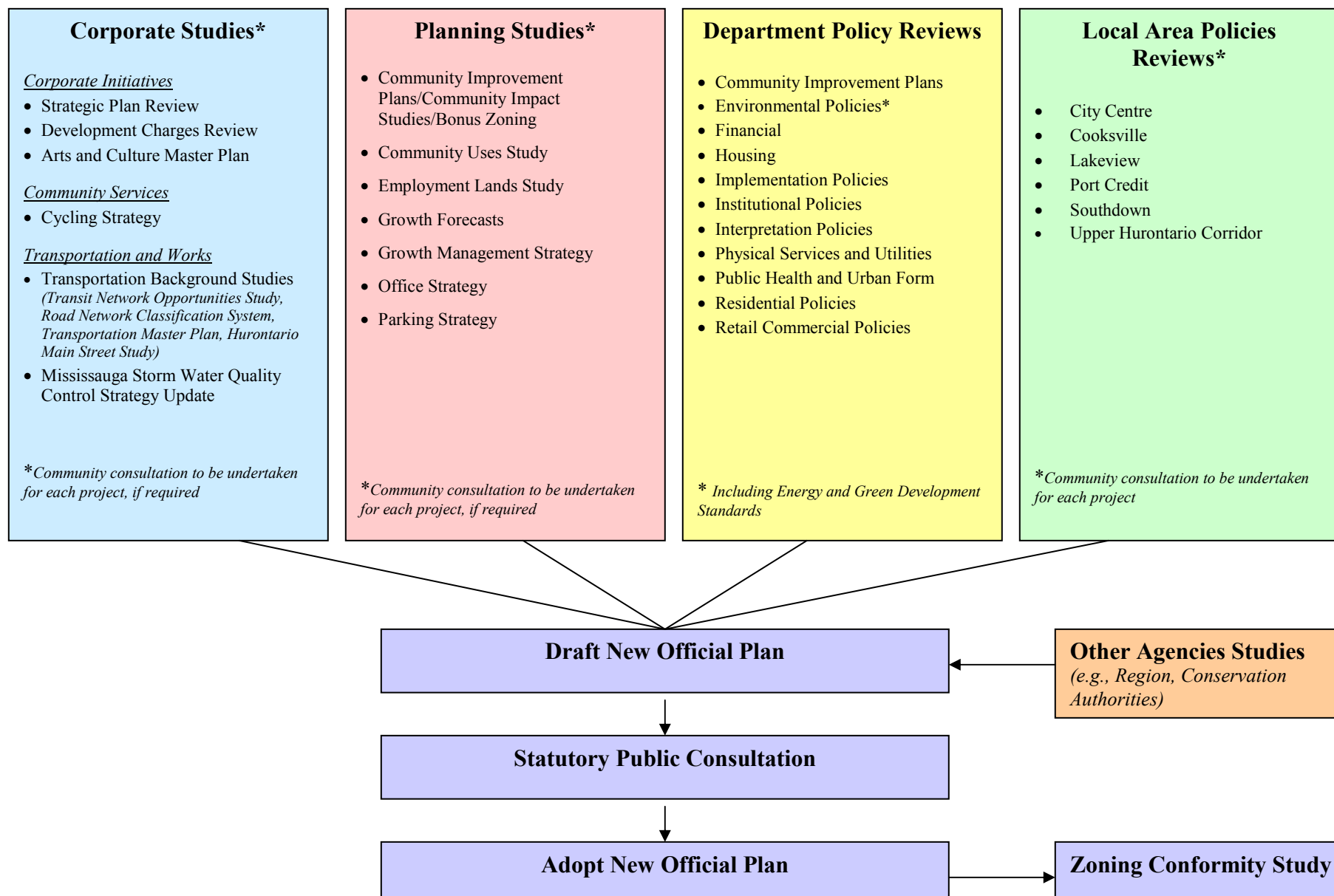
APPENDIX 3: Growth Forecasts for the Region of Peel and Area Municipalities

Original Signed By:

Edward R. Sajecki
Commissioner of Planning and Building

Prepared By: Angela Dietrich, Manager, Policy Planning

Mississauga Plan Review - Overview



Distribution of Population and Employment for the Greater Golden Horseshoe 2001-2031 (figures in 000s)								
	POPULATION				EMPLOYMENT			
	2001	2011	2021	2031	2001	2011	2021	2031
Region of Durham	530	660	810	960	190	260	310	350
Region of York	760	1,060	1,300	1,500	390	590	700	780
City of Toronto	2,590	2,760	2,930	3,080	1,440	1,540	1,600	1,640
Region of Peel	1,030	1,320	1,490	1,640	530	730	820	870
Region of Halton	390	520	650	780	190	280	340	390
City of Hamilton	510	540	590	660	210	230	270	300
GTAH TOTAL**	5,810	6,860	7,770	8,620	2,950	3,630	4,040	4,330
County of Northumberland	80	87	93	96	29	32	33	33
County of Peterborough*	56	58	144	149	16	17	60	60
City of Peterborough*	74	79			37	41		
City of Kawartha Lakes	72	80	91	100	20	23	25	27
County of Simcoe*	254	294	583	667	85	102	230	254
City of Barrie*	108	157			53	77		
City of Orillia*	30	33			16	17		
County of Dufferin	53	62	71	80	19	22	25	27
County of Wellington*	85	91	269	321	36	41	137	158
City of Guelph*	110	132			63	76		
Region of Waterloo	456	526	623	729	236	282	324	366
County of Brant*	35	39	157	173	16	17	67	71
City of Brantford*	94	102			39	45		
County of Haldimand	46	49	53	56	17	19	19	20
Region of Niagara	427	442	474	511	186	201	209	218
OUTER RING TOTAL**	1,980	2,230	2,560	2,880	870	1,010	1,130	1,240
TOTAL GGH**	7,790	9,090	10,330	11,500	3,810	4,640	5,170	5,560

Source: Hemson Consulting Ltd., "The Growth Outlook for the Greater Golden Horseshoe", January 2005

Note: Numbers rounded off to nearest 10,000 for GTAH municipalities, GTAH Total and Outer Ring Total, and to nearest 1,000 for outer ring municipalities.

* Separate forecasts for these municipalities for 2021 and 2031 will be determined.

** Totals may not add up due to rounding.



PLACES TO GROW

GROWTH PLAN FOR
THE GREATER GOLDEN HORSESHOE 2006

SCHEDULE 3

Distribution of Population & Employment for the Greater Golden Horseshoe 2001-2031

Appendix 3

Growth Forecasts for the Region of Peel and Area Municipalities

Population Forecasts - Mississauga Reference Scenario				
Municipality	2006 Census	2011	2021	2031
Brampton	434,000	534,000	660,000	758,000
Caledon	57,000	75,000	88,000	113,000
Mississauga	698,000	738,000	764,000	785,000
Total Region	1,189,000	1,347,000	1,512,000	1,656,000
Growth Plan Target	NA	1,320,000	1,490,000	1,640,000
Variance from Target	NA	+27,000	+22,000	+16,000

Population Forecasts - Mississauga High Growth Scenario				
Municipality	2006 Census	2011	2021	2031
Brampton	434,000	534,000	660,000	758,000
Caledon	57,000	75,000	88,000	113,000
Mississauga	698,000	739,000	776,000	814,000
Total Region	1,189,000	1,348,000	1,524,000	1,685,000
Growth Plan Target	NA	1,320,000	1,490,000	1,640,000
Variance from Target	NA	+28,000	+34,000	+45,000

Employment Forecasts - Mississauga Reference Scenario				
Municipality	2006 Census	2011	2021	2031
Brampton	155,000	203,000	267,000	320,000
Caledon	21,000	28,000	38,000	49,000
Mississauga	431,000	454,000	492,000	504,000
Total Region	607,000	685,000	797,000	873,000
Growth Plan Target	NA	730,000	820,000	870,000
Variance from Target	NA	-45,000	-23,000	3,000

Employment Forecasts - Mississauga High Growth Scenario				
Municipality	2006 Census	2011	2021	2031
Brampton	155,000	203,000	267,000	320,000
Caledon	21,000	28,000	38,000	49,000
Mississauga	431,000	454,000	500,000	519,000
Total Region	607,000	685,000	805,000	888,000
Growth Plan Target	NA	730,000	820,000	870,000
Variance from Target	NA	-45,000	-15,000	18,000

Notes:

1. Brampton numbers are interim numbers to be finalized later in 2008.
2. Caledon numbers are based on *Report 2006-49 Town of Caledon Population and Employment Forecasts and Allocations: Final Recommendations*, endorsed by Caledon Town Council.
3. Numbers have been rounded.