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LONG RANGE FORECASTS

City of Mississauga 1996 - 2031



August 1998

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EXECUTIVE SUMMARY

- Long-term forecasts of growth are being prepared to provide the City of Mississauga with an information base to assist the City in decision-making for planning and financial purposes, and program delivery. These forecasts update the 1995 forecasts prepared for the City by incorporating 1996 Census data, other updated information and refinements to the forecast methodology.
- The City of Mississauga is an integral part of the Greater Toronto Area (GTA). The economic and demographic trends influencing the growth patterns in the GTA forecast are the same factors influencing growth in Mississauga. The City forecast is derived from the overall outlook for the GTA.
- The difficult economic period of the early 1990s has given way to more rapid growth in the GTA and Mississauga. Recent trends in a number of economic and demographic factors suggest that relatively rapid growth will continue in the GTA:
 - The extreme boom and bust cycle which occurred in the residential, industrial and commercial development market in the late 1980s and the early 1990s influences the perception of growth. There is a general perception that little growth occurred in the 1990s because the usual signs of growth — new construction — were very limited. Between 1991 and 1996, the GTA actually added nearly 400,000 people, though employment growth in the GTA was minimal through this period.
 - After a difficult period of restructuring the fundamentals are now in place for a period of sustained economic growth. The Canadian economy is in relatively good
- shape, notwithstanding the current effects of the "Asian Flu." The economy is growing, the export sectors are booming, inflation remains very low and Canada has finally addressed the government deficit problem.
- Since mid-1996, the GTA has added nearly 200,000 jobs. Real estate markets are returning to more stable conditions with significant increases in residential construction. Commercial-industrial construction is almost back to long term average levels.
- The GTA remains one of the most rapidly growing of the large cities in North America. This is primarily the result of its continuing attractiveness to migrants. Immigrants, in particular, see the GTA as a highly attractive place to live because it is perceived of as a metropolitan area offering good long term economic opportunity.
- Migration is the key demographic variable in forecasting the GTA's future population growth. There are a number of components of migration, but the most important for the GTA is international immigration, since the GTA is the destination for over one-third of Canada's immigrants. The forecast assumes that Canada will remain relatively open to immigration, as it has through most of its history. The migration assumption combined with other demographic assumptions yield the forecast for the GTA shown on the following page.
- An employment forecast has also been prepared based on a return to a sustained period of economic growth. Employment growth is particularly high during the current 1996-2001

period, likely because the GTA is "catching-up" from the period of little growth in the early 1990s.

GTA Forecast Population and Employment Reference Forecast (in millions)				
Year	Population	Annual Growth Rate	Employment	Annual Growth Rate
1961	2.10	--	--	--
1966	2.53	3.8%	--	--
1971	2.92	2.9%	1.29	--
1976	3.10	1.7%	1.56	3.9%
1981	3.42	1.5%	1.83	3.3%
1986	3.73	1.8%	2.08	2.5%
1991	4.24	2.6%	2.29	2.0%
1996	4.63	1.8%	2.33	0.3%
2001	5.06	1.8%	2.76	3.5%
2006	5.47	1.6%	3.04	2.0%
2011	5.86	1.4%	3.29	1.6%
2016	6.26	1.3%	3.51	1.3%
2021	6.67	1.3%	3.71	1.1%
2026	7.09	1.2%	3.88	0.9%
2031	7.47	1.1%	4.05	0.9%

- The growth outlook for Mississauga is based on the outlook for the GTA. Growth in population and employment are distributed to the Regions of the GTA, and from the Region to the City, by market shares of growth. Population growth is determined by housing unit growth, since the ability to accommodate new housing dictates the ability to accommodate population growth.
- The key factor influencing future growth in Mississauga will be its declining land supply. Most of the City is currently

developed and will physically change little though the forecast period. The remaining vacant development land in the City is being rapidly depleted and Mississauga will near full development of its land for lower density housing early in the next decade. The supply of employment land will last somewhat longer, but will also near full development within the next fifteen years. Once the supply of land for low density housing and industrial-type development becomes highly limited, Mississauga's capacity to grow rapidly will also be constrained.

Mississauga Forecast Population, Households and Employment Reference Forecast, in 000s				
Year	Population	Households	Employment	Activity Rate
1986	375	120	215	57.9%
1991	465	150	275	59.1%
1996	545	170	305	55.6%
2001	615	195	370	60.1%
2006	655	210	400	61.3%
2011	675	220	430	63.2%
2016	695	230	445	64.2%
2021	710	240	460	64.8%
2026	730	250	475	64.8%
2031	745	260	485	65.1%

Note: The activity rate is the ratio of population to employment.

- Growth in higher density residential development will continue in Mississauga throughout the forecast period. Growth in rowhousing is less constrained, and growth in apartment units virtually unconstrained by land supply.

Similarly, office employment will continue to grow throughout the forecast period since it is much less constrained by land supply.

with the timing of development. That is, land supplies will deplete sooner under a high growth forecast and later under a low growth forecast.

- The growth forecast for the City of Mississauga has been distributed to the planning districts, traffic zones and sub-watersheds for the purpose of detailed planning in the City. These forecasts indicate that most population growth will occur in areas with available development land, mostly in the northwest quadrant of the City and the City Centre. Other areas, primarily south of Highway 403 will experience small population declines over the forecast period, as a result of little new development occurring, and gradual declines in the average household size.
- A similar pattern exists for employment, where most of the growth will occur in areas with available development land, particularly Gateway, Meadowvale, Airport Corporate Centre and the City Centre.
- A low and high forecast was also prepared in order to provide a range on the reference forecast, since forecasting always embodies elements of uncertainty. The low and high forecast for the City is based on low and high forecasts for the GTA which vary the underlying economic assumptions and vary the all-important migration assumptions which influence levels of population growth.
- Like the reference forecast, the low and high forecasts for Mississauga are highly influenced by the available vacant land supply. The City has a relatively narrow range on growth, largely because the low density housing and employment land supplies will near full development under any scenario. The variation between the forecast scenarios is primarily to do

Mississauga Population Forecast Range (000s)				
Year	Low	Reference	High	
1986	375	375	375	
1991	465	465	465	
1996	545	545	545	
2001	605	615	630	
2006	630	655	680	
2011	650	675	715	
2016	660	695	740	
2021	670	710	770	
2026	680	730	795	
2031	695	745	820	

Mississauga Employment Forecast Range (000s)				
Year	Low	Reference	High	
1986	215	215	215	
1991	275	275	275	
1996	305	305	305	
2001	355	370	385	
2006	375	400	425	
2011	395	430	460	
2016	405	445	490	
2021	410	460	515	
2026	415	475	540	
2031	420	485	560	