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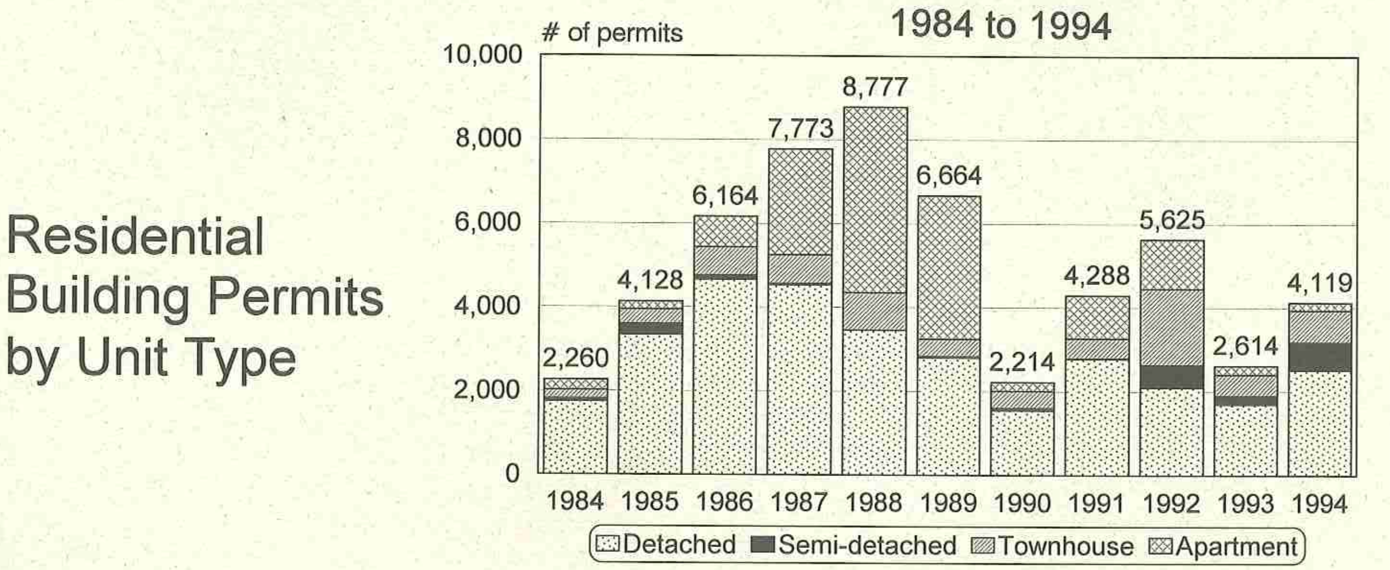
☐ POLICY PLANNING DIVISION ☐

DEVELOPMENT UPDATE

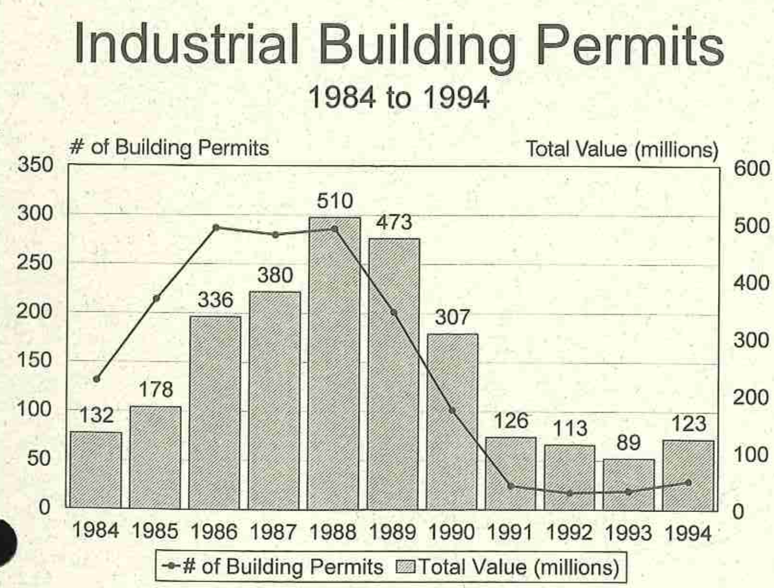
THE CITY OF MISSISSAUGA PLANNING AND BUILDING DEPARTMENT

☐ REPORT ON YEAR END 1994 ☐

A Review of Building Permits



Source: City of Mississauga Planning and Building Department



Source: City of Mississauga Planning and Building Department

Inside This Issue:

Editor: Susan Tanabe
Telephone: (905) 566-4164
FAX: (905) 896-5553

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Mississauga Market Conditions

Housing

The existing housing stock in the City of Mississauga as of December, 1994 consisted of 166,431 units, a slight increase from the same period last year. The mix of dwelling types have remained stable with detached houses and apartments making up the largest portions at 44% and 33% respectively. Townhouses represent 12% and semi-detached units represent 11% of the total housing stock.

Construction activity in 1994 was characterized by a significant increase in building permits, particularly semi-detached and townhouse units, and also an increase in housing starts. Building permits increased by 58% compared to 1993. Semi-detached, townhouse and detached units increased significantly, with apartment permits decreasing. Housing starts increased by 11% from 1993 to 1994; with semi-detached starts increasing more then 100% and detached starts by 37%.

Mississauga continues to have a large supply of land ready for building permits; these are unbuilt units on registered plans or zoned lands. There is a capacity of approximately 26,700 units in this category of which 75% are apartments. The number of draft approved units has decreased by 20% from December, 1993 and stands at 11,100 units. Again, apartments represent the largest share, with detached units representing the next largest share. Lands under application for development but not yet draft approved remains relatively stable at 30,300 units. Mississauga has lands to accommodate approximately 37,000 units designated for residential development which are not developed or under application for development.

Opportunities in the housing market have declined from 1993 as is evident in the decline in the number of residential resales from 1993 to 1994 (20% decrease). Although the average resale house price decreased slightly from 1993 to 1994, the three-year mortgage rate increased by 9%. Rental vacancy rates have fallen, from 2.20% in October 1993 to 1.40% in October, 1994. Vacancy rates are expect to continue to decline in 1995.

The Housing Strategy prepared for Mississauga proposed several targets for residential development. Sixty-five to 75% of the ultimate housing stock by type has been achieved for all but townhouses; only 53% of the target townhouse stock has been built.

Office

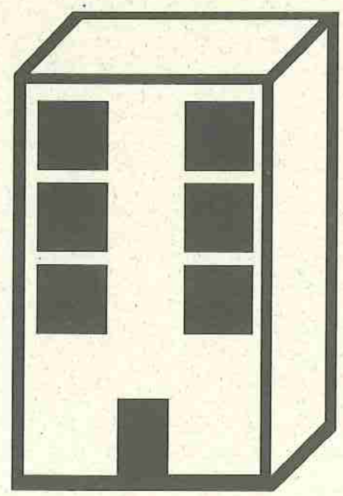
There has been little improvement in the office market over the past year. Space in the Greater Toronto Area (GTA) is only now being absorbed from the oversupply created during the 1980s. As this supply is absorbed office development will become more active. Absorption figures (a measure of demand for office space) have shown improvements in most markets and the trend is expected to continue into 1995, however, little new construction is anticipated in the near future.

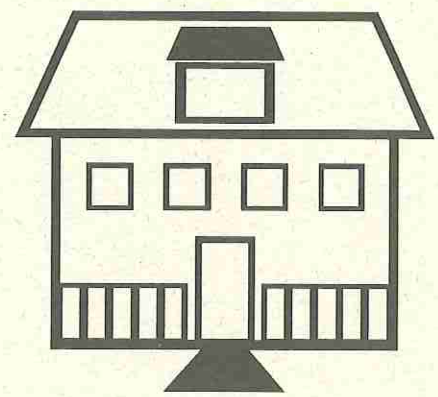
Leasing activity in Metro West (composed of Mississauga, Brampton, Oakville, and Etobicoke) continued as a result of many firms relocating from Metropolitan Toronto, as well as from outside the Region. Tenants migrated to first-class office space in Metro West from mid-quality office space elsewhere. The majority of new office leasing activity in Mississauga occurred in the Airport Centre, Meadowvale, Sheridan Park, and the Highway 10 Corridor areas. These office nodes have attracted new tenancies because of highway accessibility and visibility, competitive tax rates, and a good supply of first-class office space.

There was virtually no change in the office statistics for the Toronto Census Metropolitan Area (CMA) from 1993 to 1994. According to Royal LePage, the Toronto CMA has an existing inventory of 13.6 million m^2 (146.7 million sq.ft.). Mississauga has maintained its share of the Toronto CMA's inventory, making up 9% of the market. The Metro West area has a 17% share of the Toronto CMA market.

The vacancy rates in the Toronto CMA decreased from 18.5% to 17.4% during the past 12 months. Metro West reported the highest vacancy rate at 21.2%, whereas Metro East and Metro North had rates of 18.3% and 14.2% respectively. Vacancy rates in Mississauga office areas (as defined by Royal LePage) reported both increases and decreases. The Airport, Hurontario, City Centre, and Meadowvale areas experienced decreases whereas vacancies in Cooksville and Sheridan office districts rose.

Housing





Housing Development Activity

Construction Activity 1994 Total	Detached	Semi-detached	Townhouse	Apartment	Total
Building Permits	2,515	660	763	181	4,119
Housing Starts[1]	2,333	680	725	321	4,059
Application Activity as of December 31	**Detached**	**Semi-detached**	**Townhouse**	**Apartment**	**Total**
Unbuilt Units on Registered Plans or Zoned Lands	3,373	487	2,832	20,076	26,768
Draft Approved	3,950	798	1,477	4,878	11,103
Under Application for Development	4,698	1,485	6,110	18,060	30,353
Lands Designated, Not Under Application for Development	10,692	48	7,230	24,687	42,657
Existing Units	73,720	17,863	19,454	55,394	166,431
Total	96,433	20,681	37,103	123,095	277,312

Housing Market Indicators

(For the Month of December)	1993	1994	Increase or Decrease
Residential Resales[2]	332	264	Decreased by 20%
Average Resale House Price[2]	$187,468	$187,380	Decreased by 0.05%
Three-Year Mortgage Rate[1]	8.10%	8.82%	Increased by 9%
Average Rental Rate 2 Bedrooms (October)[1]	$821	$813	Decreased by 1%
Rental Vacancy Rate (October)[1]	2.2%	1.4%	Decreased by 36%

Housing Policy Targets

Housing Targets	Target	% Achieved
Dwelling Units		
Short Term Target	197,000	84%
Ultimate Target	245,000	68%
Ultimate Housing Stock		
Detached	98,000	75%
Semi-detached	24,500	73%
Townhouse	36,750	53%
Apartments	85,750	65%

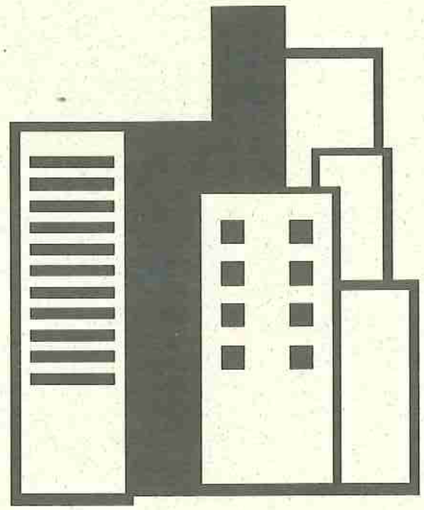
Tenure Targets	Target	% Achieved
Ultimate Tenure Split		
Ownership	60%	65%[3]
Rental	40%	35%[3]
Average Annual Target Rental Units	1,700	321 (19%)
Non-Profit Units	550	321 (58%)
Average Annual Ownership Units	2,700	3,738 (139%)
Low Density	1,350	3,013 (223%)
Medium Density	900	725 (81%)
High Density	450	0 (0%)

Source: City of Mississauga Planning & Building Department

1 CMHC Local Housing Market Report and Rental Market Report
2 Canadian Real Estate Association
3 Statistics Canada, Census 1991

Office Commercial

Office Node	Existing m² (sq.ft)	# Bldgs	On-Stream m² (sq.ft)	# Bldgs
Airport Corporate	226 977 (2,443,240)	30	82 223 (885,070)	7
Airport (Others)	193 353 (2,081,302)	27	289 436 (3,115,565)	4
City Centre	337 310 (3,630,893)	20	49 085 (528,364)	4
Cooksville	65 845 (708,773)	11	12 244 (131,798)	4
Hurontario (North of 403)	147 658 (1,589,429)	20	795 953 (8,567,847)	16
Meadowvale	144 811 (1 ,558,784)	24	185 557 (1,997,384)	9
Sheridan	32 925 (354,413)	4	3 252 (35,005)	1
Other	119 648 (1,287,922)	28	311 111 (3,348,880)	5
Total	1 268 527 (13,654,757)	164	1 728 861 (18,609,913)	50



Source: City of Mississauga Planning and Building Department
Note: A building moves from the on-stream inventory to the existing inventory once the building permit has been issued.

Retail Commercial

As of December, 1994	Regional		District		Neighbourhood		Convenience		Other[1]		Total
	GFA* m² (sq.ft.)	#	GFA m² (sq.ft)	#	GFA m² (sq.ft)	#	GFA m² (sq.ft.)	#	GFA m² (sq.ft.)	#	GFA m² (sq.ft.)
Existing	180 999 (1,948,321)	2	321 986 (3,465,942)	10	248 579 (2,675,769)	39	128 764 (1,386,049)	91	171 531 (1,846,405)	29	1 051 859 (11,322,486)
Unbuilt Units on Registered Plans or Zoned Lands:											
Approved Site Plans	-	-	-	-	3 479 (37,449)	1	7 456 (80,258)	4	4 847 (52,174)	2	15 782 (169,882)
Site Plans Submitted	-	-	-	-	15 466 (166,480)	2	4 542 (48,891)	3	27 721 (298,396)	4	47 729 (513,767)
No Site Plan Submitted	-	-	-	-	-	-	14 704 (158,278)	10	15 716 (169,171)	4	30 420 (327,449)
Draft Approved	-	-	-	-	2 810 (30,248)	1	2 047 (22,034)	1	7 200 (77,503)	1	12 057 (129,785)
Under Application for Development	-	-	-	-	45 693 (491,851)	6	16 721 (179,989)	10	77 632 (835,651)	11	140 046 (1,507,492)
Lands Designated, Not Under Application for Development	-	-	-	-	18 590 (200,108)	2	14 400 (155,005)	8			32 990 (355,113)
Additions	-	-	-	-	-	-	-	-	13 864 (149,236)	4	13 864 (149,236)
Total	180 999 (1,948,321)	2	321 986 (3,465,942)	10	334 617 (3,601,905)	52	188 634 (2,030,506)	127	318 511 (3,428,536)	55	1 344 747 (144,752,209)

Source: City of Mississauga Planning and Building Department

*GFA refers to Gross Floor Area

[1] Includes the following types of uses Mixed Use, Mixed Commercial and Employment. Some applications for this type of use do not indicate a GFA.

Industrial

Industrial Application Activity

December 1994	Heavy		General		Prestige (includes Office)		Mixed Industrial & Commercial		Total	
	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres
Unbuilt Registered Plans or Zoned Lands	93	230	688	1,699	744	1,839	95	235	1 620	4,004
Draft Approved	0	1	99	244	310	766	0	0	409	1,011
Under Application for Development	0	0	130	321	244	604	0	0	374	925
Lands Designated Not Under Application for Development	0	0	160	396	308	762	0	0	468	1,157
Existing	409	1,011	2 521	6,229	1 007	2,489	418	1,032	4 355	10,761
Total	503	1,242	3 598	8,890	2 614	6,459	513	1,267	7 227	17,858

Source: City of Mississauga Planning and Building Department

Retail Commercial

The existing gross floor area of retail space in the City of Mississauga as of December 1994 included over one million m^2 (11.3 million sq.ft.). District Centres comprise the largest portion with 31% of this space, followed by Neighbourhood and Regional Centres representing 24% and 17% respectively. Convenience and the Other category represent the smallest portions at 12% and 16% respectively.

On-stream retail commercial space is made up of Neighbourhood, Convenience, and Other types of centres. On-stream, which includes unbuilt development proposals on registered plans or zoned lands, and development proposals that have been draft approved or are under application for development, totalled 246 000m^2 (2.6 million sq.ft.). Lands designated for retail commercial space but not yet under application include a total of 32 990m^2 (355,100 sq.ft); 56% of this space is in the form of Neighbourhood Centres and 44% Convenience Centres. Lands designated for retail commercial space but not yet under application are situated in the Lisgar and Churchill Meadows Planning Districts.

As of December 1994 the total retail commercial space, including existing, on-stream, designated lands and additions, is 1 344 750 m^2 (14.5 million sq.ft.) with District and Neighbourhood Centres representing 24% and 25%, respectively. Regional and Convenience Centres each represent 14% and Other centres 24%.

New format retailing has been a recent trend in the retail industry. These new retail forms include "retail warehousing", "outlet stores", and "big box retailing". New retail forms meet the consumer demands of the 1990's - quality at discount prices. Mississauga is no exception to new retail trends. A power centre has evolved on lands designated for District Commercial and Mixed Industrial and Commercial on the south-east quadrant of Mavis Road and Britannia Road. Existing tenants include Home Depot, Price Club, Winners, Michaels, Business Depot, Future Shop, and The Shoe Company.

Industrial

At year end 1994 Mississauga had approximately 4 300 ha (10,760 ac) of land developed for industrial purposes. Most was designated as General Industrial (58%), followed by Prestige Industrial (23%), Mixed Industrial and Commercial (10%), and Heavy Industrial (9%).

Mississauga has a large inventory of land ready for development; 2 029 ha (5,015 ac) of land registered and zoned or draft approved for industrial purposes. A further 374 ha (925 ac) of land are under application for development. Approximately 468 ha (1,157 ac) of land are designated for industrial development but have not been developed and no application activity has occurred. The number of industrial buildings built in 1994 was 29 (a permit value of $123,000,000), an increase of 10 buildings (a permit value increase of $34,000,000) from the previous year. ♦

Community Profiles, Statistics Canada

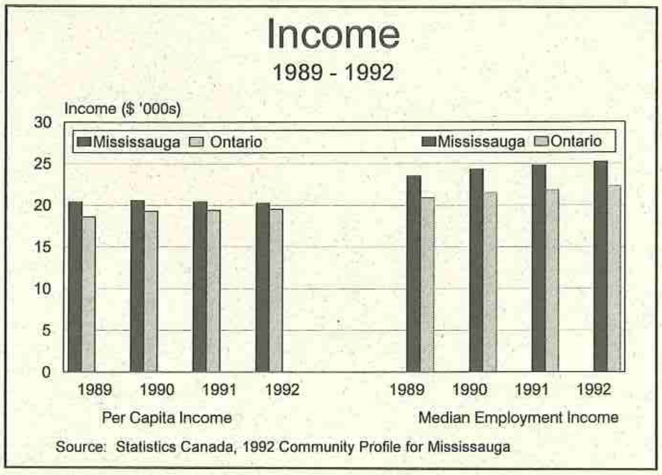
Community Profiles is a document produced by the Small Area Administrative Data Division (SAADD) of Statistics Canada and provides statistical information on specific areas, defined by postal codes. The *1992 Community Profiles for Mississauga* was a requested run from the databank and contains a variety of information on population, income, labour force participation, economic dependency and characteristics of Husband-Wife Families (HWF) for the City of Mississauga and the Province. It is derived using data collected from 1992 tax returns, filed in the spring of 1993.

The tables contained within the document provide information for a four year period. There have, however, been changes in the statistical definitions used making accurate comparisons between 1989 and 1992 difficult. For example, beginning in 1992 total income reported on tax returns was altered to include that of non-filing spouses. The document is nevertheless a valuable source of income information for Mississauga and how Mississauga compares to the Province as a whole.

In 1992 the population for Mississauga was approximately 480,000 people and of this approximately 70% were of normal working age, i.e. between 18-64 (1989) and 15-64 (1990+). Of the total population 78% were in HWF's, 10% in lone parent families and 12% as non-family persons.

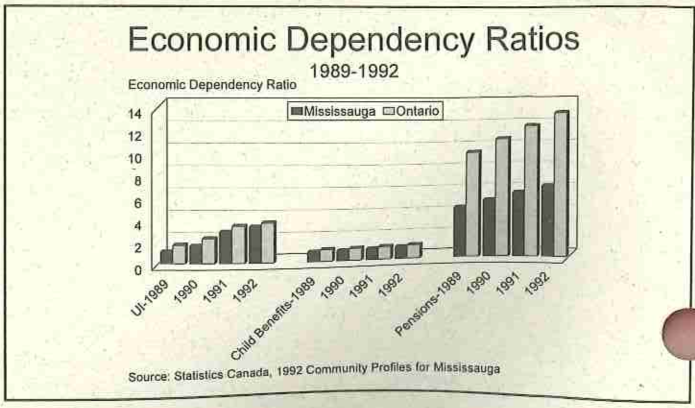
For Mississauga in 1992 the per capita income was $20,248 and has remained just above $20,000 since 1989. The per capita income being the total income for all those within the City, divided by the population. The per capita income for the Province of Ontario was slightly lower, approximately $19,000, during the same period. Transfer payments accounted for about 12% of the total income for Mississauga in 1992, compared to 18% of the total income for the Province.

The median employment income is the mid point of the range of all earned incomes, such as salaries and wages. Within Mississauga, the median employment income has increased from $23,500 in 1989 to $25,200 in 1992 and has remained higher than that of Ontario, calculated at $22,300 in 1992. It has also been consistently about $10,000 higher for males than for females during the same period. Of the 272,290 gross labour force in Mississauga, males and females account for 52% and 48% respectively, and together account for 5.1% of those employed in Ontario. Of those aged between 18-64 (1989) and 16-64 (1990+), 81% are in the labour force.



Source: Statistics Canada, 1992 Community Profile for Mississauga

The total economic dependency ratio (EDR) for Mississauga in 1992 was 14.68 compared to 24.31 for the Province. The EDR is the amount of transfer payments per every $100 earned as employment income. In both the City and Province this has increased significantly since 1989. Although this increase has in part been caused by a change in statistical definitions, i.e. the inclusion of income of non filing spouses, it has also been a result of a change in economic conditions over the last four years. Since 1989 there have been increases in the amount of transfer payments reported, such as child benefit, unemployment insurance and pensions, received from the Government and other institutions.



Source: Statistics Canada, 1992 Community Profiles for Mississauga

(continued on page 8)

Employment Opportunities and Commuting in Mississauga

On June 4, 1991 Statistics Canada conducted the 17th Census of Population and Housing. Releases contained information regarding employment including place of work data with origins and destinations of employed persons within regions and municipalities. Journey to work data is important information for the analysis of travel-to-work characteristics of an area's resident labour force and thus valuable data for the design of transportation planning models which provide the basis for determining future needs for transportation networks and facilities to serve continuing urban growth. The journey to work data in this article is based on 1991 as well as historical Census data that has been analyzed by the IBI Group in conjunction with the Region of Peel.

Mississauga is often referred to as a "bedroom community" suggesting it is a place where people live but not a place where people work. The City's first Official Plan identified this as a concern and established a number of goals and objectives for employment growth to create a balance between the resident labour force and local employment opportunities. Mississauga has been highly successful in attracting employers and is now a net importer of employment.

"Resident labour force", *"resident workers"*, and *"workers"* refers to the labour force living within a municipality or region. These people may work in the same municipality in which they live or they may work in other municipalities. *"Local employment"* or *"jobs"* refers to the number and type of jobs, at the place of work, located within a municipality or region. These jobs will be filled either by resident workers or workers from other municipalities.

Labour Force Employment Trends

Trends in the labour force give evidence of the extent to which Mississauga's economic base has diversified over the past twenty years. Unlike the early 1970s, the local employment base is no longer primarily oriented to traditional industrial firms or occupations.

Between 1971 and 1991 the resident labour force in Mississauga grew by 250%, while local employment grew at an even faster rate of 300%. Mississauga which in 1991 had a resident labour force of 252,090 and local employment is 274,065. Mississauga has evolved from being a net exporter of workers to being a net importer of 21,975 workers. The activity rate (ratio of jobs to population) for the City was 59% in 1991, compared to only 41% in 1971.

The degree of imbalance between jobs and workers, expressed as a ratio, has increased from approximately 0.92 to 1.09 during that time period. Within industry groups, imbalances between local jobs and resident workers are more evident. Mississauga is a net importer of 34,500 "industrial sector" workers and a net exporter of 12,400 "service sector" workers. The imbalances occur in industrial occupations (processing, production, transportation, construction) where local jobs exceed resident workers by almost 11,900. Employment in the primary industries and in manufacturing/construction grew slowly, while employment in the finance/real estate/institutional, and transportation/utilities sectors grew above the average for the labour force as a whole. The growing importance of service sector employment is a trend that has become well established within the region's labour force over the past twenty years. The resident labour force of Mississauga, Brampton, and Caledon also experienced a similar shift away from traditional industrial employment towards a greater reliance on the service sectors, transportation and utilities.

Mississauga is a net importer of "managerial and clerical" workers (4,475 and 4,190) and a net exporter of "finance/insurance" and "institutional" workers (8,560 and 6,635). This could imply that a significant percentage of workers in Mississauga's manufacturing/wholesaling/construction sectors are, in fact, managerial and clerical workers.

Commuting Patterns and Trends

The percentage of people who live and work in the same municipality, the percentage of in- and out-commuters, and the major origins and destinations of these commuters establish commuting patterns and trends of the community. *"Out-commuters"* are defined as resident workers who travel to jobs outside the municipality. *"In-commuters"* are defined as residents of other municipalities who travel to jobs located within Mississauga.

(continued on page 8)

Employment Opportunities *(continued from page 7)*

Comparisons between the resident labour force and the number of local jobs provides useful information about the degree of self-containment in a municipality (i.e. the percentage of local jobs filled by local workers). The degree of self-containment in Mississauga has increased substantially since 1971, when only 38% of the local labour force worked in the City, compared to 54% of the resident labour force working in the municipality in 1991. A total of 133,705 people live and work in Mississauga. From a commuting standpoint, Mississauga has become significantly more self-contained over the twenty year period, as the number of local jobs has begun to exceed the number of workers, particularly in the industrial sectors.

In 1971, the majority of Mississauga's out-commuters travelled to Metro Toronto, in particular Etobicoke (24% of Mississauga's resident labour force), Toronto/East York (22%), and North York (8%). By 1991, out-commuting to Metro Toronto had declined significantly as a percentage of Mississauga's resident work force, to the point where Etobicoke captured 11% of out-commuters, Toronto 20%, and North York 5%. Metro Toronto is still the largest destination for Mississauga's out-commuters. The decline in out-commuting activity is likely due to the very significant growth in Mississauga's local employment opportunities between 1971 and 1991, which provided local residents with additional opportunities to work closer to their homes. Only 4% of Mississauga's resident labour force travel to other locations in Peel Region.

In-commuting activity, as a percentage of the local employment base, declined over the 1971 to 1991 period, from 58% of the local employment base in 1971 to 48% in 1991. Due to rapid growth in Mississauga's employment base, in-commuters now outnumber out-commuters by almost 10%. There are now more people making the reverse commute into Mississauga from North York, and an almost equal balance of in- and out-commuters between Etobicoke and Mississauga.

Of those commuting into Mississauga, the largest percentage come from Brampton (11%). Other major sources of workers include Etobicoke (8%), Oakville (5%), Toronto (5%), and North York (4%).

Conclusion

It is the City's long range goal to create a better balance between the skills of the resident population and local employment opportunities by providing more managerial and professional jobs by attracting head offices, research and development and technological enterprises to the City. As the Canadian location for many international corporations, Mississauga is making good progress in this area.

Given Mississauga's proximity to other municipalities and the large number of households with more than one person working, it is unrealistic to expect that all working persons living in Mississauga would work locally; however, there is room for improvement. Mississauga has a highly skilled labour force and needs to attract employers offering employment opportunities attractive to people living here. Matching skills of resident labour force with local job opportunities is important for several reasons. Keeping people who live in Mississauga working in Mississauga reduces the demand on the road system and makes the use of public transit more viable, which in turn lessens the strain on the environment. ♦

Community Profiles *(continued from page 6)*

In 1992, within Mississauga, there were 107,330 people in the gross labour force. Of these, 18% were reporting unemployment insurance (UI), compared to 10% in 1989. With respect to the Province, 19% of the labour force were reporting UI in 1992 compared to 13% in 1989. Of the 117,370 HWF's in Mississauga, in 1992, approximately 91% had at least one member in the gross labour force. The median total income for HWF's was calculated at $57,200 in 1992 and has remained at least $5,000 higher than that for the Province for the four year period from 1989. ♦

MISSISSAUGA

City of Mississauga
300 City Centre Drive
Mississauga, Ontario L5B 3C1