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ECONOMISTS LTD.



City of Brampton Official Plan Review – Draft Growth Scenarios Council Presentation

December 7, 2020

Introduction



- The City of Brampton is currently undertaking a comprehensive review and update of its Official Plan (O.P.).
- The City’s new O.P. is intended to implement the direction of the “Brampton 2040 Vision” while complying with Provincial and Regional planning direction.
- Watson & Associates Economists Ltd. (Watson) are working with WSP Consulting on this study. Our focus is directed to the development of three long-term range growth scenarios for the City to the year 2051.

Purpose



- The purpose of this meeting is to summarize the draft findings prepared by the Consultant Team with respect to the City's long-range growth scenarios to the year 2051.
- As part of the O.P. review, a total of three long-term growth scenarios for the City have been examined, including:
 - Current Trends Scenario (Scenario 1);
 - Policy Driven Regional Conformity Scenario (Scenario 2); and
 - Preferred Scenario – Brampton Vision 2040 (Scenario 3).
- Each scenario will be used to inform the City's long-term growth potential by Planning Policy Area i.e. Built-up Area (B.U.A. and Designated Greenfield Area (D.G.A)).

What Drives Population and Employment Growth?



Economics

Local and Regional
Economic Outlook

Economic Drivers of
Population and
Employment Growth by
Area

Labour Force Growth
within the Commuter
Shed

Forecast Employment
Growth by Sector

Demographics

Net Migration
and Natural
Increase

Population and
Housing forecast
2016 to 2051

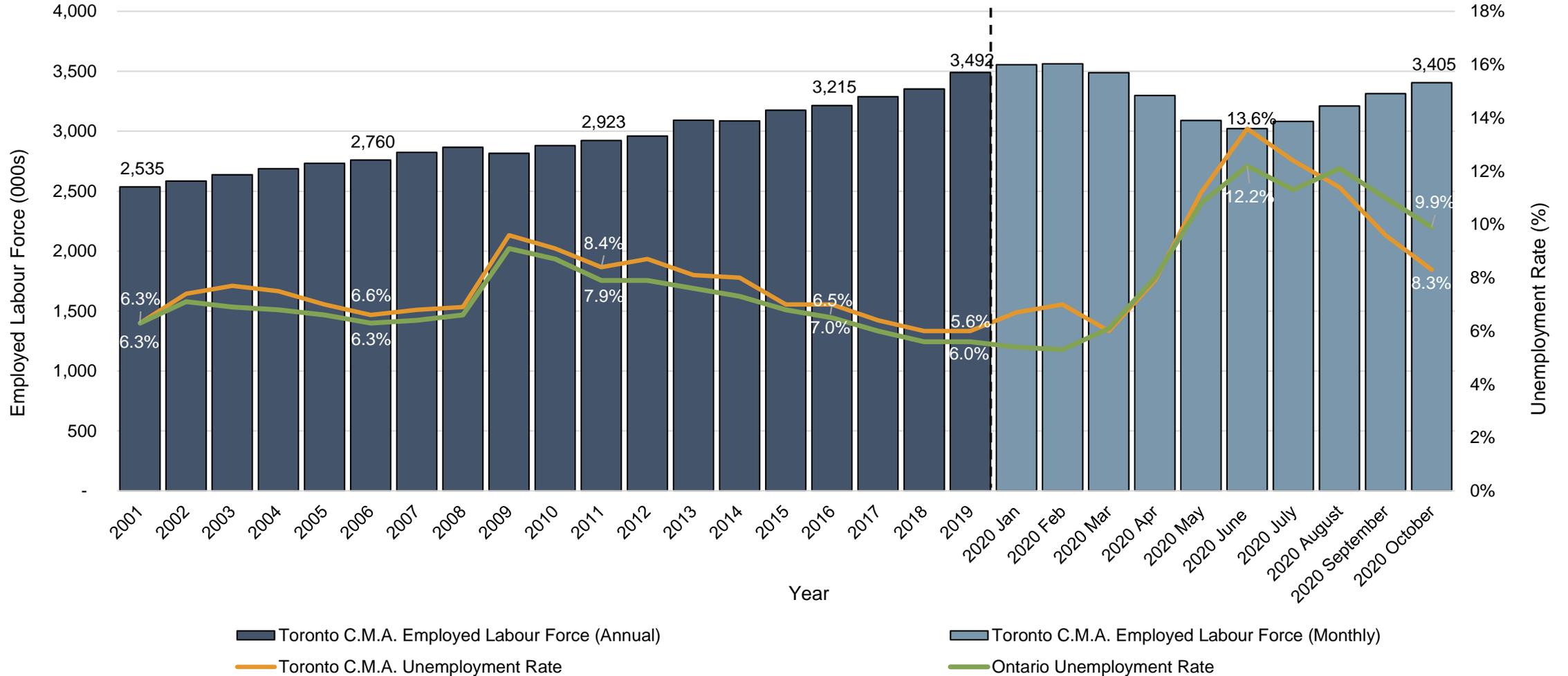
Housing Forecast
by Type, 2016 to
2051

Population,
Housing, and
Employment
Growth Scenarios

Population and
Housing Forecast
Allocation by
D.G.A. and B.U.A.

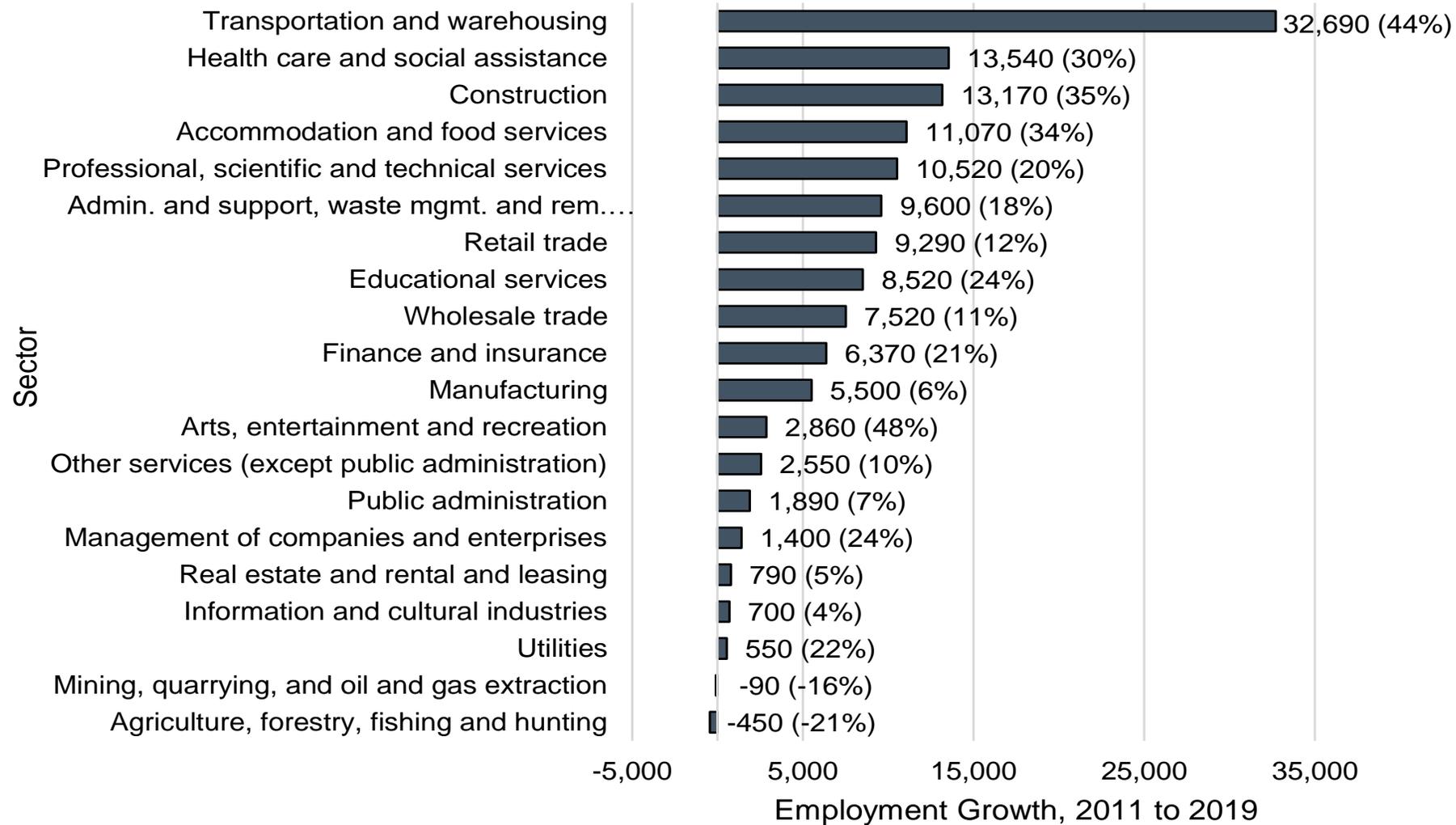
Overview of Macro-Economic and Regional Employment Trends

Toronto C.M.A. Total Labour Force and Unemployment Rate Trends, 2001 to October 2020



Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
 Source: Statistics Canada Data Tables 14-10-0098-01 and 14-10-0294-02. By Watson & Associates Economists Ltd., 2020.

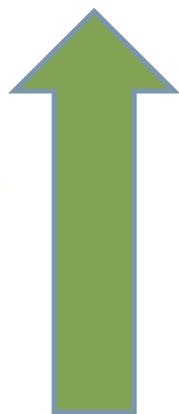
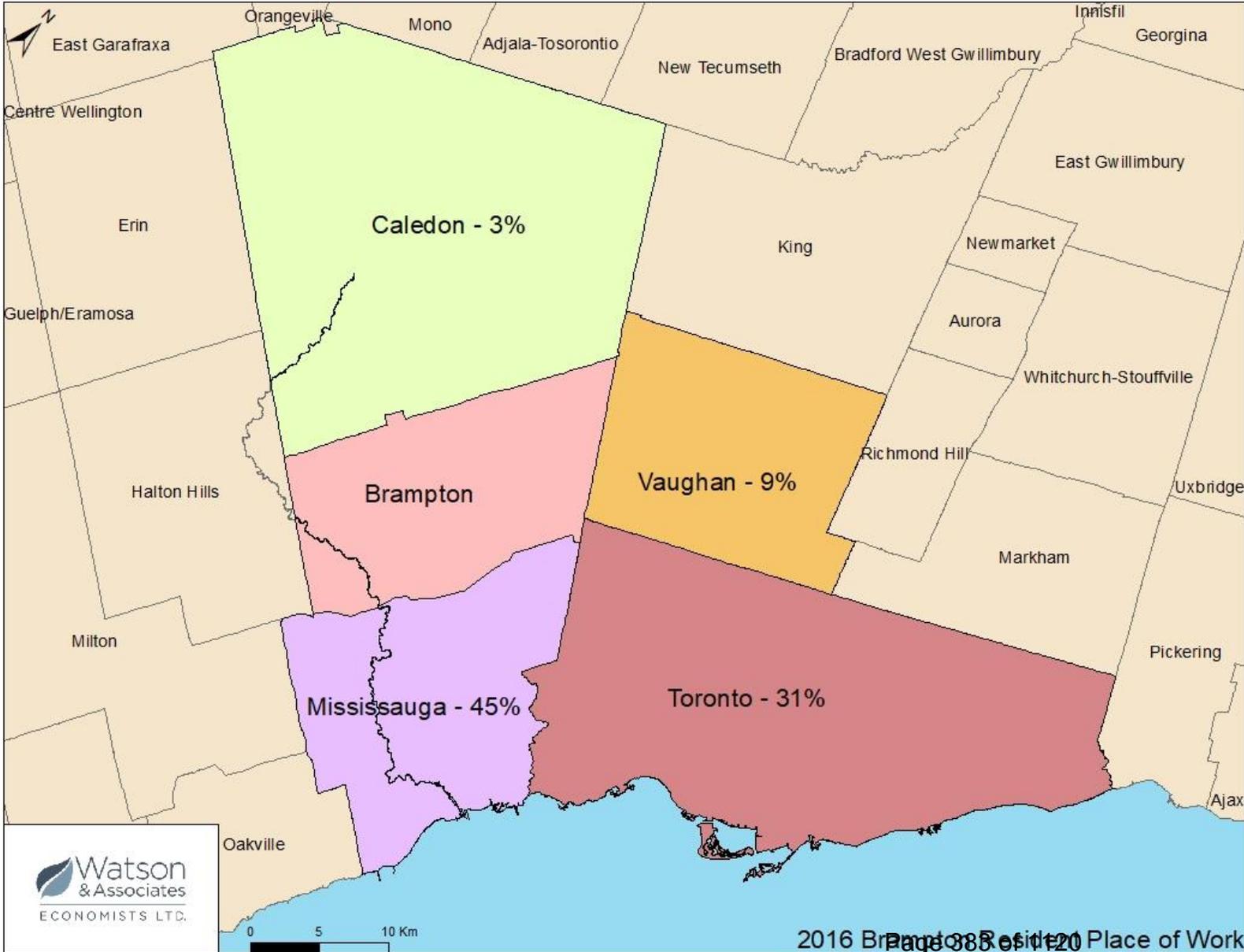
Peel Region Employment Growth by Sector, 2011 to 2019



Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2020.

Note: Figure includes employed and self-employed. Page 68 of 1120

City of Brampton Commuting Patterns by Usual Place of Work, 2016



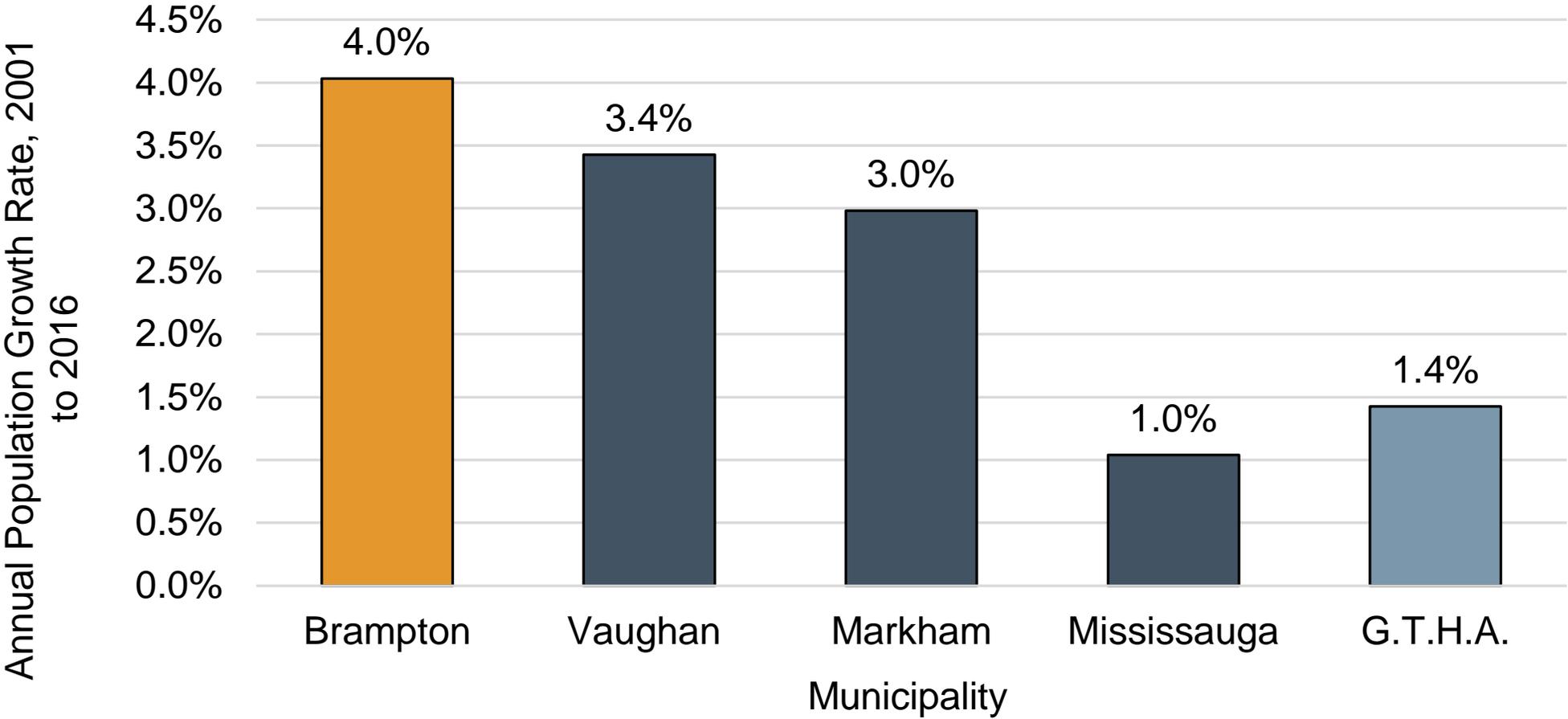
- 661,000 increase in Primary Commuter Shed jobs from 2016-2051.
- 0.7% Annual employment growth rate 2016-2051.
- Primary commuter shed is 88% of the City's total commuter shed.

City of Brampton Primary Commuter Shed Employment Forecast

2016	2051	2016-2051
2,301,000	2,962,000	661,000

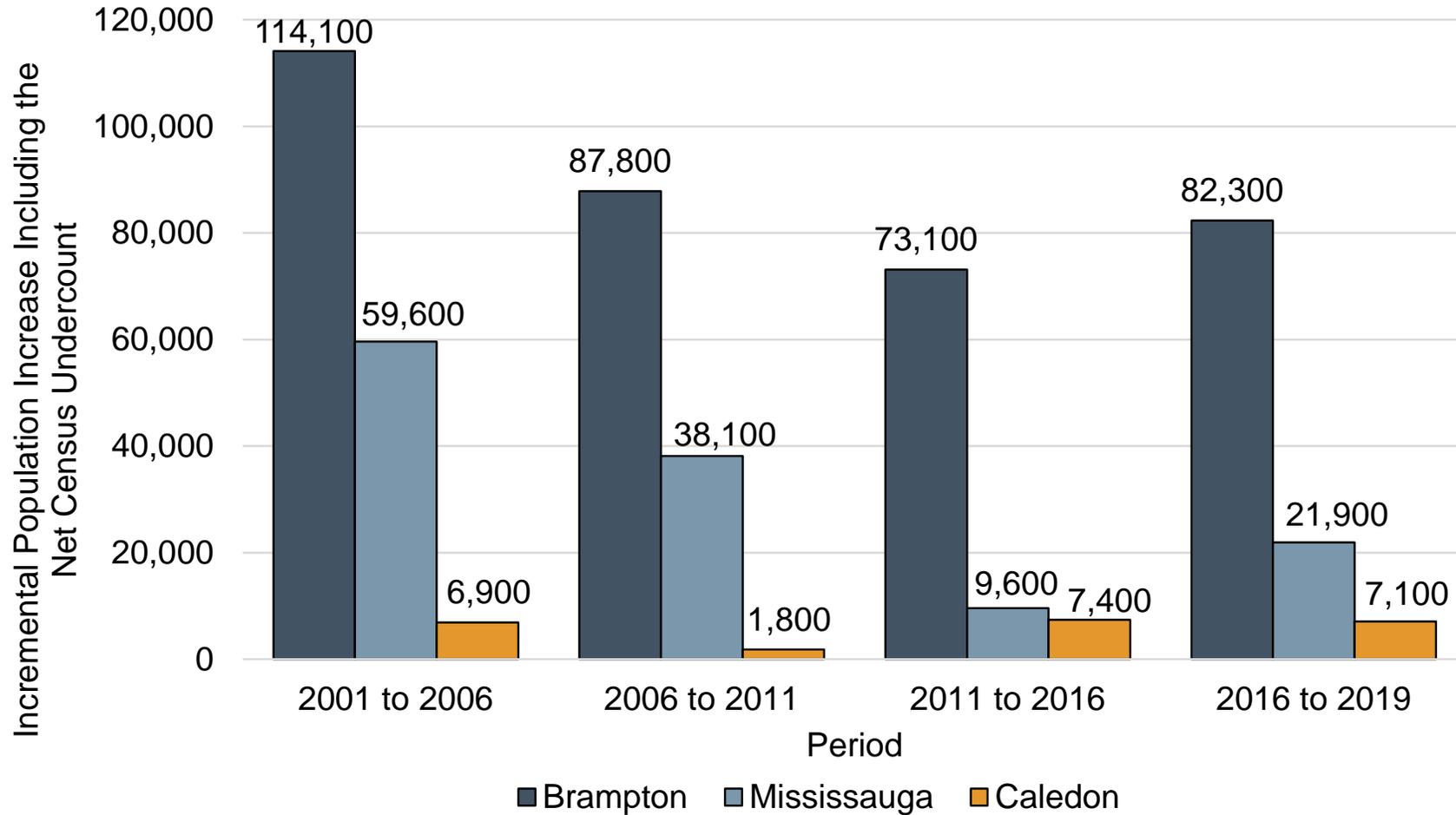


Historical Population Growth Rates, 2001 to 2016 by Comparator Municipalities

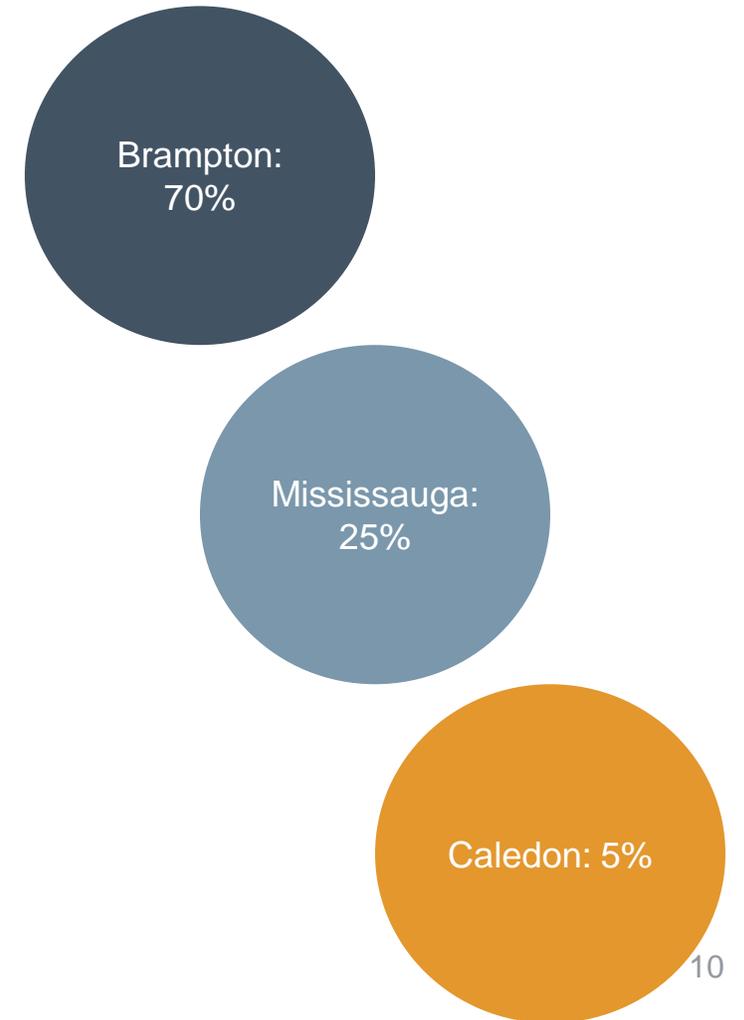


Source: 2001 to 2016 from Statistics Canada Census. Figure by Watson & Associates Economists Ltd., 2020.
Note: Population includes Net Census Undercount.

Region of Peel Historical Population Growth, 2001 to 2019

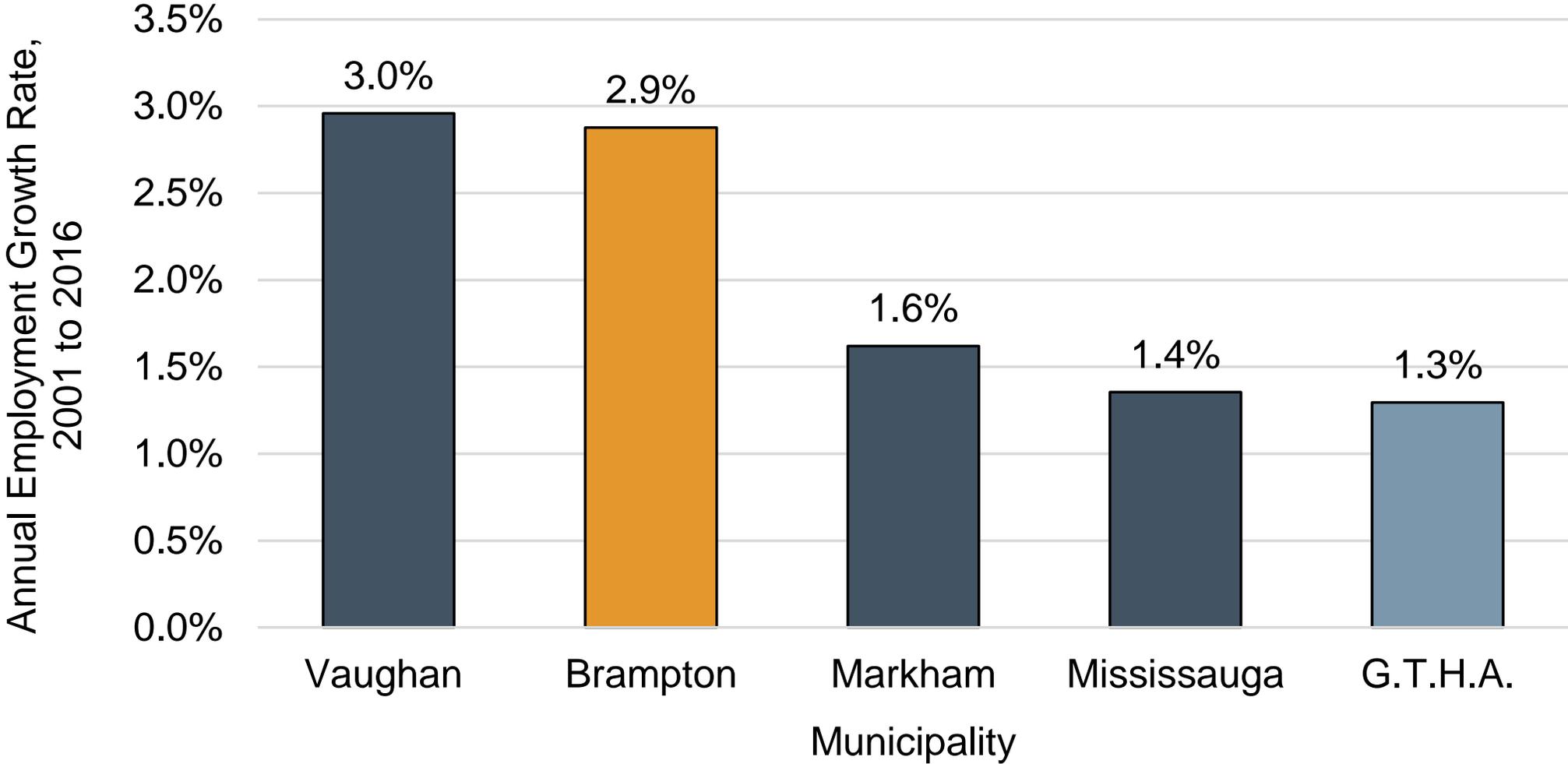


Share of Regional Population Growth, 2001 to 2019



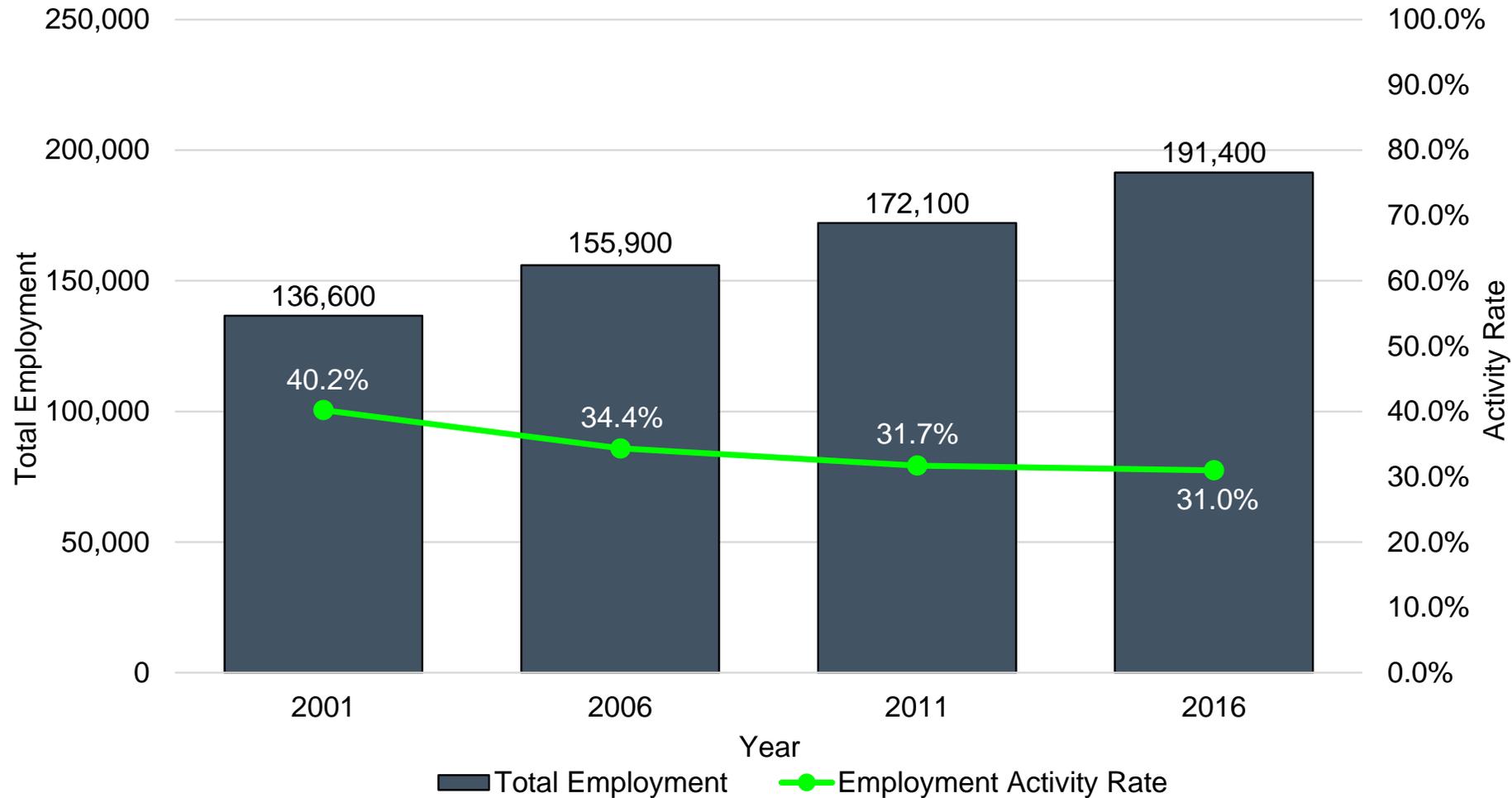
Source: 2001 to 2016 from Statistics Canada Census. 2019 from Statistics Canada Post-Censal Estimates. Figure by Watson & Associates Economists Ltd., 2020.

Historical Employment Growth Rates, 2001 to 2016 by Comparator Municipalities



Source: 2001 to 2016 from Statistics Canada Census. Figure by Watson & Associates Economists Ltd., 2020.
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City of Brampton Employment Growth, 2001 to 2016

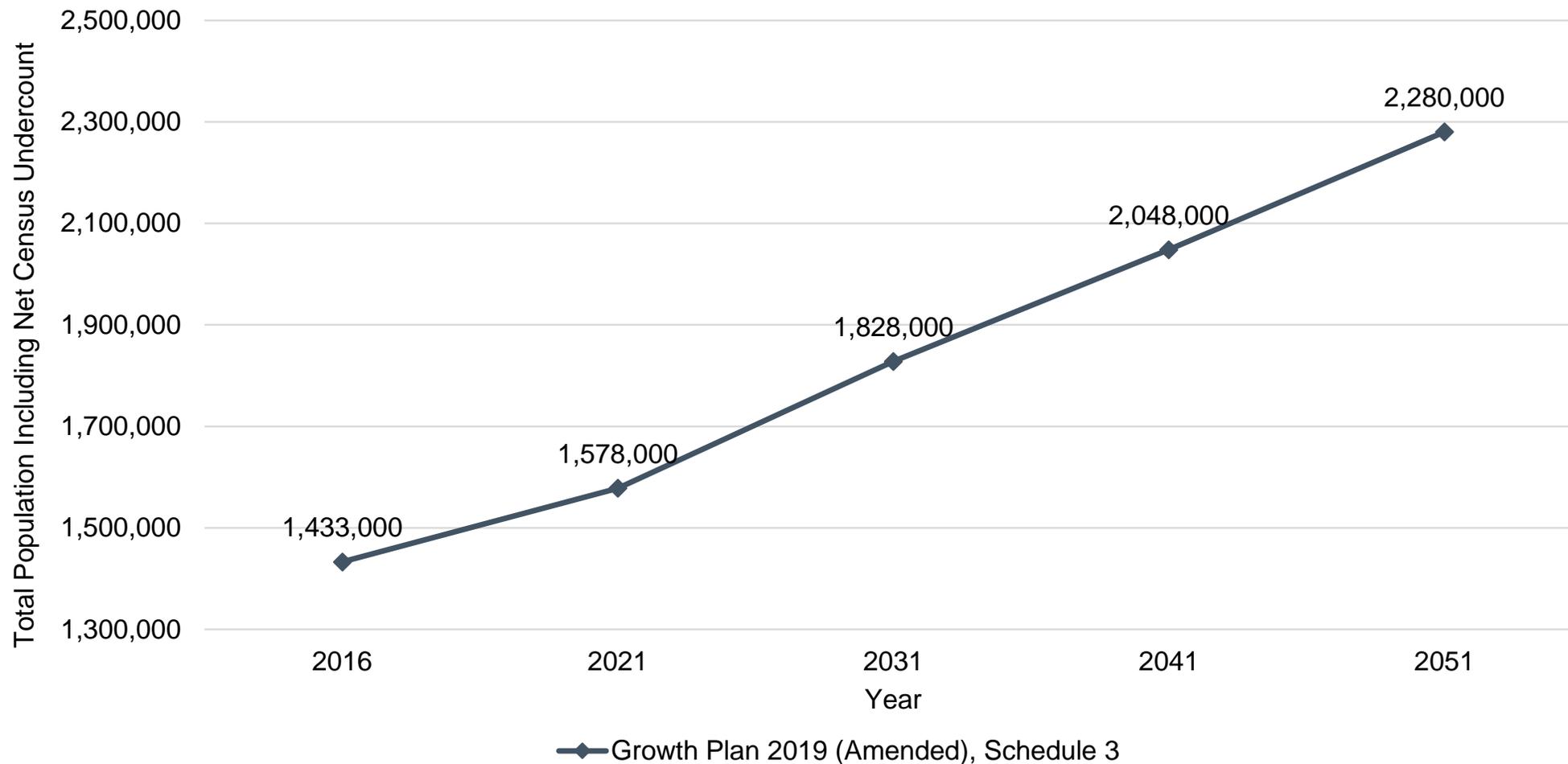


Source: 2001 to 2016 total employment from Statistics Canada Census, by Watson & Associates Economists Ltd., 2020.

Note: Activity rate calculated using the Statistics Canada Census undercount.

City-Wide Long-Term Population and Housing Forecast Scenarios to 2051

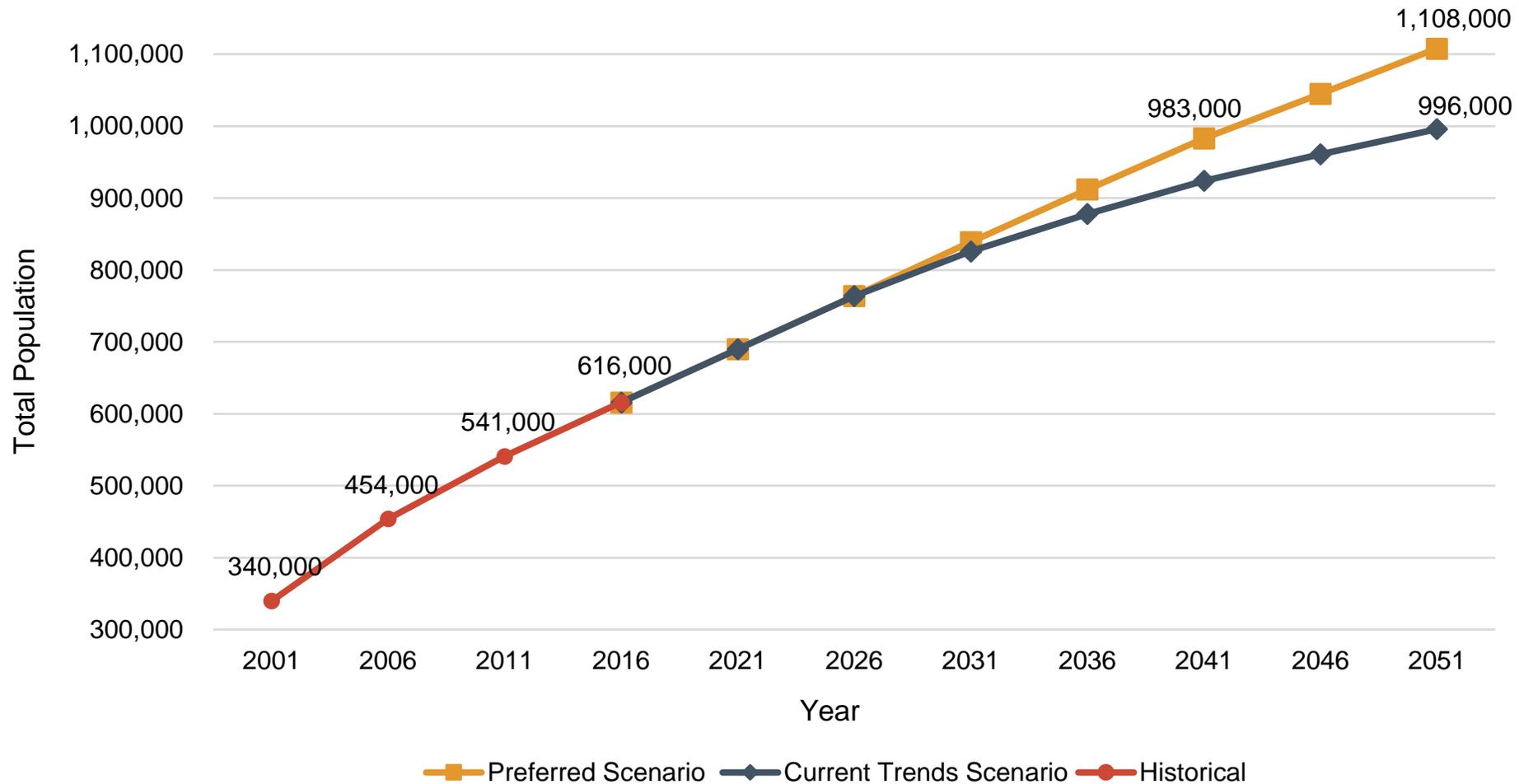
Growth Plan 2019 (Amended), Schedule 3 Forecast for Peel Region, 2016 to 2051



2016 to
2051
Population
Growth:
847,000

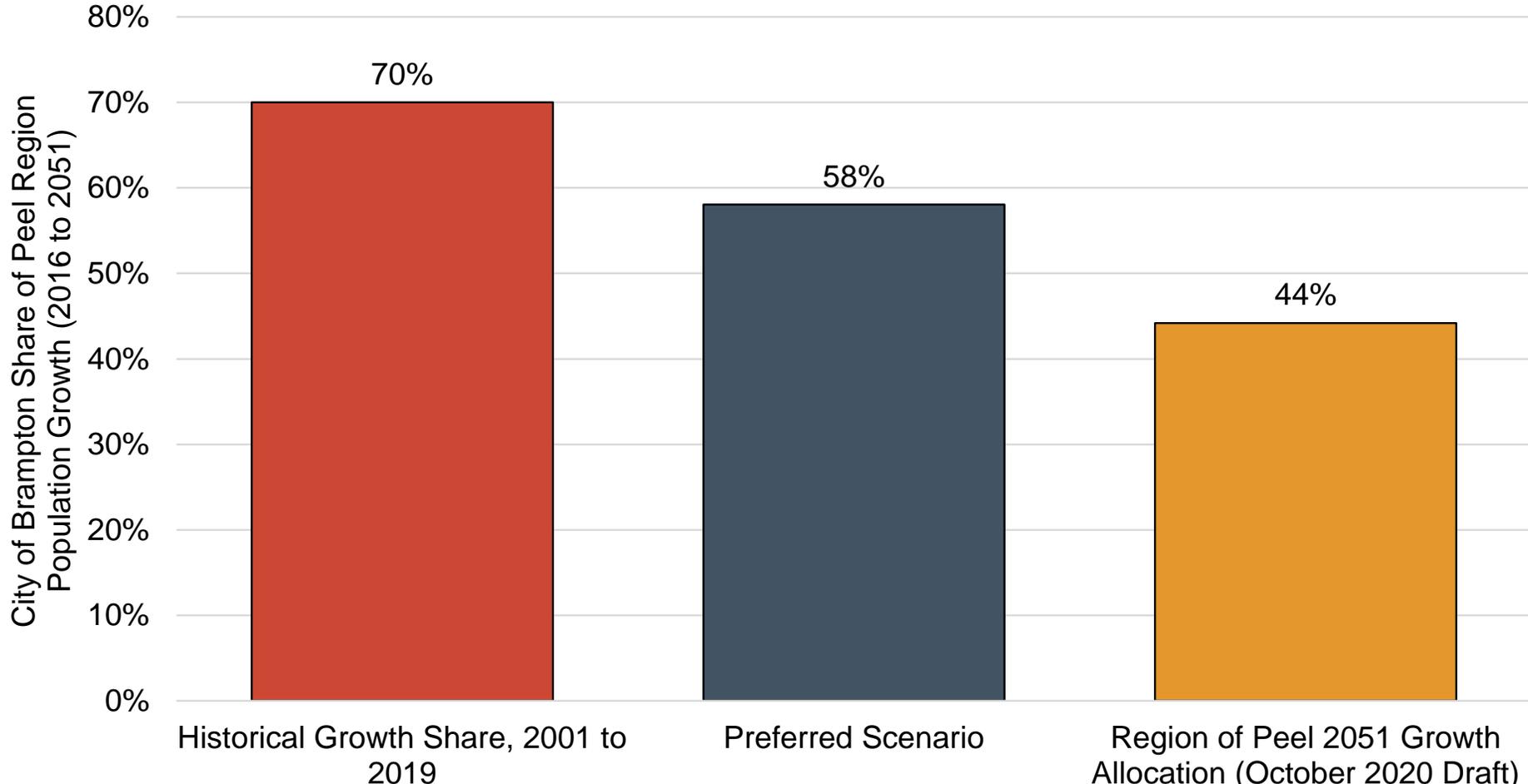
Source: Data from Growth Plan, 2019 and Greater Golden Horeshoe: Growth Forecasts to 2051 by Hemson Consulting Ltd. Figure prepared by Watson & Associates Economists Ltd., 2020. Page 389 of 1120

City of Brampton Population Forecast Scenarios, 2016 to 2051



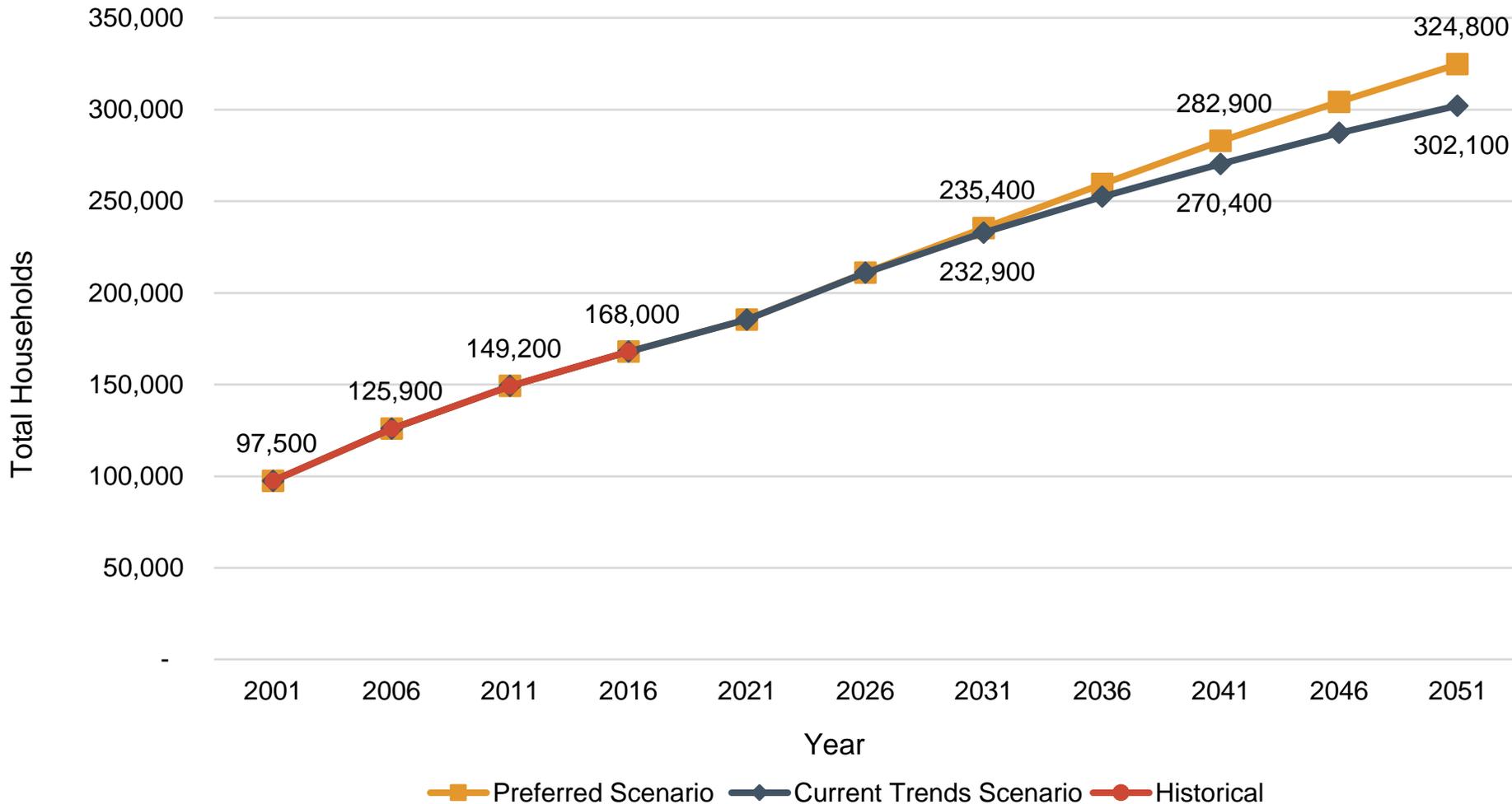
Source: Forecasts by Watson & Associates Economists Ltd., 2020.
 Note: Population includes the Net Census Undercount estimated at 0.5%.

Share of Growth Between City of Brampton Forecast Scenarios and Region of Peel Forecast, 2016 to 2051



Source: Region of Peel population growth derived from Growth Plan (2020). Figure by Watson & Associates Economists Ltd., 2020.

City of Brampton Total Household Forecast, 2016 to 2051



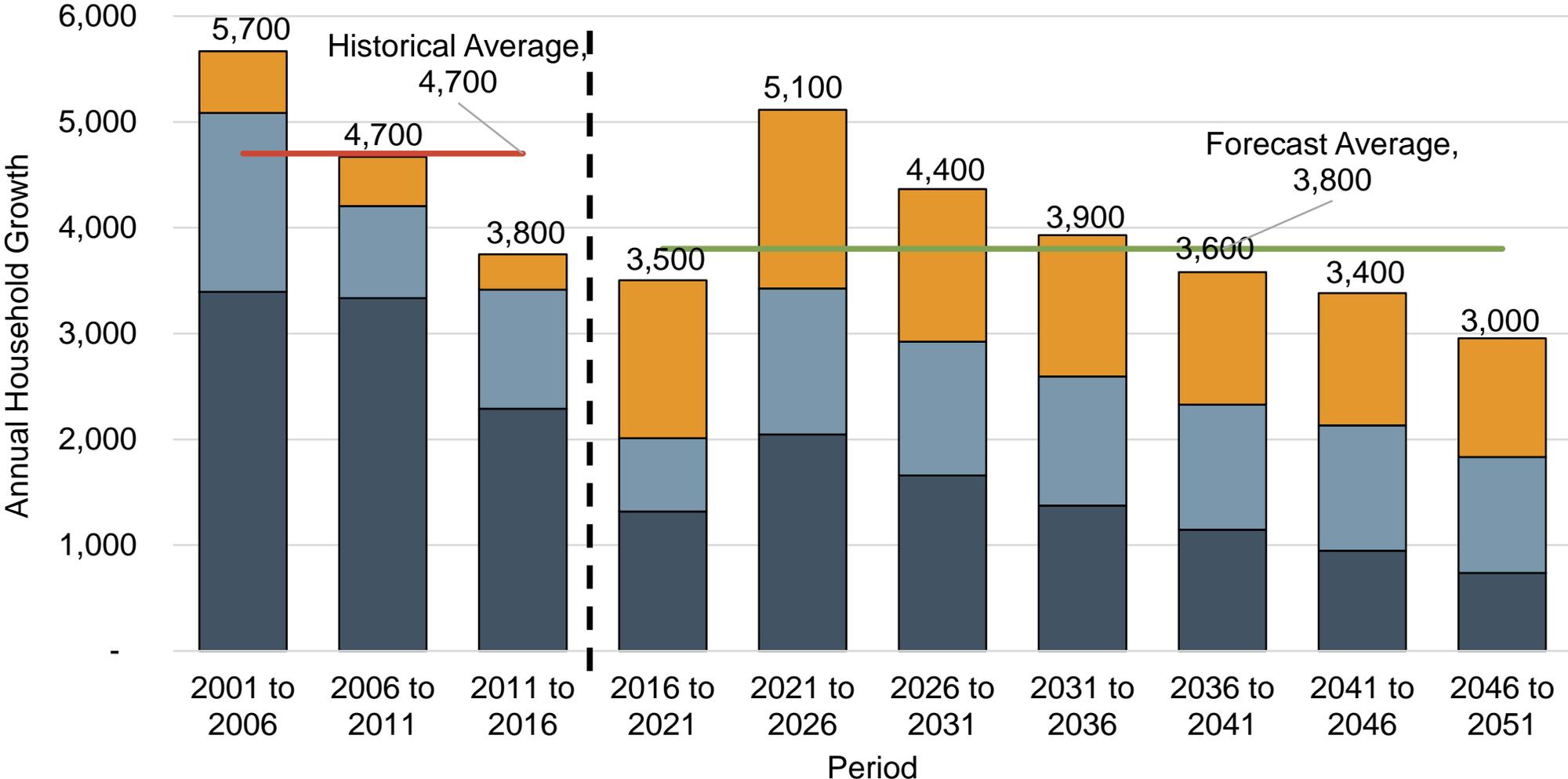
Household Growth, 2016 to 2051:

Preferred:
156,900

Current Trends:
134,100

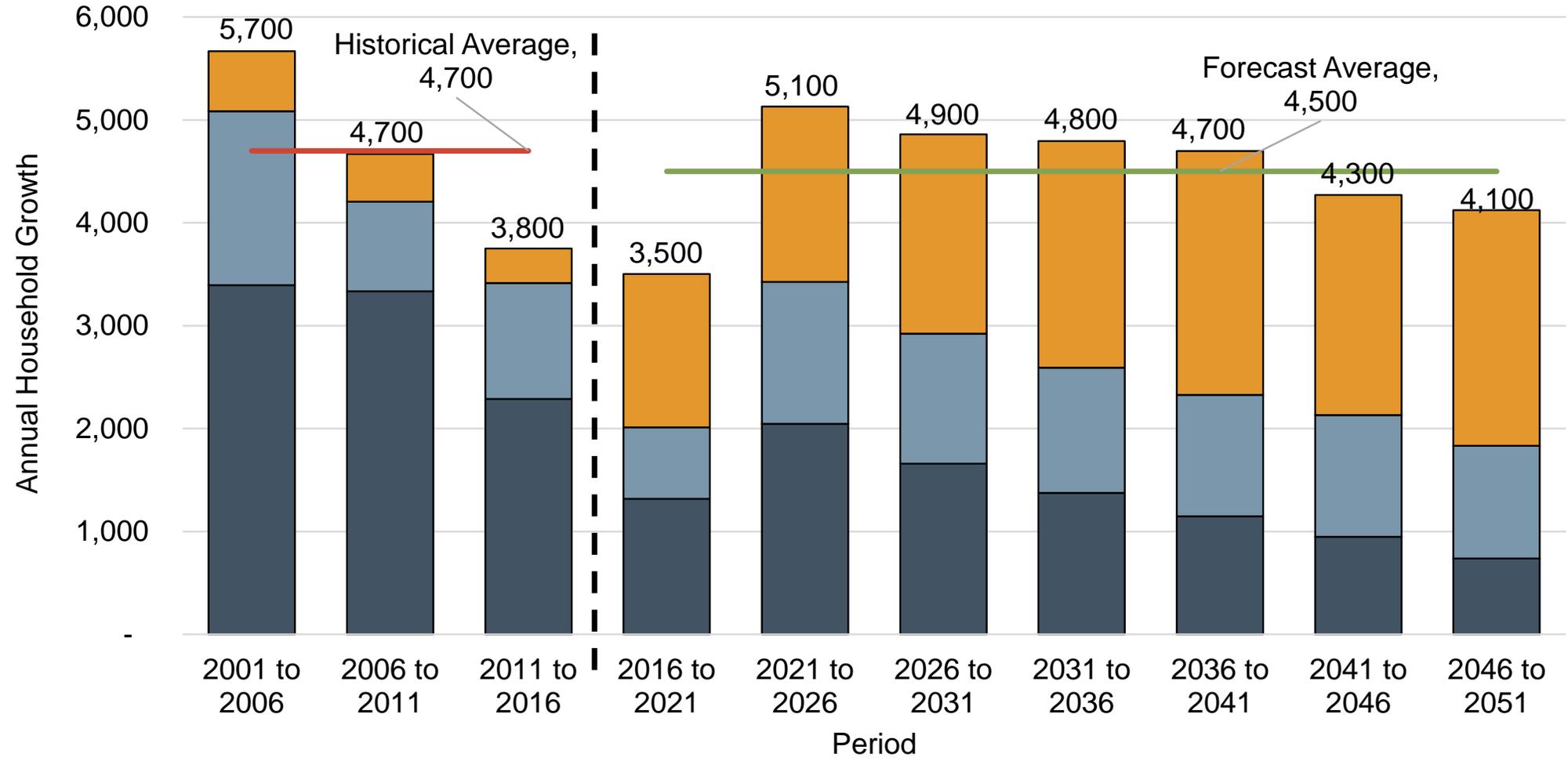
Source: Forecasts by Watson & Associates Economists Ltd., 2020.
Note: Households depict occupied housing units.

City of Brampton Current Trends Annual Household Forecast, 2016 to 2051



Source: 2001 to 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2020.
 Note: Households depict occupied housing units. Page 393 of 1120

City of Brampton Preferred Annual Household Forecast, 2016 to 2051

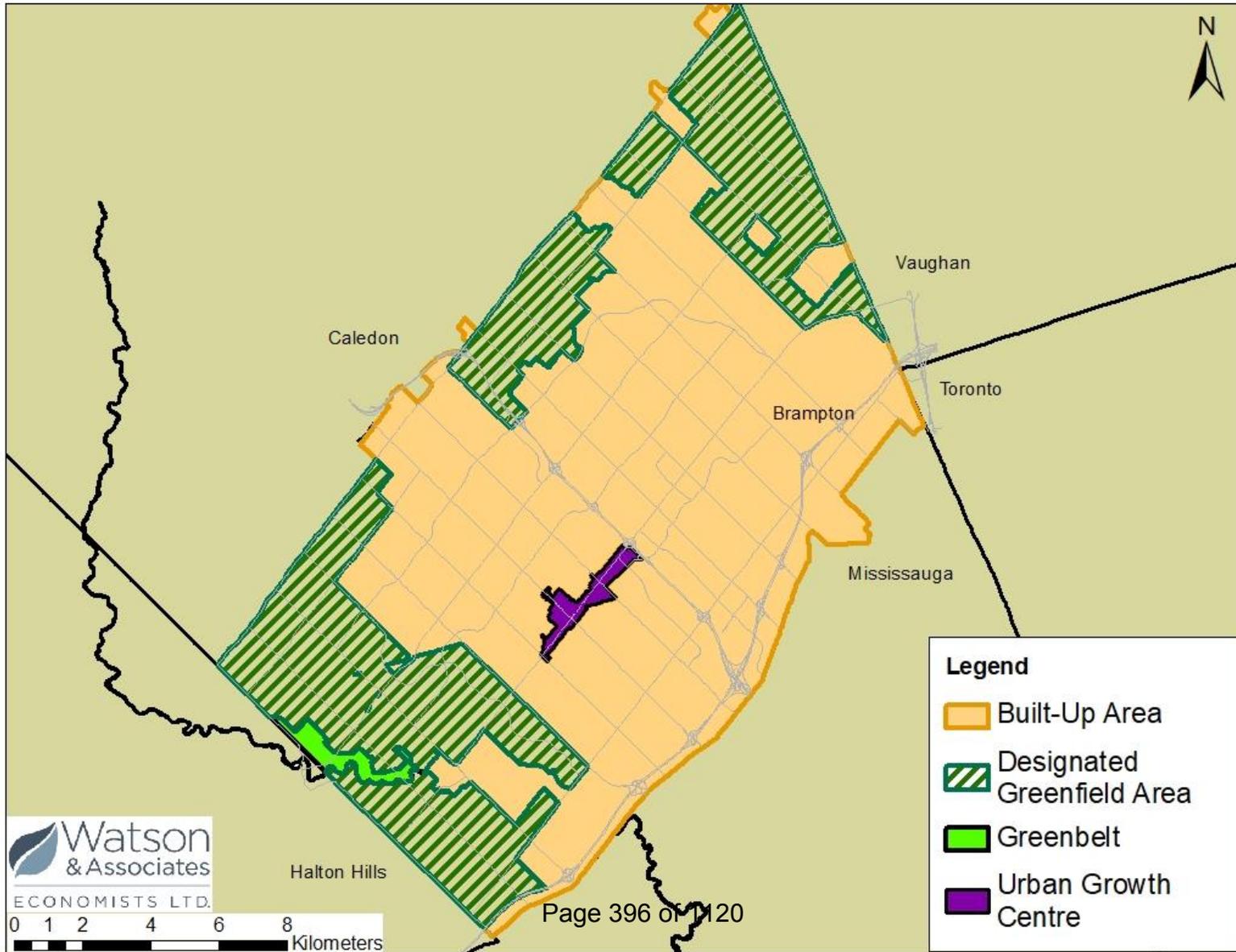


Source: 2001 to 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2020.

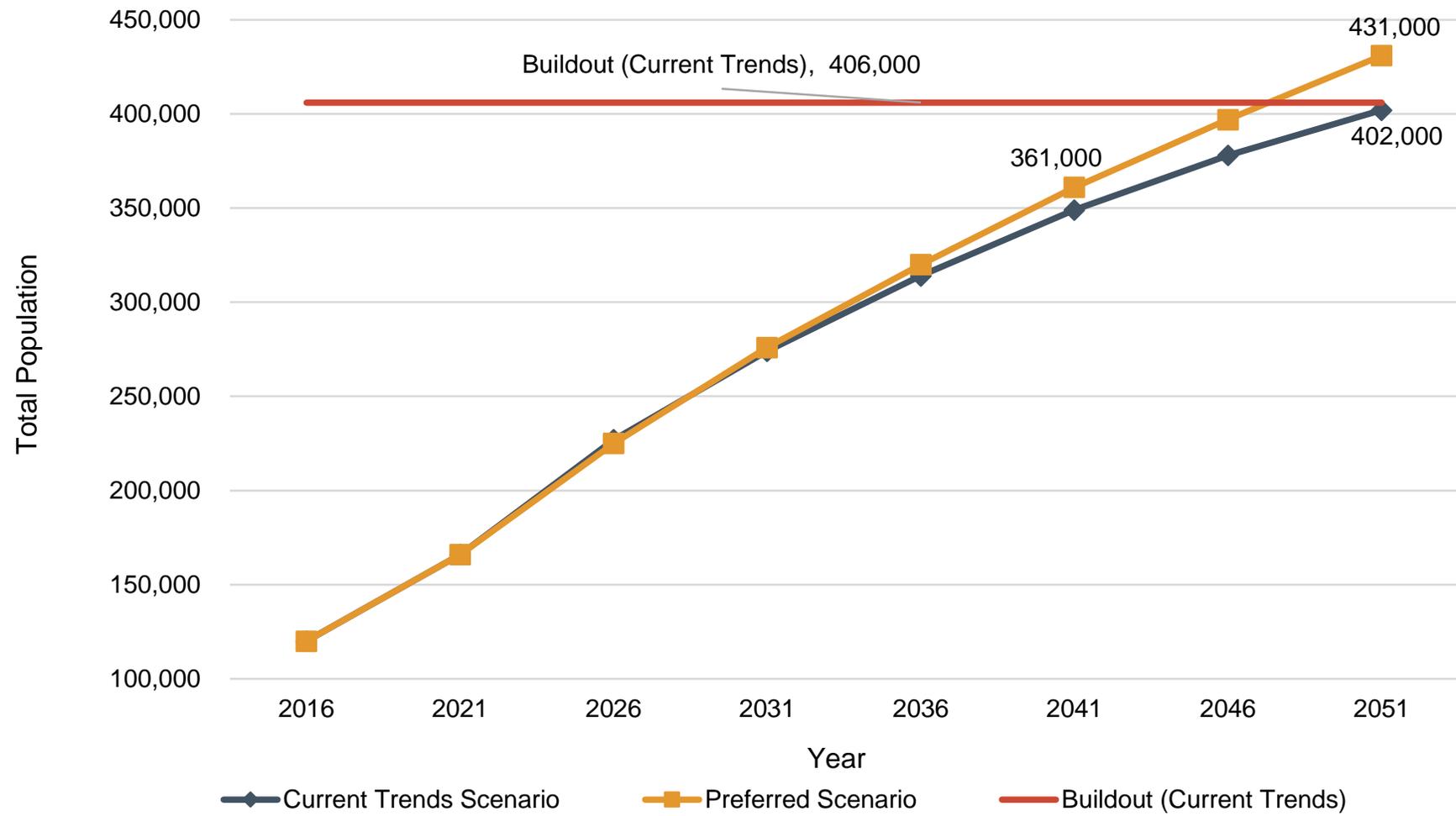
Note: Households depict occupied housing units.

Long-Term Population and Housing Forecast Scenarios by Planning Policy Area to 2051 (Built-up Area and Designated Greenfield Area)

City of Brampton Planning Policy Area Map

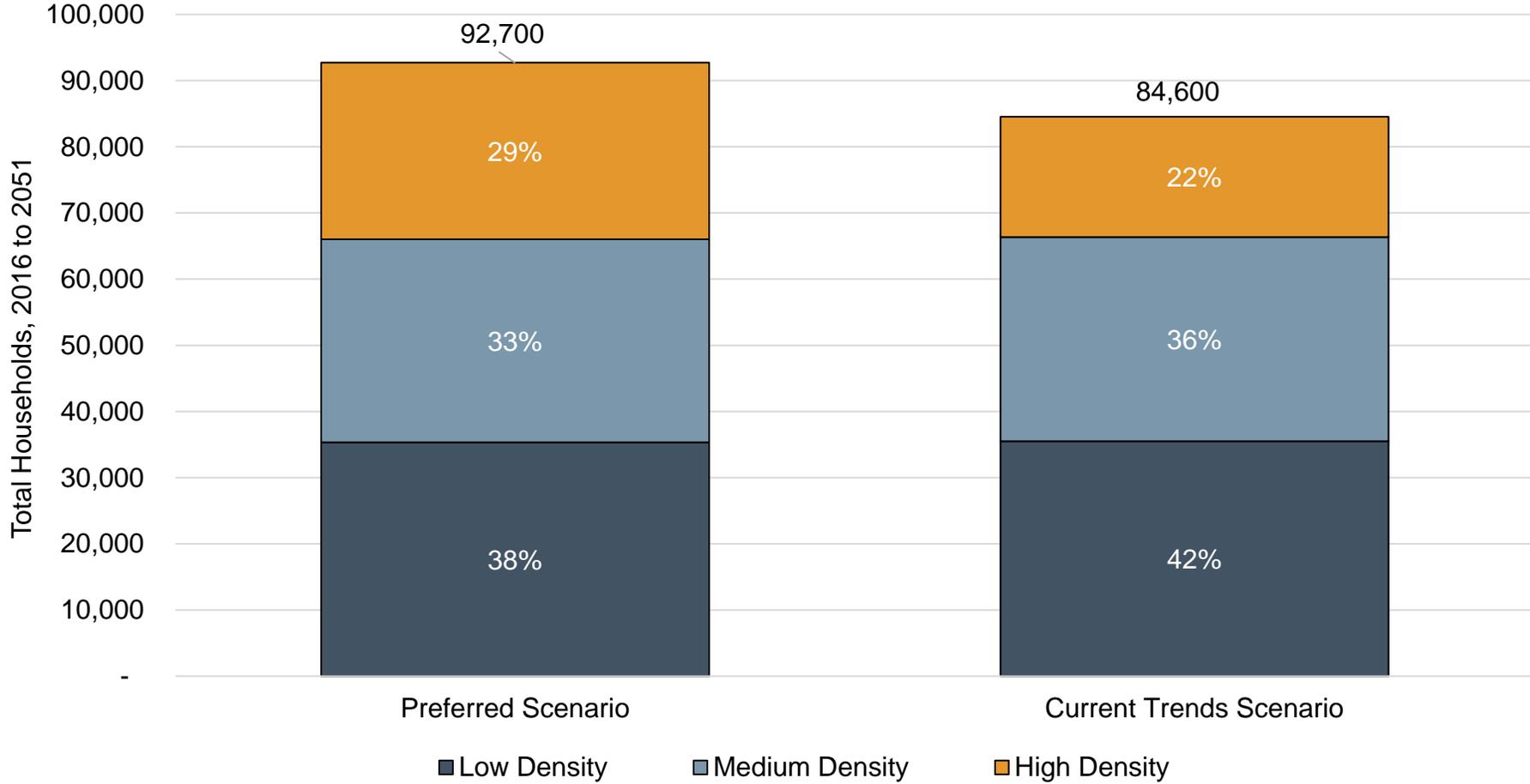


City of Brampton D.G.A. Population Forecast Scenarios, 2016 to 2051



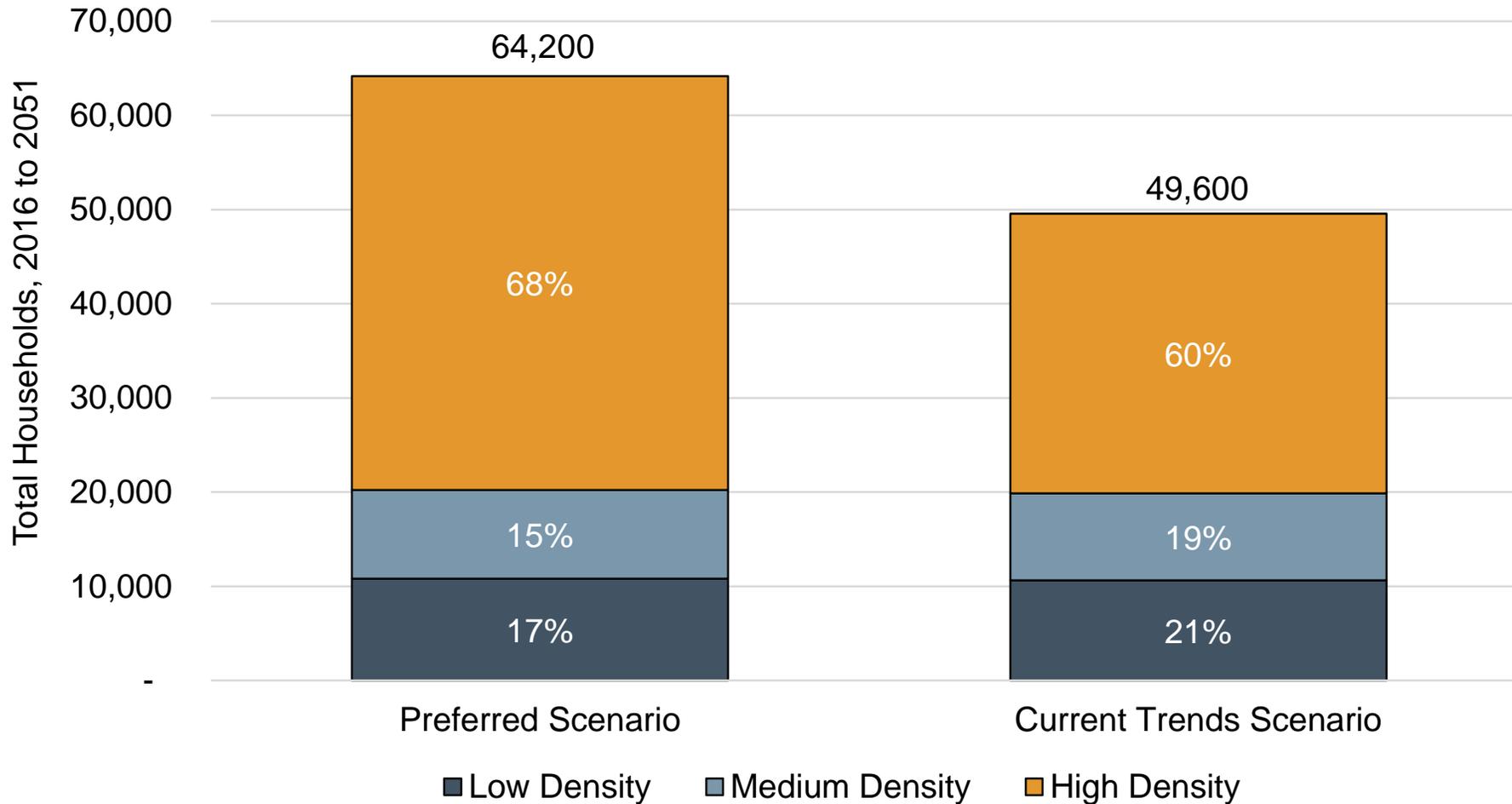
Source: Current Trends and Preferred Scenario by Watson & Associates Economists Ltd., 2020.
 Note: Population includes the Net Census Undercount estimated at 3.5%.

City of Brampton D.G.A. Household Growth by Type, 2016 to 2051

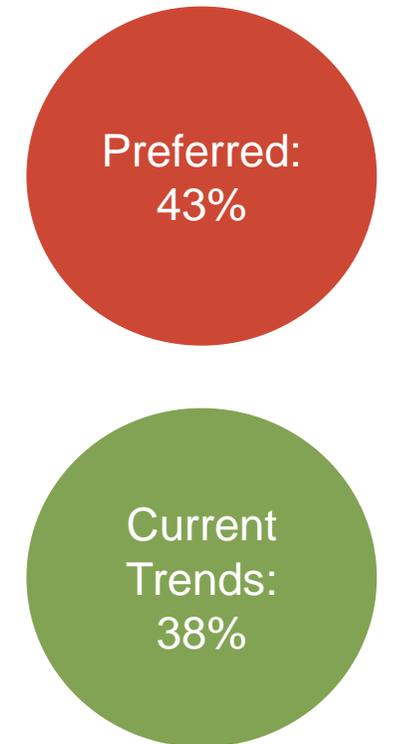


Source: Current Trends and Preferred Scenario by Watson & Associates Economists Ltd., 2020.
 Note: Household depicts occupied housing units.

City of Brampton B.U.A. Household Growth by Type, 2016 to 2051



Intensification, 2022 to 2051:



Source: Current Trends and Preferred Scenario by Watson & Associates Economists Ltd., 2020.
 Note: Household depict occupied housing units.

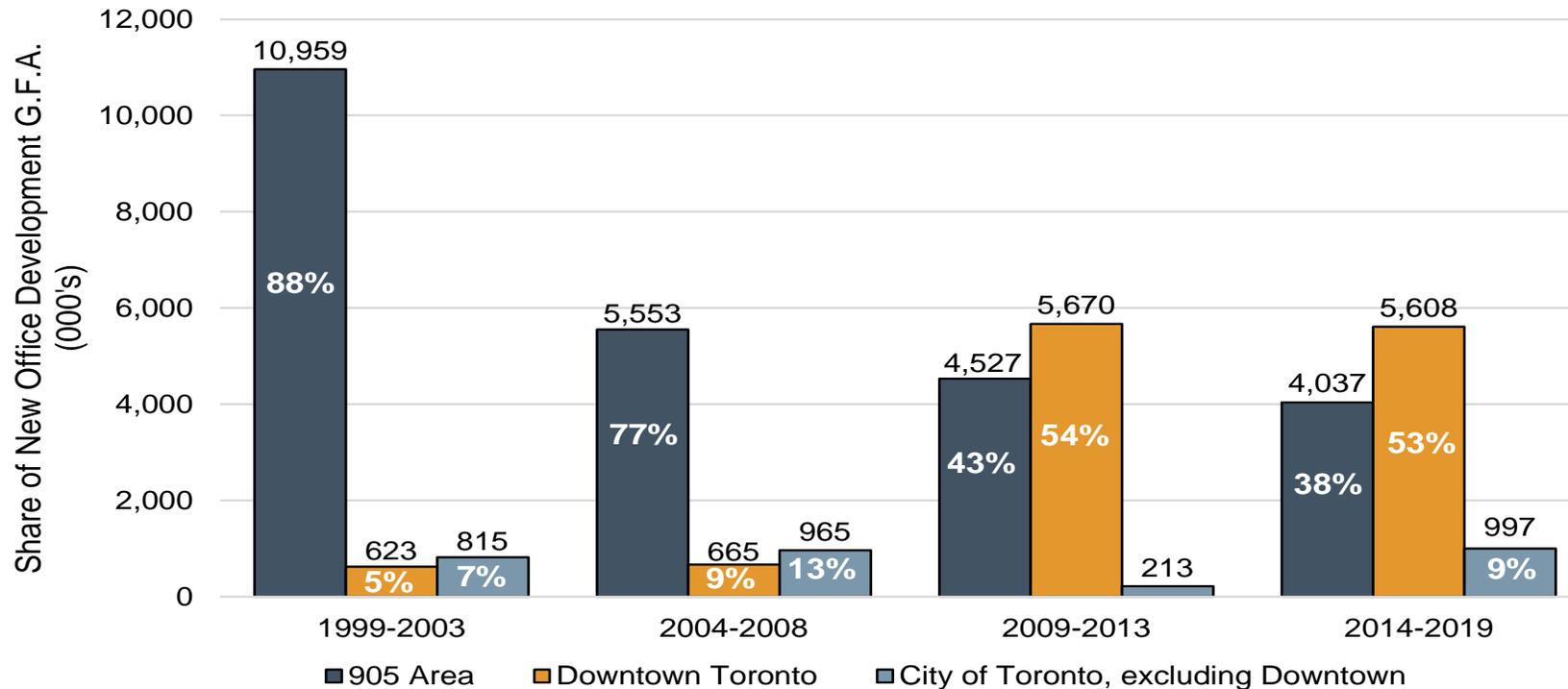
City-Wide Long-Term Employment Forecast Scenarios to 2051

G.T.A. Major Office Market

Share of New Office G.F.A. Sq.ft. Development in the G.T.A.



City of Toronto and Surrounding G.T.A. (905 Area)
Major Office Development, 1999 to 2019



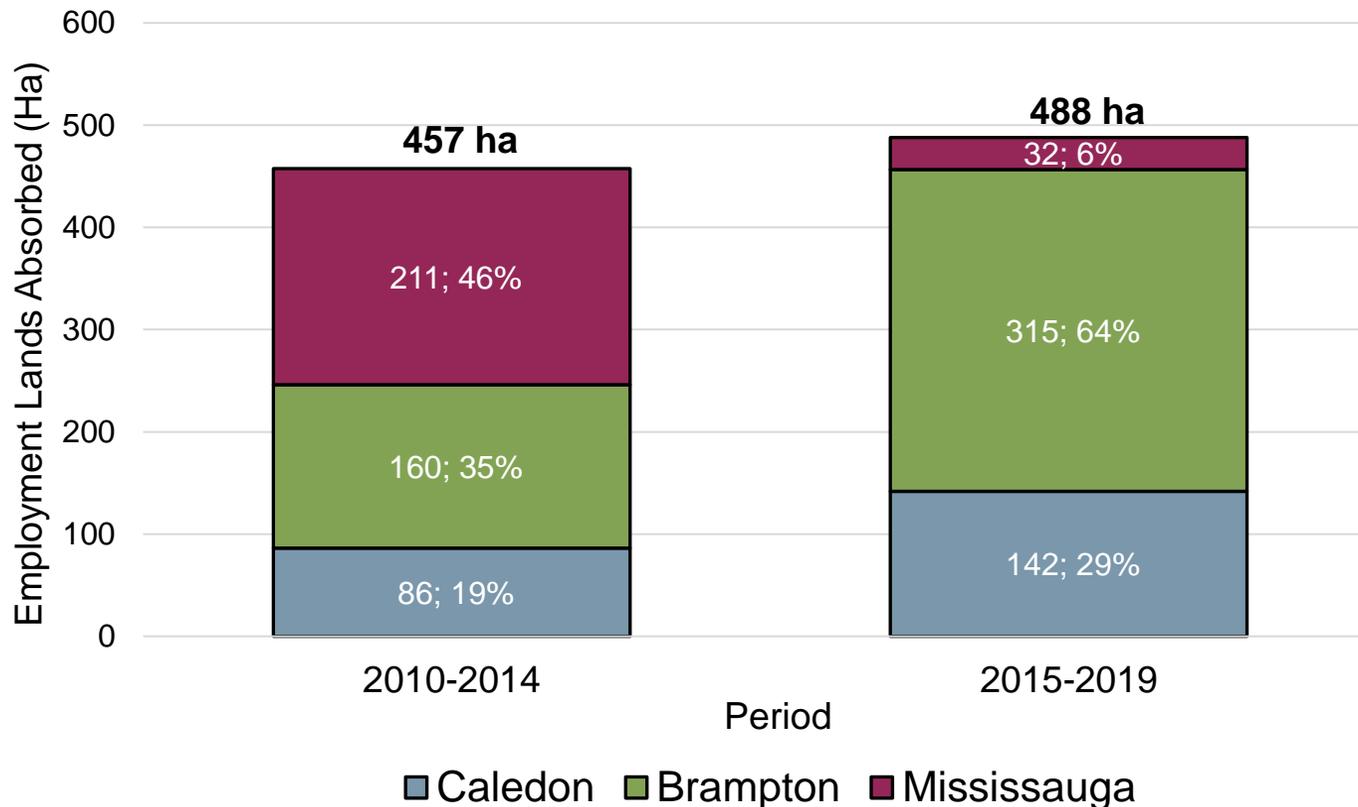
- Within the 905 Area over the 2014 to 2019 period, the City of Mississauga represented 40% of the office development, while Brampton represented less than 1%.

Source: 1999-2013 derived from Office Space Financial/Market Analysis and Marketing Plan Study. 2014-2019 derived from Colliers International Office Market Reports, by Watson & Associates Economists Ltd., 2020.

City of Brampton Employment Lands Employment Historical Employment Land Absorption, Peel Region



Peel Region
Employment Lands Absorbed,
2010 to 2014 and 2015 to 2019

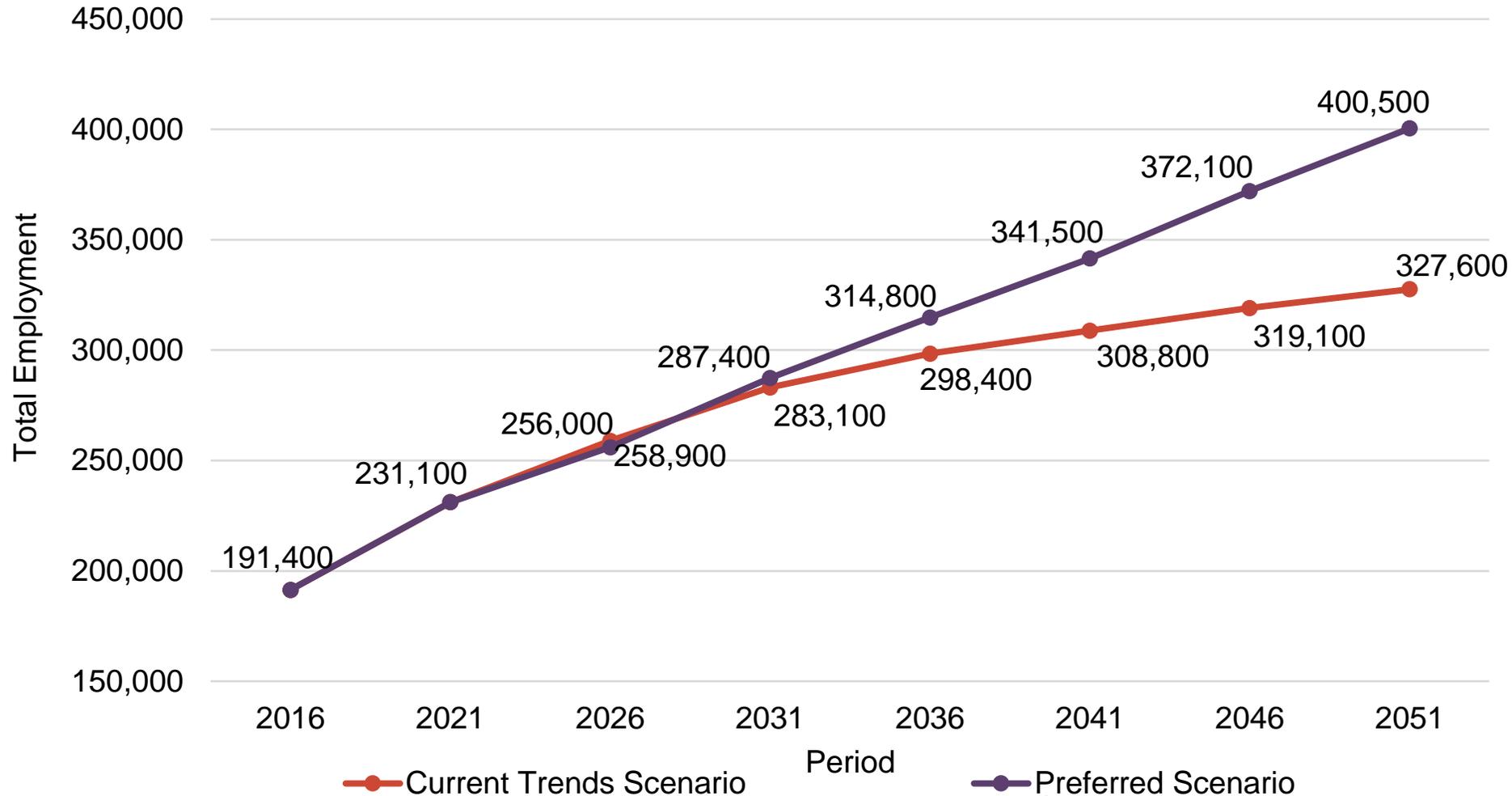


- Employment land absorption has historically been strong within the City of Brampton.
- Over the past 5-years, approximately 63 ha of lands has been absorbed annually with the City of Brampton, significantly more than the City of Mississauga.
- A key challenge for the City of Brampton is maximize its finite supply of employment by increasing employment density and intensification levels.
- Average employment density on lands absorbed within the last 5-years averaged 21 jobs/net ha.

Source: Watson & Associates Economists Ltd., 2020.

City of Brampton Employment Forecast

City of Brampton Employment Forecast, 2016 to 2051



Employment Growth,
2016 to 2051:

Preferred:
209,100
(2.1%
annually)

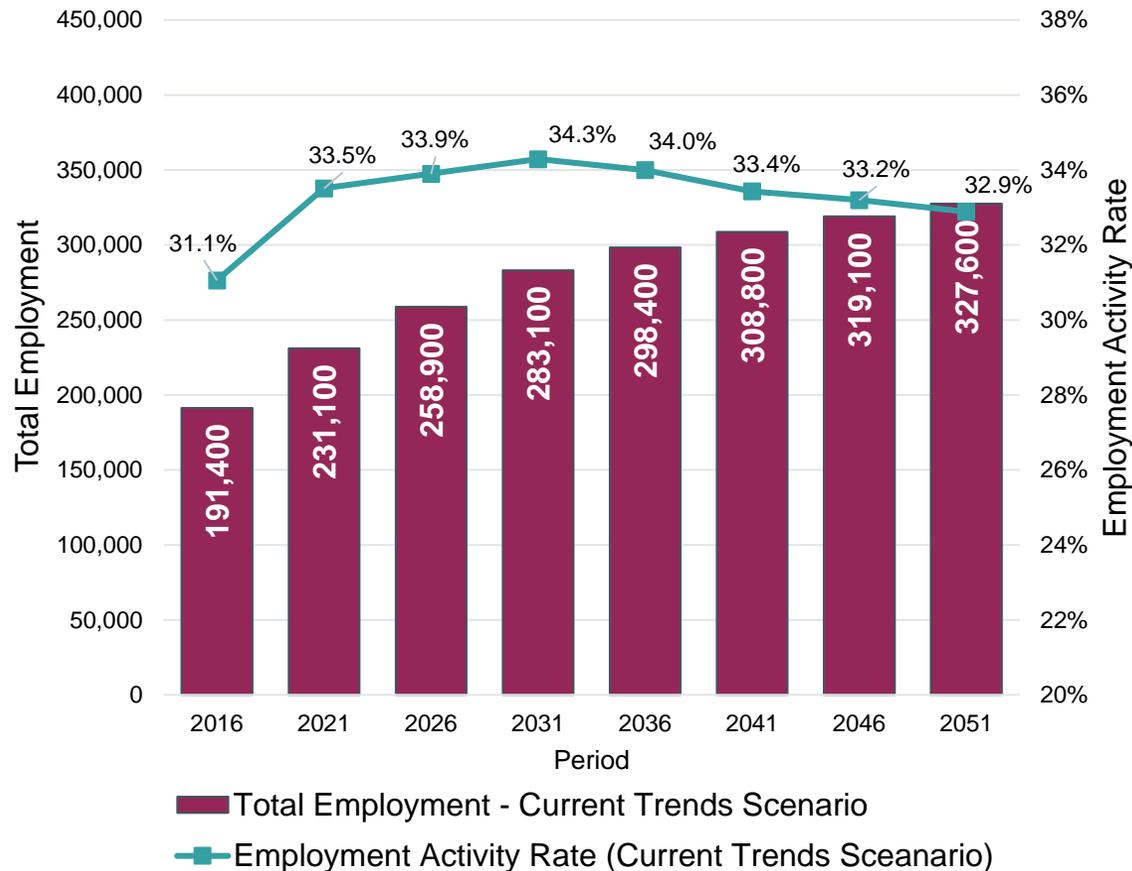
Current
Trends:
136,200
(1.5%
annually)

City of Brampton Employment Forecast

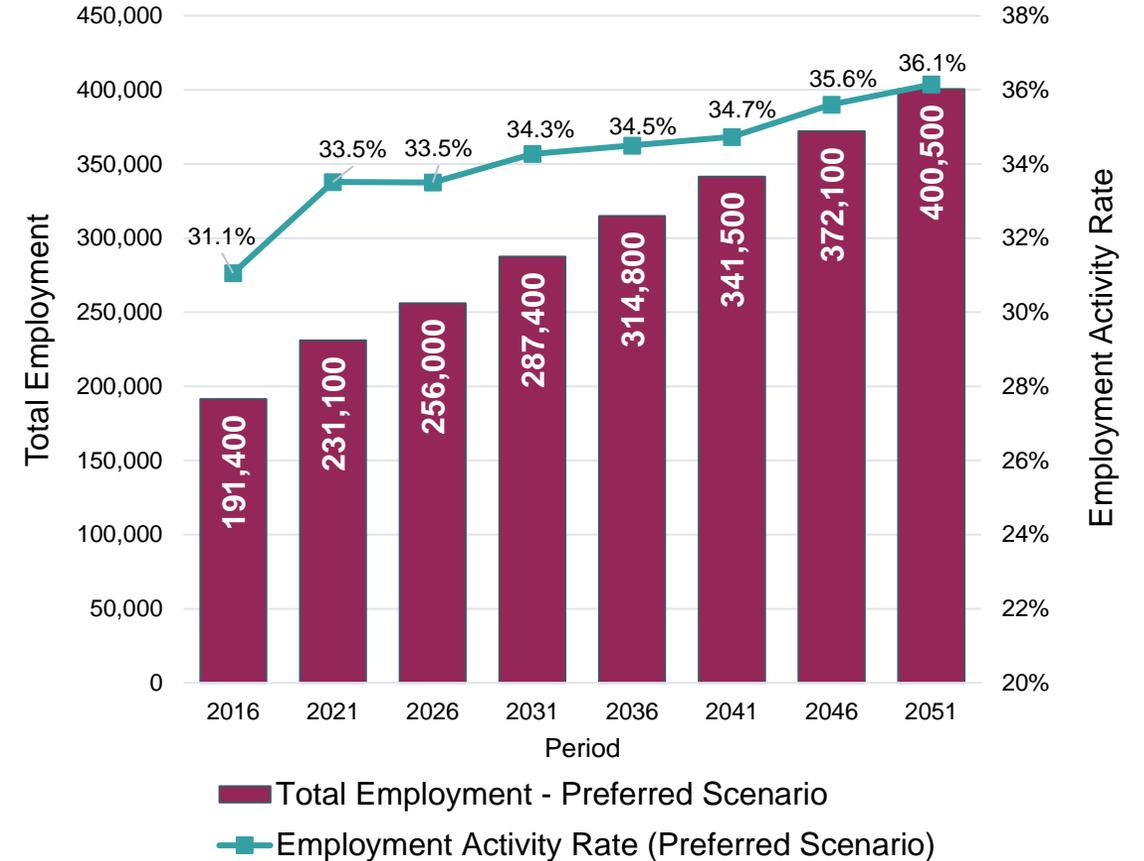
City of Brampton Employment Activity Rates, 2016 to 2051



Current Trends Scenario



Preferred Growth Scenario



Conclusions

Conclusions

Population and Housing Outlook



- With an average annual population growth rate of approximately 4.0% annually between 2001 and 2016, the City of Brampton has been one of the fastest growing municipalities in Canada.
- By 2051, the City of Brampton's population base is forecast to reach between 1 million (Current Trends) and 1.1 million (Preferred).
- This represents a population increase of 380,000 to 505,000 between 2016 and 2051, or an average annual population growth rate of approximately 1.4% to 1.7%.
- Relative to the Current Trends Scenario, the Preferred Scenario anticipates a higher level of net migration with a slightly younger age structure.

Conclusions

Housing Outlook – D.G.A.



- The draft results of this analysis indicate that the City can accommodate an additional 85,000 units and 402,000 people within the D.G.A. assuming a moderate increase in housing density informed by recent and anticipated housing market conditions.
- Under the Preferred Scenario, approximately 8,000 housing units have been allocated to the D.G.A., largely driven by higher D.G.A. densities achieved in Heritage Heights.

Conclusions

Housing Outlook – B.U.A.



- Under the Current Trends Scenario, a more modest housing intensification target of 38% has been assumed.
- Under the Preferred Scenario, a long-term housing intensification target of 43% has been identified from 2016 to 2051. Relative to the Current Trends Scenario, this translates into an additional 14,600 high-density households allocated to the B.U.A. over the planning horizon.

Conclusions

Employment Outlook



- While the City's employment base has grown steadily over the past 15 years at annual rate of approximately 2.8%, the rate of annual employment has been slower relative to population. As a result, the City's employment activity rate (ratio of jobs to population) has declined from approximately 37% in 2001 to 31% in 2016.
- By 2051, the City of Brampton's employment base is forecast to reach between 328,000 (Current Trends) and 400,500 (Preferred).
- This represents an employment increase of 136,000 to 209,000 between 2016 and 2051, or an average annual employment growth rate of approximately 1.5% to 2.1%.
- By 2051, the City's employment activity rate is forecast to increase to between 33% (Current Trends) and 36% (Preferred). Under the Current Trends Scenario the City's employment activity rate is anticipated to peak by 2031 at 34%.

Conclusions

Employment Outlook



- The Preferred Scenario assumes a greater amount of Major Office Employment (M.O.E.) compared to the Current Trends Scenario.
- In targeting the Preferred Scenario, the City will need to attract a wider-range of sectors in the M.O.E. category.
- Relative to the Current Trends Scenario, the Preferred Scenario assumes a higher yield of Employment Lands Employment (E.L.E.) through higher densities and increased intensification in Employment Areas.
- The Preferred and Current Trends Scenario both assume a similar ratio of Population Related Employment (P.R.E.) relative to population growth. As a result, more P.R.E. growth is forecast under the Preferred Scenario as a result of higher population growth assumed.

Next Steps

Next Steps



- Preparation of City of Brampton Draft Growth Analysis Study, February 2021.
- Preparation of City of Brampton Final Growth Analysis Study, February 2021.