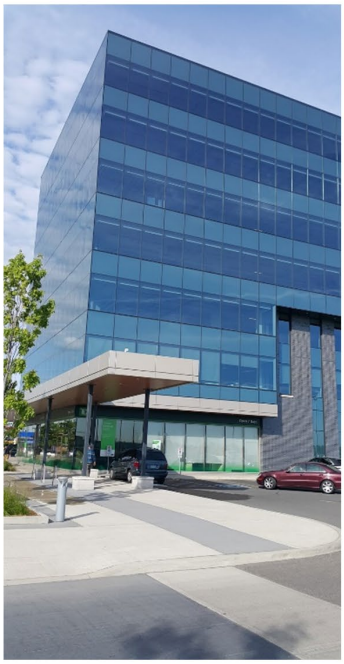
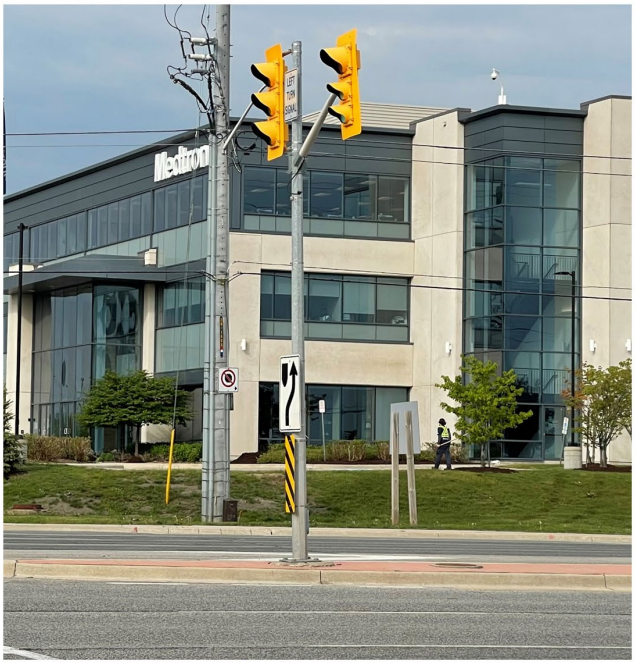




Office Market Review of Major Transit Station Areas

City of Brampton

Report

August 16, 2023

Watson & Associates Economists Ltd.
905-272-3600
info@watsonecon.ca

Table of Contents

Page

Executive Summary ..... **i**

1. Introduction **1-1**
- 1.1 Purpose 1-1
- 1.2 Study Components 1-2
- 1.3 Background 1-3
  - 1.3.1 Major Office Employment Definition 1-3
  - 1.3.2 Importance of Major Office Space 1-4
  - 1.3.3 The Need to Rethink Office Development Patterns in the City of Brampton 1-5

2. Review of Macro and Regional Trends **2-1**
- 2.1 Overview 2-1
- 2.2 Quality of Office Space 2-2
- 2.3 Workplace Arrangements 2-4
  - 2.3.1 Commuting to Work and Work from Home 2-4
  - 2.3.2 Average Weekly Hours in the Office 2-8
- 2.4 Office Real Estate Base and Trends in the G.T.A. 2-9
  - 2.4.1 Office Base in the G.T.A. 2-9
  - 2.4.2 New Office Construction in the G.T.A. 2-11
  - 2.4.3 Office Vacancy Rates in the G.T.A. 2-13
- 2.5 Office Real Estate Base and Trends in Peel Region 2-14
  - 2.5.1 Office Space within Brampton 2-14
  - 2.5.2 Multi-Tenant and Single-Tenant Space in Brampton 2-15
  - 2.5.3 New Office Construction within Peel Region 2-16
  - 2.5.4 Trends in Non-Traditional Office Space 2-17

3. Outlook for the Office Sector in the Greater Toronto Hamilton Area **3-1**
- 3.1 Anticipated Office Growth in the Long Term 3-1
- 3.2 Drivers of Office Growth 3-2

Table of Contents (Cont'd)

Page

3.2.1 Overview 3-2
3.2.2 Need for Office Space 3-3
3.2.3 Competitive Office Environment in the G.T.H.A. 3-4
3.2.4 Access to Labour 3-5
3.2.5 Transit Improvements 3-7
3.2.6 Knowledge-Based Economy 3-9

4. Opportunity for Office Development in the Region of Peel and the City of Brampton 4-1
4.1 Potential Office Development Activity in Peel Region 4-1
4.2 Major Office Employment and Office Gross Floor Area 4-3

5. Major Office Opportunities by Major Transit Station Area in the City of Brampton 5-1
5.1 Policy Context 5-1
5.2 Existing Conditions of the M.T.S.A.s 5-2
5.3 M.T.S.A. Proposed Land Uses and Buildout G.F.A. Potential 5-3
5.3.1 Conceptual Land Use Plans 5-3
5.3.2 Buildout Office G.F.A. Analysis 5-6
5.4 SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis by M.T.S.A. 5-7
5.4.1 Mississauga at Steeles M.T.S.A. 5-8
5.4.2 Ray Lawson M.T.S.A. 5-11
5.4.3 Bramalea GO M.T.S.A. 5-13
5.4.4 The Gore M.T.S.A. 5-16
5.5 Office Growth Allocation by M.T.S.A. 5-18
5.5.1 Office Employment Growth and Office G.F.A. by M.T.S.A. 5-18
5.5.2 Recommended Ratio of Office Space by M.T.S.A. 5-19
5.5.3 Forecast Office G.F.A. Demand from 2021 to 2051 Compared to Total Development Yield 5-21

6. Strategic Recommendations 6-1
6.1 Need for Monitoring 6-1
6.2 Key Targets 6-1
6.3 Timing and Prioritization of Office Development by M.T.S.A. 6-4
6.4 Consider Other Forms of Employment Uses 6-6
6.5 Protect M.T.S.A.s Over the Long-Term for Office Development 6-6
6.6 Support the Development of M.T.S.A.s as Strategic Anchors to Employment Areas 6-7
6.7 Support the Development of Amenities in the M.T.S.A. 6-7

7. Next Steps 7-1

Table of Contents (Cont'd)

Page

Appendix A City-Wide Summary Tables A-1

Appendix B Major Transit Station Area Summary Tables B-1

List of Acronyms and Abbreviations

B.R.T.	Bus Rapid Transit
C.I.P.	Community Improvement Plan
COVID-19	Coronavirus disease
F.S.W.	Floor Space Per Worker
G.F.A.	Gross Floor Area
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
L.R.T.	Light Rapid Transit
M.C.R.	Municipal Comprehensive Review
M.O.E.	Major Office Employment
M.T.S.A.	Major Transit Station Area
O.P.	Official Plan
S.G.U.	Small Geographic Unit
SWOT	Strengths, Weaknesses, Opportunities and Threats

Executive Summary

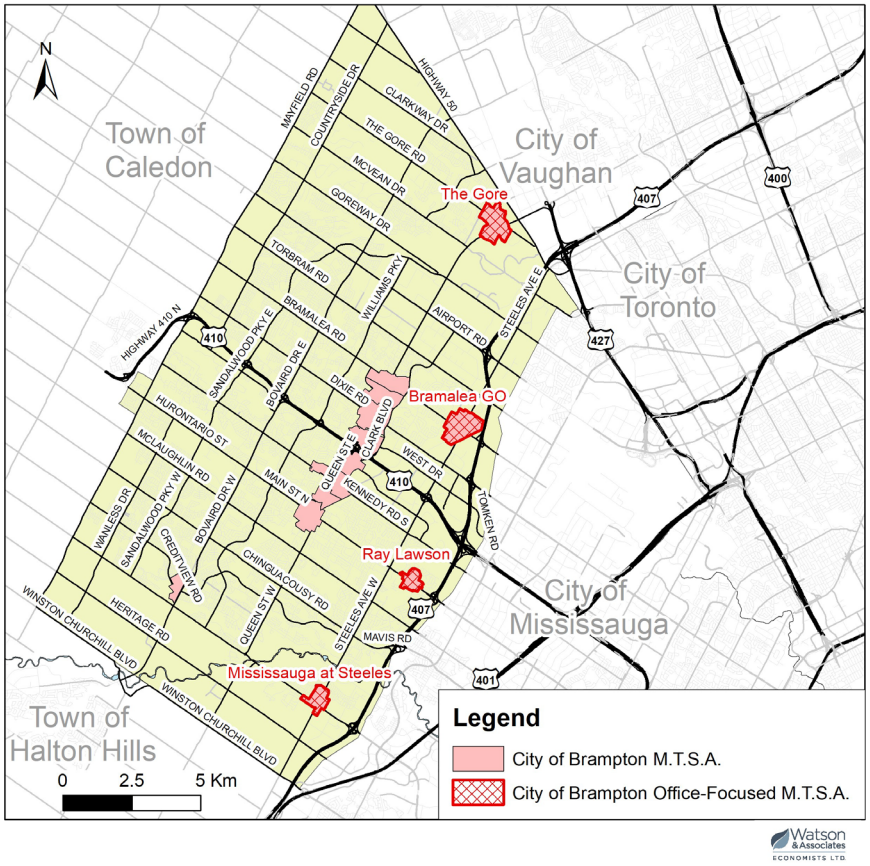
Executive Summary

Introduction

The City of Brampton retained Watson & Associates Economists Ltd. (Watson) to review the City's office market and assess the potential of four strategic Major Transit Station Areas (M.T.S.A.s) in accommodating the City's office demand to 2051. As identified in Figure E-1, the following four M.T.S.A.s have been reviewed in terms of their ability to accommodate office uses over the long-term planning horizon:

- Ray Lawson;
- Steeles at Mississauga;
- The Gore; and
- Bramalea GO.

Figure E-1
City of Brampton
Office-Focused M.T.S.A.s



The four strategic M.T.S.A.s have been identified as focus areas for office development (hereinafter referred to as "office-focused M.T.S.A.s) since they are adjacent to Employment Areas and provide the potential to support the integration of Employment Areas with non-employment uses (i.e., residential uses). It is the City's aspiration that these four M.T.S.A.s will facilitate the development of "complete communities" and provide opportunities to support the City's growing knowledge-based employment sectors.[1] Workers in knowledge-intensive industries increasingly require accessible and dynamic work environments that promote interaction and innovation.

[1] According to the Government of Canada, Canada's Innovation and Skills Plan, 2021: "The knowledge-based sectors refers to industries and economic activities that heavily

A key component of this study is to provide the City with direction in terms of the appropriate number of jobs and ratio of office uses to consider in each of the four M.T.S.A.s. The study recognizes that the City is planning for these four M.T.S.A.s to accommodate a higher ratio of jobs to population relative to the City's remaining M.T.S.A.s. Moreover, the report recognizes the City's on-going efforts in attracting private investment to the City, as well as the City's plans to accommodate an employment base of 140,000 jobs by 2051.[1]

Ultimately, this study will inform the City's Secondary Plan land use plans and policies to ensure the long-range strategy for these four M.T.S.A.s is both marketable and consistent with the direction of economic development and planning.

Major Office Employment (M.O.E.) Definition

Within the City of Brampton Draft Official Plan (O.P.), *major office* is defined as "office type employment that is contained within free standing buildings more than 20,000 net sq.ft. (1,858 sq.m), based on the threshold where most data collection of office building information occurs."[2] While major office development is a key focus of this report, it is important to recognize that office space and office workers can be accommodated in a mix of development built-forms and land uses.

The Need to Rethink Office Development Patterns in Brampton

Within the G.T.H.A., Brampton has historically been considered a peripheral office market, as the City of Brampton currently represents 2% of the G.T.H.A.'s office space[3] in terms of office G.F.A. As a further comparison, the City of Brampton has represented 6% of new office G.F.A. development within the Region of Peel since 2015.[4] Despite the small share of the G.T.H.A. market, the City has had some success in the past decade attracting large office users in single-tenant or owner-occupied buildings. These

rely on intellectual capital, specialized knowledge, and innovation to drive their growth and productivity."

[1] City of Brampton Draft Official Plan, December 2022, p. 2-5.

[2] Ibid., p. 5-73.

[3] Based on an inventory of office space in the G.T.H.A. by Colliers International, Q1 2023. Includes only major office buildings (i.e., greater than 20,000 sq.ft. or 1,858 sq.m).

[4] Based on non-residential building permit data provided by the Region of Peel and utilized for the Region of Peel Development Charges Background Study.

office users are attracted to the “campus style” offerings of the City, including on-site surface parking and easy access to 400-series highways. While this type of office development is anticipated to continue, it is important to recognize that the City is evolving, with plans for a more connected urban centre. The City of Brampton Draft O.P. provides the framework to accommodate a significant increase in population and employment growth by supporting opportunities to create more compact and complete communities. Moreover, the policy framework provides an urban structure that delivers on the type of setting sought by a wide range of office users and their employees as discussed further in the report.

In addition to a policy framework that supports a competitive urban environment for economic growth, the City has made investments in the innovation and entrepreneurship ecosystem with a desire to build on the momentum of these investments and spread their influence across the City at strategic locations, including the downtown core and the four strategic office-focused M.T.S.A.s.

It is important to note that the City of Brampton recently approved the City-wide Community Improvement Plan (C.I.P.), specifically designed to attract office uses, including complementary uses such as research and lab space. The new C.I.P. consists of a tax increment equivalent grant as the first component in a toolkit where other programs can potentially be activated. The C.I.P. program provides Brampton with an incentive for office development that was never previously available in the City.

This report has reviewed the demand for office space as forward looking and considers the initiatives and commitments by the City that strengthen the City’s competitive position within the G.T.H.A.

Impact of Workplace Trends on Floorspace Requirements

The coronavirus disease (COVID-19) pandemic has accelerated changes in work and commerce as a result of technological disruptions that were already taking place prior to the pandemic. Businesses are increasingly required to rethink the way they conduct business with a greater emphasis on leveraging technology to improve connectivity with employees and customers. These disruptive forces continue to broadly impact the nature of employment by place of work and sector, and have a direct influence on commercial, institutional and industrial real estate space needs.

Provided below are key trends influencing office space needs:

- Rise in office vacancy rates across the G.T.H.A., including a negative net absorption of office space;
- Increase in staff working remotely with a growing preference by employees and employers for a hybrid model that offers opportunities for flexible workplace arrangements. Furthermore, the acceptance of remote work provides the opportunity for employers to reach beyond the commuter-shed for talent;
- Change in the office floorplan with a focus on "activity-based" workspaces (e.g., collaboration rooms, hot desking stations, larger kitchens, a variety of desk options, virtual conference rooms, rest areas, etc.);
- Focus on flexible office-hour arrangements with less emphasis on the "9 to 5" office environment; and
- "Flight to quality" office space where businesses are seeking higher quality offices with amenities on-site and nearby to attract talent and to bring employees into the office.

Looking forward, these trends are anticipated to generate increasingly higher average office floor space per worker (F.S.W.) levels and potentially reduce office space needs per capita over the long term. Such trends, however, are not anticipated to eliminate the need for new office construction over the long term. As discussed later in this report, Watson has adjusted the M.O.E. forecast for the City, reflecting a shift towards more work from home office jobs than previously anticipated. Furthermore, the office G.F.A. forecast assumes less office floor space required per worker.

Need for Office Space

While remote work has shown its viability since the onset of the pandemic, the demand for office development persists because physical workplaces continue to provide unique advantages and benefits for both companies and their employees. The post-pandemic office landscape may experience a shift towards hybrid work models, combining the best of remote work and in-office collaboration to meet the evolving needs of businesses and their workplace. Companies still see the value in office space for the factors discussed below.

- **Collaboration and Innovation:** While remote work has become more prevalent, many companies recognize the value of in-person collaboration for fostering

creativity, innovation, and team dynamics. Offices provide a physical space where employees can interact, share ideas and work together effectively.

- **Company Culture and Identity:** Offices play a vital role in cultivating a strong company culture and identity. Being a physical presence in a shared space can reinforce a sense of belonging, loyalty, and commitment to the organization's values and goals.
- **Training and Mentoring:** On-site offices offer a structured environment for training new employees and providing mentorship opportunities, which can be challenging to replicate remotely.
- **Client Meetings and Relationships:** Face-to-face interactions with clients can be more impactful for building and maintaining strong business relationships. Offices provide a professional setting for conducting meetings and hosting clients, enhancing trust and credibility.
- **Company Image and Branding:** Offices can serve as a physical representation of a company's brand and image. A well-designed and attractive office space can impress clients, partners, and potential employees, enhancing the organization's reputation.
- **Employee Socialization and Well-being:** Offices offer opportunities for social interactions and networking, contributing to employees' well-being and reducing feelings of isolation.
- **Infrastructure and Technology:** Offices are equipped with specialized infrastructure and technology that might not be readily available at home. This includes high-speed internet and advanced equipment required in a range of knowledge-based sectors.
- **Confidentiality and Security:** A range of industries that deal with sensitive information require a secure and controlled environment. Offices provide the necessary infrastructure and measures to maintain confidentiality and data security.

Drivers of Office Growth

Office development and the employment sectors they typically accommodate have certain site-specific requirements which include:

- Access to skilled labour, including an educated labour force;

- Proximity to related industry clusters (companies and public institutions such as universities);
- Prestige setting;
- Access to higher order public transit;
- Access and exposure to 400-series/limited access highways;
- Ease of access/egress;
- Access to on-site amenities/services and proximity to off-site services; and
- Potential for live/work opportunities.

These drivers, both individually and collectively, shape the landscape of the office market, with developers and businesses seeking opportunities to meet the demands of a dynamic and evolving market.

Accommodating the Knowledge-Based Sectors

The primary catalyst behind the demand for office growth is the knowledge-based sectors. Although office developments play a significant role in accommodating a substantial portion of the office market, it is important to emphasize the need to plan for a diverse range of built-forms to cater to the specific requirements of the knowledge-based industries. Within Peel Region there is robust demand for unconventional office spaces. This includes the potential to integrate multiple uses on a single site, such as office spaces, manufacturing facilities and warehousing capabilities. The trend towards remote and hybrid work arrangements and the associated downward pressure of office floor space requirements leads to a situation where businesses are "right-sizing" operations, including consolidating or integrating operations. This bodes well for municipalities such as Brampton that can offer sites that combine office and industrial site needs.

Competitive Office Environment in the G.T.H.A.

The City of Brampton is competing with the municipalities across the G.T.H.A. with plans for ambitious plans to accommodate office development. Across the G.T.H.A., the office forecasts prepared by upper-tier/single-tier municipalities are largely underpinned by plans to intensify M.T.S.A.s and other strategic growth areas. Some of the municipalities are further ahead with key attributes, such as higher order transit already in place. For example, in York Region, the City of Vaughan has ambitious plans to create a modern urban centre around the newest subway station in the G.T.H.A.,

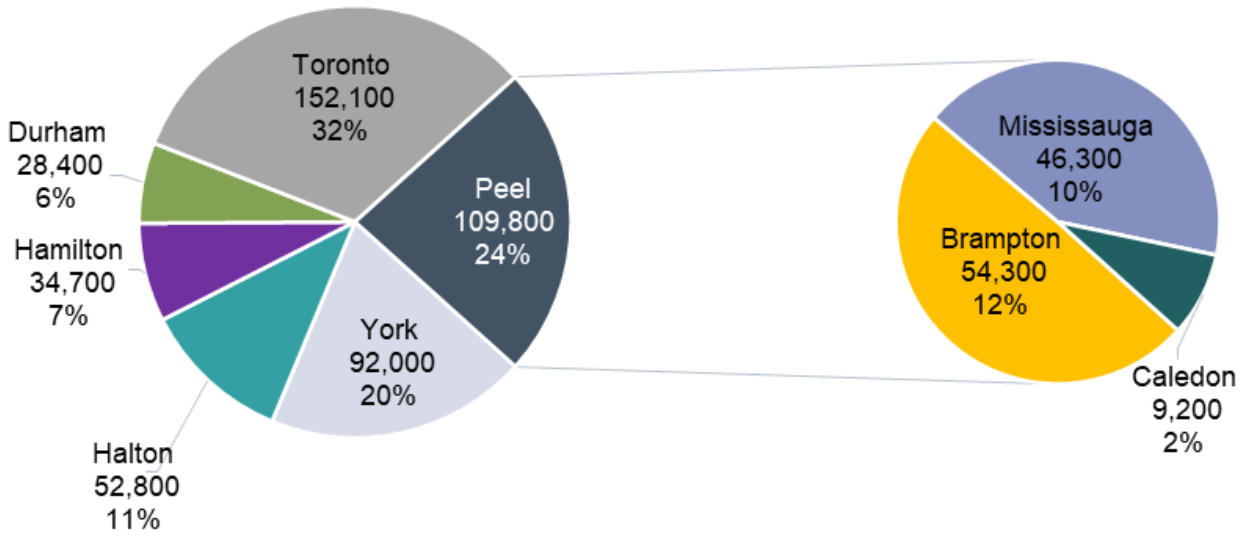
including multi-use office towers. Within the City of Mississauga, plans are underway for several intensification and redevelopment projects that will incorporate office uses.

Outlook for Office Development in the G.T.H.A.

Based on a review of Municipal Comprehensive Reviews (M.C.R.) across the G.T.H.A., approximately 435,100 major office jobs are anticipated over the 2021 to 2051 period. This represents an annual employment growth rate of 1.3% over the next 30 years. M.O.E. is considered a key component of employment growth across the G.T.H.A., representing 27% of the total employment forecast over the next 30 years. It is important to recognize that the M.C.R. forecasts were primarily prepared either before the pandemic or during the early stages of the pandemic and may not fully reflect the acceleration of trends in remote work. Work at home employment is generally included in the population-related employment category.

As summarized in Figure E-2, Peel Region represents 24% of the M.O.E. growth forecast over the 2021 to 2051 period. Within Peel Region, the City of Brampton was allocated nearly 49% of Peel's M.O.E. growth. This is higher than the M.O.E. growth forecast for all of the Region of Halton, or City of Hamilton or the entire Region of Durham. As illustrated in the figure, the City of Brampton is anticipated to represent 12% of the M.O.E. growth over the next 30 years in the G.T.H.A., a significant share of M.O.E. within the G.T.H.A.

Figure E-2
G.T.H.A.
M.O.E. Growth Forecast, 2021 to 2051



Source: Derived from recent Municipal Comprehensive Reviews from the respective upper-tier and single-tier municipalities in the G.T.H.A. by Watson & Associates Economists Ltd.

Why is the City of Brampton an Attractive Market within the G.T.H.A. for Office Development?

The City of Brampton is an attractive market for office development within the G.T.H.A. for several reasons, discussed below.

- **Strategic Location:** Brampton is accessible; it is located in the centre of the Toronto-Waterloo Innovation Corridor, the second largest information and communication cluster in North America. Building on its strategic location, the City of Brampton has made investments and commitments to building a dynamic ecosystem of innovation within the City.
- **Access to Labour:** A key advantage for the City of Brampton in accommodating M.O.E. growth is its robust population growth and access to the broader commuter-shed within the G.H.T.A. Over the five-year period 2016 to 2021, Brampton's population increased by approximately 73,900 persons, at an annual growth rate of 2.4%. In comparison, the G.T.H.A. grew by 0.9% over the same

period. Furthermore, the City has a growing working-age population. The population age group between 20 and 34 accounted for 53% of population growth in the City of Brampton over the 2006 to 2011 period. As a comparison, the same age group in the G.T.H.A. represented 18% of the population growth.[1]

- **Skilled Workforce:** In addition to a young robust population base, the City of Brampton has a highly educated labour force, with over 44% of the population having a post-secondary education. As a comparison, approximately 30% of the population within the G.T.H.A. has a bachelor's degree or higher.[2] This bodes well for the City of Brampton in building its future office employment base.
- **Transportation Connectivity:** The City boasts good transportation connectivity, including access to major highways (Highways 401, 407 and 410), as well as City and regional transit services (e.g., GO Transit). Furthermore, the City has plans to improve connectivity with investments planned in higher order transit across the City. This accessibility makes it convenient for employees and clients to commute to and from Brampton.
- **City Policies and Incentives:** As previously discussed, the City of Brampton Draft O.P. provides the policy framework to develop an urban structure that delivers on the type of setting sought by a wide range of office users and their employees, as discussed further in the report. Furthermore, the City has recently approved the City-wide C.I.P., specifically designed to attract office uses, including complementary uses such as research and lab space. The new C.I.P. consists of a tax increment equivalent grant as the first component in a toolkit where other programs can potentially be activated. The C.I.P. program provides Brampton with an incentive for office development that was never previously available in the City.

All these factors combined make the City of Brampton an appealing market for office development within the G.T.H.A., drawing businesses from various industries looking to establish or expand their presence in the G.T.H.A.

Region of Peel and City of Brampton Office Employment and G.F.A. Forecast

It is anticipated that Peel Region will accommodate 109,800 major office jobs over the 2021 to 2051 period. The City of Brampton is anticipated to accommodate nearly half

[1] Based on Statistics Canada, 2016 and 2021 Census.
[2] Ibid.

(49%) of the major office jobs over that period. The employment forecast for M.O.E. has been reviewed by Watson and adjustments were made to the forecast, as summarized below.

- The forecast has been reduced by 5% to account for no fixed place of work employment that is embedded in the M.O.E. forecast.
- It is estimated that work at home employment in office sectors increased from an average of 16% in 2016 to 30% in 2022. As such, Watson has reduced the M.O.E. forecast by 16% to account for additional office employment that is anticipated to be carried out exclusively from home.

The total adjustment of the M.O.E. forecast includes:

- 42,900 major office jobs in Brampton;
- 36,600 major office jobs in Mississauga; and
- 7,300 major office jobs in Caledon.

In preparing the office G.F.A. forecast, an estimate was made to the City of Mississauga to reflect M.O.E. growth opportunities that have the potential to take-up existing vacant office space. The forecast assumes that approximately 15% of the M.O.E. forecast in Mississauga can be accommodated through available existing vacant office space. The City of Mississauga has a high vacancy rate of 13%. Given the limited supply of vacant office space in Brampton, it is assumed that there is limited opportunity for M.O.E. growth to be accommodated in existing vacant office space.

The office G.F.A. forecast includes two scenarios that illustrate office space requirements based on two F.S.W. assumptions:

- **Scenario 1 – 28 sq.m (301 sq.ft.) F.S.W.** is based on an average F.S.W. anticipated as part of the background work prepared by Watson for the Region of Peel Development Charges Background Study in 2020.
- **Scenario 2 – 17 sq.m (182 sq.ft.) F.S.W.** is based on an average F.S.W. of 28 sq.m assumed prior to the pandemic with a reduction of 40% (28 x 40% = 17) to reflect the downward pressures on space requirements due to hybrid work arrangements. It is assumed that average office space requirements for employees due to hybrid office arrangements has reduced the F.S.W. per

employee, as employees work at the office an average of 60% of the week (three of five days weekly).

Figure E-3 summarizes the M.O.E. forecast, while Figure E-4 summarizes the office G.F.A. forecast in two scenarios. Key highlights include the following:

- Given the trends in workplace arrangements and the outlook for the office market, Scenario 2 reflects the most realistic scenario. All figures discussed below are based on Scenario 2, a reduced F.S.W.
- The City of Brampton would require 729,000 sq.m (7,850,000 sq.ft.) of new office G.F.A. to accommodate office employment to 2051.
    - With approximately 59,920 sq.m (645,000 sq.ft.) of office G.F.A. currently in approvals, the City would require an additional 669,100 sq.m (7,202,000 sq.ft.) of office G.F.A. to accommodate office growth in the City.
- The City of Mississauga would require 528,700 sq.m (5,690,000 sq.ft.) of new office G.F.A. to accommodate office employment to 2051.
    - With approximately 120,800 sq.m (1,300,000 sq.ft.) of office G.F.A. currently in approvals, Mississauga would require an additional 407,900 sq.m (4,391,000 sq.ft.) of office G.F.A. to accommodate office growth in the City.
- The Town of Caledon would require 124,100 sq.m (1,336,000 sq.ft.) of new office G.F.A. to accommodate office employment to 2051.

Figure E-3
Region of Peel
M.O.E. Growth Forecast, 2021 to 2051

2021 to 2051	M.O.E. Growth	M.O.E. Growth Adjustment[1]	Adjusted for Take-Up of Vacancy Space	Net M.O.E. Growth Requires New Office Space, 2021 to 2051
Municipality	A	B	C	D = B - C
Brampton	**54,300**	**42,900**	**0**	**42,900**
Mississauga	46,300	36,600	5,500	31,100
Caledon	9,200	7,300	0	7,300
Peel Region	**109,800**	**86,800**	**5,500**	**81,300**

[1] Major office employment (M.O.E.) adjustment includes a downward adjustment of 5% for no fixed place of work and 16% for additional work at home employment.
Source: Watson & Associates Economists Ltd. based on the Region of Peel Municipal Comprehensive Review forecast prepared by Hemson Consulting Ltd.

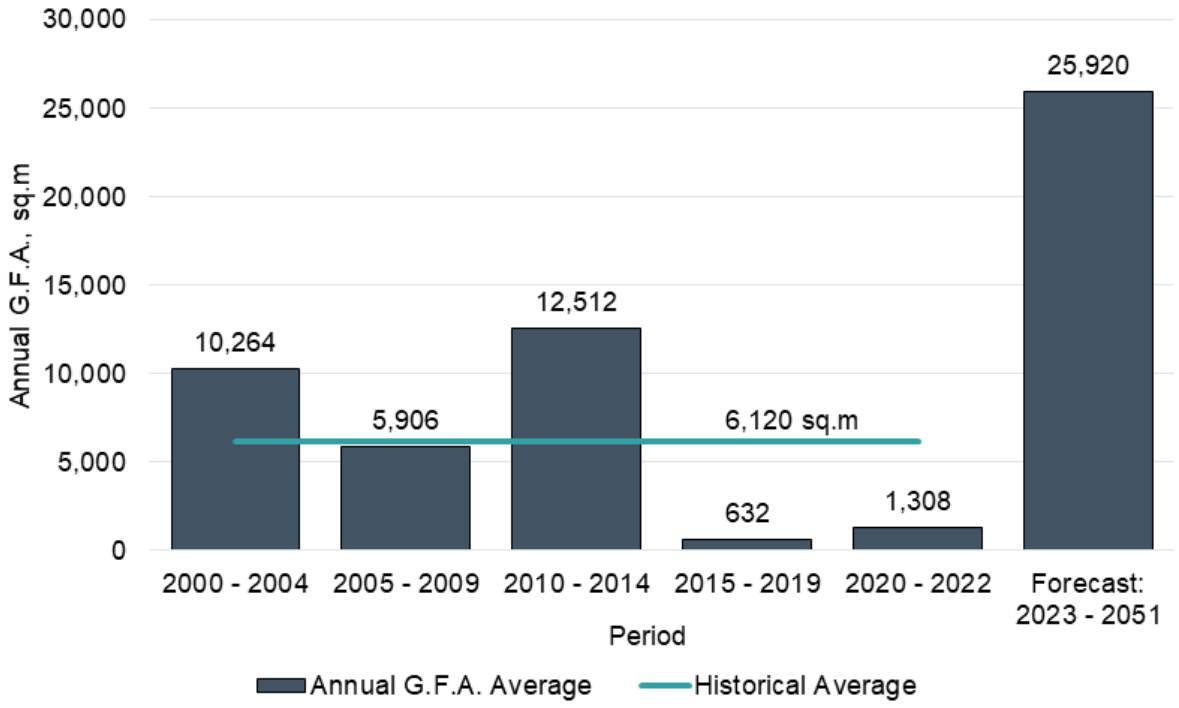
Figure E-4
Region of Peel
M.O.E. G.F.A. (sq.m) Forecast, 2021 to 2051

2021 to 2051	Net M.O.E. Growth Requires New Office Space, 2021 to 2051	Scenario 1: 28 sq.m F.S.W.	Scenario 2: 17 sq.m F.S.W.
Municipality	A	B = A x 28	C = A x 17
Brampton	**42,900**	**1,201,200**	**729,300**
Mississauga	31,100	870,800	528,700
Caledon	7,300	204,400	124,100
Peel Region	**81,300**	**2,276,400**	**1,382,100**

[1] Major office employment (M.O.E.) adjustment includes a downward adjustment of 5% for no fixed place of work and 16% for additional work at home employment.
Source: Watson & Associates Economists Ltd. based on the Region of Peel Municipal Comprehensive Review forecast prepared by Hemson Consulting Ltd.

As illustrated in Figure E-5, the City of Brampton is anticipated to add 25,920 sq.m (279,000 sq.ft.) annually over the 2023 to 2051 period which is significantly higher than historical levels achieved over the past two decades.

Figure E-5
City of Brampton
Annual Office G.F.A. – Historical and Forecast



Note: Forecast period is based on 2023 to 2051. Historical reflects recent office development.
Source: Watson & Associates Economists Ltd., 2023.

Allocation of the City of Brampton Office-Focused M.T.S.A.s

The allocation of M.O.E. growth has been informed by the Region of Peel M.C.R. forecasts by small geographic unit (S.G.U.), as well as the strengths weaknesses, opportunities and threats (SWOT) analysis discussed in further detail in Chapter 5.

Figure E-6 provides details on the office growth allocation. Key findings include:

- The four office-focused M.T.S.A.s are anticipated to accommodate 39% of the City's M.O.E. growth over the 2021 to 2051 period;

- The Mississauga at Steeles M.T.S.A. is anticipated to accommodate the largest share of M.O.E. among the four M.T.S.A.s; and
- Based on the M.O.E. growth allocation to the four office-focused M.T.S.A.s, it is anticipated that the M.T.S.A.s would support 285,000 sq.m (3,068,000 sq.ft.) of office G.F.A. over the 2021 to 2051 period.

Figure E-6
City of Brampton
M.O.E. Growth and Office G.F.A. Allocation by Area, 2021 to 2051

Office Areas	2021 to 2051 Employment	City Office G.F.A. Share (%)	Office G.F.A., sq.m (17 sq.m/ employee)
Mississauga at Steeles M.T.S.A.	5,930	14%	100,810
Ray Lawson M.T.S.A.	3,460	8%	58,820
The Gore M.T.S.A.	2,465	6%	41,900
Bramalea GO M.T.S.A.	4,910	11%	83,470
Office-Focused M.T.S.A.s	16,765	39%	285,000
Rest of City	26,135	61%	444,300
City of Brampton	42,900	100%	729,300

Source: Watson & Associates Economists Ltd., 2023.

Recommended Ratio of Office Space in the Office-Focused M.T.S.A.s

The City of Brampton is anticipated to add 0.2 of a major office job for every new resident (or 1.0 major office job for every 5.4 new residents). In terms of office G.F.A., the City is anticipated to add 2.0 sq.m (21.5 sq.ft.) of office G.F.A. per new resident over the next 30 years. With robust M.O.E. and office G.F.A. forecasts, the City needs to plan for strategic office nodes that are competitive within the G.T.H.A. The City's proposed policy framework (City of Brampton Draft O.P.) and the City's commitment to support the knowledge-based sectors will be key driving forces in attracting office growth.

The four office-focused M.T.S.A.s., compared to the rest of the City, are anticipated to accommodate a higher ratio of M.O.E. relative to population, as summarized in Figure E-7. Key highlights are provided below.

Mississauga at Steeles M.T.S.A.

- The Mississauga at Steeles M.T.S.A. has the greatest potential in accommodating the City's office growth. The M.T.S.A. has the potential to build upon synergies due to its location in a large regional employment cluster and as an extension of the Meadowvale Corporate Centre in Mississauga. Furthermore, the M.T.S.A. and the surrounding BramWest Secondary Plan Area have demonstrated that this area has the potential to attract M.O.E.
- Recognizing the need to accommodate a range of office uses, including the potential for "campus-style" office development and single-tenant/owner-occupied office uses, a large portion of the lands (74% of the land area) are envisioned for office use.
- It is recommended that the M.T.S.A. plan for a high ratio of major office jobs to population. As summarized in Figure E-7, it is recommended that the M.T.S.A. support a minimum of 6.3 major office jobs for every 1 new resident. On a G.F.A. basis, the M.T.S.A. would accommodate 107 sq.m. (1,150 sq.ft.) of office G.F.A. per resident.
- This M.T.S.A. should be considered a key priority for office growth in the City.

Ray Lawson M.T.S.A.

- The Ray Lawson M.T.S.A. is identified as an area that has the potential to accommodate office growth in the short term due to near-term improvements to transit connectivity (Hurontario L.R.T.). The M.T.S.A. has an established office G.F.A. base and the potential to build upon key anchors in the area, including the Courthouse Complex and Sheridan College.
- Office development in this area is anticipated to be accommodated through infill and redevelopment.
- The area is recommended to accommodate a minimum ratio of 1.2 major office jobs for every 1 new resident. On a G.F.A. basis, the M.T.S.A. would accommodate 21 sq.m (226 sq.ft.) of office G.F.A. per resident.
- This M.T.S.A. should be considered a key priority for office growth in the City.

The Bramalea GO M.T.S.A.

- The Bramalea GO M.T.S.A. is envisioned as a key redevelopment area that will likely require a long-term time frame to accommodate office uses. The M.T.S.A. benefits from its access to GO Transit train service, as well as its opportunity to build upon existing employment in the area.
- The area is recommended to accommodate a minimum ratio of 2.2 major office jobs for every 1 new resident On a G.F.A. basis, the M.T.S.A. would accommodate 37 sq.m (398 sq.ft.) of office G.F.A. per resident.
- In order to support the transformation of the area, it is recommended that the City support the development of strategically phased lands for residential uses that may occur prior to office development.

The Gore M.T.S.A.

- Of the four office-focused M.T.S.A.s, The Gore M.T.S.A. is envisioned to include a more balanced distribution of M.O.E. and population growth. The area is recommended to accommodate a minimum ratio of 1.0 major office jobs to 1 new resident. On a G.F.A. basis, the M.T.S.A. would accommodate 18 sq.m (194 sq.ft.) of office G.F.A. per resident.
- Compared to the other office-focused M.T.S.A.s, The Gore M.T.S.A. is anticipated to have the greatest challenges in attracting office growth due to its location. The area is surrounded by low-density residential uses and is currently not well connected to the rest of the City.
- In order to support the development of the M.T.S.A. as a dynamic urban setting, it is recommended that the City support the development of strategically phased lands for residential uses, especially high-density uses that may occur prior to office development.

Figure E-7
City of Brampton
Recommended Ratio of Office Space to 2051

M.T.S.A.s	Population Growth 2021 to 2051	M.O.E. Growth 2021 to 2051	M.O.E. Jobs-to-Population	Office G.F.A. (sq.m), 2021 to 2051	Office G.F.A. (sq.m) per Capita
M.T.S.A.s	A	B	C = B/C	D	E = D/A
Mississauga at Steeles M.T.S.A.	940	5,930	6.3	100,810	107
Ray Lawson M.T.S.A.	2,840	3,460	1.2	58,820	21
The Gore M.T.S.A.	2,360	2,465	1.0	41,900	18
Bramalea GO M.T.S.A.	2,260	4,910	2.2	83,470	37
Total Office-Focused M.T.S.A.s	**8,400**	**16,765**	**2.0**	**285,000**	**34**
Rest of Brampton	287,050	37,545	0.1	444,300	1.5
City of Brampton	**295,450**	**54,310**	**0.2**	**729,300**	**2.5**

Source: Watson & Associates Economists Ltd., 2023.

Strategic Recommendations

The report provides a series of recommendations to support the development of office growth in the City's office-focused M.T.S.A.s. Recommendations include:

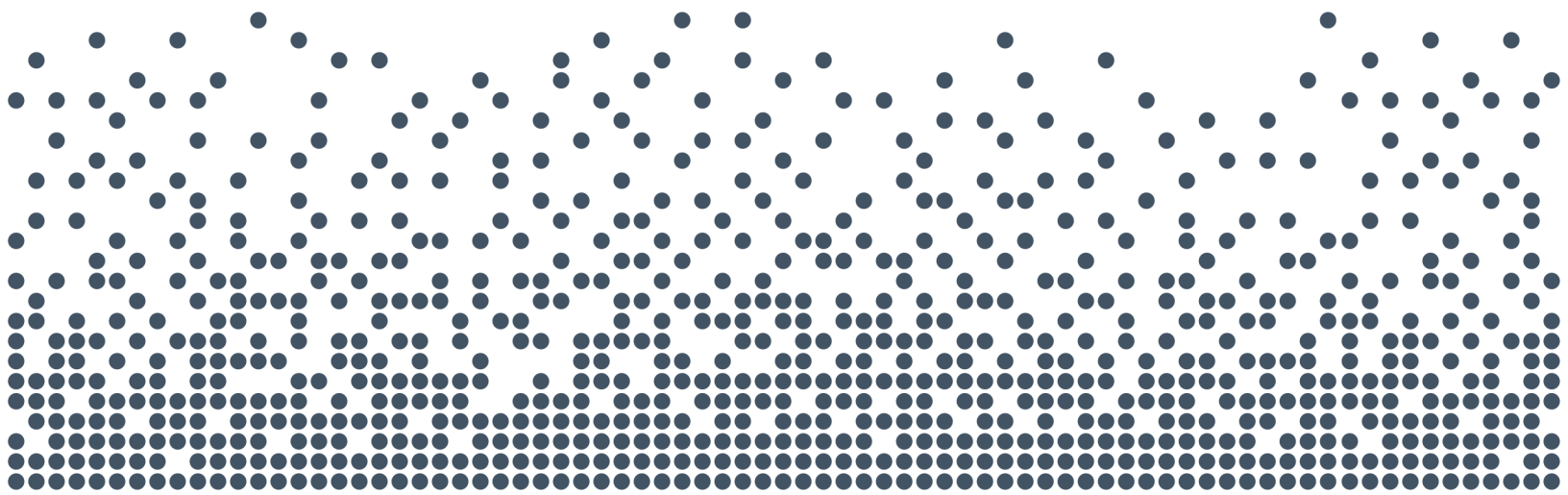
- Monitor growth in the M.T.S.A. due to the evolving nature of the office market;
- Provide a summary of key targets for the office-focused M.T.S.A.s to plan for over the long term, recognizing that these office M.T.S.A.s are anticipated to accommodate a large portion of office growth;
- Consider planning policies which protect lands for office use over the long-term as such lands represent strategic locations to attract and accommodate office uses to the year 2051 and beyond. This approach embraces provincial and local land use planning policies regarding the achievement of complete and competitive communities over the long-term;

- Identify the timing and prioritization of M.T.S.A.s. based on anticipated infrastructure improvements and market factors, recognizing that some of the M.T.S.A.s may take longer to reach the O.P.'s people and jobs/ha density target;
- Consider other forms of employment uses to support the knowledge-based sector; there is an opportunity to support other built-forms in the M.T.S.A.;
- Emphasize that the four office-focused M.T.S.A.s have the opportunity as strategic anchors to support the evolution of the adjacent Employment Areas; and
- Encourage the development of amenities in the M.T.S.A.s, ensuring that there is a range of commercial services that office users require.

Next Steps

Phase 2 of this study will include an office cost analysis comparing the cost of major office development (development larger than 100,000 sq.ft.) in the City of Brampton to other large municipalities in the G.T.H.A., including the City of Mississauga, City of Hamilton, City of Vaughan, City of Richmond Hill, Town of Oakville, City of Burlington and the City of Markham. The analysis will also include a comparison of the municipal fees imposed on office development, as well as incentive programs offered by the comparators. This component will provide the City with insights into Brampton's cost competitiveness in accommodating office employment within the G.T.H.A. Phase 2 is anticipated to be completed in October 2023.

.



Report

Chapter 1
Introduction

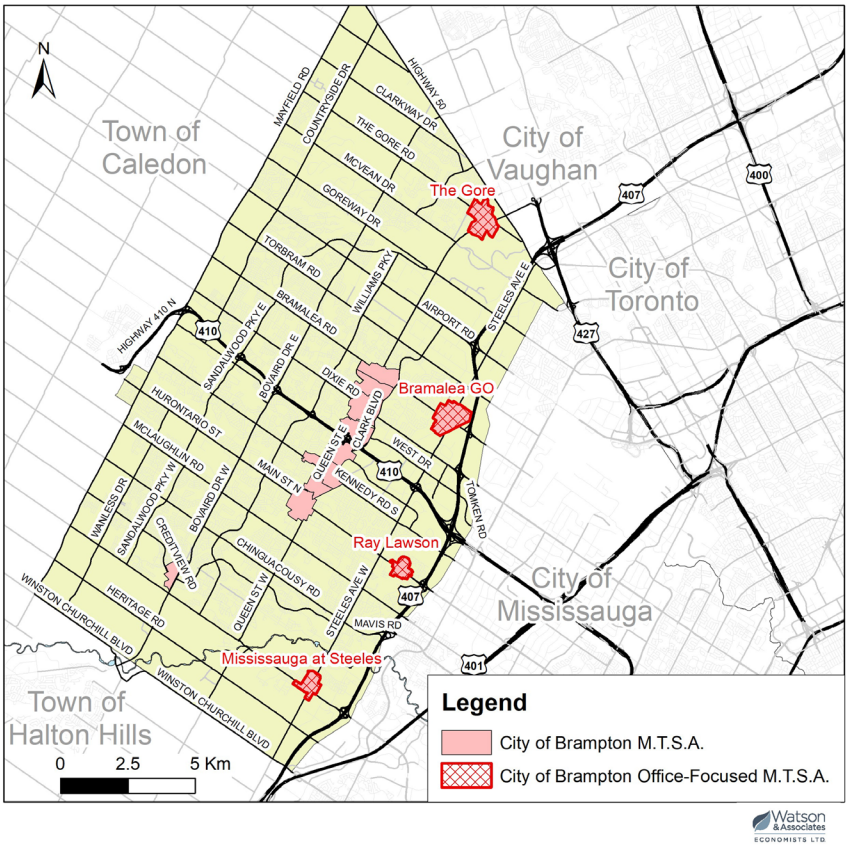
1. Introduction

1.1 Purpose

The City of Brampton retained Watson & Associates Economists Ltd. (Watson) to review the City's office market and assess the potential of four strategic Major Transit Station Areas (M.T.S.A.s) in accommodating the City's office demand to 2051. As identified in Figure 1, the following four M.T.S.A.s have been reviewed in terms of their ability to accommodate office uses over the long-term planning horizon:

- Ray Lawson;
- Steeles at Mississauga;
- The Gore; and
- Bramalea GO.

Figure 1
City of Brampton
Office-Focused M.T.S.A.s



The four strategic M.T.S.A.s have been identified as focus areas for office development since they are adjacent to Employment Areas and provide the potential to support the integration of Employment Areas with non-employment uses (i.e., residential uses). It is the City's aspiration that these four M.T.S.A.s will facilitate the development of "complete communities" and provide opportunities to support the City's growing knowledge-based employment sectors. Workers in knowledge-intensive industries increasingly require accessible and dynamic work environments that promote interaction and innovation. This underscores "placemaking" as an increasingly recognized and important concept in creating diverse and vibrant workplaces, which in turn can help attract local population and job growth, provided other necessary infrastructure requirements are met. This is particularly relevant in mixed-used environments which integrate retail, office commercial, residential, and other community

uses with public open spaces. It should be recognized that such physical qualities are typically what drives successful office real estate markets over the long term.

A key component of this study is to provide the City with direction in terms of the appropriate number of jobs and ratio of office uses to consider in each of the four M.T.S.A.s. The study recognizes that the City is planning for these four M.T.S.A.s to accommodate a higher ratio of jobs to population relative to the City's remaining M.T.S.A.s. Moreover, the report recognizes the City's on-going efforts in attracting private investment to the City, as well as the City's plans to accommodate an employment base of 140,000 jobs by 2051.[1]

Ultimately, this study will inform the City's Secondary Plan land use plans and policies to ensure the long-range strategy for these four M.T.S.A.s is both marketable and consistent with the direction of economic development and planning.

1.2 Study Components

The study has been developed into two phases. This report provides the results of Phase 1, a market assessment of office opportunities in the four strategic office-focused M.T.S.A.s. Phase 2, planned to be completed by late fall 2023, will include a competitive review of the cost of office development in the City of Brampton compared to other large comparable jurisdictions in the Greater Toronto and Hamilton Area (G.T.H.A.).

The Phase 1 Report is organized into the following components:

- Macro and regional office trends impacting the demand for office gross floor area (G.F.A.);
- Regional context of office opportunities in the G.T.H.A.;
- Existing office conditions in the City of Brampton;
- Opportunity for office development in the City of Brampton;
- Major office employment (M.O.E.) opportunities by M.T.S.A.; and
- Strategic recommendations.

[1] City of Brampton Draft Official Plan, December 2022, p. 2-5.

1.3 Background

1.3.1 Major Office Employment Definition

Within the City of Brampton Draft Official Plan (O.P.), *major office* is defined as "office type employment that is contained within free standing buildings more than 20,000 net sq.ft. (1,858 sq.m), based on the threshold where most data collection of office building information occurs."[1] While major office development is a key focus of this report, it is important to recognize that office space and office workers can be accommodated in a mix of development built-forms and land uses. Office employment accommodated in other built-forms and land uses would either be classified as *population-related employment* or *employment lands employment*. Office employment classified as population-related employment would include office workers who work from home or in small offices (less than 1,860 sq.m or 20,000 sq.ft.) serving the local population (i.e., street-front commercial uses). Office employment classified as employment lands employment may include office employment in industrial-type buildings or in an integrated industrial/office building where office use is a secondary use.

1.3.2 Importance of Major Office Space

Office development plays a crucial role in the building vibrant communities for several reasons:

- **Economic Growth:** Office support the knowledge-based sectors, leading to good quality local job opportunities, as well as spin-off employment opportunities (e.g., commercial uses).
- **Increase Foot Traffic:** Offices bring in a steady stream of employees, clients, and visitors, increasing the foot traffic in the area. This can benefit nearby retail shops, restaurants, and other businesses, contributing towards a lively environment.
- **Knowledge Exchange:** Concentrated office spaces facilitate the exchange of ideas and knowledge among professionals from diverse industries. This can lead to innovation, collaboration and investment, further enhancing the City's profile within the regional context.

[1] City of Brampton Draft Official Plan, December 2022, p. 5-73.

- **Urban Revitalization:** Office development often leads to the revitalization of underutilized areas, transforming them into thriving areas. This can improve the overall aesthetics, safety and desirability of the community for other uses, such as residential uses.
- **Live/Work Opportunities:** Office development provides opportunities for local residents to work closer to home, as well as supporting local transit services.
- **Cultural and social impact:** Vibrant office communities can foster a rich cultural scene, with events, conferences, and networking opportunities that bring people together. The social engagement promotes community cohesion and a sense of belonging among residents and office workers alike.

Overall, office development contributes towards building vibrant communities, creating a positive cycle of economic growth, social interactions and competitive and complete communities.

1.3.3 The Need to Rethink Office Development Patterns in the City of Brampton

Within the G.T.H.A., Brampton has historically been considered a peripheral office market, as the City of Brampton currently represents 2% of the G.T.H.A.'s office space[1] in terms of office G.F.A. As a further comparison, the City of Brampton has represented 6% of new office G.F.A. development within the Region of Peel since 2015.[2] Despite the small share of the G.T.H.A. market, the City has had some success in the past decade attracting large office users in single-tenant or owner-occupied buildings. These office users are attracted to the "campus style" offerings of the City, including on-site surface parking and easy access to 400-series highways. While this type of office development is anticipated to continue, it is important to recognize that the City is evolving, with plans for a more connected urban centre. The City of Brampton Draft O.P.[3] provides the framework to accommodate a significant increase in population and employment growth by supporting opportunities to create more compact and complete

[1] Based on an inventory of office space in the G.T.H.A. by Colliers International, Q1 2023. Includes only major office buildings (i.e., greater than 20,000 sq.ft. or 1,858 sq.m).
[2] Based on non-residential building permit data provided by the Region of Peel and utilized for the Region of Peel Development Charges Background Study.
[3] City of Brampton Draft Official Plan, December 2022.

communities. Moreover, the policy framework provides an urban structure that delivers on the type of setting sought by a wide range of office users and their employees as discussed further in the report.

In addition to a policy framework that supports a competitive urban environment for economic growth, the City has made investments in the innovation and entrepreneurship ecosystem with a desire to build on the momentum of these investments and spread their influence across the City at strategic locations, including the downtown core and the four strategic office-focused M.T.S.A.s.

It is important to note that the City of Brampton recently approved the City-wide Community Improvement Plan (C.I.P.), specifically designed to attract office uses, including complementary uses such as research and lab space. The new C.I.P. consists of a tax increment equivalent grant as the first component in a toolkit where other programs can potentially be activated. The tax increment equivalent grant is an allowance to offset a portion of the property tax increase the business owner will face.[1] The C.I.P. program provides Brampton with an incentive for office development that was never previously available in the City.

This report reviews the demand for office space as forward looking and considers the initiatives and commitments by the City to strengthen its competitive position within the G.T.H.A.

[1] City of Brampton, Community Improvement Plan website – https://www.brampton.ca/EN/Business/planning-development/central-area/Pages/central-area-community-improvement-plan.aspx, accessed July 25, 2023.

Chapter 2
Review of Macro and Regional Trends

2. Review of Macro and Regional Trends

2.1 Overview

The coronavirus disease (COVID-19) pandemic has accelerated changes in work and commerce as a result of technological disruptions that were already taking place prior to the pandemic. Businesses are increasingly required to rethink the way they conduct business with a greater emphasis on leveraging technology to improve connectivity with employees and customers. These disruptive forces continue to broadly impact the nature of employment by place of work and sector, and have a direct influence on commercial, institutional and industrial real estate space needs.

Provided below are key trends influencing office space needs:

- Rise in office vacancy rates across the G.T.H.A., including a negative net absorption of office space;
- Increase in staff working remotely with a growing preference by employees and employers for a hybrid model that offers opportunities for flexible workplace arrangements. Furthermore, the acceptance of remote work provides the opportunity for employers to reach beyond the commuter-shed for talent;
- Change in the office floorplan with a focus on "activity-based" workspaces (e.g., collaboration rooms, hot desking stations, larger kitchens, a variety of desk options, virtual conference rooms, rest areas, etc.);
- Focus on flexible office-hour arrangements with less emphasis on the "9 to 5" office environment; and
- "Flight to quality" office space where businesses are seeking higher quality offices with amenities on-site and nearby to attract talent and to bring employees into the office.

Looking forward, these trends are anticipated to generate increasingly higher average office floor space per worker (F.S.W.) levels and potentially reduce office space needs per capita over the long term. Such trends, however, are not anticipated to eliminate the need for new office construction over the long term.

2.2 Quality of Office Space

The above trends not only result in a downward pressure on G.F.A. required for office space, but also a need to supply higher quality office space in amenity-rich areas. There is a growing need for employers to provide compelling reasons for employees to come into the office, including providing a modern workplace with comfortable amenities and good transportation access to reduce commute times, as well as a workplace location that supports retail, leisure and recreational opportunities. With less emphasis on the quantity of space, employers are moving towards less space with more on-site and off-site amenities.[1]

The rapid change in modern office needs is quickly diminishing the need for older office building stock in the G.T.H.A., particularly office space classified as Class B and Class C. Considering the downward pressure of office space, investors and property owners are reluctant to upgrade office space to meet today's office needs. Across major office markets in North America there are pressures to convert aging or Class B office space. The City of Toronto, for example is currently undertaking an Office Needs Study that would explore the benefits and risks of converting aging and less desirable office space to alternative uses, given rising applications for conversion of office space to residential uses.[2]

According to the Building Owners and Managers Association (BOMA) International, office space by building class is based on a combination of factors including rent, building finishes, system standards and efficiency, building amenities, location/ accessibility and market perception are used as relative measures. Provided below is a summary of the office space by building class.

- Class A has the most prestigious offering with high-end finishes, state of the art building features and rents typically command above the market average. Class A attracts large national and international tenants, including Fortune 500 companies. Within the City of Brampton, tenants in Class A office space include Loblaw Inc., Canon Canada Inc., and the TD Bank.

[1] Colliers International, The hybrid equation: what drives employees to the office? June 2023.
[2] Based on https://www.toronto.ca/city-government/planning-development/planning-studies-initiatives/office-space-needs-study, accessed July 7, 2023.

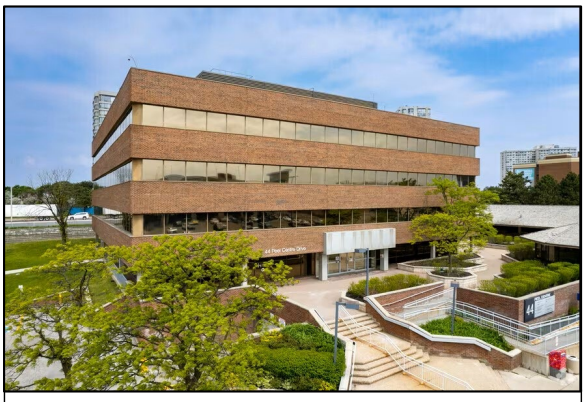
- Class B competes for a wide range of tenants and offers fair to good building features at a rent rate that is within the market average or lower. Class B may appeal to local and regional based businesses, as well as a regional office branch for a national company.
- Class C offers basic functional office needs at a rate below the market average. Class C typically appeals to budget-conscious tenants and may appeal to more local businesses.[1]

The office G.F.A. within the City of Brampton comprises 32% Class A office space, while the remainder is identified as Class B or C. As a comparison, the City of Mississauga office base comprises 65% Class A office space. There are only a few examples of Class A office space in the City of Brampton.[2] Provided below in Figure 2 are examples of office space by class in Brampton.

[1] Based on BOMA International based definitions on BOMA's website – https://www.boma.org/BOMA/Research-Resources/Industry_Resources/BuildingClassDefinitions.aspx, accessed July 7, 2023.
[2] Based on various surveys of office space inventories.

Figure 2
City of Brampton
Examples of Office Space by Building Class (A, B and C)

Class A Office Space: Kallo project, 7685 Hurontario Street, Brampton.
Year built: 2014.



Class B Office Space: Bramalea Town Centre, 44 Peel Centre Drive, Brampton.
Year built: 1977.

Class C Office Space: Village of Heart Lake, 1 Conestoga Drive, Brampton.
Year built: 1989.

Class C Office Space: 9780 Bramalea Road, Brampton.
Year built: 1975.

2.3 Workplace Arrangements

2.3.1 Commuting to Work and Work from Home

As previously discussed, there has been a significant rise in employees working from home, in particular employees in a hybrid arrangement working both remotely and commuting to the office. Prior to the COVID-19 pandemic, work at home employment represented approximately 7% of the employment in Ontario and 7% in the City of Brampton, based on 2016 Statistics Canada Place of Work data. More recent 2021

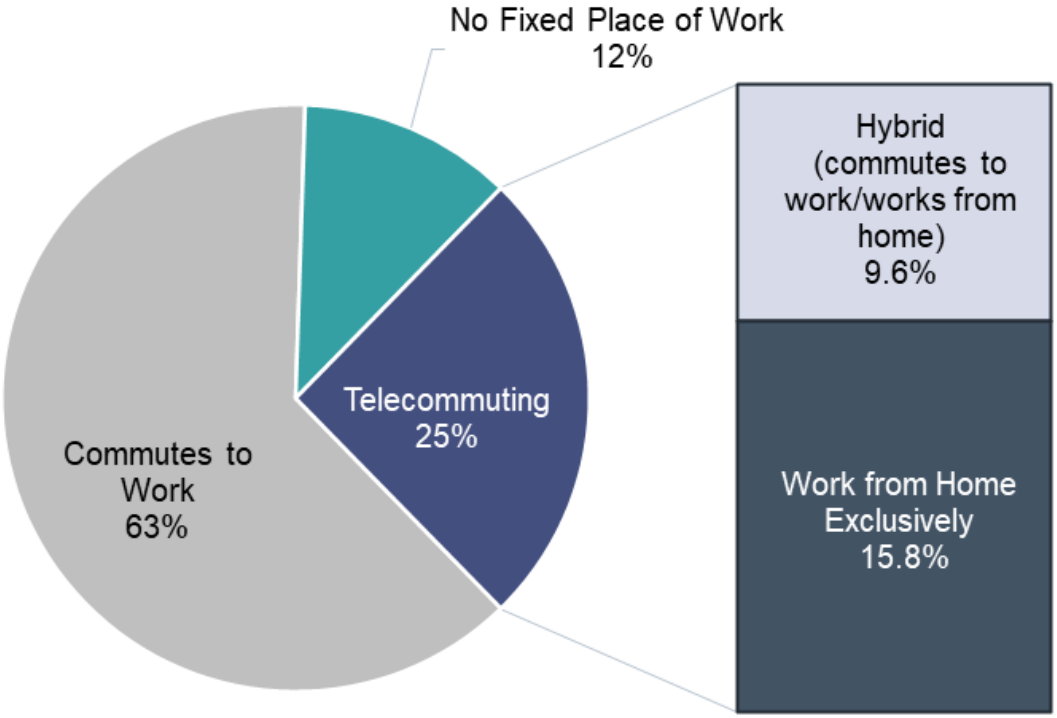
Statistics Canada Place of Work data suggests that approximately 28% of the employment base in the City of Brampton works from home.[1] This data was undertaken by Statistics Canada as part of the 2021 Census during a province-wide lockdown where non-essential employees had limitations for working in the office.[2] As such, the 2021 Statistics Canada Place of Work data does not necessarily reflect the market preference for work at home.

Since the onset of the COVID-19 pandemic, Statistics Canada has conducted surveys assessing trends in workplace arrangements. During the first wave of the pandemic in April 2020, approximately 40% of the labour force was working from home.[3] As restrictions lifted, the portion of the labour force working from home gradually decreased, while hybrid work arrangements or those who worked partially from home and at locations other than home steadily increased. By the final quarter of 2022, work from home levels stabilized and as of December 2022, approximately 16% of the labour force worked from home exclusively. Compared to 2016, it is estimated that the portion of the labour force working from home has more than doubled. In addition to the labour force working from home exclusively, another 1 in 10 (10%) of the labour force as of December 2022 work in a hybrid arrangement.[4]

Figure 3 provides a breakdown of workplace arrangements as of December 2022. As summarized, approximately 63% of the labour force in Ontario commutes on a regular basis to their place of work.

[1] Statistics Canada, Place of Work data, includes usual place of work and no fixed place of work.
[2] The 2021 Census was carried out in May 2021 during a province-wide stay-at-home order requiring everyone to remain at home except for essential purposes.
[3] Statistics Canada, Article – *Working from home in Canada: What have we learned so far?* October 27, 2021.
[4] Statistics Canada, Labour Force Survey Supplement, January 2023.

Figure 3
Province of Ontario
All Employment Sectors
Labour Force by Workplace Arrangements, December 2022



Source: Derived from Statistics Canada, Labour Force Survey Supplement, January 2023 by Watson & Associates Economists Ltd.

Generally, knowledge-based workers or those who are typically accommodated in an office setting are most likely to have the largest opportunity for teleworking arrangements. Provided below is a breakdown of the work arrangements for office-type employment sectors.[1]

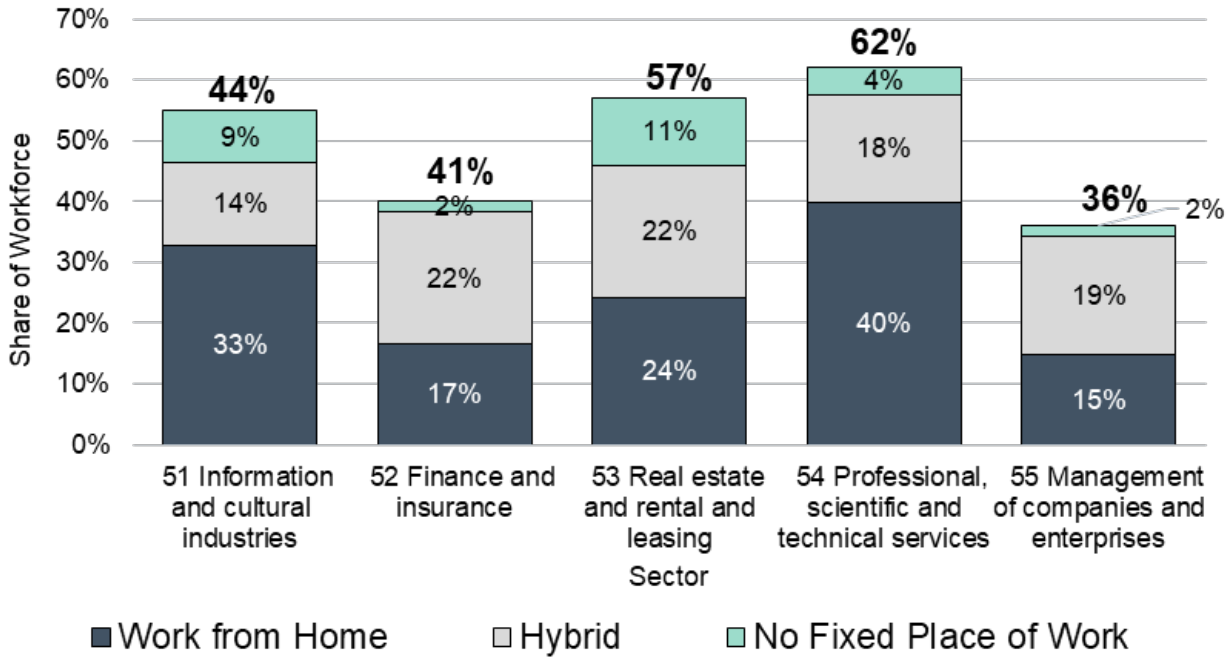
[1] Office-type employment sectors include the following NAICS categories: 51 Information and cultural industries; 52 Finance and insurance; 53 Real estate and rental and leasing; 54 Professional, scientific and technical services; and 55 Management of companies and enterprises.

- It is estimated that approximately 30% of employees in the office-type employment sectors work from home exclusively as of December 2022,[1] up from 16% in 2016.[2]
- It is estimated that 19% of employees in the office-type employment sectors are in a hybrid arrangement – working from home and commuting occasionally to the office.
- No fixed place of work employment represents approximately 5% of the employment in the office-type sectors.
- It is estimated that approximately 54% of the total labour force in the office-type employment sectors comprises employees who do not regularly commute to the office base every workday.

Figure 4 summarizes the work from home and mobile labour force (hybrid employment and no fixed place of work) by the office-type employment sectors. As illustrated, approximately 36% (management of companies and enterprises) to 62% (professional, scientific and technical services) of employees in these sectors do not regularly commute to the office.

[1] Statistics Canada, Labour Force Survey Supplement, January 2023.
[2] Statistics Canada, Place of Work data, 2016.

Figure 4
Province of Ontario
Estimates of Work from Home and Mobile Labour Force
by Office-Type Employment Sector

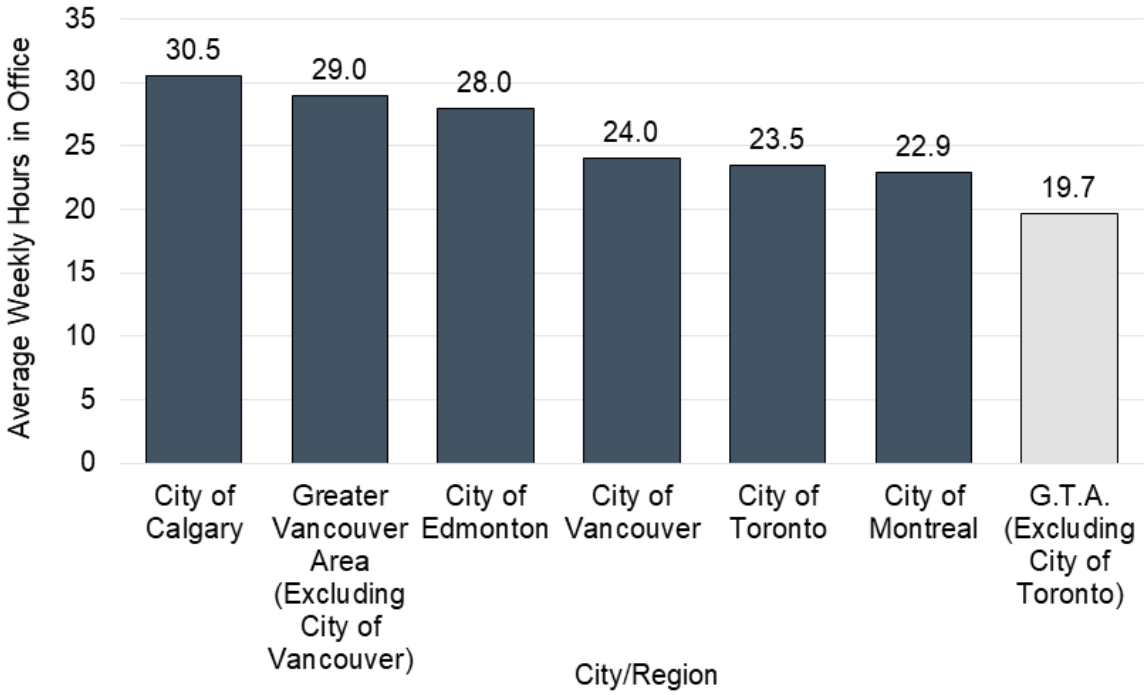


Source: Derived from Statistics Canada data sources (including Statistics Canada, Labour Force Survey Supplement, January 2023 and Business Conditions Survey Anticipated Workplace Arrangements by Sector) by Watson & Associates Economists Ltd.

2.3.2 Average Weekly Hours in the Office

Colliers International recently completed a study on the hybrid workplace and surveyed the average number of hours typically spent in the workplace across large office markets in Canada. As summarized in Figure 5, it is estimated that hybrid employees spend on average approximately 20 hours each week in offices in the G.T.A., excluding the City of Toronto. The average number of weekly hours spent in the office is higher in all other major office markets in Canada compared to the G.T.A., excluding the City of Toronto.

Figure 5
Selected Regions/Cities
Average Weekly Hours in Office by Region/City, 2023



Source: Derived from Colliers International, *The hybrid equation: what drives employees to the office?* June 2023.

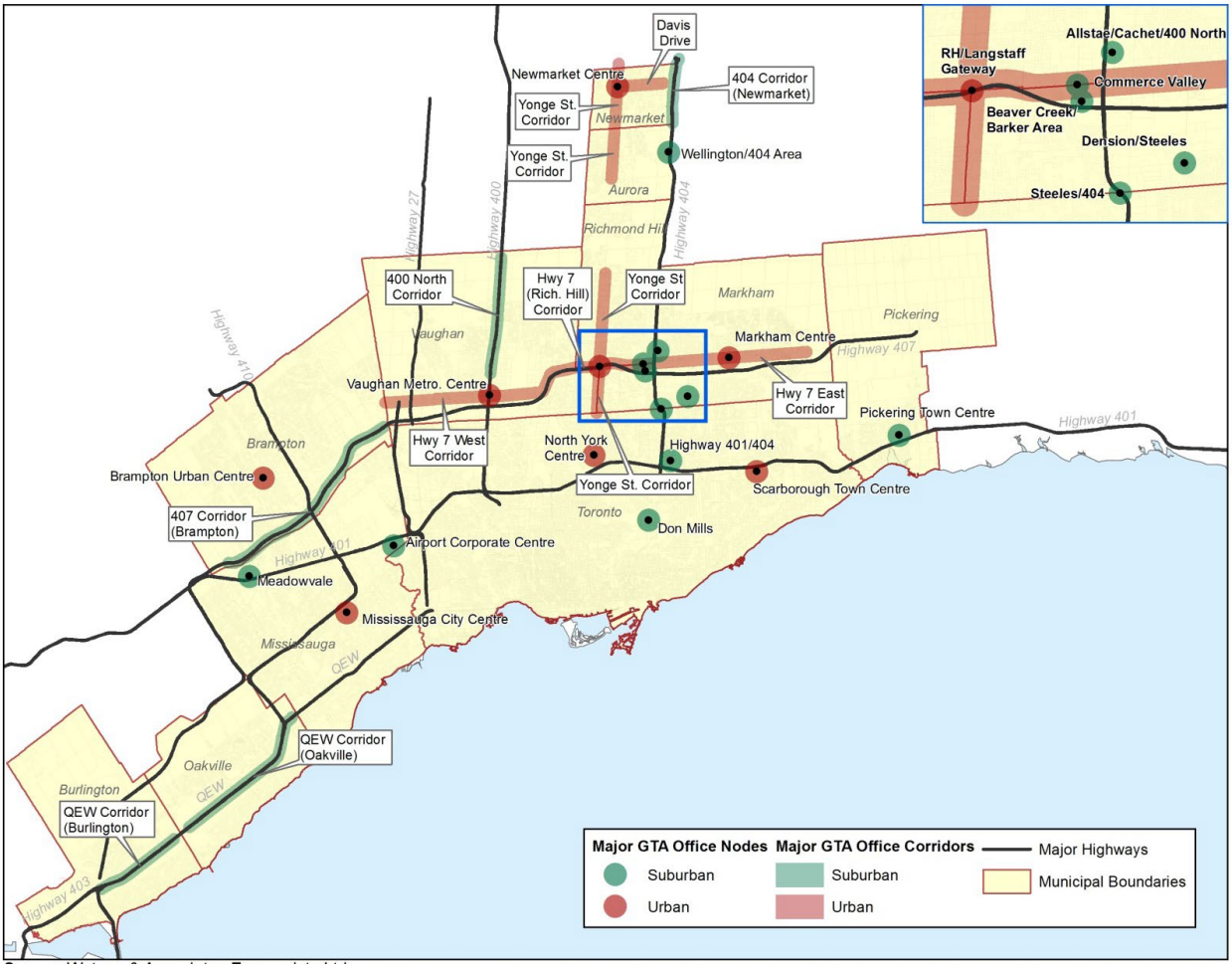
2.4 Office Real Estate Base and Trends in the G.T.A.

2.4.1 Office Base in the G.T.A.

With respect to the office market, the G.T.A. contains 23 million sq.m (252 million sq.ft.) of office space. Of this total, just under two-thirds (65%) of the G.F.A. is within the City of Toronto, with over half (nearly 60% or 70 million sq.ft.) located in the downtown core. The remaining office space in the City of Toronto is situated in a number of urban nodes including North York Centre and Yonge/Eglinton and in a number of suburban Employment Areas including Don Mills, Highway 401/404 and Highway 404/Steeles, as illustrated in Figure 6. Outside the City of Toronto, major office clusters are located in the "905" area including York Region (Highways 404/407 in Markham and Richmond Hill, Vaughan Metropolitan Centre and the Highway 400 Corridor in Vaughan), Peel

Region (Mississauga Airport Corporate Centre, City Centre and Meadowvale), and Halton Region (Q.E.W. Corridor in Burlington and Oakville), as shown in Figure 6.

Figure 6
G.T.A.'s Major Office Nodes and Corridors



Source: Watson & Associates Economists Ltd.

Peel Region's share of the G.T.A. major office market is the second largest; however, it only represents 16% of total building G.F.A.[1] Peel Region has four office nodes:

- Meadowvale Business Park;
- Airport Corporate Centre;

[1] Derived from Colliers International Market Reports.

- Mississauga City Centre; and
- Brampton Urban Centre.

Major office space in Brampton is also sparsely situated along the Highway 407 Corridor.

2.4.2 New Office Construction in the G.T.A.

The G.T.A. is among the top four active new office construction markets in North America, closely following Seattle and behind New York City and Boston. Based on construction levels over the past few years and a robust pipeline of approved office developments leading into the pandemic, the City of Toronto is anticipated to represent the majority of the office employment growth in new office space within the G.T.A. over the short term (within the next five years).

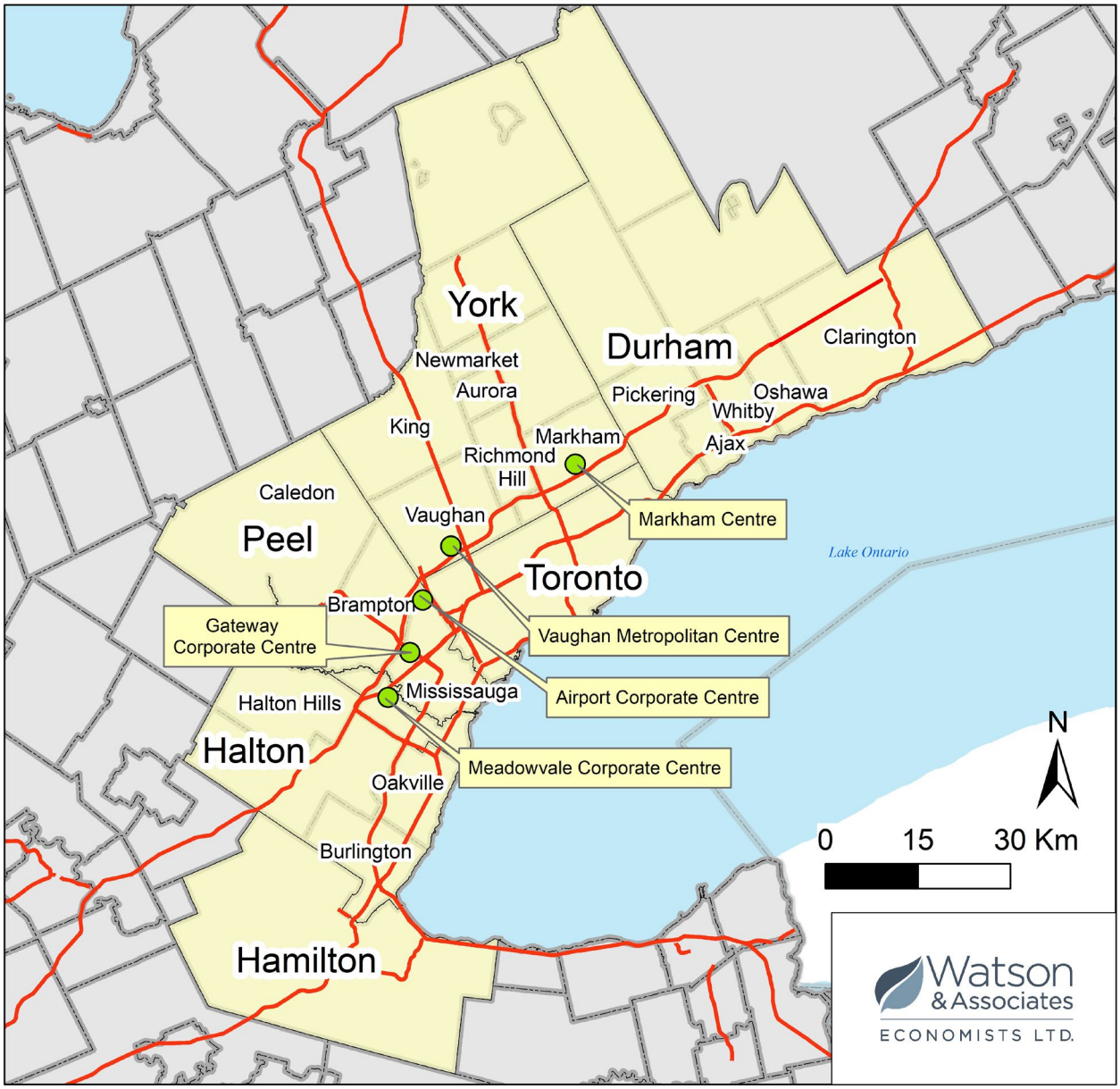
Most of the approximately 566,700 sq.m (approximately 6.1 million sq.ft.) of new office G.F.A. currently under construction in the G.T.A. is concentrated in the City of Toronto, with the other markets in the G.T.A. representing only 11%, or approximately 66,000 sq.m (710,000 sq.ft.) of office G.F.A.[1]

As identified in Figure 7, over the past decade new office development in the G.T.A. outside the City of Toronto has primarily been concentrated within the following five nodes:

- Meadowvale Corporate Centre;
- Gateway Corporate Centre;
- Airport Corporate Centre;
- Vaughan Metropolitan Centre; and
- Markham Centre.

[1] CBRE Canada Office Figures, Q2 2033.

Figure 7
G.T.A.
Active Suburban Office Nodes

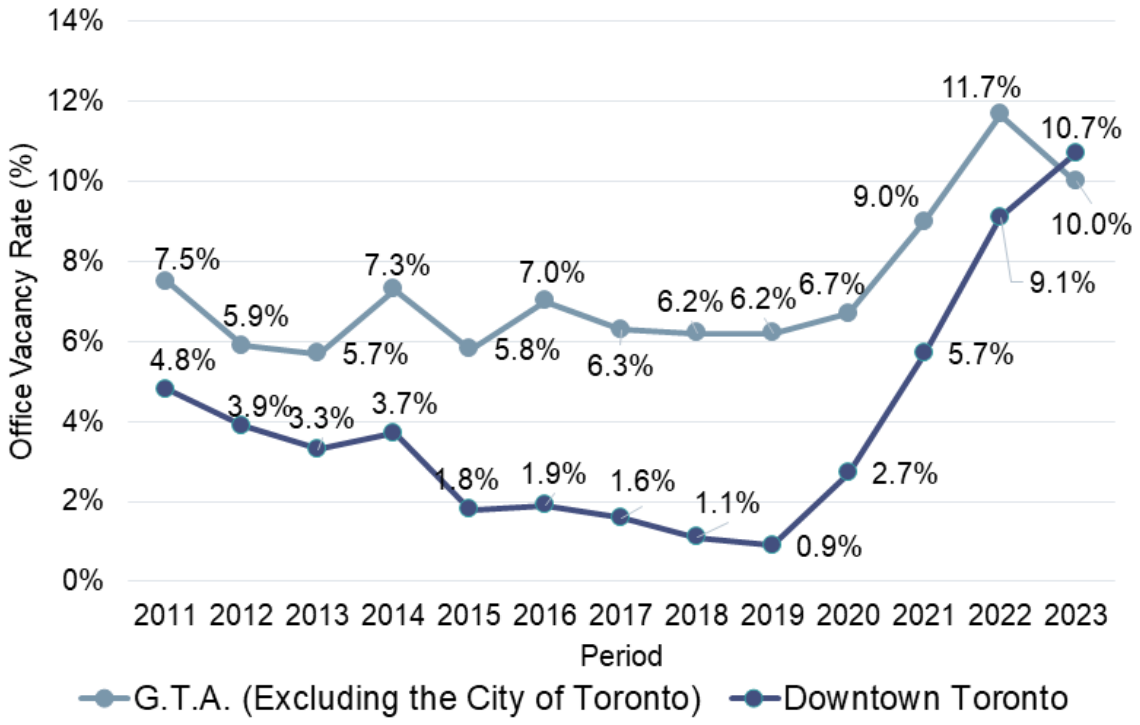


2.4.3 Office Vacancy Rates in the G.T.A.

The office vacancy rate in the G.T.A. is estimated at 10.5%, which is lower than many of the office markets in North America (for example the U.S. average is 13.0%[1]). The rise in remote working/work at home in office-based employment sectors during the pandemic has had an impact on vacancy rates, particularly in urban locations. Pre-pandemic office vacancy rates in downtown Toronto were at an all-time low at less than 1.0% in 2019. The demand for office space in downtown Toronto was largely driven by the tech sector prior to the pandemic, a sector that has a large remote and work from home component today. Figure 8 illustrates the historical change in office vacancy rates in the G.T.A. market with a comparison of office vacancy rates in downtown Toronto and the remaining G.T.A. As illustrated in Figure 8, vacancy rates in the G.T.A. suburban office areas (G.T.A., Excluding the City of Toronto) have declined from 11.7% in 2022 to 10.0% in 2023.[2] Vacancy rates in Downtown Toronto continue to climb and now are exceeding G.T.A. suburban areas. While vacancy rates in Downtown Toronto are exceeding the suburban areas, it is important to recognize that Downtown Toronto has absorbed a higher level of new office G.F.A. since the onset of the pandemic.

[1] Derived from Lee & Associates North America Report, Q1 2023.
[2] Colliers International real estate market reports by Watson & Associates Economists Ltd.

Figure 8
G.T.A.
Office Vacancy Rate, 2011 to 2023



Source: Derived from Colliers International real estate market reports by Watson & Associates Economists Ltd.

The availability rate in the G.T.A. is 12.7% and is higher than the vacancy rate of 10.5%. The availability rate consists of all vacant, available space (space that is occupied but could be leased or subleased to a new tenant) and office space under construction not yet pre-leased.[1]

[1] Colliers International real estate market reports.

2.5 Office Real Estate Base and Trends in Peel Region

2.5.1 Office Space within Brampton

The City of Brampton has an existing office base of 380 million sq.m (4.1 million sq.ft.) of G.F.A. which comprises 10% of Peel Region's total office inventory.

Key highlights of the office space in the City of Brampton are provided below.

- Brampton has 55 major office buildings across the City.[1] The largest office building in the City is the Loblaw Head Office at approximately 42,500 sq.m (457,400 sq.ft.) situated in the BramWest Secondary Plan area.
- The office base in the City of Mississauga is 6 times larger than Brampton.[2]
- Brampton has a very low office vacancy rate of 1.4% and an availability rate of 3.4%. As of July 2023, there is approximately 12,820 sq.m (138,000 sq.ft.) of office space available in the City of Brampton. Compared to the rest of the G.T.A., Brampton has very low vacancy and availability rates.[3] Since a large portion of the City's office base is oriented towards single-tenant users, the City has not experienced the fluctuations in office vacancy rates since the onset of the pandemic. Underutilized office space in a single-tenant building, especially owner-occupied, is less likely to be available for lease.
- As previously discussed, the G.F.A. in Brampton comprises 32% Class A office space, while the remainder is identified as Class B or C. As a comparison, Mississauga's office G.F.A. comprises 65% Class A office space. There are only a few examples of Class A office space in the City of Brampton.

2.5.2 Multi-Tenant and Single-Tenant Space in Brampton

Only two multi-tenant major office buildings have been added to the City of Brampton in the last decade – an office development in the Ray Lawson M.T.S.A. (7685 Hurontario Street) and an office development in The Gore M.T.S.A. (7965 Goreway Drive).

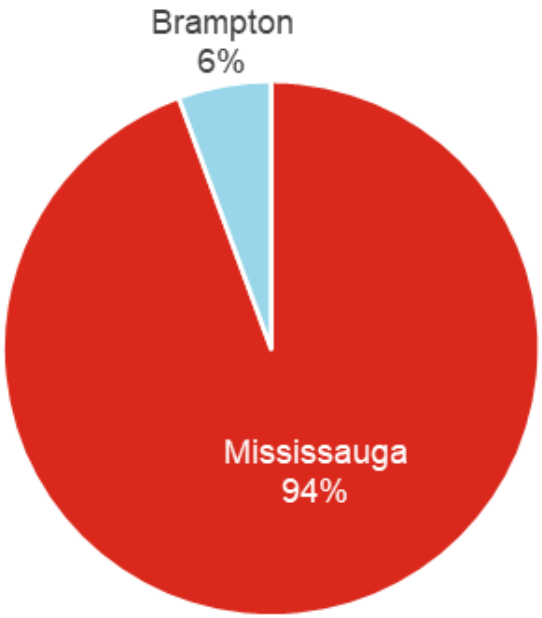
[1] Colliers International real estate market reports.
[2] Ibid.
[3] Vacancy rate based on Colliers International Reports. Office space available on the market is based on a survey of listings by Watson & Associates Economists Ltd. as of July 2023.

The City of Brampton has been more successful in accommodating single-tenant/ owner-occupied office space. Owners of single-tenant/owner-occupied buildings typically seek specific requirements for site development and building design (e.g., Adidas Head Office in Vaughan has a site large enough to accommodate a soccer field; and the BMW Head Office in Richmond Hill has bays to store protype vehicles). Single-tenant/owner-occupied building owners typically plan for a longer period of occupancy and as a result will seek a site that may offer the opportunity for future expansion. These requirements often require larger office sites typically found in greenfield areas.

2.5.3 New Office Construction within Peel Region

Over the 2015 to 2022 period, Peel Region added one to two office buildings annually or approximately 15,500 sq.m (167,000 sq.ft.) of office G.F.A. annually. Brampton comprised 6% of the office G.F.A. development in Peel Region, while the City of Mississauga comprised 94% of the office G.F.A. development during this period, as summarized in Figure 9.

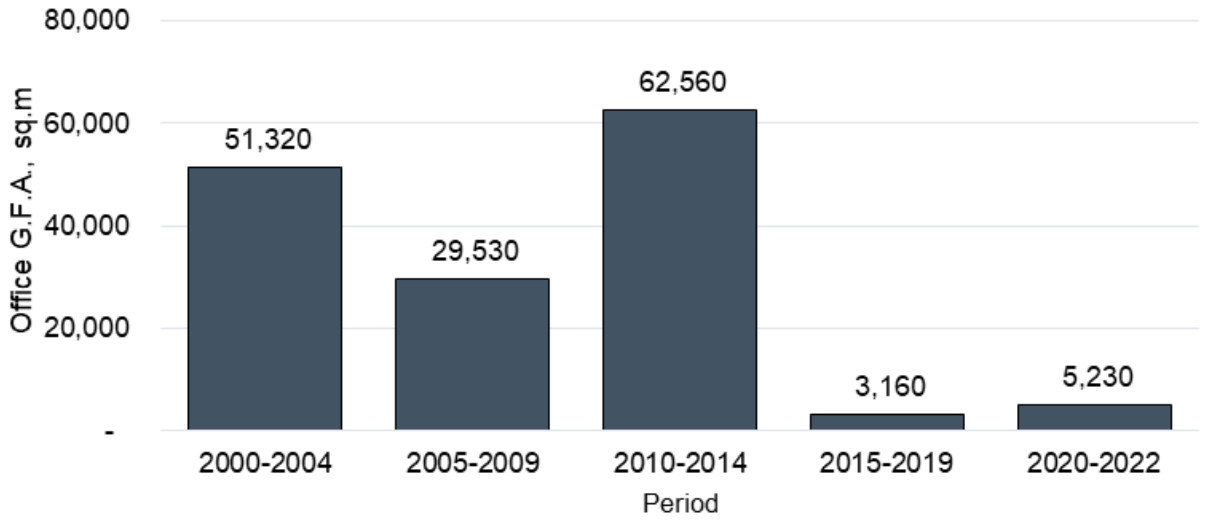
Figure 9
Peel Region
Share of New Office Gross Floor Area by Area Municipality, 2015 to 2022



Source: Based on Region of Peel Non-Residential Building Permit data by Watson & Associates Economists Ltd.

Over the 2000 to 2023 period, the City of Brampton has averaged 6,900 sq.m (74,000 sq.ft.) of office G.F.A. annually; however, since 2015, the City has averaged 1,200 sq.m (13,000 sq.ft.) of new office G.F.A. annually, as illustrated in Figure 10.

Figure 10
City of Brampton
Office G.F.A. Development Activity, 2000 to 2022, sq.m



Source: Derived from the City of Brampton Non-Residential Building Permit Activity by Watson & Associates Economists Ltd.

2.5.4 Trends in Non-Traditional Office Space

It is important to note that Figures 9 and 10, previously discussed, only include stand-alone major office development. While construction activity for stand-alone office buildings in Peel Region has been modest, there have been some notable developments that are accommodating the growing knowledge-based sector in more integrated built-forms with other employment uses. Furthermore, integrated industrial and office development provide an opportunity to create a transition from Employment Area uses to mixed-uses in M.T.S.A.s. Examples in Peel Region are discussed below.

- Construction is underway in the BramWest area to accommodate the MDA Global Headquarters, a space robotics manufacturer. The integrated development is approximately 18,580 sq.m (200,000 sq.ft.) and includes a four-storey office building and a large manufacturing and lab building on site.

- Development has been completed on Bramalea Road and Steeles Avenue in Brampton to accommodate three buildings that include 34,700 sq.m (373,000 sq.ft.) of industrial space and 2,880 sq.m (31,000 sq.ft.) of flex office space.
- Within the City of Mississauga, plans are underway to redevelop a former head office building site (2395 Speakman Drive) within the Sheridan Research Park into a 32,510 sq.m (350,000 sq.ft.) life sciences campus. The location will be tailored to accommodate wet laboratory space, manufacturing, office, innovation and technology-oriented space in a phased development approach, beginning with 13,470 sq.m (145,000 sq.ft.).[1]
- In the Town of Caledon, The Beer Store built a new integrated head office and warehousing facility (approximately 37,810 sq.m (407,000 sq.ft.)). The large facility involved consolidating The Beer Store employees from a head office location in Mississauga and staff from a warehousing facility in Brampton, as illustrated in Figure 11.

[1] Based on development profile on Colliers International Website.

Figure 11
Peel Region
Example of Consolidation of Office and Distribution Space into an Integrated Operation

Former The Beer Store Head Office, Mississauga (Office Site)

Former The Beer Store Distribution Centre, Brampton (Industrial Site)

Consolidated The Beer Store – Head Office and Distribution Centre Integrated, Caledon

Image sources: LoopNet (The Beer Store former Head Office) and Google Earth Imagery.

Figure 12 provides additional examples of integrated industrial and office uses across the G.T.H.A. As illustrated in Figure 12, Kubota Canada Ltd., a tractor and compact equipment distributor, built an industrial and office complex in the City of Pickering during 2022 that comprises 46,500 sq.m (500,000 sq.ft.) of industrial warehouse space and an attached state-of-the-art three-storey office building (6,400 sq.m (65,000 sq.ft.)). There is also the opportunity to accommodate integrated industrial and office facilities on small infill sites, as shown in Figure 12 with the development of the Blum Canada warehouse and head office facility in Mississauga, Ontario. This new facility was built on a small infill lot of less than 2 ha) and comprises 5,800 sq.m (62,000 sq.ft.) of Gross Flor Area (G.F.A.) and includes high ceiling warehousing space, as well as showroom space for the sales team to demonstrate products to contractors and dedicated office space for head office staff.

Figure 12
Selected Locations in G.T.A.
Examples of Integrated Industrial/Office Uses

Kubota Canada Ltd. (tractor and compact equipment distributors) – Pickering Innovation Corridor, Highway 407, Pickering, ON. This new facility (built in 2022) comprises 46,500 sq.m (500,000 sq.ft.) of industrial warehouse space and 6,400 sq.m (65,000 sq.ft.) in an attached state-of-the-art three storey office building.

Blum Canada (kitchen furniture and fixtures supplier) – Gateway Employment Area, Mississauga, ON. This new facility was built on a small infill lot (less than 2 ha). Comprises 5,800 sq.m (62,000 sq.ft.) of G.F.A. and includes high ceiling warehousing space, as well as showroom space for the sales team to demonstrate products to contractors and dedicated office space for head office staff.

Image sources: Google Earth.

Chapter 3
Outlook for the Office Sector in the Greater Toronto Hamilton Area

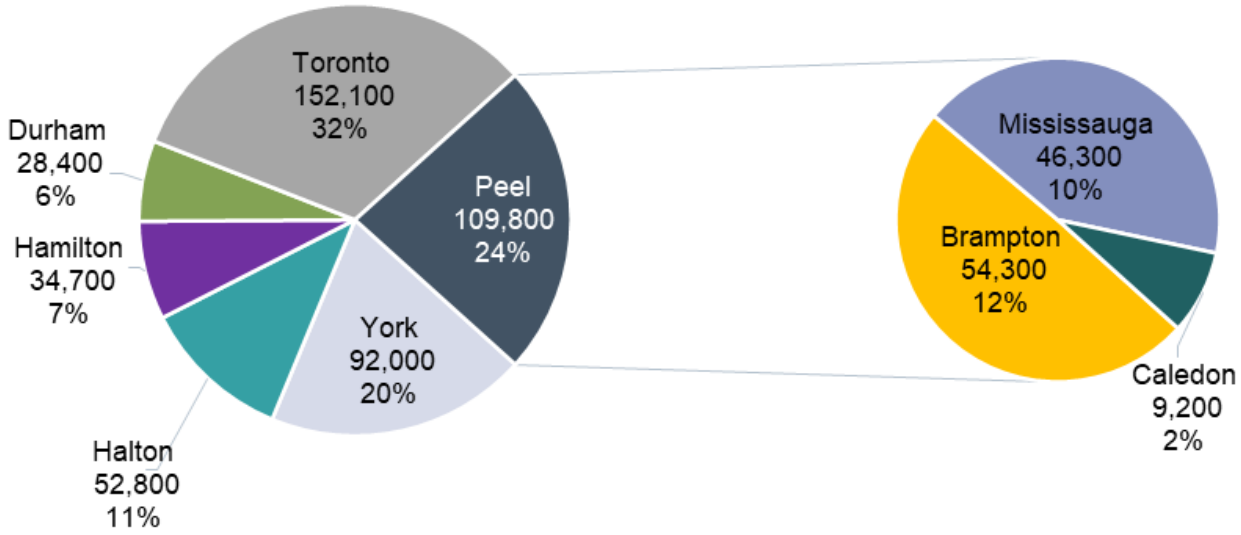
3. Outlook for the Office Sector in the Greater Toronto Hamilton Area

3.1 Anticipated Office Growth in the Long Term

Based on a review of Municipal Comprehensive Reviews (M.C.R.) across the G.T.H.A., approximately 435,100 major office jobs are anticipated over the 2021 to 2051 period. This represents an annual employment growth rate of 1.3% over the next 30 years. M.O.E. is considered a key component of employment growth across the G.T.H.A., representing 27% of the total employment forecast over the next 30 years. It is important to recognize that the M.C.R. forecasts were primarily prepared either before the pandemic or during the early stages of the pandemic and may not fully reflect the acceleration of trends in remote work. Work at home employment is generally included in the population-related employment category.

As summarized in Figure 13, Peel Region represents 24% of the M.O.E. growth forecast over the 2021 to 2051 period. Within Peel Region, the City of Brampton was allocated nearly 49% of Peel's M.O.E. growth, exceeding the M.O.E. growth forecast for the Region of Halton, City of Hamilton and Region of Durham individually. As illustrated in the figure, the City of Brampton is anticipated to represent 12% of the M.O.E. growth over the next 30 years in the G.T.H.A.

Figure 13
G.T.H.A.
Major Office Employment Growth Forecast, 2021 to 2051



Source: Derived from recent Municipal Comprehensive Reviews from the respective upper-tier and single-tier municipalities in the G.T.H.A. by Watson & Associates Economists Ltd.

3.2 Drivers of Office Growth

3.2.1 Overview

Office development and the employment sectors they typically accommodate have certain site-specific requirements which include:

- Access to skilled labour, including an educated labour force;
- Proximity to related industry clusters (companies and public institutions such as universities);
- Prestige setting;
- Access to higher order public transit;
- Access and exposure to 400-series/limited access highways;
- Ease of access/egress;
- Access to on-site amenities/services and proximity to off-site services; and
- Potential for live/work opportunities.

3.2.2 Need for Office Space

While remote work has shown its viability since the onset of the pandemic, the demand for office development persists because physical workplaces continue to provide unique advantages and benefits for both companies and their employees. The post-pandemic office landscape may experience a shift towards hybrid work models, combining the best of remote work and in-office collaboration to meet the evolving needs of businesses and their workplace. Companies still see the value in office space for the factors discussed below.

- **Collaboration and Innovation:** While remote work has become more prevalent, many companies recognize the value of in-person collaboration for fostering creativity, innovation, and team dynamics. Offices provide a physical space where employees can interact, share ideas and work together effectively.
- **Company Culture and Identity:** Offices play a vital role in cultivating a strong company culture and identity. Being a physical presence in a shared space can reinforce a sense of belonging, loyalty, and commitment to the organization's values and goals.
- **Training and Mentoring:** On-site offices offer a structured environment for training new employees and providing mentorship opportunities, which can be challenging to replicate remotely.
- **Client Meetings and Relationships:** Face-to-face interactions with clients can be more impactful for building and maintaining strong business relationships. Offices provide a professional setting for conducting meetings and hosting clients, enhancing trust and credibility.
- **Company Image and Branding:** Offices can serve as a physical representation of a company's brand and image. A well-designed and attractive office space can impress clients, partners, and potential employees, enhancing the organization's reputation.
- **Employee Socialization and Well-being:** Offices offer opportunities for social interactions and networking, contributing to employees' well-being and reducing feelings of isolation.
- **Infrastructure and Technology:** Offices are equipped with specialized infrastructure and technology that might not be readily available at home. This includes high-speed internet and advanced equipment required in a range of knowledge-based sectors.

- **Confidentiality and Security:** A range of industries that deal with sensitive information require a secure and controlled environment. Offices provide the necessary infrastructure and measures to maintain confidentiality and data security.

3.2.3 Competitive Office Environment in the G.T.H.A.

The City of Brampton is competing with the municipalities across the G.T.H.A. with plans for ambitious plans to accommodate office development. Across the G.T.H.A., the office forecasts prepared by upper-tier/single-tier municipalities are largely underpinned by plans to intensify M.T.S.A.s and other strategic growth areas. Some of the municipalities are further ahead with key attributes, such as higher order transit already in place. For example, in York Region, the City of Vaughan has ambitious plans to create a modern urban centre around the newest subway station in the G.T.H.A., including multi-use office towers. It is anticipated the Vaughan Metropolitan Centre will accommodate an additional 5,000 office jobs by 2031.[1]

The knowledge-based sectors are the primary driver of demand for office growth. While office developments accommodate a large share of this employment, it is important to stress the importance of planning for a range of built-forms to accommodate these knowledge-based sectors. Within Peel Region there are signs of strong demand for unconventional office space, including the opportunity to accommodate office uses with other uses, such as manufacturing and warehousing. The trend towards remote and hybrid work arrangements and the associated downward pressure of office floor space requirements leans to a situation where businesses are "right-sizing" operations, including consolidating operations. This bodes well for municipalities such as Brampton that can offer sites that combine office and industrial site needs.

Provided below are further details on the City's competitive position in terms of accommodating M.O.E.

[1] City of Vaughan, Vaughan Metropolitan Centre, Secondary Plan, City of Vaughan Official Plan – Volume 2 – 2020 Office Consolidation, as partially approved by the Ontario Municipal Board, p. 8.

3.2.4 Access to Labour

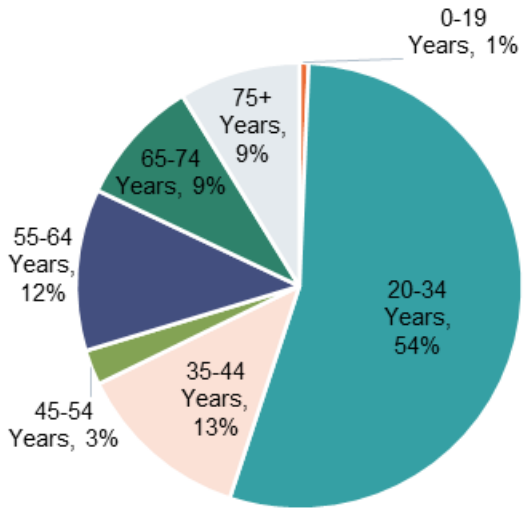
A key advantage for the City of Brampton in accommodating M.O.E. growth is its robust population growth and access to the broader commuter-shed within the G.H.T.A. Over the last five years (2016 to 2021), Brampton's population increased by approximately 73,900 persons, at an annual growth rate of 2.4%. In comparison, the G.T.H.A. grew by 0.9% over the same period. The City of Brampton represented 19% of the population growth within the G.T.H.A. over the 2016 to 2021 period. A notable observation of the recent population growth within Brampton is its composition by age cohort, with a significant increase in the young working-age population. The population age group between 20 and 34 accounted for 53% of population growth in the City of Brampton over the 2006 to 2011 period, as shown in Figure 14. As a comparison, the same age group in the G.T.H.A. represented 18% of the population growth.[1]

Looking forward, the City is anticipated to reach a population base of approximately 985,000 people by 2051 according to the City of Brampton O.P. This represents an increase of approximately 295,500 residents between 2021 and 2051 and an annual growth rate of 1.2%, as summarized in Figure 15.

In addition to a young robust population base, the City of Brampton has a highly educated labour force, with over 44% of the population having a post-secondary education.[2] As a comparison, approximately 30% of the population within the G.T.H.A. has a bachelor's degree or higher. This bodes well for the City of Brampton in building its future office employment base.

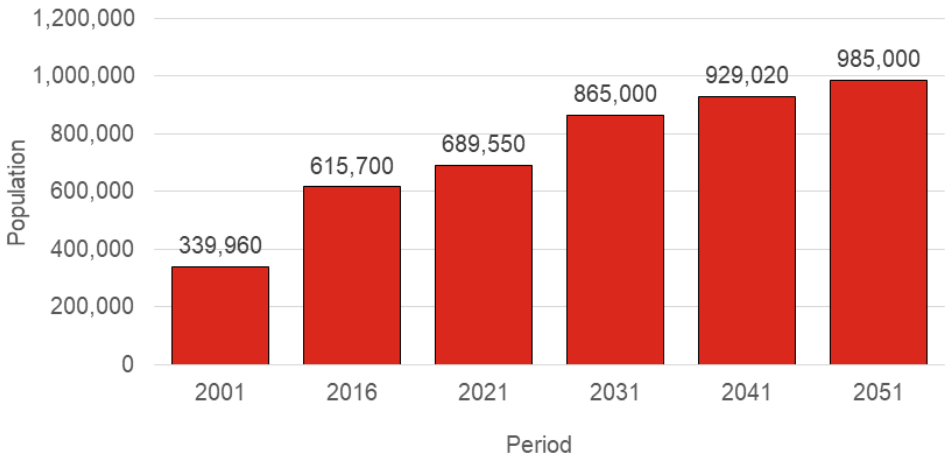
[1] Based on Statistics Canada, 2016 and 2021 Census.
[2] Ibid.

Figure 14
City of Brampton
Population Growth by Age Cohort, 2016 to 2021



Source: Derived from Statistics Canada, 2016 and 2021 Census by Watson & Associates Economists Ltd.

Figure 15
City of Brampton
Population Forecast, 2021 to 2051



Note: Includes population undercount.
Source: Statistics Canada Census 2001 and 2021 and the City of Brampton Official Plan forecasts summarized by Watson & Associates Economists Ltd.

3.2.5 Transit Improvements

There are several significant transit improvements planned within the City of Brampton which will enhance connectivity both within the City and across the G.T.H.A. These transit improvements are expected to act as vital catalysts, driving the demand for office space in Brampton as accessibility and transportation options improve. Provided below is a summary.

Bramalea GO Transit Train Service

Currently GO Transit service at the Bramalea GO train station primarily facilitates out-flow commuter travel of local residents; however, Metrolinx is transforming the Kitchener GO line into a two-way, all-day rapid transit line. The project involves adding additional lanes and electrification of the line in order to increase train service and reduce the duration of travel along the Kitchener Line. The Province anticipates that the Bramalea GO Station will be the busiest station on the Kitchener Line, accommodating nearly 12,200 daily riders by 2041.[1] The transit improvements are underway and the timeline for completion is expected over the next two to three years.[2] The two-way rapid transit service improvement to the Bramalea GO train station will benefit the Bramalea GO M.T.S.A., by providing opportunities for improved access for businesses and workers in the area, a key advantage that has largely benefited City of Toronto office nodes.

Hurontario L.R.T. (now Hazel McCallion Line)

Currently under construction the Hazel McCallion Line will provide 18 km of rapid transit with 19 stops on a dedicated right-of-way along the Hurontario Street Corridor from Port Credit to the Gateway Terminal in Brampton. Within the City of Brampton, there are three stops, Ray Lawson, County Court, and Gateway. A key feature of the L.R.T. (Light Rapid Transit) is that it will better integrate transit services across Peel Region. The new transit system will connect to major transit systems including GO Transit (Milton and Lakeshore West lines), the Mississauga Transitway, Brampton Transit, ZUM and MiWay.

[1] Based on a press release by the Province of Ontario – *Province one step closer to delivering two-way, all-day GO train service along the Kitchener line*, May 11, 2023.
[2] CityNews Article, *Bramalea GO improvements billed as another step toward two-way, all-day service between Kitchener and the GTA,* May 12, 2023.

It is anticipated that the L.R.T. will be a key catalyst in the re-urbanization of the Hurontario Street Corridor. The L.R.T. project has been instrumental in generating new development opportunities within the cities of Brampton and Mississauga. Within the City of Brampton, plans are underway to transform the Shoppers World mall into a large-scale mixed-use development, while in the City of Mississauga, plans are underway for the first office development in the City Centre in decades (The Offices by Square One District). The L.R.T. will improve access for businesses and workers in the area, reducing the reliance on the need to accommodate parking, a key advantage that has largely benefited City of Toronto office nodes.

Queen Street-Highway 7 B.R.T.

The Queen Street-Highway 7 B.R.T. (Bus Rapid Transit) project is a proposed rapid transit line in the cities of Brampton and Vaughan. The study area covers a 24-kilometre corridor along Queen Street and Highway 7, with 18 kilometres in Brampton, which would create a crucial east-to-west transit spine connecting the northwest and northcentral sections of the G.T.H.A. This infrastructure planning study is being led by Metrolinx, with support from the City of Brampton, Peel Region, and York Region.[1]

A rapid transit corridor on Queen Street was identified as a key Council priority to support population and employment growth, improve connectivity, and increase the share of trips made using transit. The transit improvements would greatly improve access from areas of the City that are not currently well connected, including The Gore M.T.S.A.

Steeles B.R.T.

The Steeles B.R.T. started operations in 2012 and functions as part of the City's Züm transit service that includes six routes. The B.R.T. supports high-capacity routes and has benefits similar to rail transportation, including real-time next bus information and transit signal priority technology. The Steeles B.R.T. currently provides services along Steeles Avenue within Brampton, including service to Mississauga and the City of

[1] City of Brampton website – Queen Street and Highway 7 B.R.T. Projects – https://www.brampton.ca/EN/Business/planning-development/projects-studies/QSTMP/Pages/Welcome.aspx, retrieved July 29, 2023.

Toronto (Humber College). The Mississauga Road at Steeles M.T.S.A. is identified as a strategic transit hub that would better facilitate transit services.

3.2.6 Knowledge-Based Economy

Brampton is in the centre of the Toronto-Waterloo Innovation Corridor, the second largest information and communication cluster in North America. Building on its strategic location, the City of Brampton has made investments and commitments to building a dynamic ecosystem of innovation within the City. The City's Innovation District within the Brampton Urban Growth Centre has attracted entrepreneurs, businesses and education providers. The Innovation District includes incubators supporting growth in the knowledge-based sectors[1] including the Rogers Cybersecure Catalyst, a national centre of innovation and collaboration in cybersecurity, Brampton venture Zone (in partnership with TMU), Altitude Accelerator, Brampton BHIVE (an international incubator in partnership with TDBC). In addition, the City has forged partnerships with post-secondary institutions in developing a presence within the City, including Toronto Metropolitan University which has absorbed around 23,226 sq.m (250,000 sq.ft) in Bramlea Civic Centre, Sheridan College and Algoma University which has a need of over 32,516 sq.m (350,000 sq.ft) on top of the area absorbed by its growth in the downtown. Plans are underway for Toronto Metropolitan University to expand its presence within the City, including a new medical school. Furthermore, there are over 90 private career colleges in Brampton and growing. Such post-secondary institutions within the City act as drivers for education, entrepreneurship and innovation, while taking up existing office space and creating the demand for more.

There is an opportunity to build on the momentum of these investments and spread their influence across the City at strategic locations, including the four strategic office-focused M.T.S.A.s.

[1] According to the Government of Canada, Canada's Innovation and Skills Plan, 2021: "The knowledge-based sectors refers to industries and economic activities that heavily rely on intellectual capital, specialized knowledge, and innovation to drive their growth and productivity."

Chapter 4
Opportunity for Office Development in the Region of Peel and the City of Brampton

4. Opportunity for Office Development in the Region of Peel and the City of Brampton

4.1 Potential Office Development Activity in Peel Region

Provided below is a summary of office development opportunities within Peel Region. In total, the cities of Mississauga and Brampton have approved approximately 180,720 sq.m (approximately 1,945,000 sq.ft.) of office space. The City of Mississauga represents 67% of the active approved development applications in the Region of Peel for office space in terms of G.F.A. Furthermore, there are other major redevelopment projects that are anticipated to add an additional opportunity for office development over the longer term, including Shoppers World (Brampton), Heartland Town Centre (Mississauga), SmartCentres Meadowvale (Mississauga) and Lakeview Village (Mississauga).

City of Mississauga

The City of Mississauga has active development applications to accommodate approximately 120,800 sq.m (approximately 1.1 million sq.ft.) of office G.F.A.[1] A notable office development currently underway includes The Offices by Square One District. The Offices by Square One District is the first office development in the City of Mississauga downtown area in over 20 years. The limited ability to accommodate surface parking in an area without higher order transit has long been a key obstacle for office development in downtown Mississauga. The Offices by Square One District includes 41,800 sq.m (450,000 sq.ft.) of Class A office space in a mixed-use building with future access to the Hurontario L.R.T. (now known as the Hazel McCallion Line).

Ambitious plans are underway to accommodate office uses in the large-scale redevelopment of the Lakeview community in Mississauga. Lakeview Village is planned

[1] Based on development applications received since 2019. The City of Mississauga has identified 132,700 sq.m of office G.F.A. based on applications since 2006. Retrieved from the City of Mississauga website: https://www.arcgis.com/apps/dashboards/6494c7eb73f74d49b422b9633557fa47, accessed July 7, 2022.

to accommodate nearly 167,230 sq.m (approximately 1.8 million sq.ft.) of office G.F.A. in a mixed-use community.

Other more mixed-use developments anticipated to provide office space over the long-term period include the redevelopment of Heartland Town Centre (a large power centre) and the redevelopment of SmartCentres Meadowvale (a power centre). The full development of office uses on these sites is considered long term; however, it is important to recognize that this redevelopment in Mississauga opens up a significant number of supply opportunities for office G.F.A. within Peel Region.

City of Brampton

The City of Brampton has had pre-consultation on several potential developments that include allocations for office space. Six proposed office developments have formal applications and are planned to accommodate a total of 59,920 sq.m (645,000 sq.ft.) of office space.[1] Of these developments, only two active office developments are further along in the approval process. As discussed below, the two office developments include a 10-storey office building in the BramWest Secondary Plan Area and the relocation of the Rogers Head Office to downtown Brampton. These developments total 53,550 sq.m (576,000 sq.ft.) of new office space. In addition to this, plans are underway for the development of the Peel Regional Police Support Facility located beside Canon and within the Mississauga Rd & Steele's MTSA. The facility is anticipated to cover 18,580 sq.m (200,000 sq.ft) and accommodate 600 jobs. Construction is anticipated to commence in the fall. Further, Pearl Developments have proposed development of a 5-storey office building at covering 3,809 sq.m (41,000 sq.ft) with 100 + jobs.

Plans are underway for the development of a new 10-storey office building with ground floor retail, hotel and banquet hall uses in the BramWest Secondary Plan Area. The site plan includes office space for floors 2 to 10 with a G.F.A. of 7,100 sq.m (76,000 sq.ft.).

A notable new office development anticipated in the City of Brampton is the relocation of the Rogers Head Office operation from an Employment Area in the City to the downtown core of Brampton. The City received a Minister's Zoning Order for an office development of 18,500 sq.m to 46,500 sq.m (200,000 sq.ft. to 500,000 sq.ft.) on a site

[1] The lower end range of the proposed Rogers Head Office building is included in the office G.F.A. estimates.

adjacent to the Brampton GO Station. The office development is anticipated to accommodate up to 3,000 employees.

The Magna International located on Ace Drive is an integrated advanced manufacturing site with substantial office space. In February 2023, Magna announced it is investing more than $470 million to expand its operations across Ontario, Canada. The growth includes a new battery enclosures facility in Brampton to support the Ford F-150 Lightning and future OEM programs.[1] The facility is proposed to cover 46,451 sq.m (500,000 sq ft) building with 7,432 sq.m (80,000 sq.ft) of office space and employ almost 600 employees. Furthermore, site plan has been approved for MDA Phase 2. to build 4,645 sq.m (50,000 sq.ft) of the office space for MDA north of the 18,580 sq.m (200,000 sq.ft) facility.

Over the long-term period, the redevelopment of Shoppers World (within the Gateway M.T.S.A.) based on the conceptual master plan is anticipated to accommodate a total G.F.A. of 35,100 sq.m (378,000 sq.ft.) of office uses at ultimate buildout (Phase 4).

4.2 Major Office Employment and Office Gross Floor Area

As previously discussed, based on the Region of Peel M.C.R. employment forecast, it is anticipated that the Region will accommodate 109,800 major office jobs over the 2021 to 2051 period. The City of Brampton is anticipated to accommodate nearly half (49%) the major office jobs over that period. As previously noted, the employment forecast prepared by the Region of Peel was carried out in the early stages of the pandemic and due to the timing of the Region's M.C.R. did not consider the impacts of the pandemic on the rapidly changing nature of work.

The forecast for M.O.E. has been reviewed by Watson and adjustments were made to the forecast. Adjustments are summarized below.

- The forecast has been reduced by 5% to account for no fixed place of work employment that is embedded in the M.O.E. forecast.
- It is estimated that work at home employment in office sectors increased from an average 16% in 2016 to 30% in 2022. As such, Watson has reduced the M.O.E.

[1] https://www.magna.com/stories/news-press-release/2023/magna-announces-new-facility-and-expands-in-five-other-locations-across-ontario-to-support-new-business

forecast by 16% to account for additional office employment that is anticipated to be carried out exclusively from home.

The total adjustment of the M.O.E. forecast includes:

- 42,900 major office jobs in Brampton;
- 36,600 major office jobs in Mississauga; and
- 7,300 major office jobs in Caledon.

In preparing the office G.F.A. forecast, an estimate was made to the City of Mississauga to reflect M.O.E. growth opportunities that have the potential to take-up existing vacant office space. The forecast assumes that approximately 15% of the M.O.E. forecast in Mississauga can be accommodated through available existing vacant office space. The City of Mississauga has a high vacancy rate of 13%. Given the limited supply of vacant office space in Brampton, it is assumed that there is limited opportunity for M.O.E. growth to be accommodated in existing vacant office space.

The office G.F.A. forecast includes two scenarios that illustrate office space requirements based on two floor space per worker (F.S.W.) assumptions:

- **Scenario 1: 28 sq.m (301 sq.ft.) F.S.W.** is based on the average F.S.W. anticipated as part of the background work prepared by Watson for the Region of Peel Development Charges Background Study in 2020.
- **Scenario 2: 17 sq.m (182 sq.ft.) F.S.W.** is based on the average F.S.W. of 28 sq.m assumed prior to the pandemic with a reduction of 40% (28 x 40% = 17) to reflect the downward pressures on space requirements due to hybrid work arrangements. It is assumed that average office space requirements for employees due to hybrid office arrangements has reduced the F.S.W. per employee, as employees work at the office an average 60% of the week (three of five days weekly).

Figure 16 summarizes the M.O.E. forecast, while Figure 17 summarizes the office G.F.A. forecast in two scenarios. Key highlights include the following:

- Given the trends in workplace arrangements and the outlook for the office market, Scenario 2 reflects the most realistic scenario. All figures discussed below are based on Scenario 2, a reduced F.S.W.

- The City of Brampton would require 729,000 sq.m (7,850,000 sq.ft.) of new office G.F.A. to accommodate office employment to 2051.
    - With approximately 59,920 sq.m (645,000 sq.ft.) of office G.F.A. currently in approvals, the City would require an additional 669,100 sq.m (7,202,000 sq.ft.) of office G.F.A. to accommodate office growth in the City.
- The City of Mississauga would require 528,700 sq.m (5,690,000 sq.ft.) of new office G.F.A. to accommodate office employment to 2051.
    - With approximately 120,800 sq.m (1,300,000 sq.ft.) of office G.F.A. currently in approvals, Mississauga would require an additional 407,900 sq.m (4,391,000 sq.ft.) of office G.F.A. to accommodate office growth in the City.
- The Town of Caledon would require 124,100 sq.m (1,336,000 sq.ft.) of new office G.F.A. to accommodate office employment to 2051.

Figure 16
Region of Peel
M.O.E. Growth Forecast, 2021 to 2051

2021 to 2051	M.O.E. Growth	M.O.E. Growth Adjustment[1]	Adjusted for Take-Up of Vacancy Space	Net M.O.E. Growth Requires New Office Space, 2021 to 2051
Municipality	A	B	C	D = B - C
Brampton	**54,300**	**42,900**	**0**	**42,900**
Mississauga	46,300	36,600	5,500	31,100
Caledon	9,200	7,300	0	7,300
Peel Region	**109,800**	**86,800**	**5,500**	**81,300**

[1] Major office employment (M.O.E.) adjustment includes a downward adjustment of 5% for no fixed place of work and 16% for additional work at home employment.
Source: Watson & Associates Economists Ltd. based on the Region of Peel Municipal Comprehensive Review forecast prepared by Hemson Consulting Ltd.

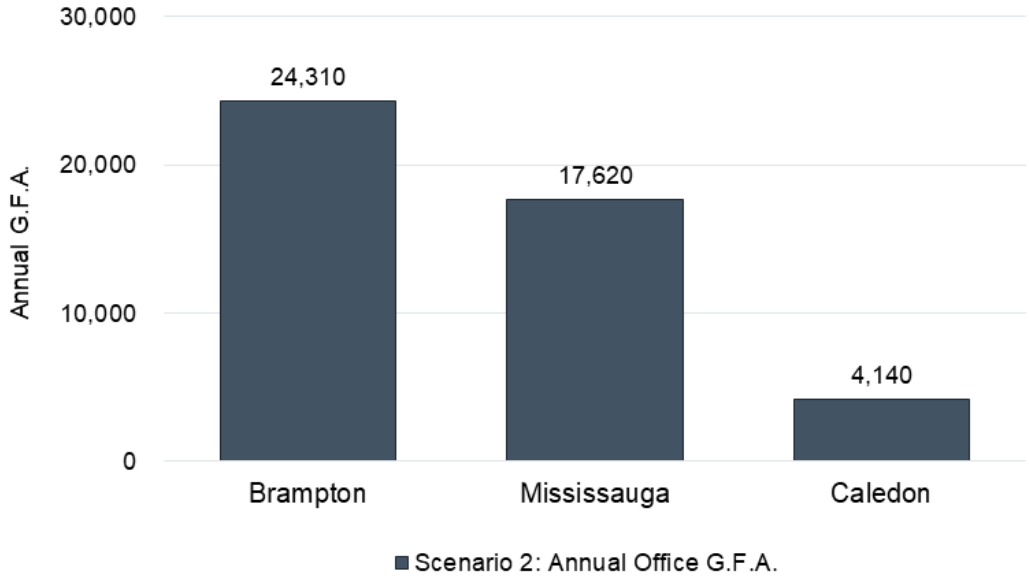
Figure 17
Region of Peel
M.O.E. G.F.A. (sq.m) Forecast, 2021 to 2051

2021 to 2051	Net M.O.E. Growth Requires New Office Space, 2021 to 2051	Scenario 1: 28 sq.m F.S.W.	Scenario 2: 17 sq.m F.S.W.
Municipality	A	B = A x 28	C = A x 17
Brampton	**42,900**	**1,201,200**	**729,300**
Mississauga	31,100	870,800	528,700
Caledon	7,300	204,400	124,100
Peel Region	**81,300**	**2,276,400**	**1,382,100**

Source: Watson & Associates Economists Ltd. based on the Region of Peel Municipal Comprehensive Review forecast prepared by Hemson Consulting Ltd.

As illustrated in Figure 18, the City of Brampton is anticipated to add 24,310 sq.m (262,000 sq.ft.) of office G.F.A. annually over the next 30 years. This is a significant increase from the historical office G.F.A. since 2000 of 6,900 sq.m (74,000 sq.ft.) annually, or 1,200 sq.m (13,000 sq.ft.) of new office G.F.A. annually since 2015.

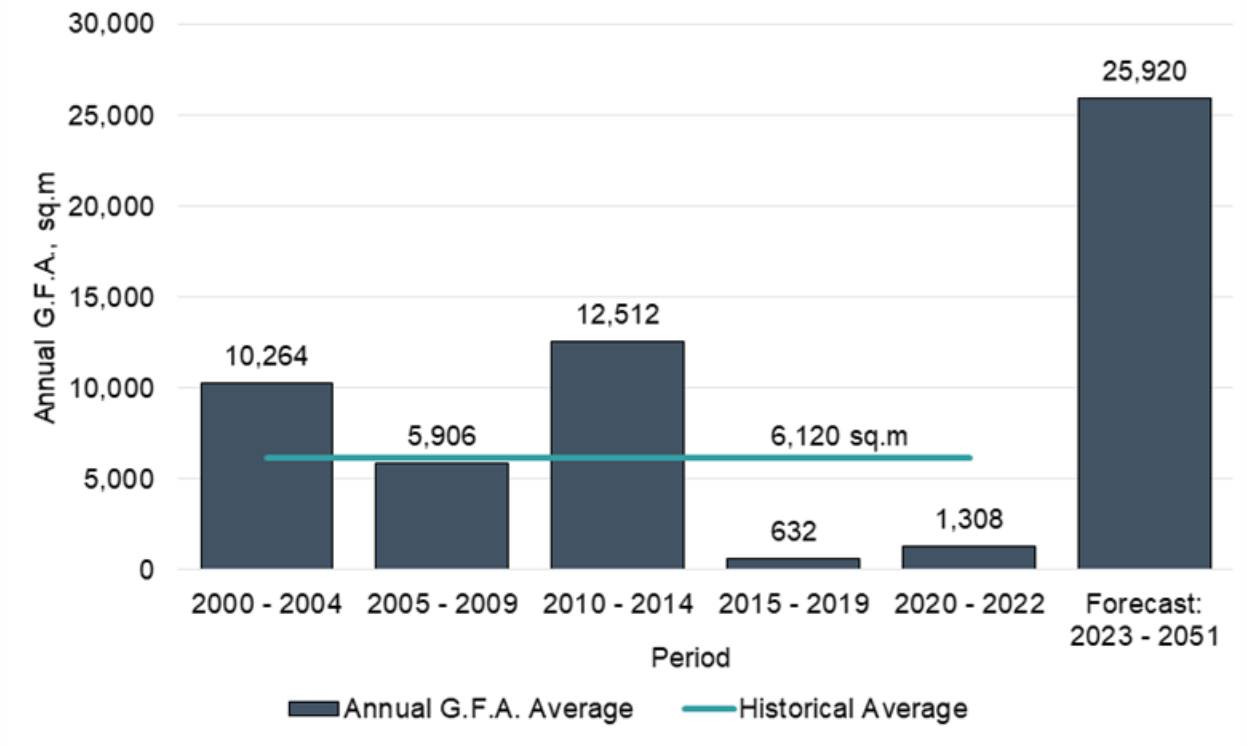
Figure 18
Region of Peel
Scenario 2 G.F.A. Forecast
Annual Office G.F.A Forecast by Municipality, 2021 to 2051, sq.m



Source: Watson & Associates Economists Ltd., 2023.

Figure 19 provides further details on historical and forecast office G.F.A. absorption, including an adjustment for recent office G.F.A.

Figure 19
City of Brampton
Annual Office G.F.A. – Historical and Forecast



Note: Forecast period is based on 2023 to 2051. Historical reflects recent office development.
Source: Watson & Associates Economists Ltd., 2023.

Chapter 5
Major Office Opportunities by Major Transit Station Area in the City of Brampton

5. Major Office Opportunities by Major Transit Station Area in the City of Brampton

5.1 Policy Context

The City of Brampton Draft O.P. has identified a series of M.T.S.A.s across the City. According to the City of Brampton Draft O.P., M.T.S.A.s are designated as mixed-use areas on Schedule 2 along boulevards. The purpose of M.T.S.A.s is to encourage activity along the City's boulevards, support 15-minute neighbourhoods and to provide opportunities to help achieve Brampton's affordable housing goals. The O.P. notes that each M.T.S.A. is unique with its own growth potential and that the City will study each M.T.S.A. in accordance with the implementation policies of the O.P.[1]

M.T.S.A.s are classified into one of two categories within the City:

- **Primary M.T.S.A.** – areas delineated by the Region of Peel O.P. that have existing or planned rapid transit and can meet or exceed the minimum density target.
- **Planned M.T.S.A.** – areas identified by the Region of Peel O.P. which are intended to become M.T.S.A.s and will be further delineated when infrastructure planning and investment, or changes in land use unlock potential.[2]

The O.P. notes that where Employment Areas overlap or are within an M.T.S.A., the City will initiate a study, in accordance with the Region of Peel O.P. and Part 2.2 of the City of Brampton O.P., to support the integration of non-employment uses in specific portions of Employment Areas based on the planning context to develop vibrant, mixed-use areas, and innovation hubs.[3]

Four of the M.T.S.A.s have been identified as focus areas for office development since they overlap with Employment Areas. Below is a list of the M.T.S.A.s that have been identified as focus areas for office development, and the minimum people and jobs/ha density target.

[1] City of Brampton Official Plan, p. 2-16.
[2] Ibid.
[3] Ibid., policy 2.1.2.30, p. 2-18.

- **Ray Lawson** – minimum 160 people and jobs/ha;
- **Mississauga at Steeles** – minimum 160 people and jobs/ha;
- **The Gore** – minimum 160 people and jobs/ha; and
- **Bramalea GO** – minimum 150 people and jobs/ha.

The following provides a brief overview of the four M.T.S.A.s identified as strategic office-focused M.T.S.A.s.

5.2 Existing Conditions of the M.T.S.A.s

Provided in Figure 20 is a brief description of the M.T.S.A.s, as well as a review of the preliminary land use plan for the four key M.T.S.A.s for development, based on the City's conceptual land use plans. Key highlights are provided below.

- Bramalea GO M.T.S.A. is the only M.T.S.A. that does not have an existing office base. Furthermore, the Bramalea GO M.T.S.A. does not offer a prestige image given that it is in an area surrounded by general industrial uses.
- The Mississauga at Steeles M.T.S.A. is primarily a greenfield area, while the remaining M.T.S.A.s would require some level of redevelopment or infill to accommodate additional development.
- It is estimated that the four M.T.S.A.s have a combined employment base of 6,740 employees and a population base of 4,840.
- The total combined land area of the four M.T.S.A. totals 273 ha (673 acres). The average existing people and jobs density is 25 people and jobs/ha.

Figure 20
City of Brampton
Office-Focused M.T.S.A.s
Existing Conditions

M.T.S.A.	Land Area, ha	Existing Prestige Image	Development Opportunities	Existing Population Base	Existing Employment Base	Existing Uses
Bramalea GO (GO Train)	97.0	No	Redevelopment	1,530	2,300	Employment Area Uses
The Gore (Queen St. B.R.T.)	85.5	Yes	Greenfield/Infill/ Redevelopment	2,170	1,330	Office, Retail and Residential
Ray Lawson (Hurontario L.R.T.)	38.0	Yes	Infill/ Redevelopment	1,140	2,100	Office, Retail and Residential
Mississauga at Steeles (Steeles Ave. B.R.T.)	52.0	Yes	Greenfield	0	1,040	Office and Employment Area Uses
Total	**272.5**	**-**	**-**	**4.840**	**6,770**	**-**

Source: Based on background M.T.S.A. work prepared by the City of Brampton and summarized by Watson & Associates Economists Ltd.

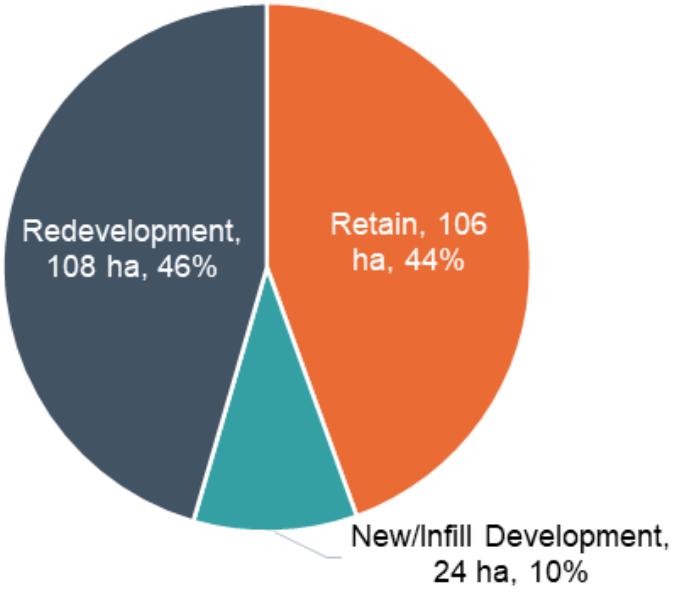
5.3 M.T.S.A. Proposed Land Uses and Buildout G.F.A. Potential

5.3.1 Conceptual Land Use Plans

Figures 21 through to 23 summarize the preliminary conceptual land use plans for the four office-focused M.T.S.A.s. It should be noted that these plans are conceptual and are subject to change. Key highlights are discussed below.

As summarized in Figure 21, conceptual plans include retaining approximately 44% of the existing uses.

Figure 21
Office-Focused M.T.S.A.s
Plans for Development, Land Area, ha



Source: Derived from City of Brampton Conceptual Land Use M.T.S.A. land use plans by City staff.

Provided below are details on lands to be retained.

- Within The Gore M.T.S.A., a large portion (32 ha (79 acres)) of the M.T.S.A. is anticipated to remain residential which includes newly developed subdivisions.
- A large swath of industrial lands in the southeast of the Bramalea GO M.T.S.A. is anticipated to remain industrial.
- Within the Ray Lawson M.T.S.A., approximately 13 ha (32 acres) of lands currently accommodating institutional buildings (courthouse complex) are planned to remain.

As summarized in Figure 22, approximately 108 ha (267 acres) of land in the M.T.S.A.s are anticipated to be redeveloped for other uses. Of the 108 ha, approximately 37 ha (91 acres) of land in the M.T.S.A.s are anticipated to be redeveloped for office and office mixed uses. The largest redevelopment is within the Bramalea GO M.T.S.A. with 18 ha (44 acres) of existing industrial land planned for redevelopment to office and office mixed uses.

Figure 22
Office-Focused M.T.S.A.s
Redevelopment Opportunities, Land Area, ha

Land Use	The Gore	Ray Lawson	Bramalea GO	Mississauga at Steeles	Total
Residential	14	7	22	0	43
Office	**0**	**0**	**4**	**0**	**4**
Office Mixed Use	**9**	**10**	**14**	**0**	**33**
Commercial	0	0	0	0	0
Light Industrial	22	0	7	0	29
Total	**45**	**17**	**46**	**0**	**108**

Source: Derived from City of Brampton Conceptual Land Use M.T.S.A. land use plans by City staff and subject to change.

As summarized in Figure 23, approximately 24 ha (59 acres) of land in the M.T.S.A.s are anticipated to develop on greenfield lands. Mississauga at Steeles is the only M.T.S.A. with significant greenfield opportunities.

Figure 23
Office-Focused M.T.S.A.s
Infill/Greenfield Opportunities, Land Area, ha

Land Use	The Gore	Ray Lawson	Bramalea GO	Mississauga at Steeles	Total
Residential	1	0	0	5	6
Office	**0**	**0**	**0**	**17**	**17**
Office Mixed Use	**0**	**0**	**0**	**0**	**0**
Commercial	0	0	0	0	0
Institutional	0	0	0	1	1
Light Industrial	0	0	0	0	0
Total	**1**	**0**	**0**	**23**	**24**

Source: Derived from City of Brampton Conceptual Land Use M.T.S.A. land use plans by City staff and subject to change.

5.3.2 Buildout Office G.F.A. Analysis

Based on the conceptual buildout analysis prepared by the City of Brampton, it is estimated that the four office-focused M.T.S.A.s have the potential to accommodate up to 1,708,480 sq.m (18,390,000 sq.ft.) of non-residential G.F.A., as summarized in Figure 24. Key highlights are provided below.

- M.T.S.A.s can collectively accommodate up to 997,960 sq.m (10,742,000 sq.ft.) of office G.F.A. The non-residential space is largely oriented towards office uses at 58%, followed by retail/commercial uses at 15%.
- The Mississauga at Steeles M.T.S.A. has the potential to accommodate the largest share of office G.F.A., nearly 58% of the G.F.A. potential of the four M.T.S.A.s.
- The Bramalea GO M.T.S.A., an M.T.S.A. with no major office presence, has the potential to accommodate 243,480 sq.m (2,621,000 sq.ft.) of office G.F.A., the second highest among the office-focused M.T.S.A.s.
- Closely following the Bramalea GO M.T.S.A., The Gore M.T.S.A. has the potential to accommodate 224,530 sq.m (2,417,000 sq.ft.) of office G.F.A.
- The Ray Lawson M.T.S.A. has the potential to accommodate up to 139,110 sq.m (1,497,000 sq.ft.) of office G.F.A.

Figure 24
City of Brampton
Office-Focused M.T.S.A.s
Preliminary G.F.A. Buildout Estimates, sq.m

Land Use	The Gore	Ray Lawson	Bramalea GO	Mississauga at Steeles	Total Office-Focused M.T.S.A.s	Share (%)
Retail/Commercial	118,740	20,320	67,250	53,890	260,200	15%
Other Mixed-use Commercial	76,870	14,600	-	-	91,470	5%
Office	**224,530**	**139,110**	**243,480**	**390,840**	**997,960**	**58%**
Institutional	-	-	-	201,000	201,000	12%
Light Industrial	37,270	-	120,580	-	157,850	9%
Total	**457,410**	**174,030**	**431,310**	**645,730**	**1,708,480**	**100%**
Retail/ Commercial	46%	8%	26%	21%	100%	-
Other Mixed-use Commercial	84%	16%	0%	0%	100%	-
Office	**22%**	**14%**	**24%**	**39%**	**100%**	-
Institutional	0%	0%	0%	100%	100%	-
Light Industrial	24%	0%	76%	0%	100%	-
Total	**27%**	**10%**	**25%**	**38%**	**100%**	-

Source: Based on City of Brampton, preliminary land use plan and subject to change.

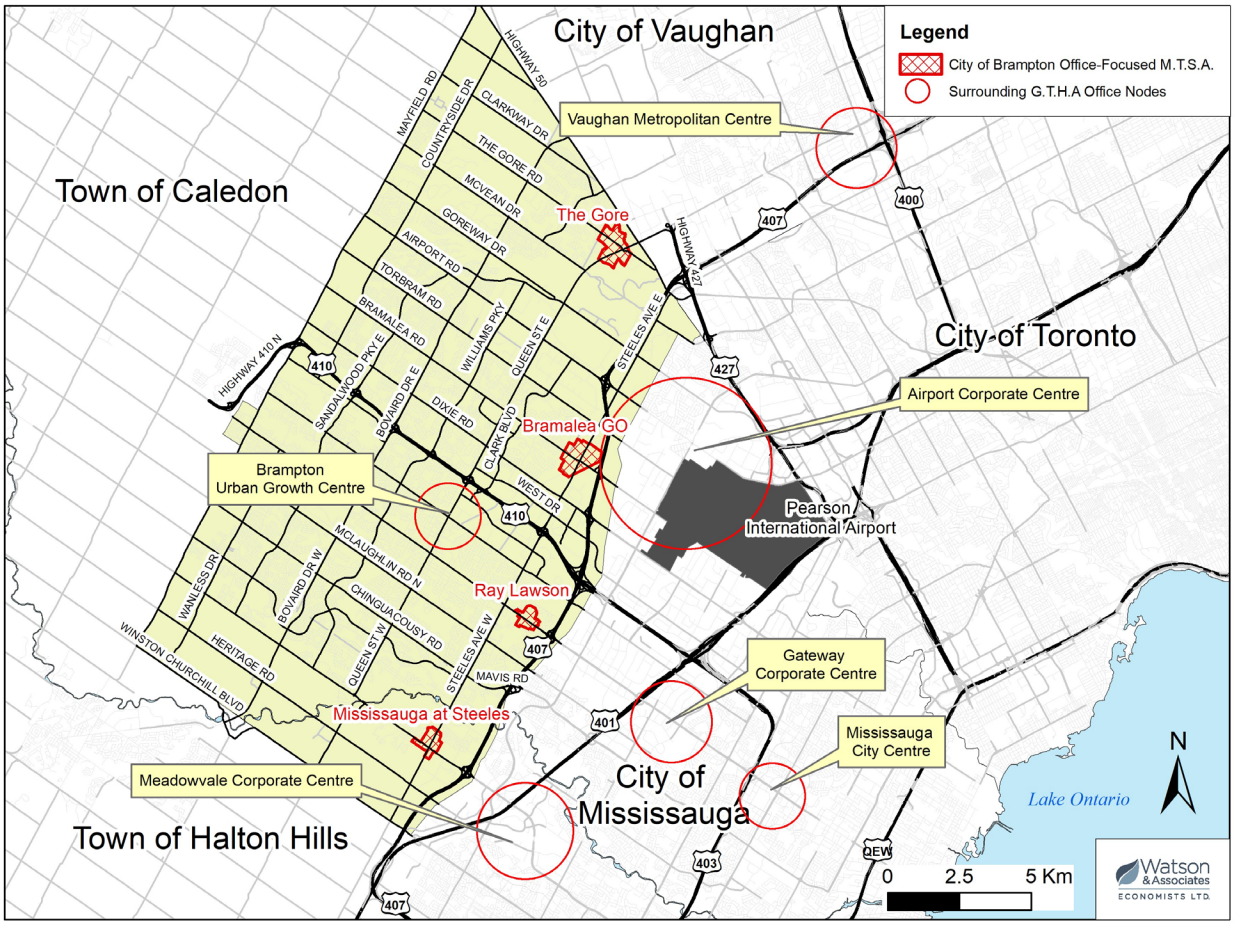
5.4 SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis by M.T.S.A.

Figure 25 provides a map providing the context of the four office-focused M.T.S.A.s and the surrounding competitive office nodes. The following office nodes are in proximity to the four office-focused M.T.S.A.s in Brampton:

- Airport Corporate Centre (Mississauga);
- Vaughan Metropolitan Centre (Vaughan);
- Gateway Corporate Centre (Mississauga);
- Mississauga City Centre (Mississauga);
- Brampton Urban Growth Centre (Brampton); and
- Meadowvale Corporate Centre (Mississauga).

The surrounding competitive office nodes represent approximately 8.1 million sq.m (87.6 million sq.ft.) of office space, or approximately 35% of the G.T.A.'s office G.F.A.

Figure 25
City of Brampton
Office-Focused M.T.S.A.s and Surrounding Competitive Office Nodes



The following section provides an overview of the four office-focused M.T.S.A.s based on a SWOT analysis for each.

5.4.1 Mississauga at Steeles M.T.S.A.

The Mississauga Road at Steeles M.T.S.A., as identified in Figure 26 is primarily a greenfield site situated on the southwest side of the City in proximity to Highway 407. The M.T.S.A. is within the BramWest Secondary Plan Area and is on the edge of an Employment Area.

The Employment Area in the surrounding area is a part of a large regional cluster of Employment Areas in Halton Hills (Premier Gateway Employment Area) and Mississauga (Meadowvale Corporate Centre).

Figure 26
City of Brampton
Mississauga at Steeles M.T.S.A.

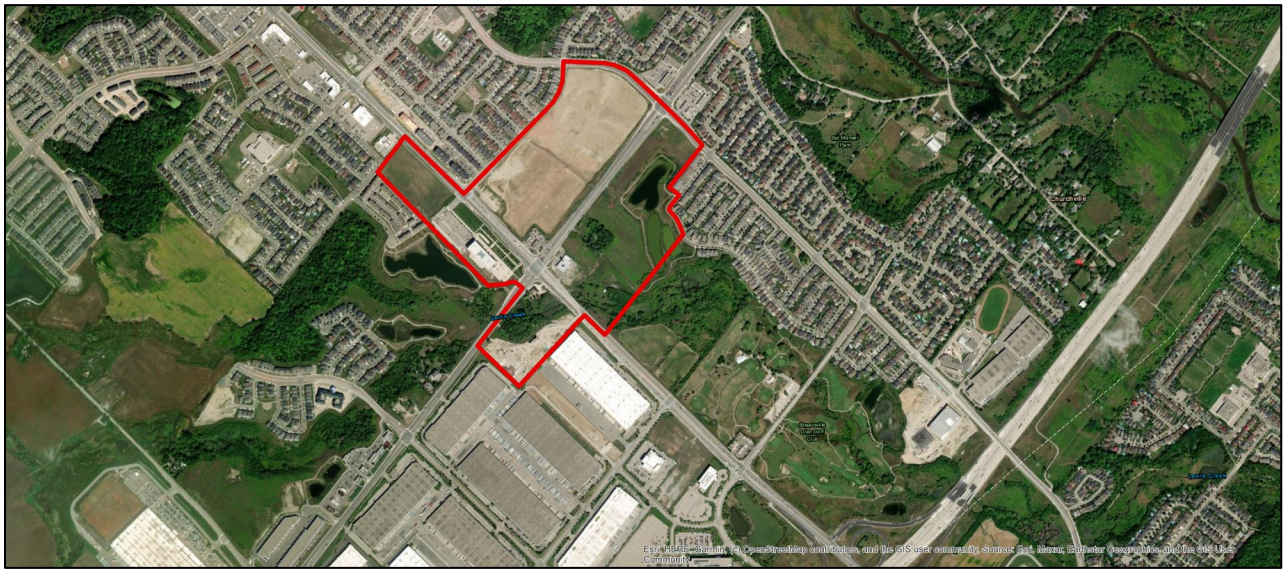


Image Source: Google Earth Imagery.

Existing Base: The M.T.S.A. has an estimated employment base of 1,040 jobs. The existing office base includes the Cannon Canada Head Office built in 2015. Currently, the M.T.S.A. does not have a population base; however, there are residential uses directly to the north and east.

Existing Urban Structure Function: Given that the M.T.S.A. is primarily vacant, the M.T.S.A. currently has a low level of activity. There are, however, a number of proposed and under construction developments. These include:

- Regional Police Support Facility to be located north of Canon. It will encompass 18,580 sq.m (200,000 sq.ft) of office space with about 600 jobs.
- Approved Hotel and Convention centre at the southwest corner of Mississauga Rd & Steeles within the MTSA

The area of the M.T.S.A. is anticipated to serve as an important to transition from Employment Area uses to residential uses, as well as a node to complement the Employment Area.

Transit Improvements: The M.T.S.A. is identified as a station location for the Steeles Avenue B.R.T.

Preliminary Land Use Conceptual Plans: The M.T.S.A. is identified to primarily accommodate office uses with opportunities for ground floor retail in office buildings. Residential use plans include high-density housing units (i.e., apartments) that are envisioned for the northeastern portion of the M.T.S.A. with a total population yield of 3,300 persons.

Figure 27
City of Brampton
SWOT Analysis: Mississauga at Steeles M.T.S.A.

Strengths

- Highway access to Highway 407 and near the convergence of Highway 407 and Highway 401.
- Presence of prestige employment uses, including an office building in the M.T.S.A. and in the surrounding area.
- Located at the juncture of two boulevards (Mississauga Road and Steeles Avenue).

Weaknesses

- Faces strong competition from the nearby Meadowvale Corporate Centre in Mississauga where there are plans to intensify the M.T.S.A. in that business park.
- Office opportunities can be accommodated south of the M.TS.A. – M.T.S.A. is competing with other office opportunities in the immediate area.
- Primarily accommodates single-tenant/owner-occupied office uses. It has not yet been demonstrated that the area can appeal to multi-tenant office.

Opportunities

- Future large labour force/population anticipated in Heritage Heights to the north.

- Build upon the success of the Meadowvale Corporate Centre.
- Act as a hub supporting Employment Areas and residential uses in the area.
- M.T.S.A. offers an opportunity for campus-style office, similar to what has already been developed in the area.

Threats

- Competing with intensification opportunities in the Meadowvale Corporate Centre with regional transit options (e.g., M.T.S.A.s and SmartCentres Meadowvale site).
- Pressures for more residential uses given the desirability of the area.

Note: SWOT analysis includes some of the factors that were identified in the City of Brampton Office Strategy, 2016 prepared by Cushman and Wakefield.

5.4.2 Ray Lawson M.T.S.A.

The Ray Lawson M.T.S.A. is situated along Hurontario Street, north of Highway 407, as identified in Figure 28. The M.T.S.A. is surrounded by residential uses and is in proximity to the Sheridan College campus to the west.

Figure 28
City of Brampton
Ray Lawson M.T.S.A.

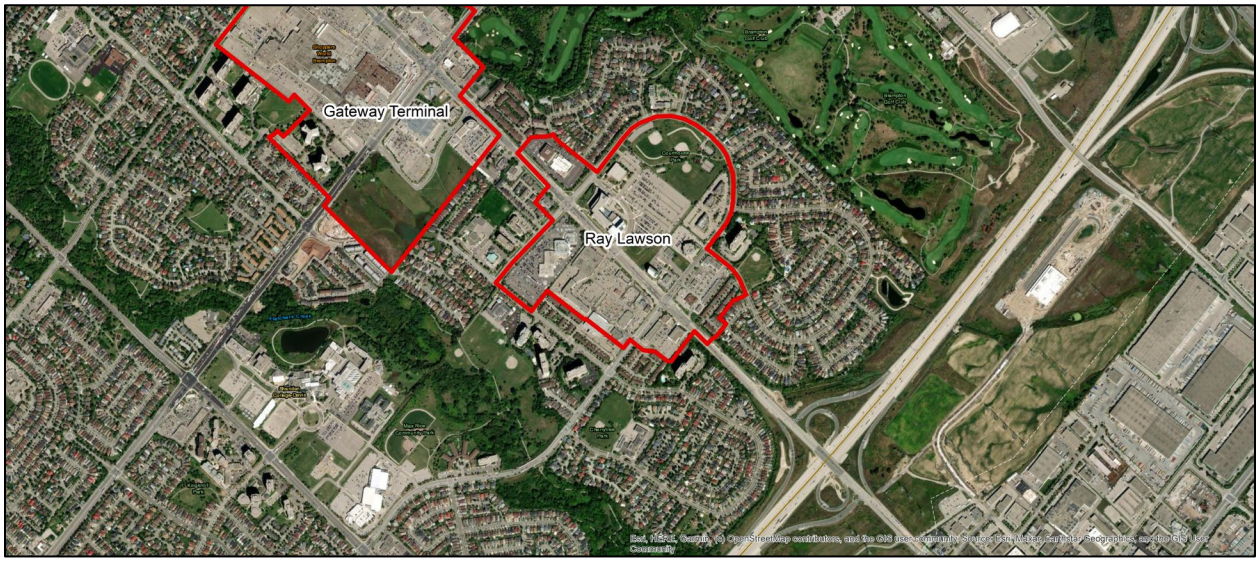


Image Source: Google Earth Imagery.

Existing Base: The M.T.S.A. has an estimated employment base of 2,100 jobs, as well as a population base of 1,140 residents. The employment base comprises institutional uses (A. Grenville and William Davis Courthouse Complex), retail uses, as well as office uses. The M.T.S.A. includes a concentration of the City's multi-tenant office buildings, largely anchored by the courthouse complex.

Existing Urban Structure Function: M.T.S.A. currently functions as a retail and institutional node for the surrounding area, including a grocery store and retail that supports the daily and weekly needs of local residents. The courthouse complex is a major institutional building that supports residents across Peel Region.

Transit Improvements: The M.T.S.A. is identified as a station for the Hurontario L.R.T. connecting the M.T.S.A. to residents across Peel Region.

Preliminary Land Use Conceptual Plans: The M.T.S.A. is identified to primarily accommodate growth through redevelopment; however, plans are to retain the existing institutional uses, as well as the stable residential neighbourhoods. Redevelopment is planned to transform the existing lower density commercial uses to higher density uses, including office, residential and ground floor retail. The area is planned to accommodate an additional population of 5,400 residents through higher density residential housing units (i.e., apartment buildings).

Figure 29
City of Brampton
SWOT Analysis: Ray Lawson M.T.S.A.

Strengths

- An extension of the re-urbanization of the Hurontario Street corridor in Mississauga.
- Higher order transit underway (Hurontario L.R.T.) and is further ahead compared to other transit improvements planned for the M.T.S.A.s.
- Regional transit connections via the Hurontario L.R.T.
- The courthouse complex is an anchor for the M.T.S.A.
- Area already serves as a community node for the surrounding area.
- In proximity to Highways 407 and 410.

Weaknesses

- Well-functioning retail uses (low vacancy rates) may reduce immediate motivation to redevelop site.

Opportunities

- Potential to build upon the courthouse complex in the M.T.S.A. and provide opportunities to accommodate professional services that benefit from proximity to a courthouse (e.g., law offices).
- Potential to build upon the nearby Sheridan College campus and accommodate development opportunities for technology and other knowledge-based sectors.
- Infill opportunities, in particular surface parking lots, may provide an opportunity to accommodate development in the short term.

Threats

- The redevelopment of the M.T.S.A. may displace commercial uses that serve the daily and weekly needs of residents (e.g., large grocery store). This threat may be mitigated by the City by supporting applications that incorporate the same level of commercial G.F.A. and commercial uses in redevelopments.
- Pressures for more residential uses given the desirability of the area.

Note: SWOT analysis includes some of the factors that were identified in the City of Brampton Office Strategy, 2016 prepared by Cushman and Wakefield.

5.4.3 Bramalea GO M.T.S.A.

The Bramalea GO M.T.S.A. is situated at the juncture of Bramalea Road and Steeles Avenue, just north of Highway 407. Figure 30 provides an aerial imagery of the area. Residential uses are to the north, while the M.T.S.A. and the uses to the east, west and south are primarily industrial uses.

Figure 30
Bramalea GO M.T.S.A.

Image Source: Google Earth Imagery.

Existing Base: The M.T.S.A. has an estimated employment base of 2,270 jobs, primarily comprising industrial and service commercial employment uses. There is a small existing residential base of 1,500 residents that is accommodated in high-rise apartment buildings.

Existing Urban Structure Function: The M.T.S.A. currently functions as an Employment Area with pockets of serviced commercial uses along Steeles Avenue.

Transit Improvements: The GO Transit train station in the M.T.S.A. is one of the main regional transit connections in the City. Currently the GO train station provides commuter service to the City of Toronto on the Kitchener GO line. Potential plans for two-way, all-day transit service are being explored by Metrolinx for the Kitchener GO line.

Preliminary Land Use Conceptual Plans: The M.T.S.A. is identified to partially redevelop for residential, light industrial and office uses. Just over half (51%) the M.T.S.A. is planned to retain existing industrial uses. The area is planned to accommodate an additional population of 11,200 residents through higher density residential buildings (i.e., apartments).

Figure 31
City of Brampton
SWOT Analysis: Bramalea GO M.T.S.A.

Strengths

- GO Transit train station is already in operation.
- In proximity to Highways 407 and 410.
- Potential for highway signage/visibility from Highway 407.
- Availability of larger parcels compared to downtown which provides greater flexibility for a range of employment uses.

Weaknesses

- Lack of parkland and open space to support a prestige setting.
- Height restrictions associated with nearby Pearson International Airport impact the scale of development.
- Lack of prestige image of the area.
- The surrounding Employment Area supports the Goods Movement Sector – generating heavy truck traffic in the surrounding area.
- Planning for the redevelopment of this M.T.S.A. will require more effort by the City (compared to other M.T.S.A.s) in mitigating land use conflicts with the surrounding Employment Areas.

Opportunities

- Expansion of services on the Kitchener GO line, including two-way commuter service, will enhance regional transit services for the M.T.S.A.
- Opportunity to support the redevelopment of industrial sites to accommodate integrated industrial/office developments that require the additional site attributes that support the knowledge-based sector.

Threats

- More appealing office opportunities across the City with a limited City-wide demand for major office uses.

Note: SWOT analysis includes some of the factors that were identified in the City of Brampton Office Strategy, 2016 prepared by Cushman and Wakefield.

5.4.4 The Gore M.T.S.A.

The Gore M.T.S.A. is situated at the juncture of Queen Street and the Goreway, just west of Highway 427, as identified in Figure 32. The M.T.S.A. is situated near the municipal boundary of the City of Brampton and the City of Vaughan. The area is generally surrounded by residential uses; however, there are industrial uses to the east in the City of Vaughan.

Figure 32
The City of Brampton
The Gore M.T.S.A.

Image Source: Google Earth Imagery.

Existing Base: The M.T.S.A. has an estimated employment base of 1,330 jobs, primarily comprising a small pocket of Employment Area uses (Bram East Employment Area), as well as commercial uses and a small office base. The residential base is estimated at 2,170 residents, primarily accommodated within lower density housing uses.

Existing Urban Structure Function: The M.T.S.A. currently functions as a small commercial node serving residents in the surrounding area. There is a small office base, including a recently constructed 5,110 sq.m (55,000 sq.ft) office building (built in 2023).

Transit Improvements: The M.T.S.A. is planned to serve the Queen Street B.R.T.

Preliminary Land Use Conceptual Plans: The M.T.S.A. is identified for redevelopment opportunities for light industrial, office and residential uses. The planned residential uses include approximately 12,500 residents in higher density housing developments.

Figure 33
City of Brampton
SWOT Analysis: The Gore M.T.S.A.

Strengths

- Queen Street B.R.T. planned.
- In proximity to Highway 427.
- Established presence of office uses (although small and Class B).
- Conservation Area in the surrounding area provides an amenity to the M.T.S.A.

Weaknesses

- Isolated urban area that is removed from the City of Brampton.
- Low appeal for Class A office space.
- Employment base is too small to build upon targeting key sectors.
- Large Employment Area in nearby Vaughan accommodating the Goods Movement Sector overshadows potential for office development in this area.

Opportunities

- Potential to create a mixed-use node to support the Employment Area uses in Vaughan, including an eastern gateway node to the City of Brampton.
- Potential to accommodate local office users on the east side of the City of Brampton and the surrounding area. Opportunity to support the redevelopment of industrial sites to accommodate integrated industrial/office developments that require the additional site attributes that support the knowledge-based sector.

Threats

- Pressures for more residential uses given the desirability of the area for residential uses.

Note: SWOT analysis includes some of the factors that were identified in the City of Brampton Office Strategy, 2016 prepared by Cushman and Wakefield.

5.5 Office Growth Allocation by M.T.S.A.

5.5.1 Office Employment Growth and Office G.F.A. by M.T.S.A.

Provided in Figure 34 is a summary of the M.O.E. growth allocation by M.T.S.A., as well as the rest of the City to provide context. The allocation of M.O.E. growth has been informed by the Region of Peel M.C.R. forecasts by S.G.U., as well as the SWOT analysis previously discussed.

Key findings include:

- The four office-focused M.T.S.A.s are anticipated to accommodate 39% of the City's M.O.E. growth over the 2021 to 2051 period;
- The Mississauga at Steeles M.T.S.A. is anticipated to accommodate the largest share of M.O.E. among the four M.T.S.A.s; and
- Based on the M.O.E. growth allocation to the four office-focused M.T.S.A.s, it is anticipated that the M.T.S.A.s would support 285,000 sq.m (3,068,000 sq.ft.) office G.F.A. over the 2021 to 2051 period.

Figure 34
City of Brampton
M.O.E. Growth and Office G.F.A. Allocation by Area, 2021 to 2051

Office Areas	2021 to 2051 M.O.E. Growth	Share of City M.O.E. (%)	Office G.F.A., sq.m (17 sq.m/ employee)
Mississauga at Steeles M.T.S.A.	5,930	14%	100,810
Ray Lawson M.T.S.A.	3,460	8%	58,820
The Gore M.T.S.A.	2,465	6%	41,900
Bramalea GO M.T.S.A.	4,910	11%	83,470
Office-Focused M.T.S.A.s	**16,765**	**39%**	**285,000**
Rest of City	26,135	61%	444,300
City of Brampton	**42,900**	**100%**	**729,300**

Source: Watson & Associates Economists Ltd., 2023.

5.5.2 Recommended Ratio of Office Space by M.T.S.A.

As summarized in Figure 35, the City of Brampton is anticipated to add 0.2 of a major office job for every new resident (or 1.0 major office job for every 5.4 new residents). In terms of office G.F.A., the City is anticipated to add 2.0 sq.m (21.5 sq.ft.) of office G.F.A. per new resident over the next 30 years. With a robust M.O.E. forecast and office G.F.A. forecast, the City needs to plan for strategic office nodes that are competitive within the G.T.H.A. The City's proposed policy framework (City of Brampton Draft O.P.) and the City's commitment to support the knowledge-based sectors will be key driving forces in attracting office growth.

The four office-focused M.T.S.A.s., compared to the rest of the City are anticipated to accommodate a higher ratio of M.O.E. relative to population, as summarized in Figure 35. Key highlights are provided below.

Mississauga at Steeles M.T.S.A.

- As previously discussed, the Mississauga at Steeles M.T.S.A. has the greatest potential in accommodating the City's office growth. The M.T.S.A. has the potential to build upon synergies due to its location in a large regional employment cluster and as an extension of the Meadowvale Corporate Centre in Mississauga. Furthermore, the M.T.S.A. and the surrounding BramWest Secondary Plan Area has demonstrated that this area has the potential to attract M.O.E.
- Recognizing the need to accommodate a range of office uses, including the potential for "campus-style" office development and single-tenant/owner-occupied office uses, a large portion of the lands (74% of the land area) are envisioned for office use.
- It is recommended that the M.T.S.A. plan for a high ratio of major office jobs to population. As summarized in Figure 35, it is recommended that the M.T.S.A. support a minimum ratio of 6.3 major office jobs for every 1 new resident. On a G.F.A. basis, the M.T.S.A. would accommodate 107 sq.m. (1,150 sq.ft.) of office G.F.A. per resident.
- This M.T.S.A. should be considered a key priority for office growth in the City.

Ray Lawson M.T.S.A.

- The Ray Lawson M.T.S.A. is identified as an area that has the potential to accommodate office growth in the short term due to near-term improvements to transit connectivity (Hurontario L.R.T.). The M.T.S.A. has an established office G.F.A. base and the potential to build upon key anchors in the area, including the Courthouse Complex and Sheridan College.
- Office development in this area is anticipated to be accommodated through infill and redevelopment.
- The area is recommended to accommodate a minimum ratio of 1.2 major office jobs to 1 new resident. On a G.F.A. basis, the M.T.S.A. would accommodate 21 sq.m (226 sq.ft.) of office G.F.A. per resident.
- This M.T.S.A. should be considered a key priority for office growth in the City.

The Bramalea GO M.T.S.A.

- The Bramalea GO M.T.S.A. is envisioned as a key redevelopment area that will likely require a long-term timeframe to accommodate office uses. The M.T.S.A. benefits from its access to GO Transit train service, as well as its opportunity to build upon existing employment in the area.
- The area is recommended to accommodate a minimum ratio of 2.2 major office jobs to 1 new resident. On a G.F.A. basis, the M.T.S.A. would accommodate 37 sq.m. (398 sq.ft.) of office G.F.A. per resident.
- In order to support the transformation of the area, it is recommended that the City support the development of strategically phased lands for residential uses that may occur prior to office development.

The Gore M.T.S.A.

- Of the four office-focused M.T.S.A.s, The Gore M.T.S.A. is envisioned to include a more balanced distribution of M.O.E. and population growth. The area is recommended to accommodate a minimum ratio of 1.0 major office jobs to 1 new resident. On a G.F.A. basis, the M.T.S.A. would accommodate 18 sq.m (194 sq.ft.) of office G.F.A. per resident.
- Compared to the other office-focused M.T.S.A.s, The Gore M.T.S.A. is anticipated to have the greatest challenges in attracting office growth due to its

location. The area is surrounded by low-density residential uses and is currently not well connected to the rest of the City.

Figure 35
City of Brampton
Recommended Ratio of Office Space to 2051

M.T.S.A.	Population Growth 2021 to 2051	M.O.E. Growth 2021 to 2051	M.O.E. Jobs-to-Population	Office G.F.A. (sq.m), 2021 to 2051	Office G.F.A. (sq.m) per Capita
-	A	B	C = B/C	D	E = D/A
Mississauga at Steeles M.T.S.A.	940	5,930	6.3	100,810	107
Ray Lawson M.T.S.A.	2,840	3,460	1.2	58,820	21
The Gore M.T.S.A.	2,360	2,465	1.0	41,900	18
Bramalea GO M.T.S.A.	2,260	4,910	2.2	83,470	37
Total Office-Focused M.T.S.A.s	**8,400**	**16,765**	**2.0**	**285,000**	**34**
Rest of Brampton	287,050	37,545	0.1	444,300	1.5
City of Brampton	**295,450**	**54,310**	**0.2**	**729,300**	**2.5**

Source: Forecast by Watson & Associates Economists Ltd. based on Region of Peel M.C.R. Growth forecast allocations by S.G.U. Downward adjustments made to the M.O.E. based on anticipated impact of work from home employment.

5.5.3 Forecast Office G.F.A. Demand from 2021 to 2051 Compared to Total Development Yield

Figure 36 compares the M.O.E. G.F.A. demand allocation by M.T.S.A. over the 2021 to 2051 period to the potential total development yield based on a review of developable land area and office employment density assumptions. This analysis draws from preliminary land use plan concepts prepared by City staff. As summarized in Figure 36, 29% of the total office G.F.A. potential, as envisioned in the conceptualized land use plans, would be developed over the 2021 to 2051 period. Accordingly, there is more than sufficient lands to accommodate the office forecast within each of the M.T.S.A.s by 2051.

Figure 36
City of Brampton
Forecast Office G.F.A. (2021 to 2051) Compared
to Total Development Yield Identified in Conceptual Plans

M.T.S.A.	2021 to 2051 M.O.E. Growth	M.O.E. Growth Share (%)	Office G.F.A., sq.m (17 sq.m/ employee)	Office G.F.A., (sq.m) Potential Development Yield	2021 to 2051 Demand as % of Total Development Yield
-	A	B	C	D	E = C/D
Mississauga at Steeles M.T.S.A.	5,930	14%	100,810	390,840	26%
Ray Lawson M.T.S.A.	3,460	8%	58,820	139,110	42%
The Gore M.T.S.A.	2,465	6%	41,900	224,530	19%
Bramalea GO M.T.S.A.	4,910	11%	83,470	243,480	34%
Office-Focused M.T.S.A.s	**16,765**	**39%**	**285,000**	**997,960**	**29%**

Source: Forecast by Watson & Associates Economists Ltd. based on Region of Peel M.C.R. Growth forecast allocations by S.G.U. Downward adjustments made to the M.O.E. based on anticipated impact of work from home employment. Office G.F.A. total development yield is based on background work prepared by the City of Brampton planning staff and is subject to change.

Chapter 6
Strategic Recommendations

6. Strategic Recommendations

The City of Brampton's Draft Official Plan (O.P.)[1] provides the framework to accommodate a significant increase in population and employment growth by supporting opportunities to create more compact and complete communities, and moreover, an urban structure that delivers on the type of setting sought by a wide range of office users and their employees.

Provided below are strategic recommendations in accommodating the City's M.O.E. growth forecast and potential.

6.1 Need for Monitoring

The outlook for M.O.E. will require ongoing monitoring given the changing nature of office work accelerated by the COVID-19 pandemic. These changes have implications on servicing and infrastructure, municipal finance (including development charges) and overall strategic growth management. The changing nature of M.O.E. challenges past metrics measuring F.S.W., people and jobs and land use patterns (differing built forms and varied site selection preferences).[2]

6.2 Key Targets

Over the long term, the City should plan to achieve a target that includes a larger portion of M.O.E. in the office-focused M.T.S.A.s. Employment growth by 2051 within the office-focused M.T.S.A.s are anticipated to collectively comprise 63% M.O.E., as summarized in Figure 37.

[1] City of Brampton Draft Official Plan, December 2022.
[2] Region of Peel Employment Strategy Discussion Paper prepared by Cushman and Wakefield, p. 13.

Figure 37
City of Brampton
Office-Focused M.T.S.A.s
Employment Growth, 2021 to 2051

M.T.S.A.	Employment Growth, 2021 to 2051	M.O.E., 2021 to 2051	M.O.E. as a Share of Employment Growth
-	A	B	C = A/B
Mississauga at Steeles M.T.S.A.	9,400	5,930	63%
Ray Lawson M.T.S.A.	5,340	3,460	65%
The Gore M.T.S.A.	5,730	2,465	43%
Bramalea GO M.T.S.A.	6,150	4,910	80%
Total Office-Focused M.T.S.A.s	**26,620**	**16,765**	**63%**

Note: Includes current base and forecast growth to 2051.
Source: Watson & Associates Economists Ltd., 2023 based on the Region of Peel Municipal Comprehensive Review growth allocations by small geographic unit.

Overall, by 2051 the office-focused M.T.S.A.s are anticipated to achieve a range in density from an average of 108 people and jobs/ha in the Bramalea GO M.T.S.A. to 265 people and jobs/ha in the Ray Lawson M.T.S.A., as summarized in Figure 38. Figure 38 also includes as comparison with the policy targets set out in the Region of Peel O.P. It is anticipated that the Ray Lawson M.T.S.A. and the Mississauga at Steeles M.T.S.A. will exceed the O.P. minimum density targets by 2051, while The Gore M.T.S.A. and Bramalea GO M.T.S.A. are anticipated to go beyond 2051 to achieve the minimum density target. As noted in the Region of Peel O.P, it is recognized that the minimum density of the M.T.S.A. policy targets may be achieved beyond the planning horizon of 2051.[1]

[1] Region of Peel Official Plan, April 2022, policy 5.6.19.8, p. 142.

Figure 38
City of Brampton
Office-Focused M.T.S.A.s
Average People and Jobs by 2051

M.T.S.A.	Land Area, ha	2051 Population	2051 Jobs	2051 People and Jobs	People and Jobs/ha at 2051	Policy Target People and Jobs
-	A	B	C	D = B + C	E = D/A	F
Ray Lawson M.T.S.A.	43.2	3,980	7,440	11,420	265	160
Mississauga at Steeles M.T.S.A.	52.0	940	10,410	11,350	200	160
The Gore M.T.S.A.	103.6	4,530	7,060	11,590	112	160
Bramalea GO M.T.S.A.	113.4	3,790	8,440	12,230	108	150
Total Office- Focused M.T.S.A.s	**312.2**	**13,240**	**33,350**	**46,590**	**146**	**-**

Note: Includes current base and forecast growth to 2051.
Source: Watson & Associates Economists Ltd., 2023, based on the Region of Peel M.C.R. growth allocations by small geographic unit.

With robust M.O.E. and office G.F.A. forecasts, the City needs to plan for strategic office nodes that are competitive within the G.T.H.A. It is forecast the City's office-focused M.T.S.A.s will accommodate 39% of the City's M.O.E. growth to 2051. The office-focused M.T.S.A.s. are anticipated to collectively add 2.0 major office jobs for every new resident. In terms of office G.F.A., the office-focused M.T.S.A.s are anticipated to add 34 sq.m (366 sq.ft.) of office G.F.A. per new resident over the next 30 years, as summarized in Figure 39.

Figure 39
City of Brampton
Recommended Ratio of Office Space to 2051

M.T.S.A.	Population Growth 2021 to 2051	M.O.E. Growth 2021 to 2051	M.O.E. Jobs-to-Population	Office G.F.A. (sq.m), 2021 to 2051	Office G.F.A. (sq.m) per Capita
-	A	B	C = B/A	D	E = D/A
Mississauga at Steeles M.T.S.A.	940	5,930	6.3	100,810	107
Ray Lawson M.T.S.A.	2,840	3,460	1.2	58,820	21
The Gore M.T.S.A.	2,360	2,465	1.0	41,900	18
Bramalea GO M.T.S.A.	2,260	4,910	2.2	83,470	37
Total Office-Focused M.T.S.A.s	**8,400**	**16,765**	**2.0**	**285,000**	**34**

Source: Forecast by Watson & Associates Economists Ltd. based on Region of Peel Municipal Comprehensive Review employment and population growth forecast allocations by small geographic unit. Downward adjustments made to M.O.E. are based on anticipated impact of work from home employment.

6.3 Timing and Prioritization of Office Development by M.T.S.A.

The major office forecast for the City of Brampton is ambitious given the downward pressure on office space in the G.T.H.A. and the potential opportunity to accommodate office growth in Mississauga through intensification.

The M.O.E. forecast prepared by Peel Region assumes that office demand will shift from decades of the Region's office growth predominately accommodated within Mississauga to a more balanced distribution between Mississauga and Brampton. This shift is anticipated to take a longer period to occur and will be dependent upon building compelling environments that will attract office uses that require amenities and transit connectivity.

The City of Brampton should prioritize the office-focused M.T.S.A.s that are able to deliver office space in the short and medium term based on proven office demand, ease of development (does not require a radical transformation) and transit improvements that are underway. M.T.S.A.s that are considered more long-term opportunities should be continually monitored and phased to allow for office growth in the long term.

Provided below is a summary of the outlook of the four office-focused M.T.S.A.s.

- The **Ray Lawson M.T.S.A.** has the greatest potential among the four office-focused M.T.S.A.s, given the near-term completion of the Hurontario L.R.T. and the already established office base, and should be considered a key priority area. The M.T.S.A. is anchored by the Courthouse complex and could build upon the nearby Sheridan College.
    - **Timing:** short term
    - **Ratio of M.O.E.-to-Population:** 1.2
    - **Office G.F.A. per Capita:** 21 sq.m (226 sq.ft.)

- The **Mississauga at Steeles M.T.S.A.** and the surrounding area has already demonstrated that the area appeals to Class A office space. The area primarily comprises greenfield sites, including a large parcel at the centre of the M.T.S.A. that does not involve complex assembly of lands for office development. Given the desirability of the site for residential uses, the City will likely be under pressure to accommodate more residential uses and, therefore, will need to demonstrate that this area accommodates the demand for office uses in the short term.
    - **Timing:** short term
    - **Ratio of M.O.E.-to-Population:** 6.3
    - **Office G.F.A. per Capita:** 107 sq.m (1,150 sq.ft.)

- The **Bramalea GO M.T.S.A.** would require the greatest transformation to appeal to office uses. The area has not yet demonstrated that it could support office uses. There is the opportunity to support more integrated office and industrial uses in this area that require the site characteristics of industrial sites and amenities that typically appeal to the knowledge-based sectors. Office growth through integrated office and industrial developments would be largely classified as employment lands employment.

- **Timing:** short term – encouraging integrated office/industrial uses; long term – supporting office uses.
- **Ratio of M.O.E.-to-Population:** 2.2
- **Office G.F.A. per Capita:** 37 sq.m (398 sq.ft.)

- **The Gore M.T.S.A.** is more isolated compared to the rest of the office sites within the City. The M.T.S.A. has a small office base and it has not yet demonstrated a need for a range of office uses, including Class A office space. The area offers opportunity for a modest amount of office growth accommodating local office users, including office uses that serve the eastern portion of the City and nearby Employment Areas in Vaughan. Other areas of the City offer superior site characteristics that would attract office development in the near-term.
  - **Timing:** Encourage a modest amount of office growth in the short and longer term.
  - **Ratio of M.O.E.-to-Population:** 1.0
  - **Office G.F.A. per Capita:** 18 sq.m (194 sq.ft.)

6.4 Consider Other Forms of Employment Uses

The opportunity to accommodate office employment and G.F.A. in Brampton should consider the various forms of development and locations to accommodate development. As discussed earlier, businesses are consolidating operations to be leaner and more integrated, especially considering remote work opportunities. The proposed Provincial Planning Statement, 2023 identifies the opportunity to accommodate some industrial uses in mixed-use environments if the industrial uses do not require separation from sensitive uses.[1]

6.5 Protect M.T.S.A.s Over the Long-Term for Office Development

While not all vacant lands identified for office use within each of the M.T.S.A.s will be fully developed by 2051, these lands should be protected for office use as they represent strategic locations to attract and accommodate office uses over the long-term

[1] Proposed Provincial Planning Statement, April 2023, policy 2.8.1.2, p. 11.

planning horizon and beyond. This approach embraces provincial and local land use planning policies regarding the achievement of complete and competitive communities over the long-term.

6.6 Support the Development of M.T.S.A.s as Strategic Anchors to Employment Areas

The City's four office-focused M.T.S.A.s are adjacent to Employment Areas in Brampton and offer the opportunity to strengthen the adjacent Employment Area as they evolve. As Brampton plans for Employment Areas in an evolving economy, the M.T.S.A.s should be viewed as key anchors in supporting the evolution of Employment Areas.

6.7 Support the Development of Amenities in the M.T.S.A.

As previously noted, recent market demand has been strongest for higher quality office space in amenity-rich areas. Post pandemic, there will be an increasing need for employers to provide compelling reasons for employees to come into the office, including providing a modern workplace with comfortable amenities and good transportation access to reduce commute times, as well as a workplace location that supports retail, leisure and recreational opportunities. With less emphasis on the quantity of space, employers are moving towards less space with more on-site and off-site amenities.

In order to support a vibrant urban setting that will attract office tenants, the City will need to ensure that the M.T.S.A.s provide a range of amenities that office employees expect. Best practices in planning for M.T.S.A.s across the G.T.H.A. include policies that seek to improve upon the existing retail base of the M.T.S.A. In order to protect the retail function of the M.T.S.A., municipalities typically set requirements in maintaining the existing commercial G.F.A. or require that applicants demonstrate that the redevelopment will improve the commercial function of the area.

Furthermore, the City should work with the Region of Peel, school boards and other public agencies to enable the timely delivery of community facilities, parks and infrastructure. These amenities are not only important for local residents, but also for office employees.

Chapter 7
Next Steps

7. Next Steps

The next component of this study is Phase 2. Phase 2 will include an office cost analysis comparing the cost of major office development (development larger than 100,000 sq.ft.) in the City of Brampton to other large municipalities in the G.T.H.A., including the City of Mississauga, City of Hamilton, City of Vaughan, City of Richmond Hill, Town of Oakville, City of Burlington and the City of Markham. The analysis will also include a comparison of the municipal fees imposed on office development, as well as incentive programs offered by the comparators. This component will provide the City with insights into Brampton's cost competitiveness in accommodating office employment within the G.T.H.A. Phase 2 is anticipated to be completed in October 2023.

Appendices

Appendix A
City-Wide Summary Tables

Appendix A: City-Wide Forecast Summary Tables

Figure A-1
City of Brampton
Population and Employment Forecast to 2051

Forecast	Population	Employment
2021	689,550	210,400
2041	930,000	315,000
2051	985,000	355,000
2021 – 2051	**295,450**	**144,600**

Source: Based on the Region of Peel M.C.R. growth allocations as summarized in the Region of Peel O.P., April 2022.

Figure A-2
Region of Peel
M.O.E. Forecast, 2021 to 2051

Municipality	Unadjusted M.O.E., 2021 to 2051[1]	Adjusted M.O.E. by Watson, 2021 to 2051[2]
Brampton	54,300	42,900
Mississauga	46,300	36,600
Caledon	9,200	7,300
Peel Region	**109,800**	**86,800**

[1] Unadjusted major office employment (M.O.E.) based on the Region of Peel M.C.R. growth allocations by small geographic unit dated February 17, 2023.
[2] Adjusted M.O.E. by Watson & Associates Economists Ltd. based on M.O.E. adjustment includes a downward adjustment of 5% for no fixed place of work and 16% for additional work at home employment. Total downward adjustment is 21%.
Source: Unadjusted based on the Region of Peel M.C.R. growth allocations by small geographic unit, dated February 17, 2023. Adjusted M.O.E. prepared by Watson & Associates Economists Ltd.

Figure A-3
City of Brampton
M.O.E. as a Share of Employment Growth, 2021 to 2051

Forecast	M.O.E.	Other Employment	Total Employment	M.O.E. Share (%)
2021 to 2051	42,900	101,700	144,600	**30%**

Source: Watson & Associates Economists Ltd.

Figure A-4
Region of Peel
M.O.E. Growth Forecast Accommodated in New Office Space,
2021 to 2051

2021 to 2051	M.O.E. Growth	M.O.E. Growth Adjustment[1]	Adjusted for Take-Up of Vacancy Space	Net M.O.E. Growth Requires New Office Space, 2021 to 2051
Municipality	A	B	C	D = B - C
Brampton	**54,300**	**42,900**	**0**	**42,900**
Mississauga	46,300	36,600	5,500	31,100
Caledon	9,200	7,300	0	7,300
Peel Region	**109,800**	**86,800**	**5,500**	**81,300**

[1] Major office employment (M.O.E.) adjustment includes a downward adjustment of 5% for no fixed place of work and 16% for additional work at home employment.
Source: Watson & Associates Economists Ltd. based on the Region of Peel Municipal Comprehensive Review forecast prepared by Hemson Consulting Ltd.

Figure A-5
Region of Peel
M.O.E. G.F.A. (sq.m) Forecast, 2021 to 2051

2021 to 2051	Net M.O.E. Growth Requires New Office Space, 2021 to 2051	Scenario 1: 28 sq.m F.S.W.	Scenario 2: 17 sq.m F.S.W.
Municipality	A	B = A x 28	C = A x 17
Brampton	**42,900**	**1,201,200**	**729,300**
Mississauga	31,100	870,800	528,700
Caledon	7,300	204,400	124,100
Peel Region	**81,300**	**2,276,400**	**1,382,100**

[1] Major office employment (M.O.E.) adjustment includes a downward adjustment of 5% for no fixed place of work and 16% for additional work at home employment.
Source: Watson & Associates Economists Ltd. based on the Region of Peel Municipal Comprehensive Review forecast prepared by Hemson Consulting Ltd.

Figure A-6
City of Brampton
Office Space Per Capita, 2021 to 2051

Period	Population	Office G.F.A., sq.m	G.F.A. sq.m per Resident (per capita)
-	A	B	C = B / A
2021	689,550	377,000	0.5
2051	985,000	1,109,710	1.1
2021 to 2051	**295,450**	**729,300**	**2.5**

Note: Existing base includes vacant office space.
Source: Existing office G.F.A. based on inventory prepared by Colliers International adjusted for recent office development to reflect the 2021 period; 2051 is a forecast by Watson & Associates Economists Ltd.

Appendix B
Major Transit Station Area Summary Tables

Appendix B: Major Transit Station Area Summary Tables

Figure B-1
City of Brampton
Office-Focused M.T.S.A.s
Existing Conditions

M.T.S.A.	Land Area, ha	Existing Population Base	Existing Employment Base
Bramalea GO	97	1,530	2,300
The Gore	85.5	2,170	1,330
Ray Lawson	38	1,140	2,100
Mississauga at Steeles	52	0	1,040
Total	**272.5**	**4.840**	**6,770**

Note: Existing population and jobs derived from the City of Brampton.
Source: Derived from the City of Brampton background M.T.S.A. information.

Figure B-2
City of Brampton
M.O.E. Growth and Office G.F.A. Allocation by Area, 2021 to 2051

Office Areas	2021 to 2051 M.O.E.	City Office G.F.A. Share (%)	Office G.F.A., sq.m (17 sq.m/ employee)
Mississauga at Steeles M.T.S.A.	5,930	14%	100,810
Ray Lawson M.T.S.A.	3,460	8%	58,820
The Gore M.T.S.A.	2,465	6%	41,900
Bramalea GO M.T.S.A.	4,910	11%	83,470
Office-Focused M.T.S.A.s	16,765	39%	285,000
Rest of City	26,135	61%	444,300
City of Brampton	42,900	100%	729,300

Source: Watson & Associates Economists Ltd., 2023.

Figure B-3
City of Brampton
Recommended Ratio of Office Space to 2051

M.T.S.A.s	Population Growth 2021 to 2051	M.O.E. Growth 2021 to 2051	M.O.E. Jobs-to-Population	Office G.F.A. (sq.m), 2021 to 2051	Office G.F.A. (sq.m) per Capita
-	A	B	C = B/C	D	E = D/A
Mississauga at Steeles M.T.S.A.	940	5,930	6.3	100,810	107
Ray Lawson M.T.S.A.	2,840	3,460	1.2	58,820	21
The Gore M.T.S.A.	2,360	2,465	1.0	41,900	18
Bramalea GO M.T.S.A.	2,260	4,910	2.2	83,470	37
Total Office-Focused M.T.S.A.s	**8,400**	**16,765**	**2.0**	**285,000**	**34**
Rest of Brampton	287,050	37,545	0.1	444,300	1.5
City of Brampton	**295,450**	**54,310**	**0.2**	**729,300**	**2.5**

Source: Watson & Associates Economists Ltd., 2023.

Figure B-4
City of Brampton
Forecast Office G.F.A. (2021 to 2051) Compared
to Buildout Identified in Conceptual Plans

M.T.S.A.	2021 to 2051 M.O.E. Growth	M.O.E. Growth Share (%)	Office G.F.A., sq.m (17 sq.m/ employee)	Office G.F.A., sq.m Capacity	2021 to 2051 Demand as % of G.F.A. Capacity
-	A	B	C	D	E = C/D
Mississauga at Steeles M.T.S.A.	5,930	14%	100,810	390,840	26%
Ray Lawson M.T.S.A.	3,460	8%	58,820	139,110	42%
The Gore M.T.S.A.	2,465	6%	41,900	224,530	19%
Bramalea GO M.T.S.A.	4,910	11%	83,470	243,480	34%
Office-Focused M.T.S.A.s	**16,765**	**39%**	**285,000**	**997,960**	**29%**

Source: Watson & Associates Economists Ltd., 2023.

Figure B-5
City of Brampton
Office-Focused M.T.S.A.s
Average People and Jobs by 2051

M.T.S.A.	Land Area, ha	2051 Population	2051 Jobs	2051 People and Jobs	People and Jobs/ha at 2051	Policy Target People and Jobs
-	A	B	C	D = B + C	E = D/A	F
Ray Lawson M.T.S.A.	43.2	3,980	7,440	11,420	265	160
Mississauga at Steeles M.T.S.A.	52.0	940	10,410	11,350	200	160
The Gore M.T.S.A.	103.6	4,530	7,060	11,590	112	160
Bramalea GO M.T.S.A.	113.4	3,790	8,440	12,230	108	150
Total Office-Focused M.T.S.A.s	**312.2**	**13,240**	**33,350**	**46,590**	**146**	**-**

Note: Includes current base and forecast growth to 2051.
Source: Watson & Associates Economists Ltd., 2023, based on the Region of Peel Municipal Comprehensive Review growth allocations by small geographic unit.