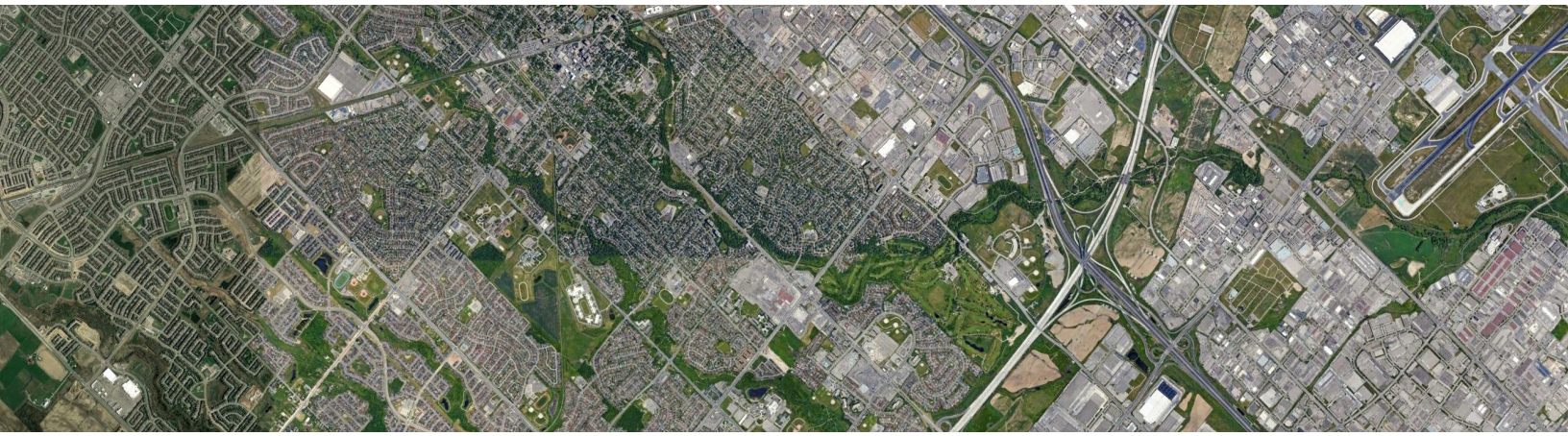
Region of Peel
working with you

# REGION OF PEEL
# INTENSIFICATION ANALYSIS



JULY 2020

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# ACKNOWLEDGEMENTS


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# EXECUTIVE SUMMARY

## PURPOSE

The Intensification Analysis memo was prepared to support the parallel MTSA Study for Peel Region as part of the Peel 2041 Municipal Comprehensive Review (MCR). The memo supports the Region's analysis and validation of Strategic Growth policies and has been assembled as a separate deliverable to be integrated with the larger regional MTSA Study. The memo consists of a review of historic intensification in the Region, an assessment of the capacity and potential of the Strategic Growth Areas based on the Region's growth scenario, and draft policy directions stemming from this analysis.

## HISTORIC RATES OF INTENSIFICATION

Intensification is generally defined as any new residential development within the existing built-up urban fabric, which may occur on undeveloped or previously developed land – what makes it intensification is its location within the area defined as already urbanized.

Between 2006-2018, the cumulative intensification rate indicates that Peel Region has met the 40% minimum target, however after 2009, less than 40% of new units were within the built-up area. Historically, the City of Mississauga has experienced consistent unit growth in 2006-2018, with over 61% of new unit delivery in the form of apartments comprising of over 80% of all new unit growth for apartments across Peel Region as a whole. In contrast, new unit growth in Brampton in 2006-2018 was primarily low-density; with over 59% of new unit delivery in Brampton in the form of single detached houses. Over 86% of all new single-detached units delivered across Peel Region as a whole occured in Brampton from 2006-2018. Town of Caledon experienced low new unit growth from 2006-2010, with most new unit growth in the form of single-detached houses and townhouses.

## SGA EXISTING DENSITIES AND FORECAST GROWTH

The Intensification Analysis identifies and evaluates existing (2016) densities within each of the Strategic Growth Areas (SGAs) in Peel Region. The analysis also includes an evaluation of the forecast densities allocated to each SGA to 2041, based on the Region's draft Growth Allocation. This analysis included a high level examination of Urban Growth Centres, Major Transit Station Areas, and other Strategic Growth Areas in Brampton and Mississauga.

## STRATEGIC MARKET DEMAND ASSESSMENT

Each municipality is expected to accommodate a larger share of household growth in apartment units in comparison to the existing stock of housing. SGAs will play an important role in achieving this future mix, as the majority of household growth in the SGAs is expected to be accommodated in apartment units and to a lesser extent, townhouse units. There are a variety of demographic, economic and housing market factors that are likely to influence the rate of intensification in the SGAs and household growth in higher densities. The analysis examines demographic and housing trends, land supply, new home construction and prices, rental market, access to amenities and transit and economic trends.

There are a number of factors that are expected to influence Region-wide development within the SGAs. As these SGAs represent an important opportunity for intensification within the Region, the intensification target can be achieved. Factors that are likely to result in increased development within the SGAs include population growth in the 20 to 39 age group and age 65 and over age cohort are likely to increase demand for apartment units over the forecast horizon.

There may also be renewed interest in purpose-built rental housing, driven, in part, by low vacancy rates and increased interest from institutional investors This is likely to help the Region achieve the rate of intensification in the SGAs and forecast housing mix.

Employment is one of the strongest predictors of net migration and housing growth within a municipality. The significant employment growth forecast in Peel Region and neighbouring municipalities will impact population growth and demand for housing in the Region.

**Has the Region set an appropriate Intensification Target?**

The Region's intensification targets are aspirational, yet achievable. To 2031, the Region is using an intensification target of 51%, which is the minimum intensification target in A Place to Grow (50%). In 2031-2041, the Regional intensification target increases to 60%. It does appear that the intensification target is achievable. In the early part of the forecast horizon (to 2031) the majority of the growth is anticipated to occur in Brampton, where most new development will likely occur in the DGA. That being said, the City of Brampton has been proactive in investing in the Downtown UGC (i.e. Riverwalk, new University campus and Centre for Innovation) to help attract future development to the area and increase rates of intensification. Post-2031, as the DGA in Brampton begins to build-out and growth shifts to the built-up areas in Mississauga and Brampton, the amount of growth accommodated through intensification will likely increase and the 60% intensification target could be achieved.

**How can the market demand Opportunities and Constraints be address to meet the intensification target?**

Certain market demand opportunities and constraints, such as demographics and household characteristics, will be beyond the control of the Region. That being said, the aging population and escalating house prices are expected to result in increased demand for apartment units in the Region. Therefore, if the Region and local municipalities are proactive in ensuring community infrastructure, active transportation and the public realm improvements are in place in the SGAs, it could help attract higher-density forms of development to these locations and achieve the intensification target.

**What SGAs should the Region be focusing on to 2041? Does growth allocation need to be shifted?**

The SGAs that are identified as have the highest potential for redevelopment based on community considerations, mobility, market readiness and land use should be the focus for growth to 2041. It does not appear to be necessary to shift the growth allocation among the SGAs, as most of the growth is already be directed towards UGCs and Priority Transit Corridors, which have the highest potential for intensification and redevelopment.

# EXECUTIVE SUMMARY

## SGA HIERARCHY

Growth efforts should be focused within Built Up Urban Areas, with secondary priority to Designated Greenfield Areas. Within the BUPA, the Downtown Mississauga and Downtown Brampton Urban Growth Centres are the highest priority areas for intensification in the Region due to their strategic location within their respective municipalities, access to higher-order transit, and market potential. Secondary to Urban Growth Centres are Major Transit Station Areas and Corridors, which are categorized based on their physical and geospatial relationship as singular nodes or connected corridors. The MTSA GO Station and Transit Hub nodes play an important role in terms of mobility and future growth potential. The MTSA Corridors are categorized by function and priority, as Primary MTSA Corridor, Secondary MTSA Corridor and Mobility MTSA Corridors. Tertiary, are the SGAs identified at the local municipal level. The City Mississauga identifies Community Nodes and Major Nodes under the Official Plan, and the City of Brampton identifies Town Centres and Major Growth Areas in the 2040 Vision Plan.

## KEY OBSERVATIONS AND RECOMMENDED POLICY-IMPLEMENTATION APPROACHES

Arising from a broad assessment of the Region's intensification framework and growth rates, including historical and forward-looking analyses, it is recommended that the Region consider adopting as policy a new intensification hierarchy as introduced in section 4.0 of this report. This hierarchy, shown on page 56, will further support the Region's current policy directions by:

- Reinforcing the primacy of the Brampton and Mississauga UGS as the most strategically important and highest density intensification areas in the Region;
- Establishing MTSAs as important, yet diverse, intensification nodes in ways that respond differently to a number of factors including transit service levels, growth rates, neighbourhood context, and infrastructure requirements; and
- Positioning other areas, including local community nodes and town centres, as being lower priority and yet more flexible locations for intensification.

# PEEL REGION STORY

Peel Region has experienced and will continue to experience significant housing, job and population growth. This report aims to capture the shape, typology and speed of this growth and how it has changed historically. The following illustrates a brief snapshot of the Peel Region story:

## POSTWAR GROWTH AND THE SUBURBAN DREAM

### 1945-1960

Following the Second World War, Peel enjoyed the economic boom that accompanied the return of veterans from combat. Growth was aided by large investments in infrastructure. Though the first sections of the Queen Elizabeth Way (QEW) opened in the 1930s, by the 1950s the highway supported commercial and residential development in the communities surrounding it, especially in Clarkson, Lorne Park, and Port Credit. Further north, the first stretch of Highway 401 through Peel, which ran between Highway 10 (Hurontario Street) and Highway 27, opened in November 1958.


Port Credit Weekly, February 23, 1956 (PAMA Archives)

## PLANNED COMMUNITIES

### 1945-1980

Limits on the growth of planned communities in Peel during the 1950s eased during the following decade. The Province helped fund major infrastructure projects, including new sewer and water lines, and the expansion of sewage facilities at Clarkson and Lakeview. Roads continued to expand, as old rural concessions turned into modern 4-lane arteries. These projects helped Peel deal with a boom sparked by rapid industrial and residential growth in Toronto, which saw companies and homeowners look west for more room and lower costs.


Parade through the community of Bramalea. Photo around 1965 Brampton Guardian fonds, 2010.299, PAMA Archives.

## AMALGAMATION AND GROWTH

### 1974-2011

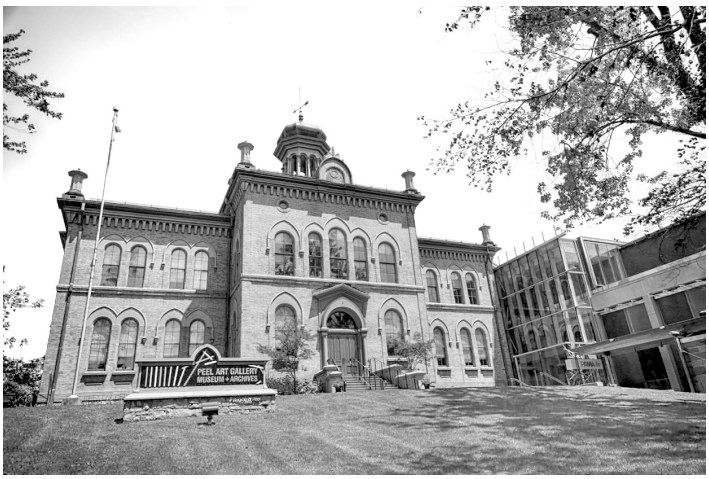
A series of amalgamations beginning in the late 1960s reflected the rapid growth of Peel and transformed its municipal organizations. Between 1971 and 2011, the population of Peel grew by over 500 percent from 264,000 to 1,300,000.

## REGION-WIDE GROWTH

### 2011 TO TODAY

Peel has continued to see rapid growth throughout the Region, across all three municipalities. During the five year period between 2011 and 2016, the population of Peel grew from 1,296,809 to 1,381,739, at a growth rate of 6.5%. Peel has the second largest population in the GTA, behind Toronto (2,731,571). Peel's Strategic Plan aims to achieve a community where growth is well managed and sustaianbility and long-term benefits are prioritized for future generations.


Home advertisements in the 1970s. (Bramptonist.com)




Peel Art Gallery on Main St, Downtown Brampton

# 1.0 VISUALIZING HISTORIC INTENSIFICATION

## 1.1 INTENSIFICATION: A LAND ACTIVITY MEASUREMENT

Intensification is one of several descriptions and ways to measure development and its use of land. The Neptis Foundation defines residential intensification as a key element in most growth management efforts: moving the focus of new residential development from peripheral farmland to existing built places. In Ontario, intensification is used to describe development of a site within an urban area at higher densities than currently exist, which can be achieved in a variety of ways; the redevelopment of vacant or brownfield lands; infilling of spaces between existing buildings; or expansion or conversion of existing buildings. In contrast to spread out low-density sprawl, intensification is promoted as a way to achieve several benefits, including decreased consumption of greenfield land, decreases in automobile use in favour of active transportation, and efficient use of public urban infrastructure such as water and sewer pipes as well as "soft" infrastructure such as public schools. Development in areas that are already urbanized plays to a growing city's strengths rather than spreading its resources over an ever wider-geography.

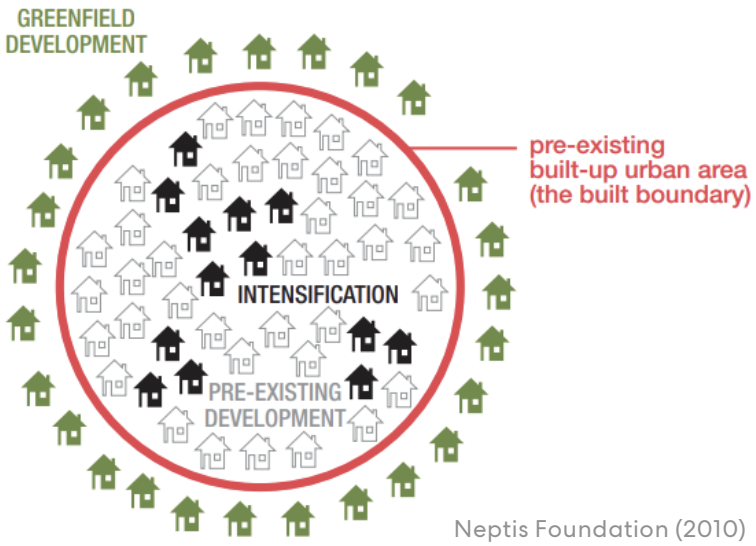
The Government of Ontario generally defines intensification as any new residential development within the existing built-up urban fabric, which may occur on undeveloped or previously developed land – what makes it intensification is its location within the area defined as already urbanized. The Growth Plan for the Greater Golden Horseshoe (GGH) emphasizes that intensification and optimizing the use of the existing land supply represents a new approach to city-building in the GGH, one which concentrates more on making better use of our existing infrastructure, and less on continuously expanding the urban area. In order to optimize the use of the existing land supply to avoid over-designating new land for future urban development, the Growth Plan (2017) outlines intensification and density targets to manage projected growth.

This study begins with this definition and acknowledges that intensification is also a process of commercial, industrial, and retail development that support residential activities; these non-residential uses also contribute to the consumption of land in the built-up urban fabric and peripheral areas.

### Methodology

With this working definition of intensification, the following study is a longitudinal analysis of building permits in the Region of Peel for residential development between 2006 to 2018. The location of residential intensification ("where"), the magnitude and type of development ("how much and what kind of change"), and the time of development ("when") have been analyzed for Brampton, Mississauga, and Caledon, as well as across the Region of Peel.

Neptis Foundation. (2010). Implementing Residential Intensification Targets: Lessons from Research on Intensification Rates in Ontario. Toronto: Neptis Foundation. // Hayden, D. (2004). A Field Guide to Sprawl. New York.




Neptis Foundation (2010)

## "Where?"

Understanding land consumption and the use of existing buildings for residential activities provides a picture of how sustainably developed or previously undeveloped land has been used. The spatial distribution of new construction and second units were mapped to understand where growth in residential built form occured. **New units** represent an intensification of land and **second units** represent the category of permit issuance that represented the most significant intensification of existing buildings *and* land.

## "How much & what kind of change?"

Understanding the built form of building permit activities helps to understand how intensely land resources and how the *existing* built form is being used. Between 2006 and 2018, building permits were issued for a variety of different jobs including conversions, relocations, demolitions, new construction, and second units. These permits resulted in either an addition of residential units, loss of units, or no change in the number of units. The analysis provides a breakdown of the net change in units by building type, including detached dwellings, semi-detached dwellings, townhouses, and multi-unit apartments.

## "When?"

Patterns of development and land intensification can be understood as happening at different *rates* of intensification. Building permit activity was analyzed for when residential units were added, the year over year volume of units added, and what kind of units were added.

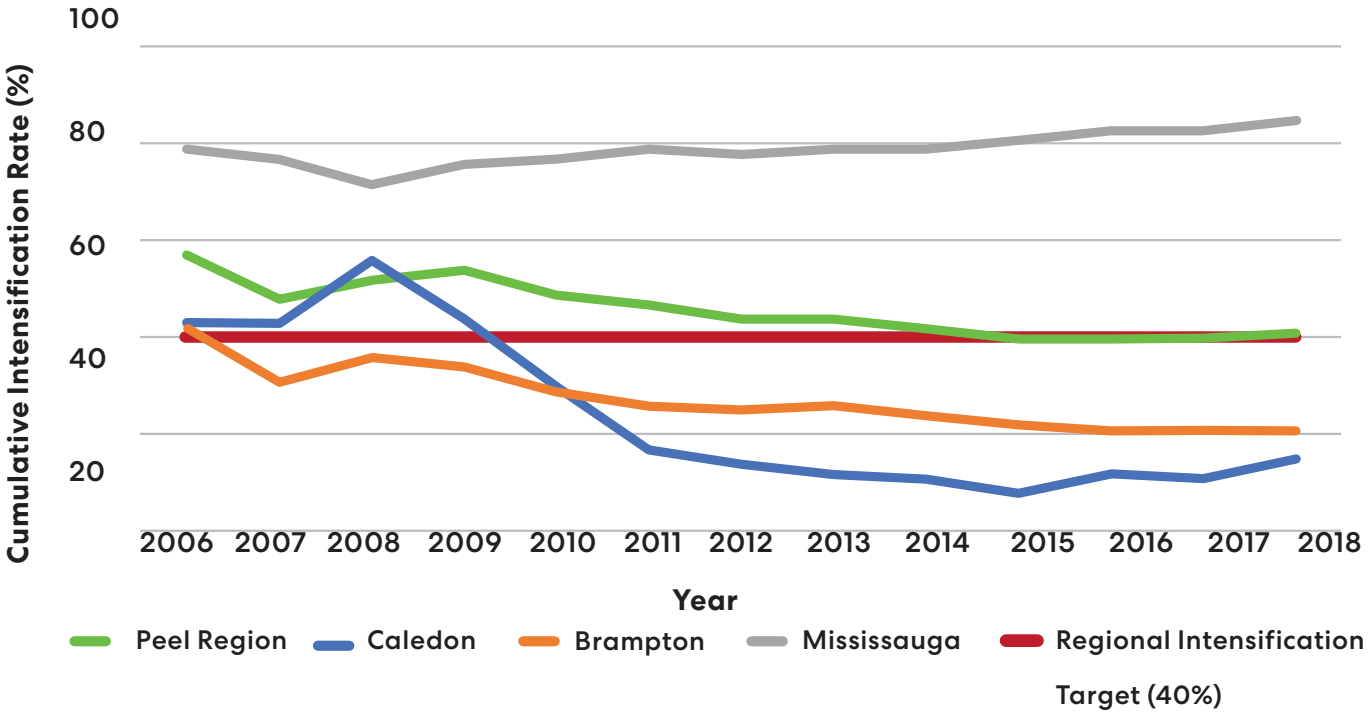
## 1.2 INTENSIFICATION AND NEW UNIT GROWTH

### Intensification Targets

Intensification targets for the Region according to Regional Official Plan (2016) Policy 5.5.3.2.4 "Require that by 2015 and for each year until 2025, a minimum of 40% of the Region's residential development occurring annually to be located within the built-up area."

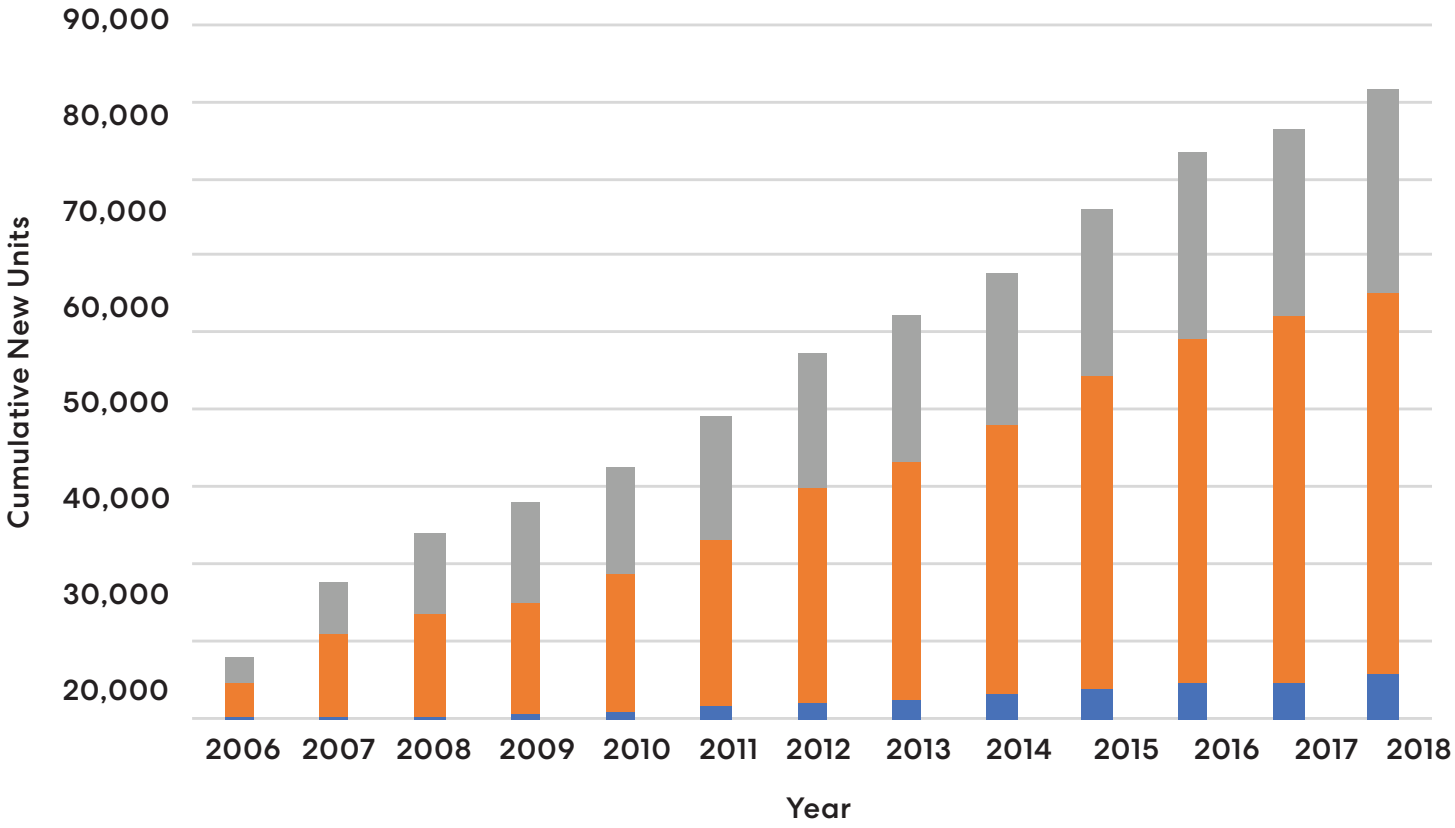
The figure below illustrates the Cumulative Intensification Rate (2006-2018) across the three municipalities and Peel Region as a whole, in comparison to the 40% target set out by the Regional Official Plan. Peel Region has met the 40% minimum target, however after 2009, less than 40% of new units were within the built-up area.

### Cumulative Intensification Rate (%), 2006-2018



The Region has seen a steady rate of new unit growth across all three local municipalities from 2006-2018. In 2006, the Region had 359,042 occupied dwelling units (PPU). Since then, the Region has seen an increase of 81,406 new unit growth between 2006-2018 - a total of 440,406 occupied dwelling units.

## Cumulative New Unit Growth, 2006-2018




Historic Population Growth (2006-2016)

| | 2006 | 2011 | 2016 |
|---|---|---|---|
| Peel Region Population | 1,159,405 | 1,296,814 | 1,381,739 |
| Occupied Dwelling Units (PPU) | 359,042 | 402,939 | 430,180 |
| People / Dwelling | 3.23 | 3.22 | 3.21 |

Source: Statistics Canada

## 1.3 HISTORIC INTENSIFICATION IN MISSISSAUGA

### Location

- Concentration of new low-density buildings within Designated Greenfield Areas
- Clusters of high-density apartment buildings located within the Urban Growth Centre, with significant intensification occurring adjacent to and outside of the Urban Growth Centre
- No visible pattern of growth concentrated within MTSAs from 2006-2018
- High density built forms in Clarkson, Port Credit, Erin Mills Town Centre, Eglinton and Hurontario

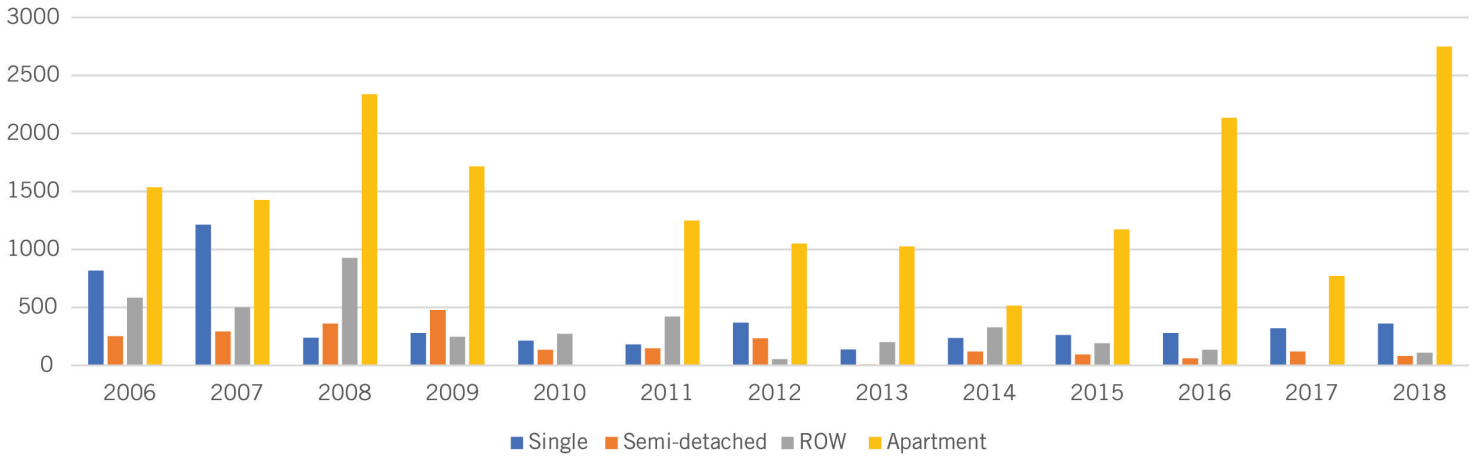
### Timing

- Growth spike in 2007-2008 could be a result of 'new' Growth Plan policies in 2006
- Low growth of new residential units in 2010-2011 as a response to 2008-2009 economic recession
- Inference that ground-related units are built out in Mississauga, where people have started to look for these types of units in other municipalities, rather than adjusting their preferences to apartment units
- Ninth Line DGA lands recently approved by Council ROPA 33

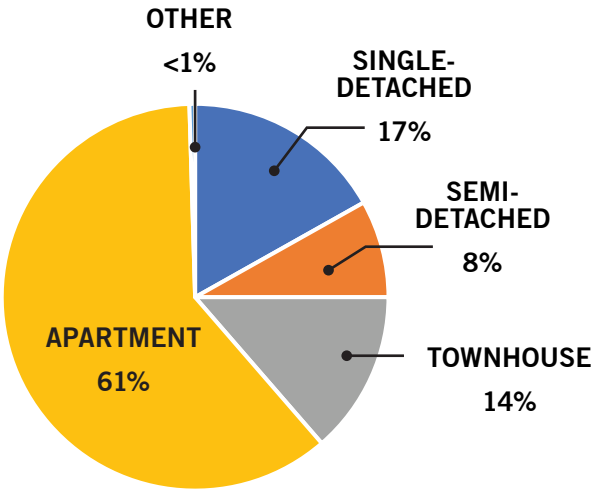
### Typology

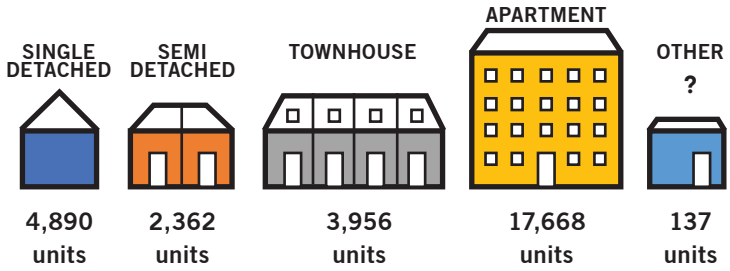
- Intensification within Mississauga primarily through apartment building typologies
- Noticeable distribution of second unit additions north of Dundas St, in contrast to new building additions concentrated south of Dundas St from 2012-2018
- Lower income areas to the north associated with 'gentle density' (ie. secondary units), in contrast to higher income areas to the south that have newly developed buildings. This observation is likely related to market demand to the south, which has better access to transit.
- Larger distribution of second units to the north could be related to income levels and trend of multi-generational households, whereas units in the south generally have larger and older lots.

### Mississauga New Units by Typology (2006-2018)



## Mississauga New Units by Typology (2006-2018)




**Total New Units Built: (2006-2018)** **29,013 units**

- The City of Mississauga experienced consistent unit growth in 2006-2018, with over 61% of new unit delivery in the form of apartments.
- Single detached houses saw an increase of over 17% of new units respectively in Mississauga.
- Over 80% of all new unit growth for apartments across Peel Region as a whole, occurred in Mississauga

**APARTMENT**

**SEMI DETACHED**

**TOWNHOUSE**

**SINGLE DETACHED**

## 1.4 HISTORIC INTENSIFICATION IN BRAMPTON

### Location

- Growth primarily occurring on the edges of the Built Up Area, within Designated Greenfield Areas from 2006-2018 contributing to intensification
- High-density intensification primarily occurring within Urban Growth Centres
- Limited relationship between new unit growth within or along MTSA corridors between 2006-2018. However, recent permit activity around Trinity Commons and development at Mississauga Rd and Steeles Ave is beginning to suggest a trend towards intensification along key transit nodes in Brampton

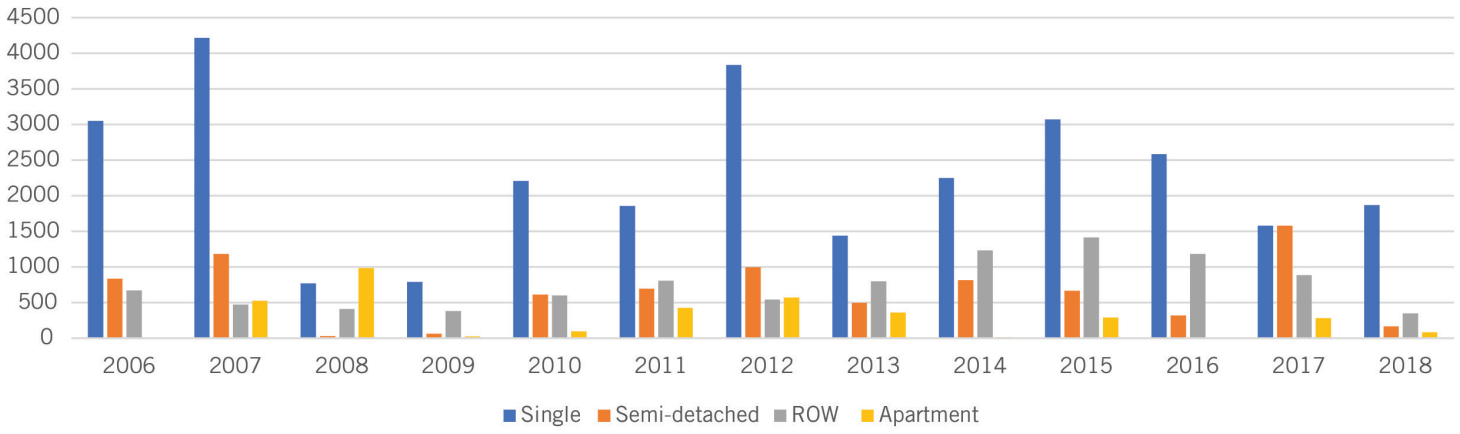
### Timing

- Peak of single-detached dwellings in 2007, followed by little growth in 2008-2009 due to economic recession
- Steady growth of low-density units from 2010-2018 in the form of single-detached housing
- Many the Town Centres (identified in the Brampton 2040 Vision) had low existing densities in 2016. Intensification rates are steadily increasing along key transit nodes, however will continue to trend within Designated Greenfield Areas in the near term.

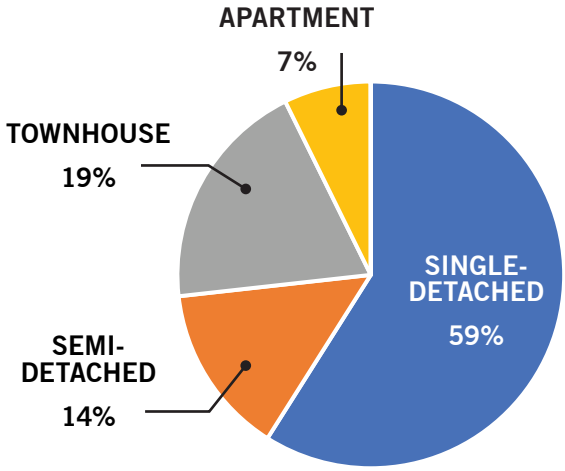
### Typology

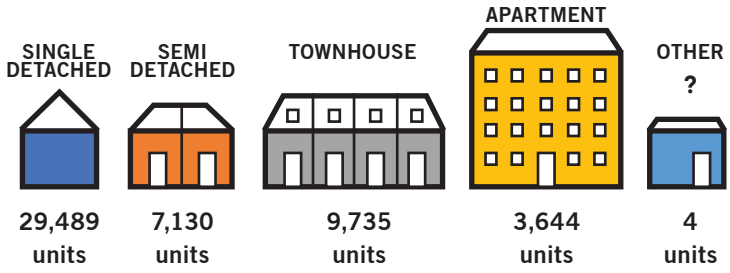
- Growth primarily occuring in the form of single detached housing, with some development in the form of semi-detached and townhouses
- Slow transition and market uptake of higher density housing within Brampton (apartment units)
- Ground-related housing is still very important and appears to be a sizable share of intensification in the form of new buildings, with some in the form of second units.

### Brampton New Units by Typology (2006-2018)



## Brampton New Units by Typology (2006-2018)




**Total New Units Built: (2006-2018)** **50,002 units**

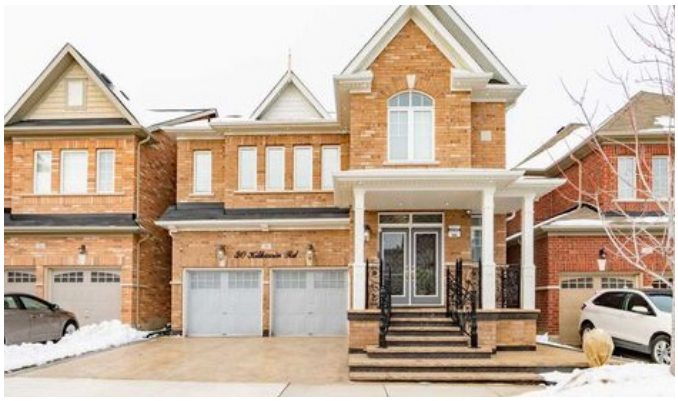
The City of Brampton experienced peak new unit growth in year 2007, and in 2012 onwards. New unit growth in Brampton in 2006-2018 was primarily low-density; over 59% of new unit delivery in Brampton was in the form of single detached houses. Over 86% of all new single-detached units delivered across Peel Region as a whole occured in Brampton from 2006-2018. A small percentage of new unit growth occurs in the form of mid to higher-density housing in townhouses and apartments.

**APARTMENT**

**SEMI DETACHED**

**TOWNHOUSE**

**SINGLE DETACHED**



## 1.5 HISTORIC INTENSIFICATION IN CALEDON

### Location

- In proportional comparison to Brampton, Caledon yields more uptake in new buildings, notably in Caledon East. Similar to southern areas of Mississauga, this could be attributed to a specific market profile geared towards more affluent end-users from the surrounding lower density neighbourhoods
- New unit growth occuring in proximity to, but not within MTSAs
- Minor permit activity across rural area, however generally low rates of intensification in contrast to other municipalities within the Region

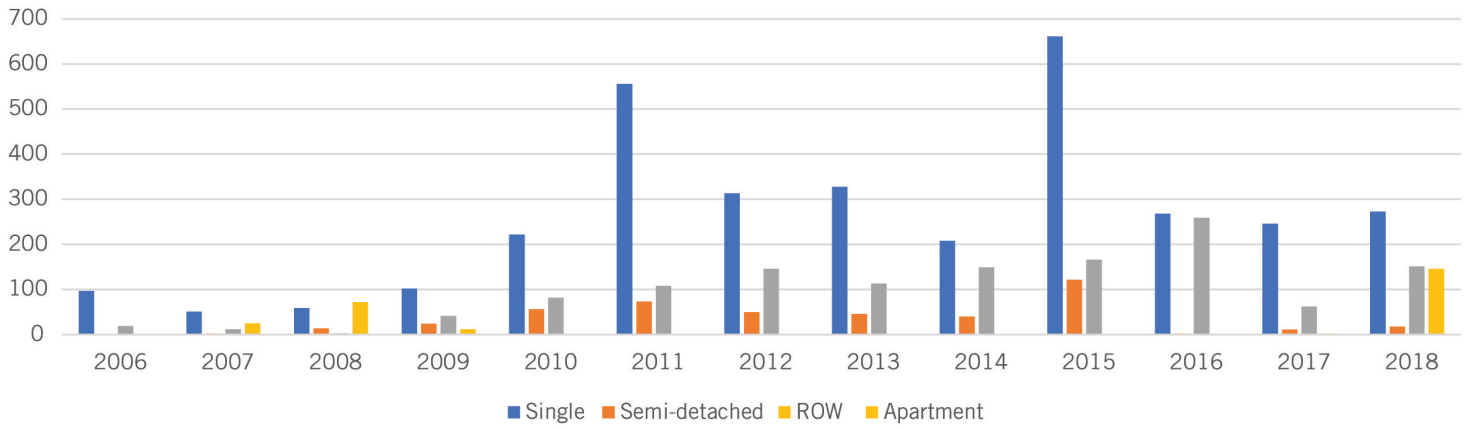
### Timing

- Accelerated development in recent years, from 2010-2018 which could be related to fewer new ground-related units being available in other parts of the Region
- Steady growth of new residential units within Caledon, with peak unit growth in 2018

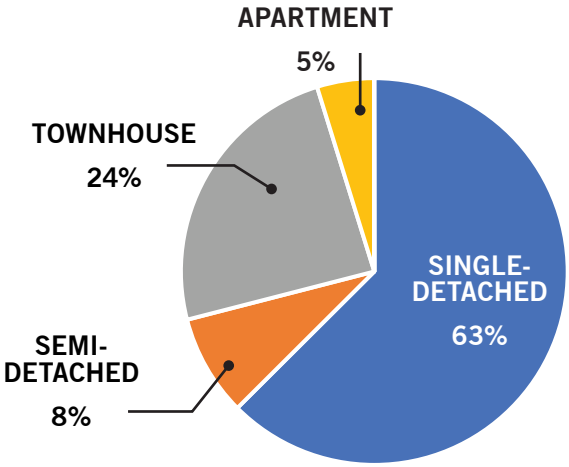
### Typology

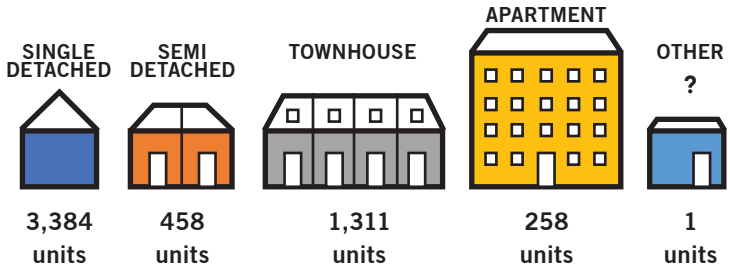
- Very little second-unit development, likely attributed to the age of new housing and income levels
- Noticeable uptake of higher density housing typologies in 2018, with visible trend of increasing higher-density housing typologies in the form of apartments and townhouses.
- Apartment units occurring primarily within Built Up Areas

### Caledon New Units by Typology (2006-2018)



## Caledon New Units by Typology (2006-2018)




**Total New Units Built: (2006-2018)** **5,412 units**

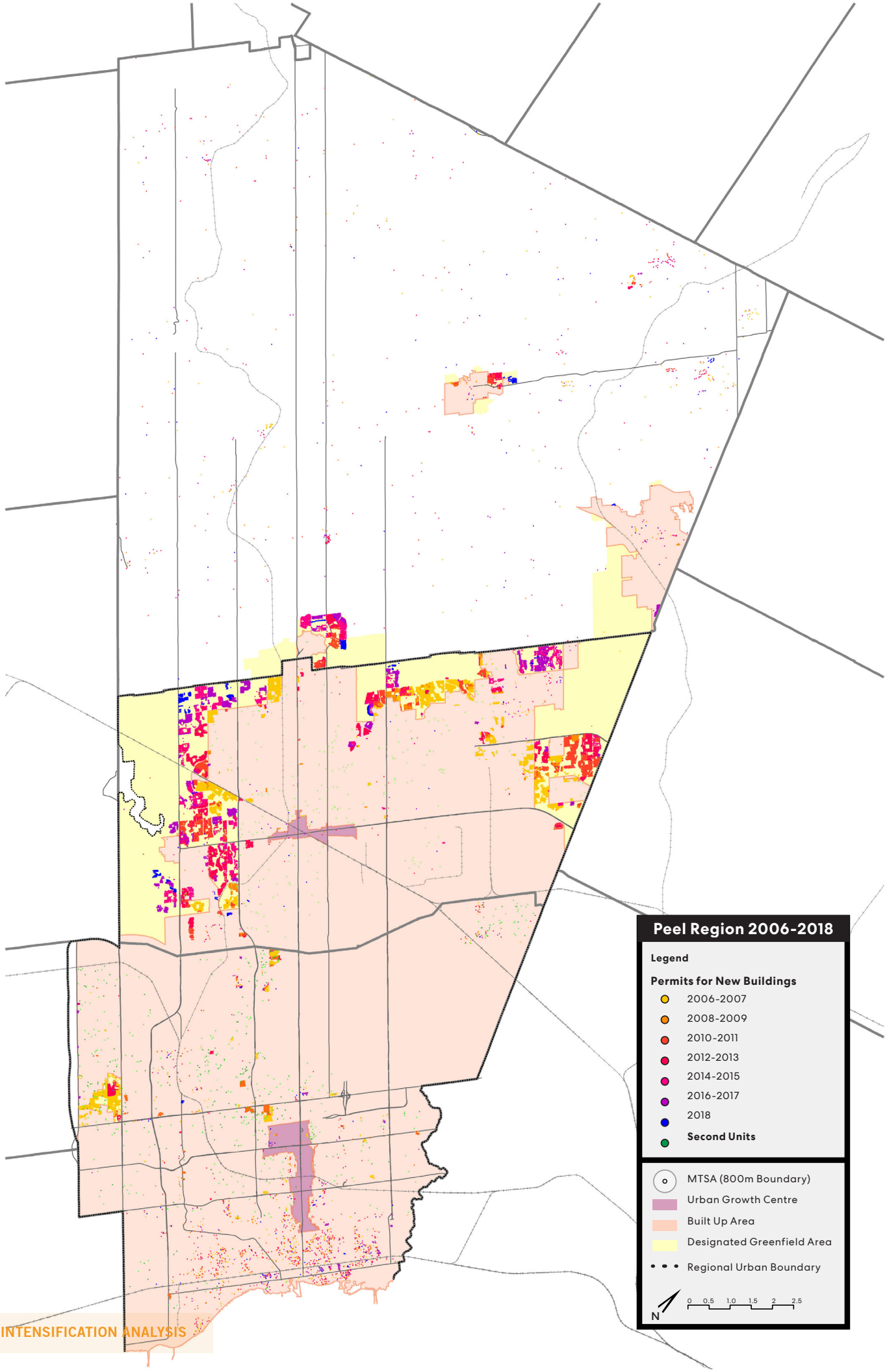
Historically, the Town of Caledon experienced low new unit growth from 2006-2010, with a steady increase following 2011. The majority of new unit growth in Caledon is in the form of single-detached housing with 3,384 new units and townhouses with 1,311 new units. A small percentage of new unit growth occurs in the form of apartment and single detached housing.

**APARTMENT**

**SEMI DETACHED**

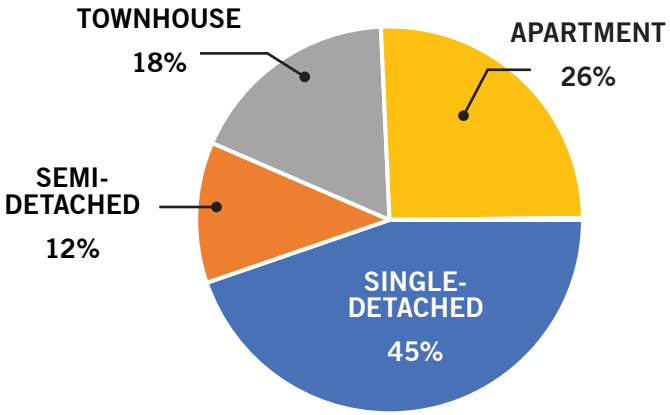
**TOWNHOUSE**

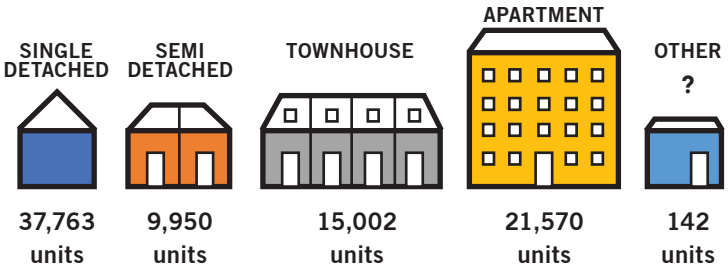
**SINGLE DETACHED**


Peel Region 2006-2018
Legend
Permits for New Buildings
2006-2007
2008-2009
2010-2011
2012-2013
2014-2015
2016-2017
2018
Second Units
MTSA (800m Boundary)
Urban Growth Centre
Built Up Area
Designated Greenfield Area
Regional Urban Boundary
N
0 0.5 1.0 1.5 2 2.5

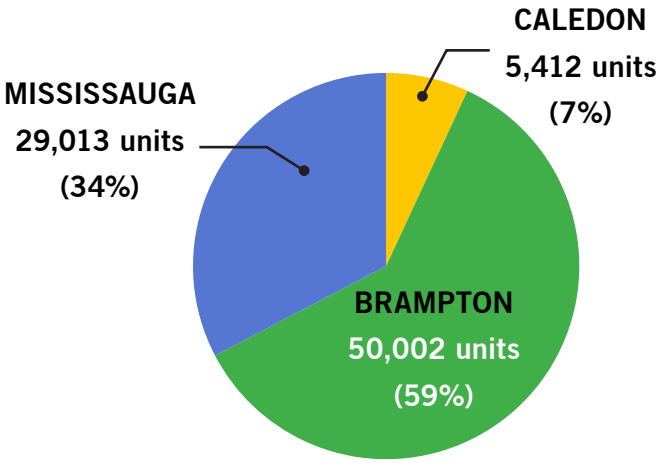
## 1.5 HISTORIC INTENSIFICATION IN PEEL REGION

### Peel Region New Units by Typology (2006-2018)




**Total New Units Built: (2006-2018)** **84,427 units**




- Peel Region's new unit growth in 2006-2018 occurred primarily in Brampton with over 50,000 units; 45% of which was in the form of single-detached housing. This suggests that the majority of Peel Region's built form is occurring through low density growth.
- However, Mississauga's growth occurs primarily in the form of higher density apartments and townhouse units, making up over 80% of the overall new unit growth in the form of apartment dwellings across the Region.
- In comparison to Mississauga and Brampton, Caledon has experienced the lowest amount of growth, accounting for only 7% of new units in 2006-2018. Most of the new units in Caledon occur in the form of semi-detached housing.

See Appendix for maps that visualize historic rates of intensification between 2006-2018 across Mississauga, Brampton and Caledon. The maps illustrate building permits for new buildings from building permit data (MPAC) provided by the Region of Peel.

# 2.0 SGA EXISTING DENSITIES AND FORECAST GROWTH

The existing 2016 densities within each Peel Region SGA, as well as the forecast densities to 2041 were considered for this analysis based on information provided by Peel Region. The purpose of this analysis has been to compare target densities identified for policy areas in A Place to Growth; Growth Plan for the Greater Golden Horseshoe ("A Place to Grow") to existing densities and forecast densities to 2041. An evaluation of how growth allocated to other SGAs in Peel Region, including Town Centres, Major Growth Areas, Mall Nodes, Community Nodes and Major Nodes, compare to target densities contained in the local official plans has also been undertaken.

## 2.1 URBAN GROWTH CENTRES

Figure 1 summarizes existing and forecast densities for the Downtown Brampton and Downtown Mississauga Urban Growth Centre (UGC). As shown, both UGCs are forecast to exceed the target density of 200 residents and jobs per hectare by 2041, which is identified in A Place to Grow.

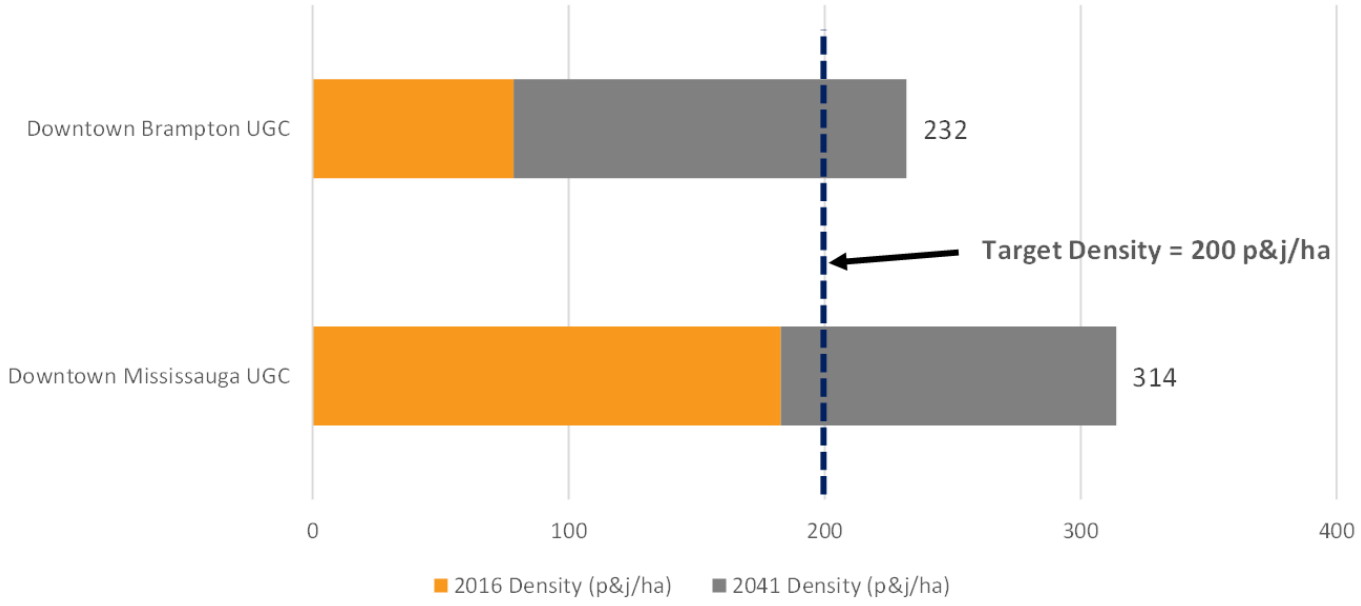



*Figure 1: Urban Growth Centre – Existing and Forecast Densities*

Within the Downtown Mississauga UGC, the majority of growth is forecast to be residential, with residents accounting for approximately three-quarters of additional density, post-2016. Apartment units are anticipated to account for most of this residential growth. In the Downtown Brampton UGC, over half (57%) of the additional density to 2041 is anticipated to be residential, with apartment units accounting for approximately three-quarters of this growth.

The significant amount of growth (residential and non-residential) forecast in the UGCs is consistent with recent development trends, including the redevelopment of Square One. Also, significant investments being made in the UGCs, including transit investments, as well as the investments by Brampton in a new university campus, the Centre for Innovation, the Riverwalk, etc. are likely to help draw both new residents and businesses to the UGCs.

## 2.2 MAJOR TRANSIT STATION AREAS

The following sections summarize the existing and forecast densities in each of the MTSAs in Peel Region. The MTSAs have been grouped by transit corridor to assist in identifying the corridors that have the greatest capacity to accommodate growth to 2041. This analysis is based on the boundaries that have been delineated for each of the MTSAs, as opposed to the 800-metre radius. The only exception are some stations along the Highway 407 BRT corridor, where boundaries have not been delineated. For each transit corridor, MTSAs are organized from either north-to-south, or west-to-east, depending on the orientation of the corridor.

### Highway 403 BRT

Figure 2 summarizes the existing and forecast densities for each of the 14 MTSAs located along the Highway 403 BRT. In 2016, the combined density across the MTSAs was 55 persons and jobs per hectare, which was well below the target density of 160 persons and jobs per hectare identified in A Place to Grow. Therefore, significant increases in density would be required to achieve the target density.

As shown, only one MTSA (Erin Mills) is forecast to exceed the target density. Erin Mills station is forecast to achieve a density of 205 persons and jobs per hectare by 2041. The relatively high forecast density in the Erin Mills MTSA is due to the MTSA being within the Central Erin Mills Major Node, which has a forecast density range of 200 to 300 persons and jobs per hectare, based on Figure 5-5 of the City of Mississauga Official Plan.

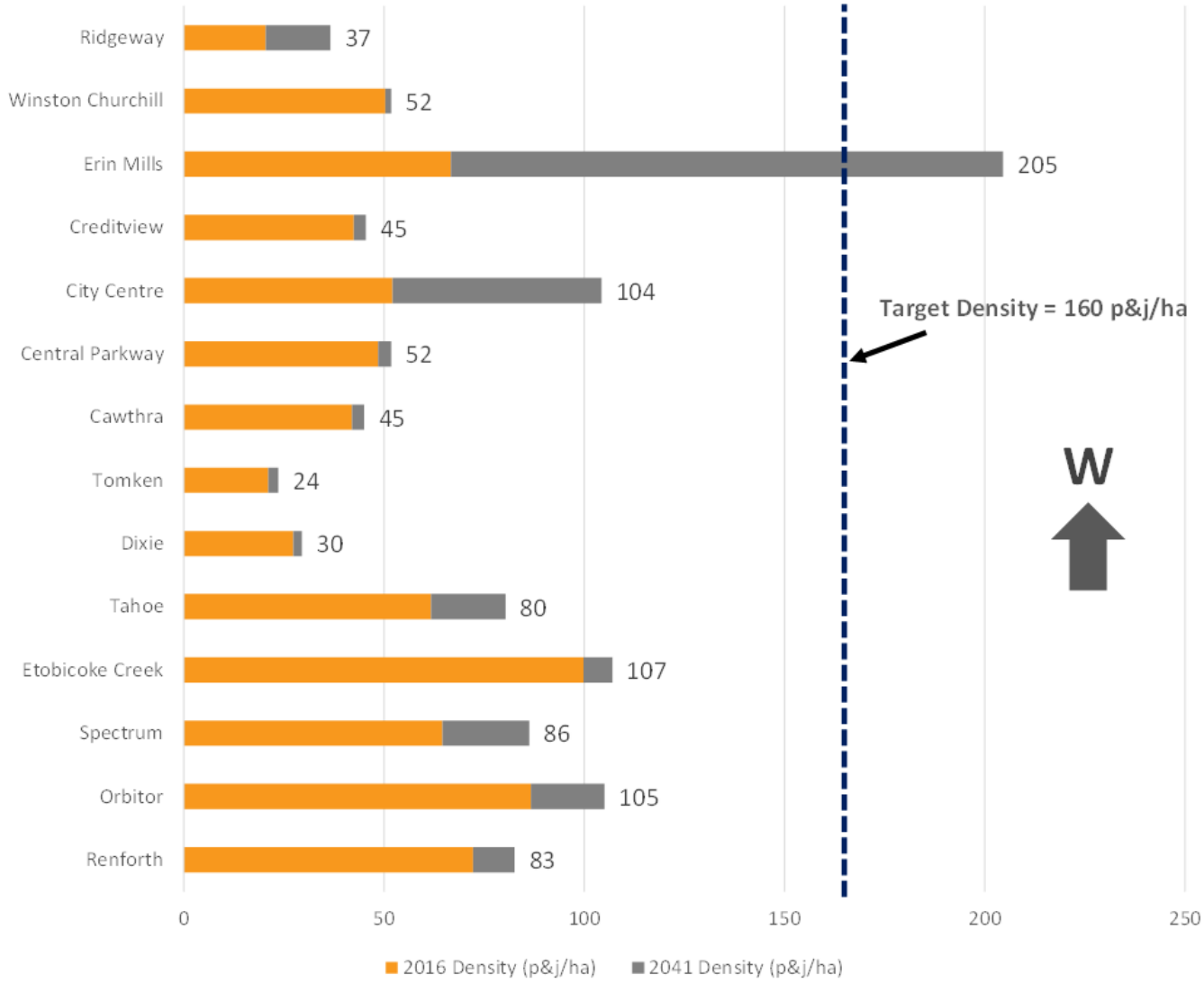



*Figure 2: Highway 403 BRT - MTSA Existing and Forecast Densities*

The MTSAs along the Highway 403 BRT, excluding Erin Mills, are expected to achieve an average density of approximately 70 persons and jobs per hectare by 2041. This level of density is reasonable, as many of the delineated MTSAs located along the Highway 403 BRT are largely built-out with low-density employment and residential uses, making intensification of these sites more challenging.

Also, based on the Station Area Profiles completed by Perkins + Will, Sean Hertel Urban Planning, Steer and urbanMetrics, many of the MTSAs located along the Highway 403 BRT are identified as having "moderate" mobility characteristics and "limited" land use/built form and community considerations. This includes limited pedestrian and cycling infrastructure and limited community services and amenities. Therefore, it may not be reasonable to accommodate significant intensification within these MTSAs until these considerations are addressed.

That being said, if the target density of 160 persons and jobs per hectare were to be achieved in each MTSA, it would require an allocation of 98,400 persons and jobs to the MTSAs between 2016 and 2041, as shown in Figure 3.

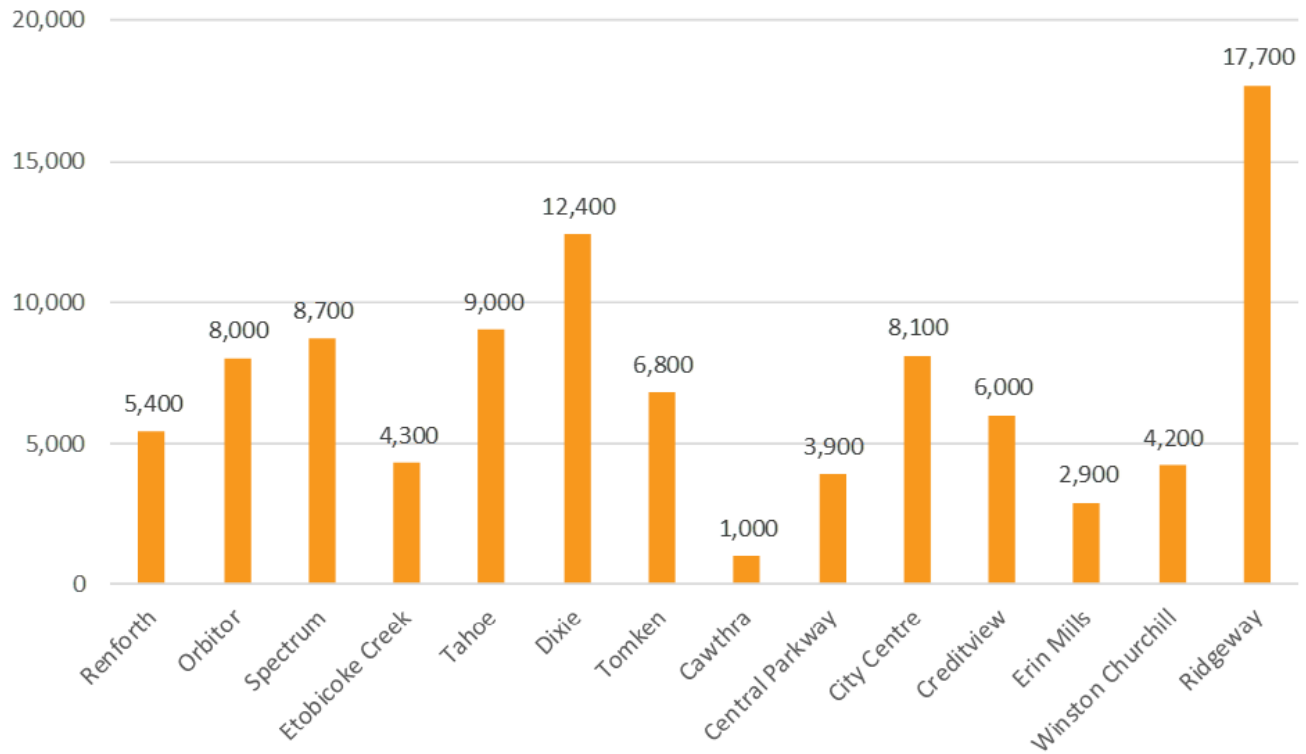



*Figure 3: Allocation of Persons and Jobs to Each MTSA Along the Highway 403 BRT*

## Highway 407 BRT

Figure 4 summarizes the existing and forecast densities for each of the 9 MTSAs located along the Highway 407 BRT. Only the Britannia and Derry MTSAs have delineated boundaries. For the remaining MTSAs, we have utilized the 800-metre radius in our analysis.

In 2016, the combined density across the MTSAs was 32 persons and jobs per hectare, which was well below the target density of 160 persons and jobs per hectare identified in A Place to Grow. The 2041 population and employment allocated to each MTSA show that each of the MTSAs are expected to remain below the target density. The low density in the MTSAs is related, in part, to the low-density forms of development that exist in the MTSAs and the significant greenspace associated with set-backs from Highway 407 and the hydro corridor. Given these constraints, it is unlikely that these MTSAs are likely to achieve the target density by 2041.

Also, based on the Station Area Profiles, many of the MTSAs located along the Highway 407 BRT are identified as having "limited" mobility and community considerations, such as limited pedestrian and cycling infrastructure and limited community services and amenities. Therefore, it may not be reasonable to accommodate significant intensification in these MTSAs.

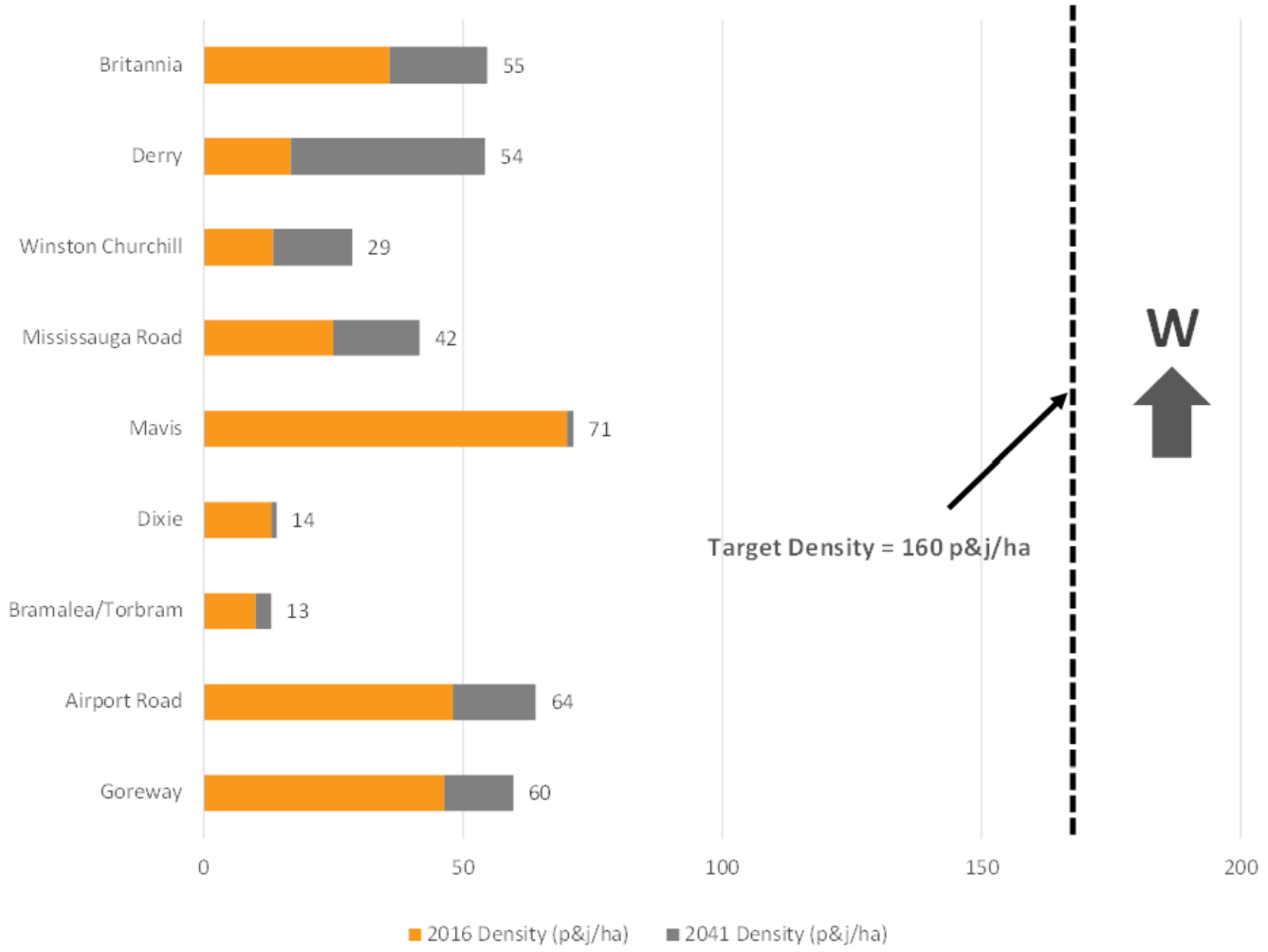



*Figure 4: Highway 407 BRT – MTSA Existing and Forecast Density*

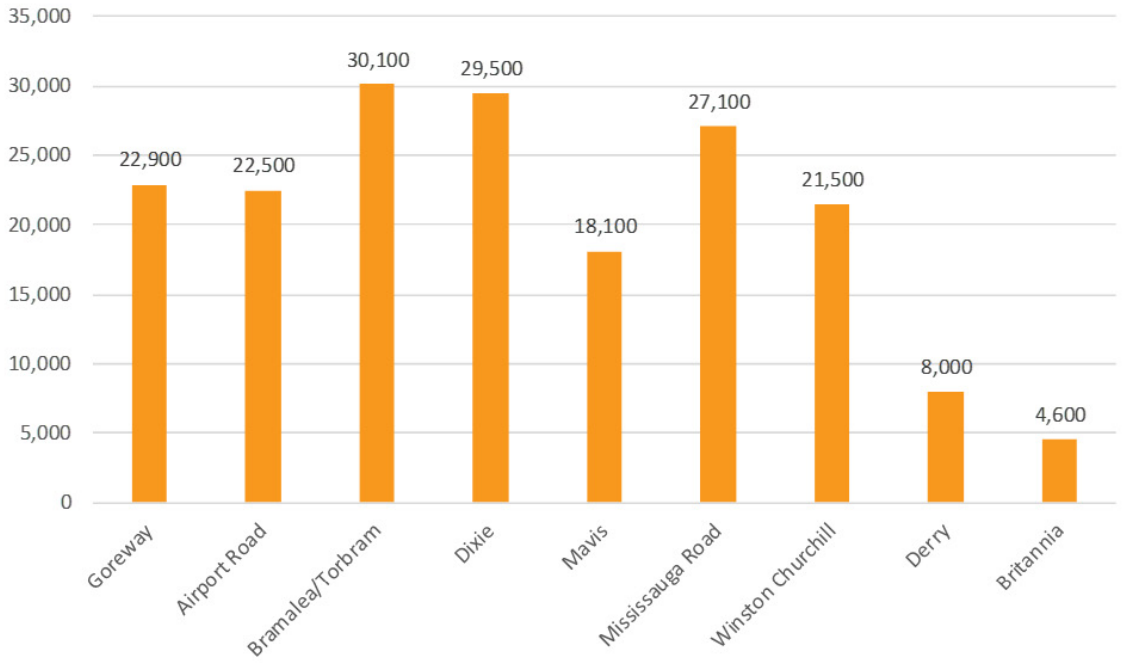



*Figure 5: Allocation of Persons and Jobs to Each MTSA Along the Highway 407 BRT*

If the MTSAs along the Highway 407 BRT were to achieve the target density, it would require the allocation of an 184,300 persons and jobs to the MTSAs between 2016 and 2041. That being said, this large allocation of persons and jobs is related to utilizing the 800-metre radius for the MTSA, rather than a delineated boundary.

## Dundas BRT

Figure 6 summarizes the existing and forecast densities for each of the identified MTSAs along the Dundas BRT corridor. In 2016, the combined density across the 17 MTSAs located along the Dundas BRT was 51 persons and jobs per hectare, which was well below the target density of 160 persons and jobs per hectare. Therefore, significant growth (both residential and non-residential) would be required to achieve the target density.

Dundas is the only MTSAs along the Dundas BRT corridor that are expected to meet or exceed the target density of 160 persons and jobs per hectare by 2041. The high density at Dundas station is related to the Hurontario LRT, which is also in the station area.

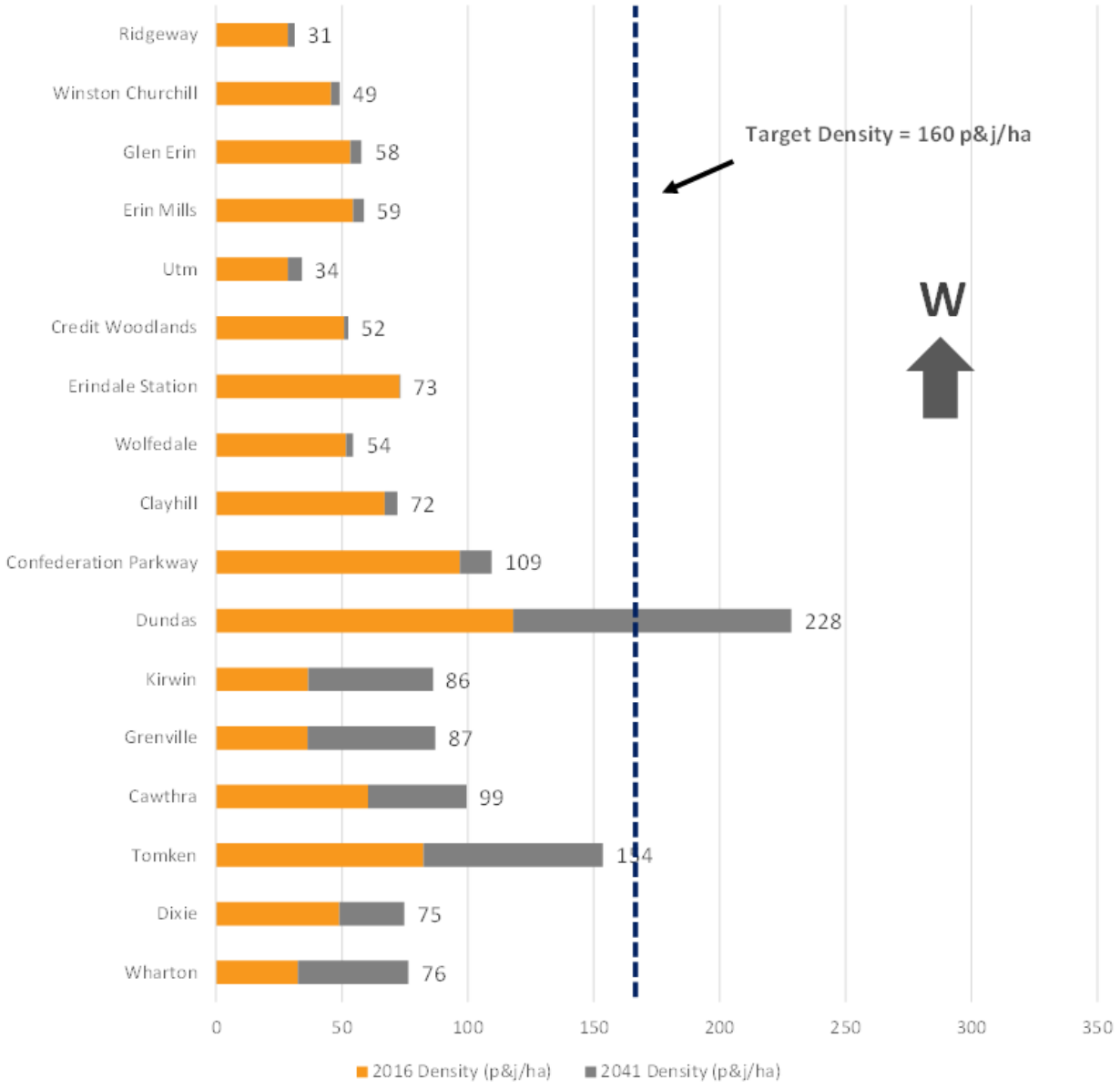



*Figure 6: Dundas BRT - MTSA Existing and Forecast Density*

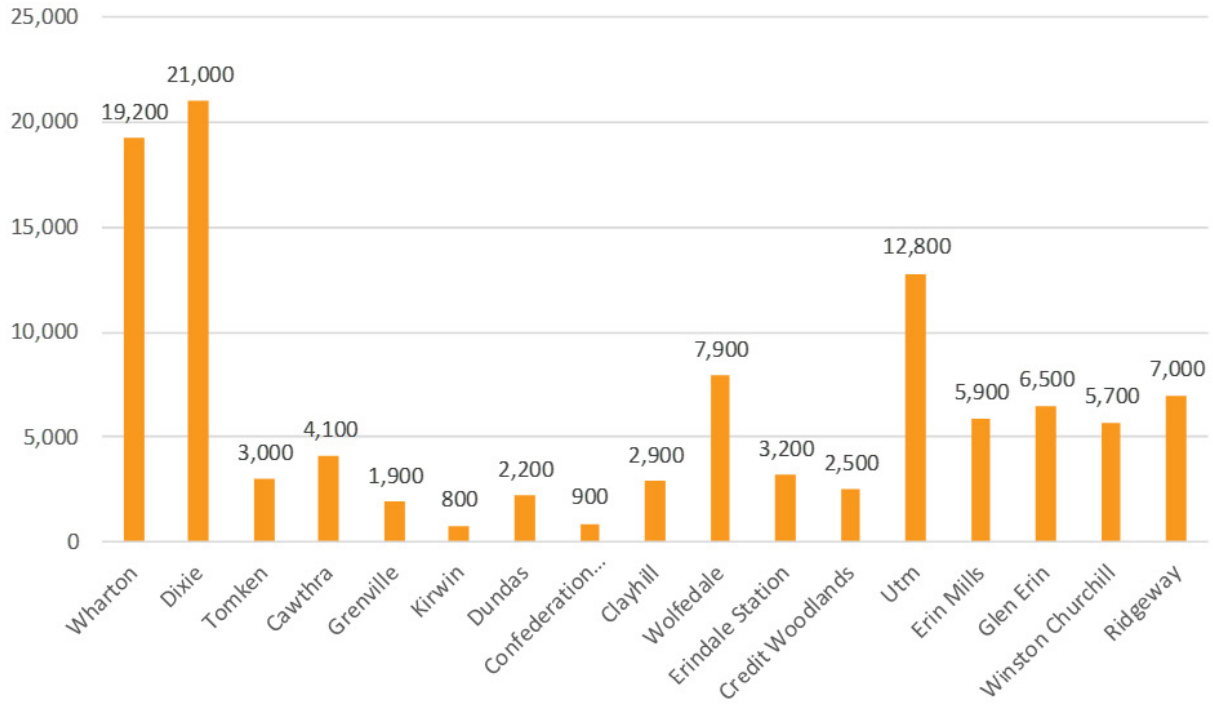



*Figure 7: Allocation of Persons and Jobs to Each MTSA Along the Dundas BRT*

If MTSAs along the Dundas BRT were forecast to achieve the target density of 160 persons and jobs per hectare, they would need to accommodate 107,500 persons and jobs between 2016 and 2041. As part of the Station Area Profiles, it was identified that many of the MTSAs along the Dundas BRT have "strong" land use/built form and community considerations, which could support growth in this area of Mississauga. That being said, it could take a long period of time to accommodate growth in this area of the City. Many of the MTSAs have "limited" market potential, as they are generally built-out and would require redevelopment of existing sites.

## Queen Street BRT

Figure 8 summarizes the existing and forecast densities for each of the identified MTSAs along the Queen BRT corridor. In 2016, the combined density across the 16 MTSAs along the Queen Street BRT was 64 persons and jobs per hectare.

As shown, in 2016, all of the MTSAs along the Queen Street BRT were below the target density of 160 persons and jobs per hectare. However, the Central Park and Dixie stations were close, at 134 and 141 persons and jobs per hectare, respectively.

By 2041, there are five stations that are forecast to meet or exceed the target density. All of these MTSAs are located in the Downtown Brampton UGC. The high densities in some of the MTSAs is related to the Brampton 2040 Vision, which forecasts significant growth in the Major Growth Areas of Downtown Brampton and Bramalea, which are both located along the BRT corridor.

If the MTSAs along the Queen Street BRT were to achieve the target density, it would require the allocation of 99,500 persons and jobs to the MTSAs between 2016 and 2041, as shown in Figure 9.

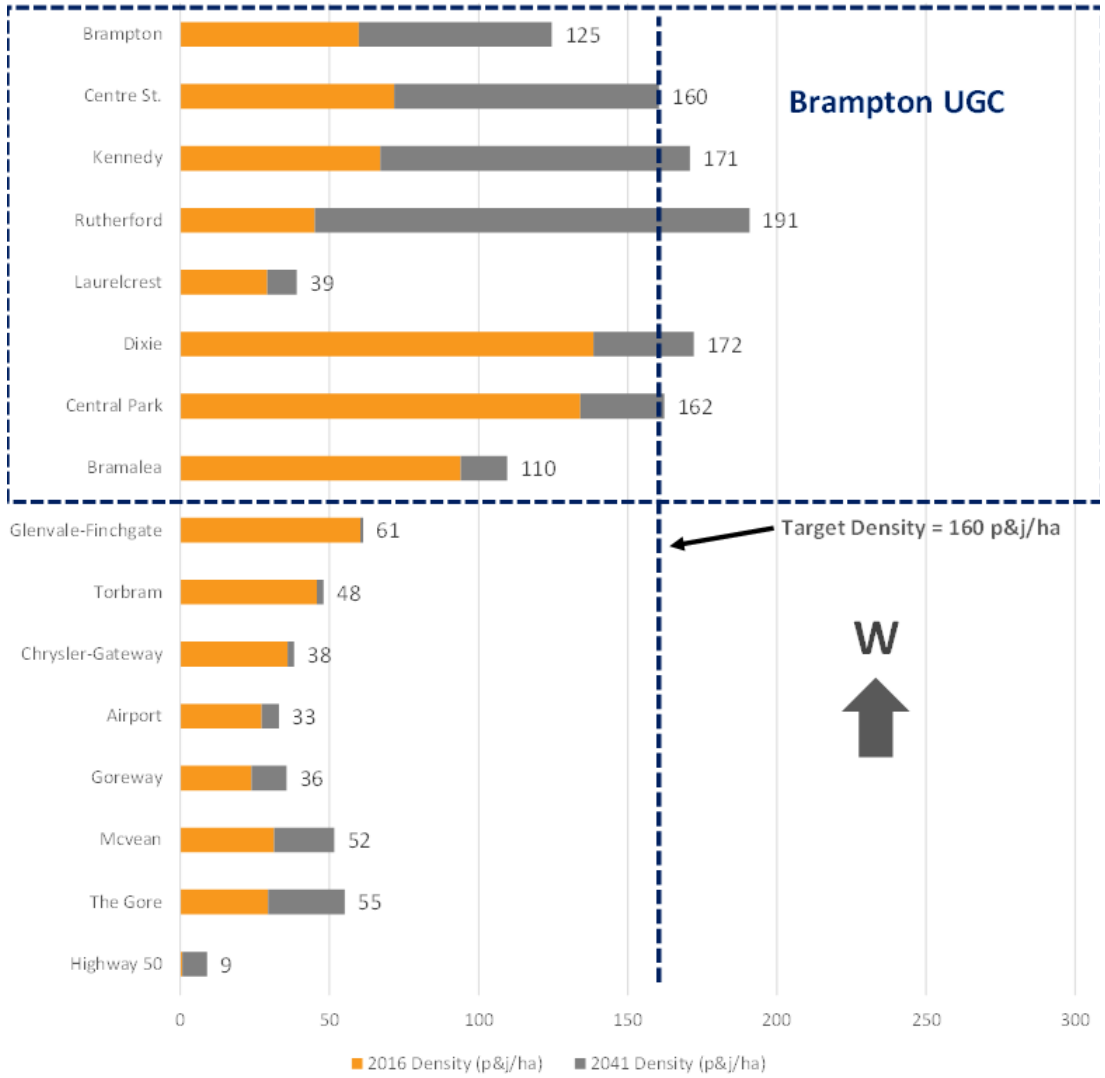



*Figure 8: Queen Street BRT - MTSA Existing and Forecast Density*

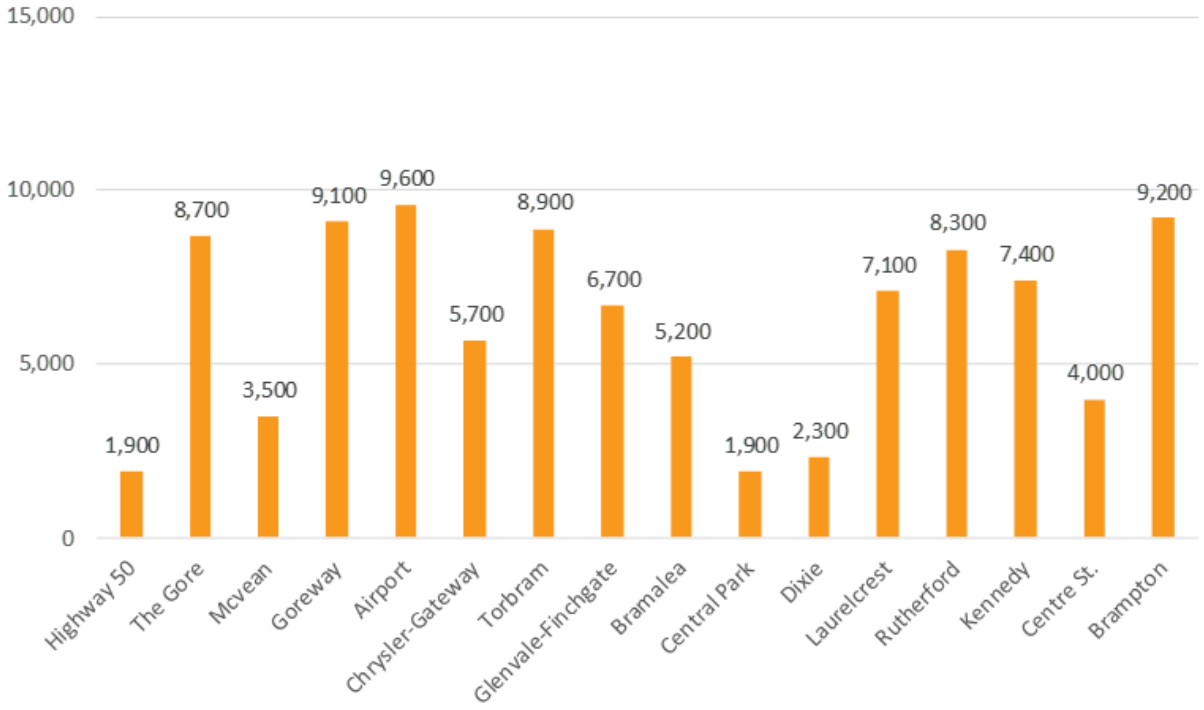



*Figure 9: Allocation of Persons and Jobs to Each MTSA Along the Queen Street BRT*

## Lakeshore BRT

Figure 6 summarizes the existing and forecast densities for the three MTSAs along the Lakeshore BRT corridor. In 2016, these MTSAs had a combined density of 24 persons and jobs per hectare. Therefore, significant increases in density would be required to achieve the target density.

By 2041, the density across the three MTSAs is forecast to be 83 persons and jobs per hectare. However post-2041, the build-out of the Inspiration Lakeview master plan that is planned for the former Ontario Power Generate (OPG) site is expected to add additional density to this area of Mississauga.

The majority of growth within the MTSAs along the Lakeshore BRT corridor between 2016 and 2041 is expected to be residents (approximately three-quarters of growth). This residential growth is forecast to predominately be accommodated in apartment units (86% of unit growth). If the MTSAs along the Lakeshore BRT were to achieve the target density, it would require the allocation of 17,400 persons and jobs to the MTSAs between 2016 and 2041.

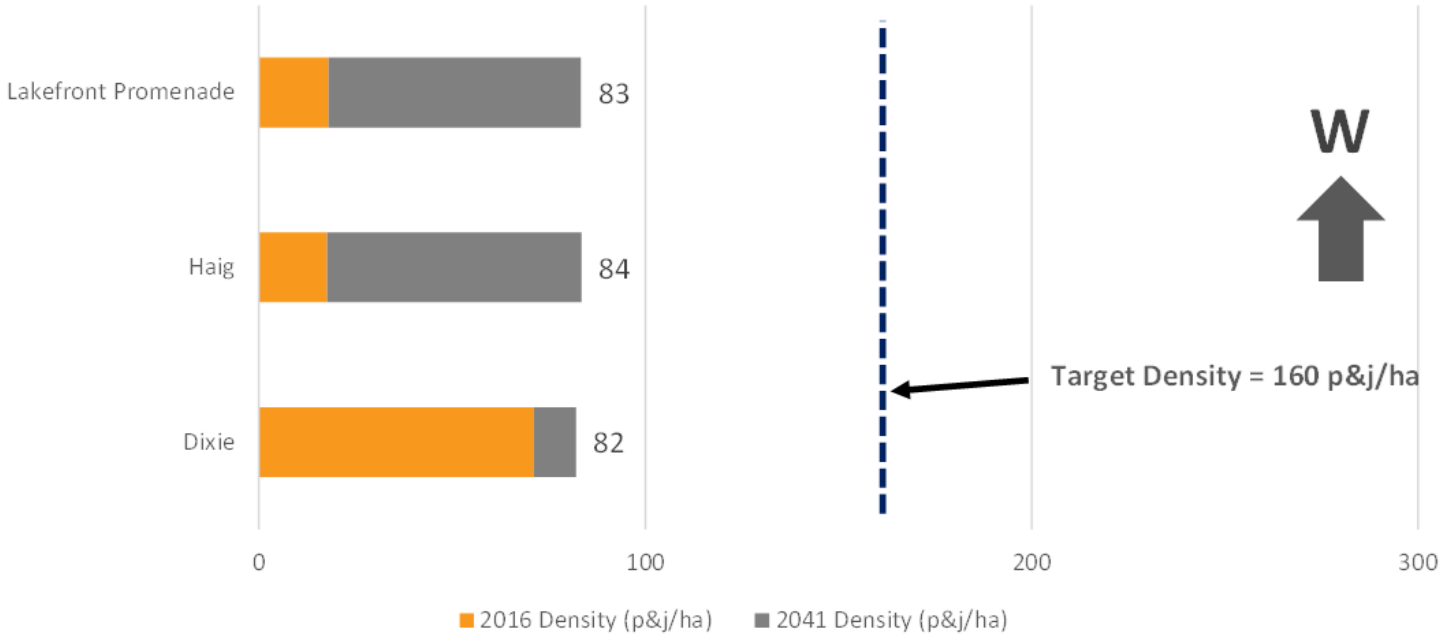



*Figure 10: Lakeshore BRT – MTSA Existing and Forecast Density*

## Hurontario LRT

Figure 7 summarizes the existing and forecast densities for each of the identified MTSAs along the Hurontario LRT corridor. In 2016, the combined density across the 23 MTSAs along the Hurontario LRT was 115 persons and jobs per hectare, which was the highest density along the various transit corridors in Peel Region. It is also notable that seven of the MTSAs had already exceed the target density by 2016.

By 2041, half of the MTSAs are expected to meet or exceed the target density. As shown, the highest densities are forecast for MTSAs located in the Mississauga UGC and the Gateway Terminal, which includes the proposed redevelopment of Brampton Shoppers World.

Growth within the MTSAs along the Hurontario LRT corridor is expected to be balanced with population accounting for 64% of growth. Most of these new residents are forecast to be accommodated in apartment units, which is consistent with the existing character of many of the MTSAs.

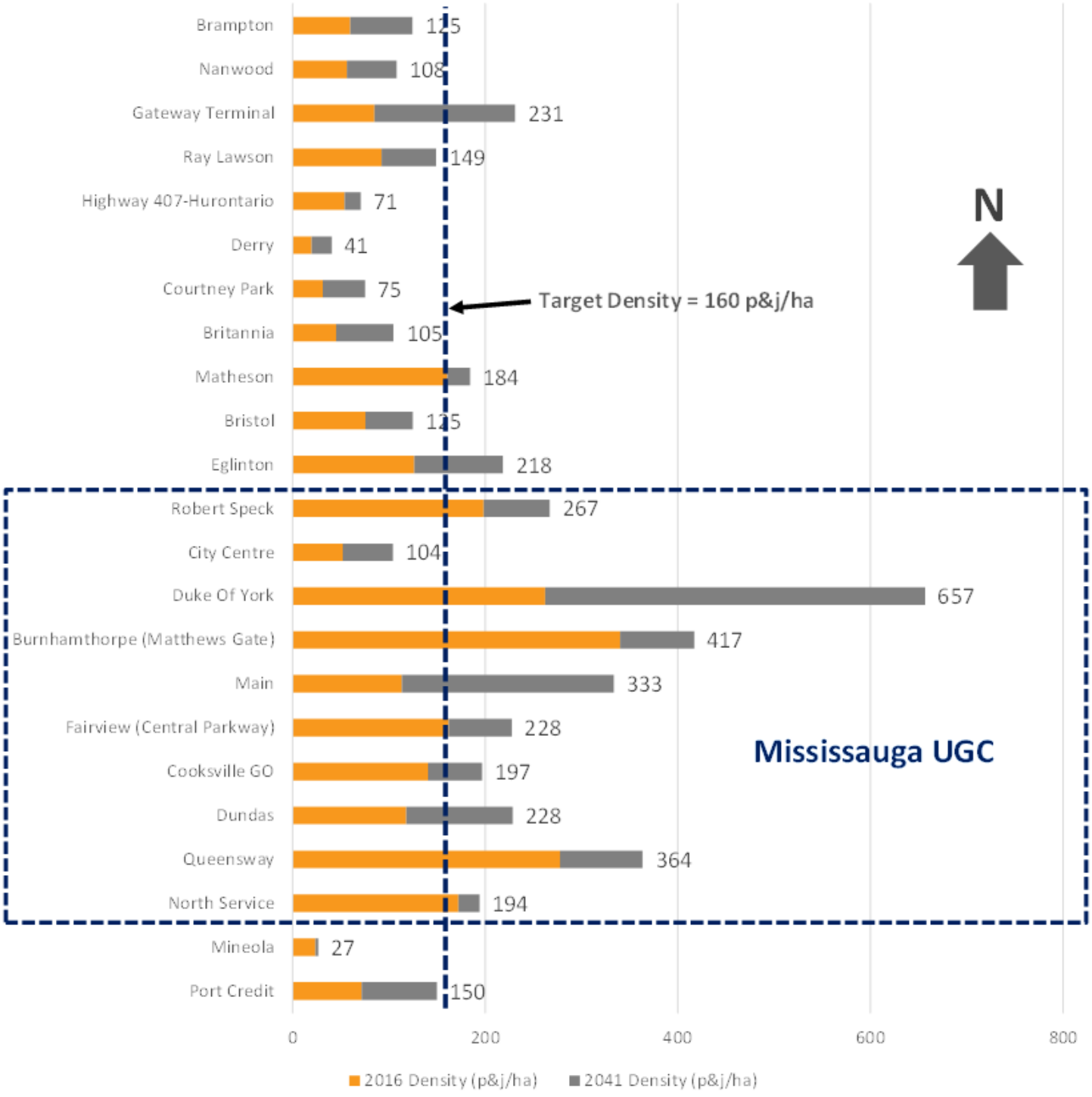



*Figure 11: Hurontario LRT - MTSA Existing and Forecast Density*

However, if the target density of 160 persons and jobs per hectare were to be achieved in each MTSA, it would require an allocation of 92,600 persons and jobs to the MTSAs between 2016 and 2041, as shown in Figure 12.

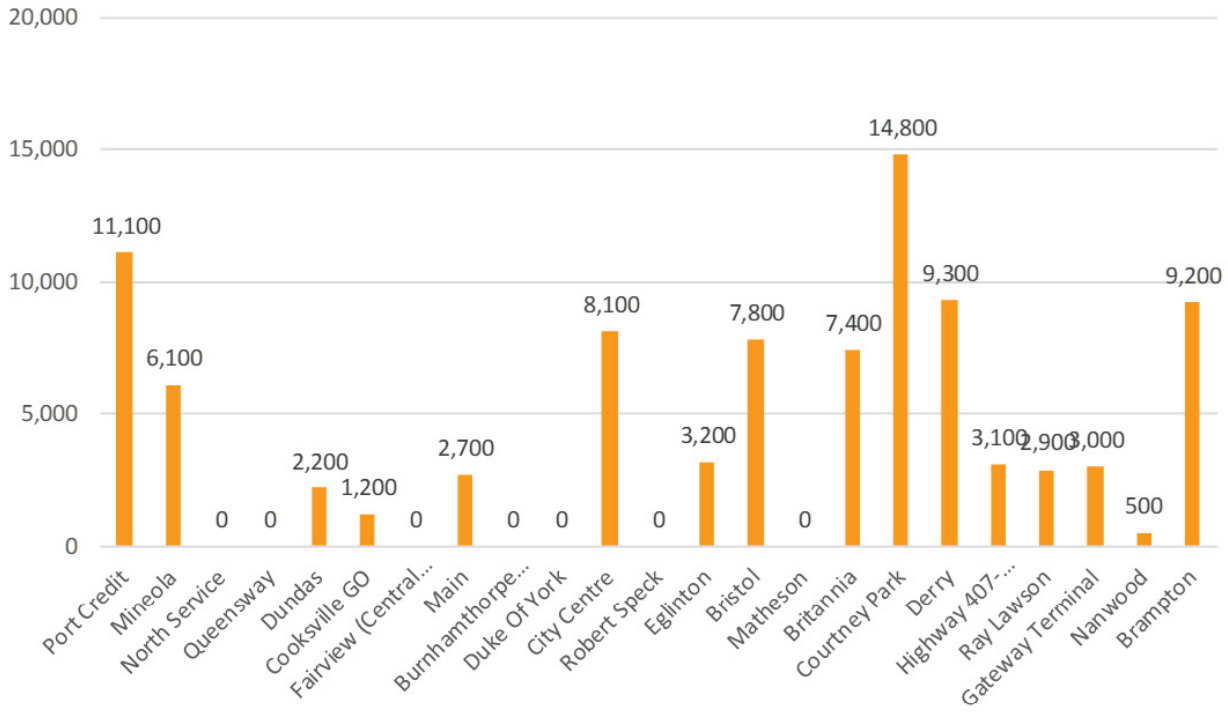



*Figure 12: Allocation of Persons and Jobs to Each MTSA Along the Hurontario LRT*

## GO Transit Stations

Figure 8 summarizes the existing and forecast densities for the nine existing and one proposed GO Transit train station in Peel Region.

MTSAs along the Milton GO Corridor had a combined density of 41 persons and jobs per hectare in 2016 and a forecast density of 59 persons and jobs per hectare in 2041. This forecast density is well below the target density of 150 persons and jobs per hectare. The low densities are related, in part, to the large surface parking lots that characterize these MTSAs. Achieving the density target will be dependent, to some extent, on the redevelopment of these parking lots. To achieve the target density, 58,000 persons and jobs would need to be allocated to the four MTSAs between 2016 and 2041.

The four MTSAs along the Kitchener GO Corridor had a combined 2016 density of 32 persons and jobs per hectare. The Brampton and Mount Pleasant GO Stations are forecast to achieve the highest densities along the Kitchener GO Corridor. Forecast growth in the Brampton GO MTSA is associated with its location in the Downtown Brampton UGC. Similarly, the Mount Please GO MTSA is located adjacent to the Heritage Heights Town Centre in the Brampton 2040 Vision. As part of the Station Area Profiles, both the Brampton and Mount Pleasant MTSAs were identified as having “strong” mobility and market growth characteristics. Therefore, the level of intensification in these MTSAs seems reasonable.

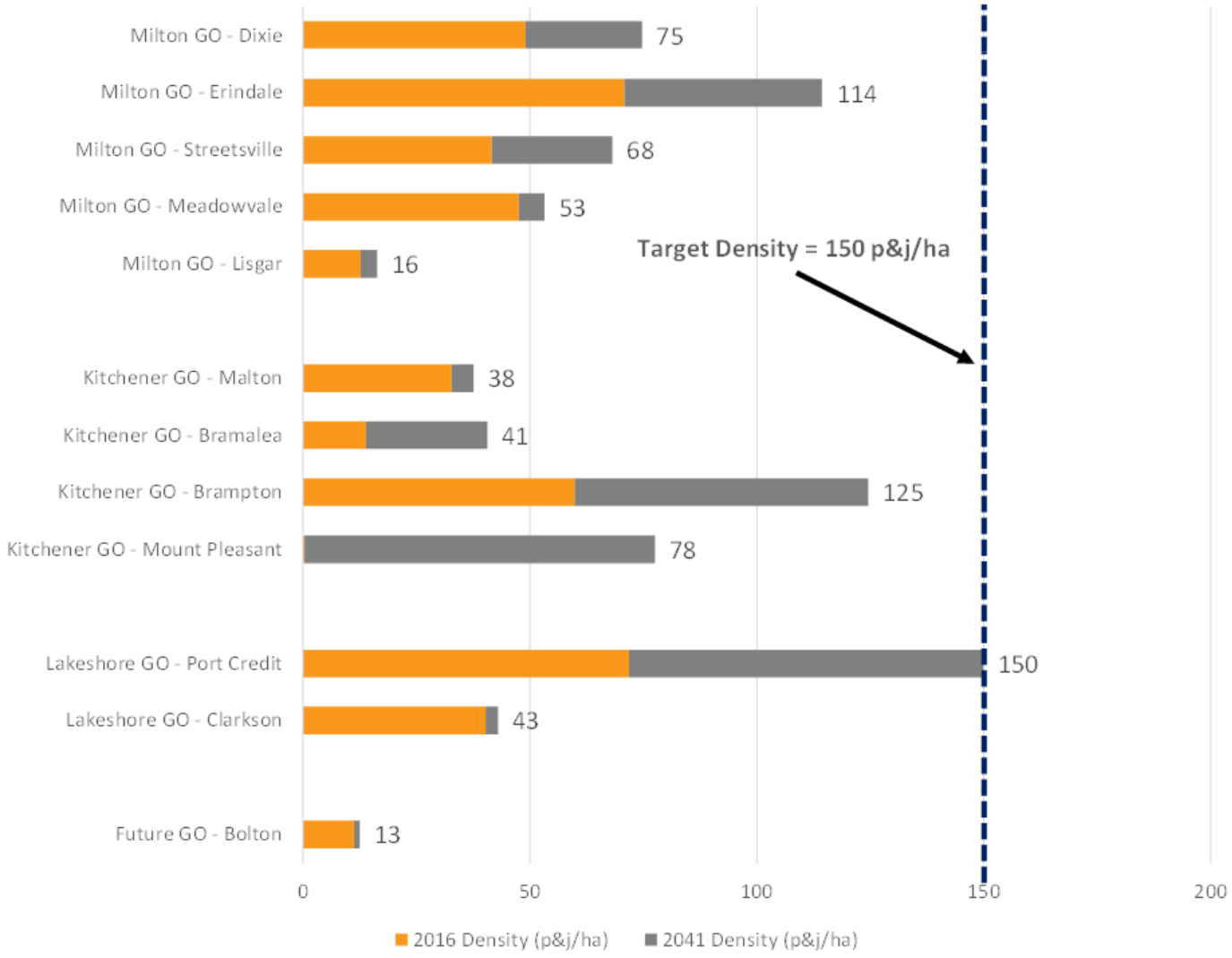



*Figure 13: GO Transit Stations – MTSA Existing and Forecast Density*

Clarkson GO and Port Credit GO are only MTSAs in Peel Region located along the Lakeshore West Corridor. The Port Credit GO station is forecast to achieve the density target of 150 persons and jobs per hectare by 2041. The Clarkson GO MTSA is forecast to have 2041 density of 43 persons and jobs per hectare. To achieve the target density, 9,100 persons and jobs would need to be allocated to this MTSA between 2016 and 2041.

There is also one future GO Station in Bolton that is forecast to achieve a density of only 25 persons and jobs per hectare by 2041. A total of approximately 7,900 persons and jobs would be required to be allocated to this MTSA to achieve the target density by 2041.

## 2.3 OTHER STRATEGIC GROWTH AREAS

In addition to the UGCs and MTSAs, both Brampton and Mississauga have identified other Strategic Growth Areas in their Official Plans and other long-range planning documents. The following sections summarize the existing and forecast densities in each of these other SGAs in Peel Region.

### City of Brampton

The Brampton 2040 Vision identifies three Major Growth Areas and five Town Centres, which are intended to accommodate a large share of intensification in Brampton. As shown in Figure 9, many of the Town Centres in Brampton had low existing densities in 2016. The 2041 density is related to forecasts identified for each of these Town Centres in the Brampton 2040 Vision.

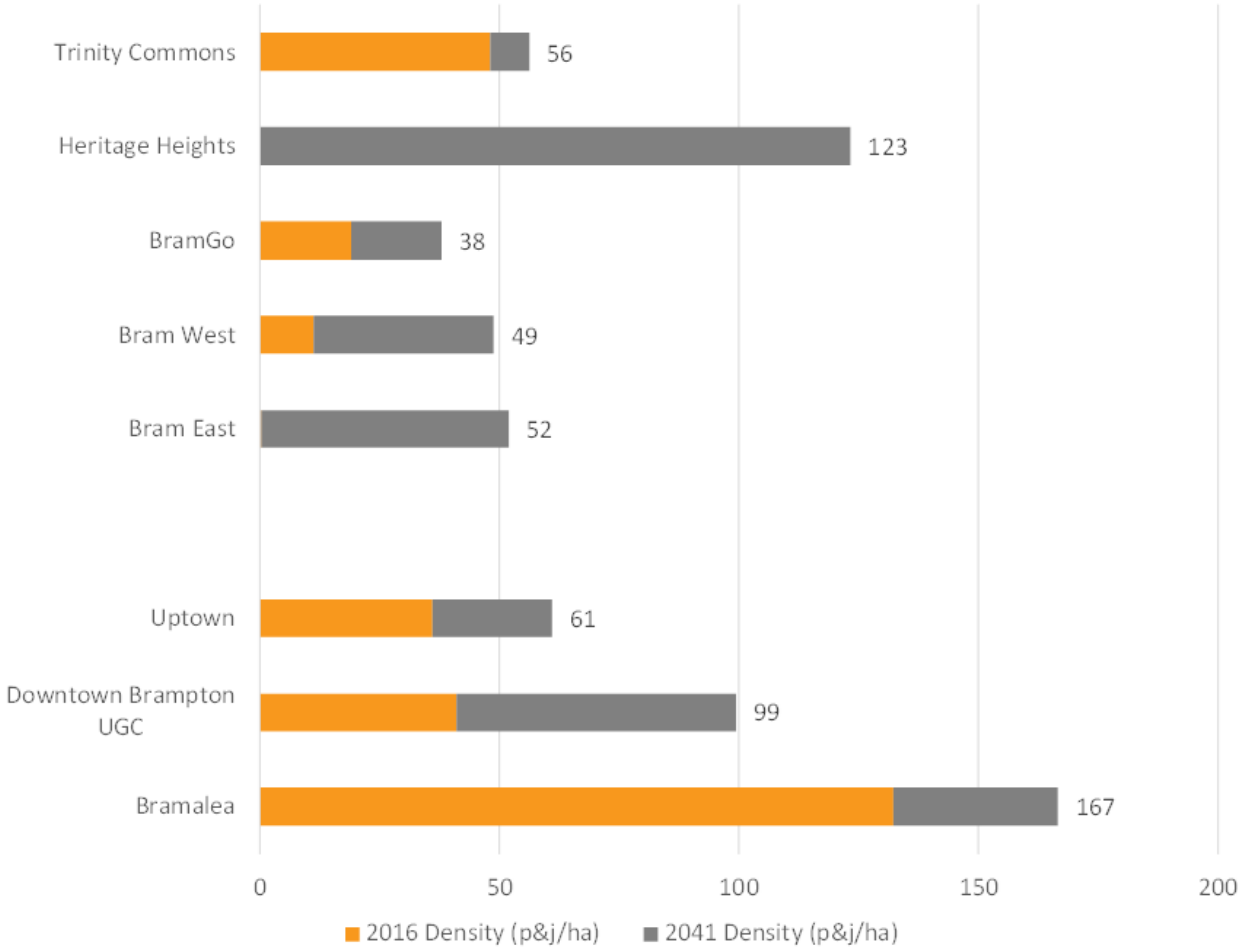



*Figure 14: Town Centres and Major Growth Areas - Existing and Forecast Density*

## City of Mississauga

Mississauga has a total of 12 SGAs that include Mall Nodes, Community Nodes and Major Nodes. Figure 5-5 of the City of Mississauga Official Plan identifies target density ranges for the Community Nodes and Major Nodes.

Among the Mall Nodes, there was combined 2016 density of 100 persons and jobs per hectare. This is forecast to reach 152 persons and jobs per hectare by 2041, based on the Reimagining the Mall Directions Report completed on behalf of the City. As shown, each of the Community Nodes and Major Nodes, with the exception of Lakeview, are forecast to achieve minimum densities identified in the City of Mississauga Official Plan by 2041.

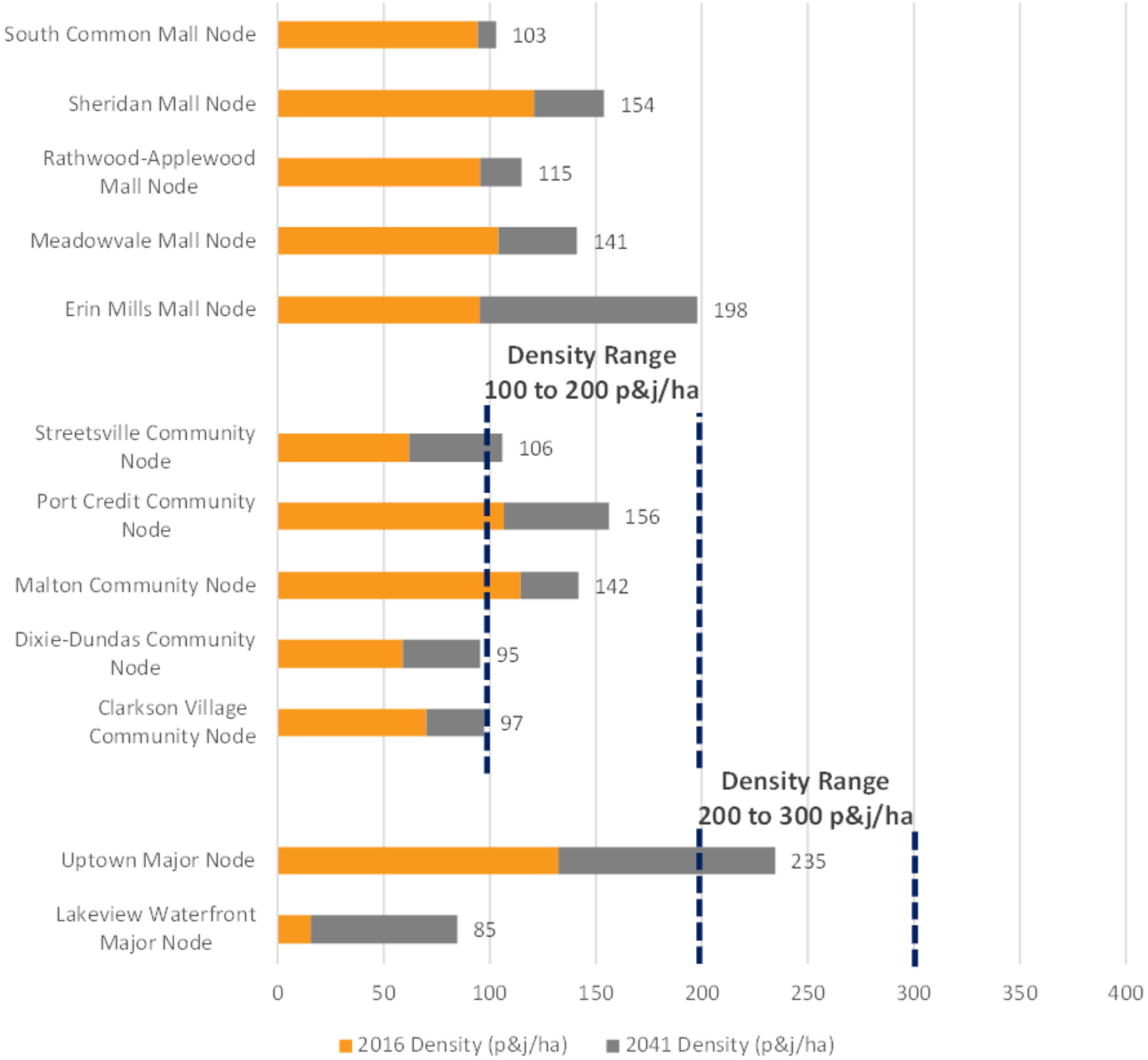
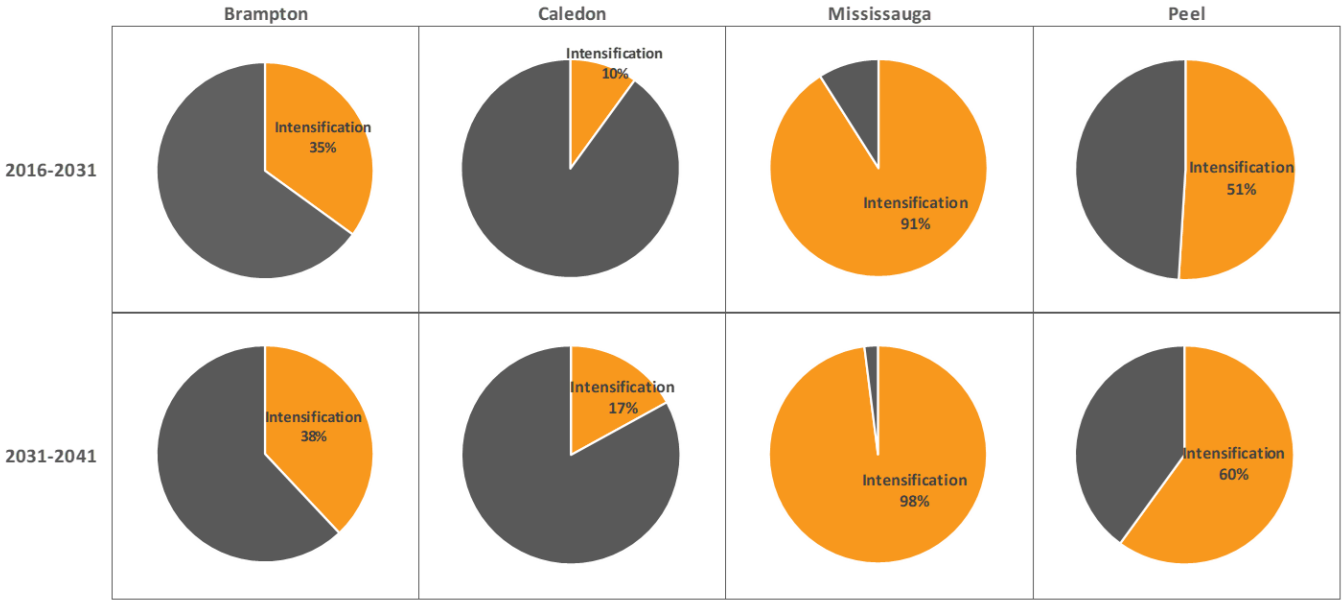



*Figure 15: Mall Nodes, Community Nodes and Major Nodes – Existing and Forecast Densities*

# 3.0 STRATEGIC MARKET DEMAND ASSESSMENT

The following high-level strategic market demand assessment is based on broad housing, demographic and economic trends to identify opportunities and constraints to achieving the forecasted rate of intensification and housing mix identified in the Region's draft Growth Allocation for SGAs.

The Region of Peel, in consultation with the constituent municipalities has identified "that by 2031 and for each year thereafter, the following minimum residential intensification targets will be planned to be achieved within the built-up area of each local municipality".[1] Accommodating new residential units within the SGAs of each municipality will be an important part of the Region's ability to achieve these targets.




As shown below, to achieve the intensification targets, each municipality is expected to accommodate a larger share of household growth in apartment units in comparison to the existing stock of housing. SGAs will play an important role in achieving this future mix, as the majority of household growth in the SGAs is expected to be accommodated in apartment units and to a lesser extent, townhouse units.

There will be a variety of demographic, economic and housing market factors that are likely to influence the rate of intensification in the SGAs and household growth in apartment units. In this analysis, we consider the potential impact of demographic trends, the supply of land, housing market characteristics and economic factors to assess the opportunities and constraints these factors will have on achieving the forecasted housing mix and rate of intensification in the SGAs.

[1]Based on Paragraph 62 in Appendix II – Peel 2041 Growth Allocation and Growth Management Regional Official Plan Amendment – Request to Proceed with Consultation of Draft Amendment.

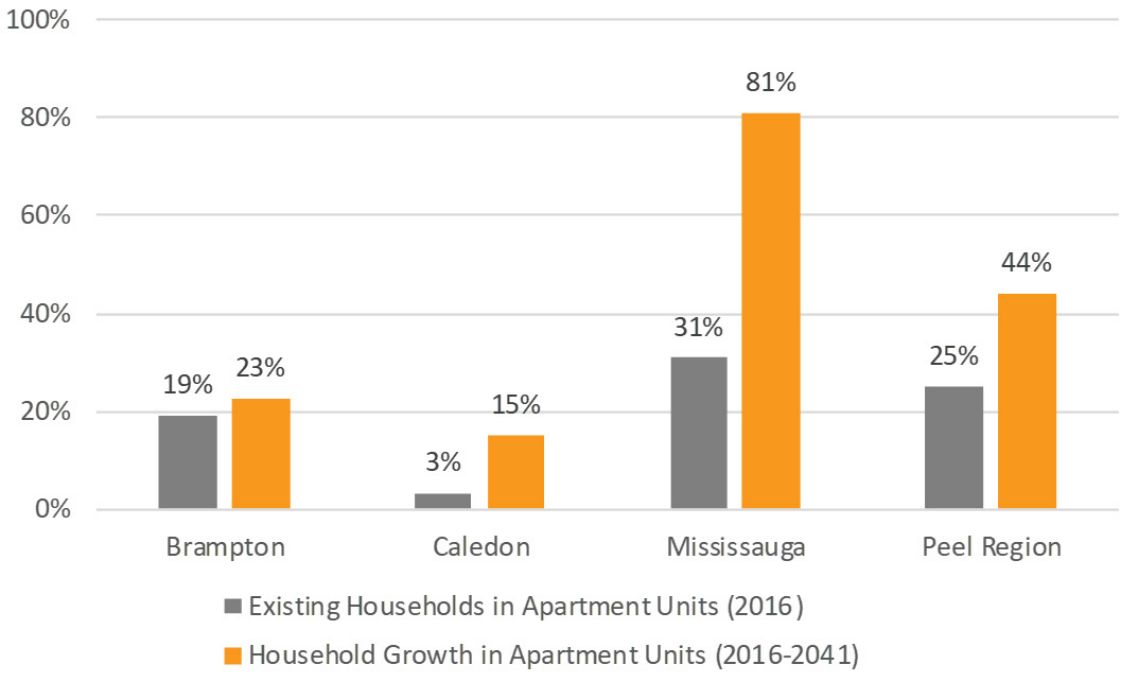



*Figure 16: Households in Apartment Units*

## 3.1 DEMOGRAPHIC AND HOUSING TRENDS

Demographic trends are one of the most important factors that influence demand for housing by unit type. Strong population growth and the age structure of the population in Peel Region are anticipated to increase demand for housing overall, and for apartment units, in particular, and influence the Region's ability to achieve the forecast housing mix and rate of intensification in the SGAs.

### Headship Rates and Age Structure

The age structure of the population has a significant impact on demand for housing, by unit type. As shown below, there are some consistent trends in headship rates by unit type for various age cohorts.

For example, headship rates for **single and semi-detached dwellings** increase after the 15 to 24 age cohort, peaking in the 45 to 64 age cohort and then decline as people age. That being said, the rate of decline differs by municipality. A similar trend exists for **townhouse units**, with headship rates generally peaking slightly earlier in the 34 to 54 age cohort, before starting to decline.

These trends are in comparison to age specific headship rates for **apartment units**. In Mississauga, headship rates peak much earlier in the 25 to 44 age cohort, before declining in the 45 to 64 age cohort, then starting to rise again after age 65 as people move into apartment units for lifestyle reasons. Brampton and Caledon have not yet seen a similar peak in headship rates in the 25 to 44 age cohort, but have a similar pattern of increasing headship rates in apartments rising after 65 years of age.

Overall, these trends in headship rates by age group and dwelling type are likely to influence the rates of intensification and dwelling mix that can be anticipated in Peel Region to 2041.

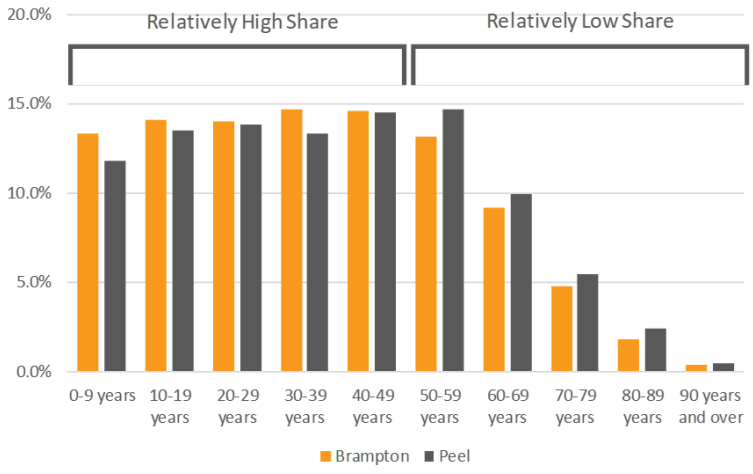

*Figure 17: Headship Rates by Dwelling Type, Peel Region, 2016 Census*

*SOURCE: urbanMetrics based on Statistics Canada, 2016 Census of Canada*

The table above examine the age structure in Brampton, Caledon and Mississauga to assess, at a high level, the impact on the forecasted housing mix and rates of intensification in the SGAs.

## Brampton

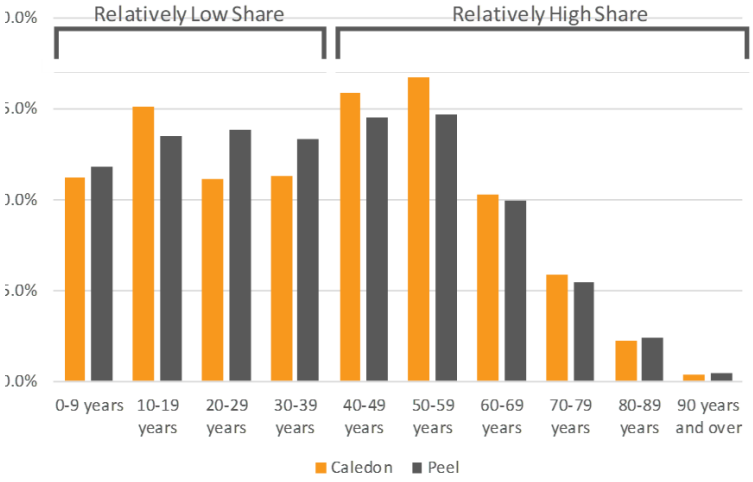
Share of Population by Age Group, 2016




- At the time of the 2016 Census, Brampton had a relatively large share of its population under the age of 20, which are predominately people living at home with family. Brampton also had a relatively large share of its population in the 20 to 49 age cohort.
- Households in these age groups have a higher propensity for ground-related units (i.e. single-detached, semi-detached and townhouse units).
- It will take a number of years for the population in the 20 to 49 age cohort to 'downsize' into apartment units. Therefore, a significant shift towards higher-density forms of housing is likely to materialize slowly. This presents a constraint to forecast household growth in apartment units and the intensification target.

## Caledon

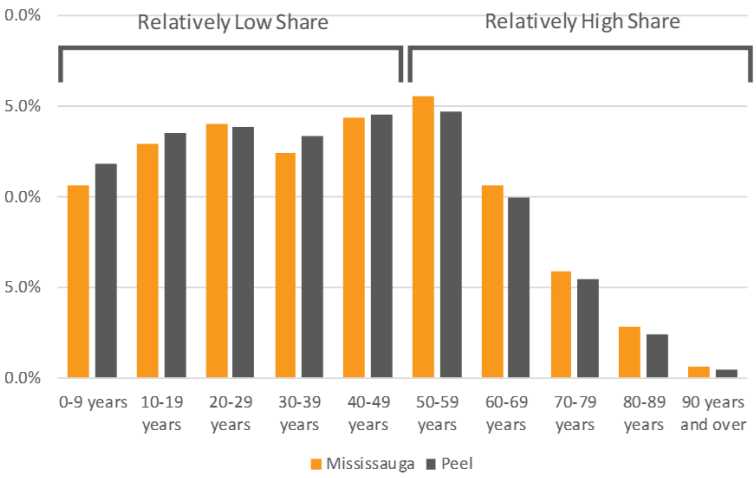
Share of Population by Age Group, 2016




- The relatively large share of the population in Caledon in the age 40 and over cohort presents an opportunity for apartment development in the municipality.
- As shown earlier, after 65 years of age, there is an increasing propensity to live in apartment units.
- However, in comparison to other municipalities in Peel Region, headship rates in single and semi-detached units decline much slower in Caledon, which presents a potential constraint.

## Mississauga

Share of Population by Age Group, 2016




- Mississauga also has a relatively large share of its population in the 50 and over age cohort. As shown earlier, Mississauga also has the highest propensity for apartment units in the age 50 and over cohort.
- The age structure of the population in Mississauga is expected to create an opportunity for achieving the forecast housing mix and rate of intensification in the SGAs.
- The older age profile of Mississauga residents will also increase demand for seniors housing, which can also be accommodated within SGAs.

*SOURCE: urbanMetrics based on Statistics Canada, 2016 Census of Canadaw*

## Population Growth

Peel Region is anticipated to experience significant population growth in the coming years. Fueled by strong employment growth and available land for development, the Region is anticipated to add 541,820 people between 2016 and 2041, an increase of nearly 38%.

As shown below, the City of Brampton is anticipated to account for the majority of population growth to 2031 as the remaining Designated Greenfield Area (DGA) lands are largely built-out. After 2031, Region-wide population growth is anticipated to slow, as demand for ground-related housing will likely shift to surrounding municipalities where supply is still available.

The large share of growth in the DGA of Brampton to 2031 will likely present a challenge to achieving the forecast housing mix and rates of intensification in the SGAs in the early part of the forecast horizon.

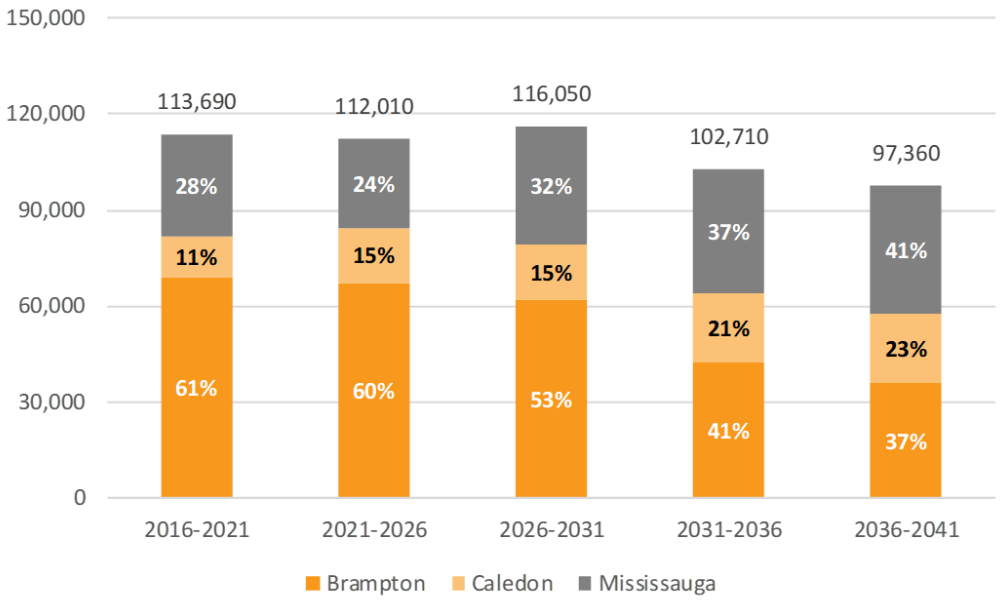



*Figure 18: Population Growth, 2016-2041*

*SOURCE: urbanMetrics based on Peel Region 2041 Growth Allocations – Scenario 16.*

Figure 19 summarizes population growth by age cohort between 2016 and 2041. Significant population growth is anticipated in the age 65 and over cohort, which has a relatively high propensity to live in apartment units, as shown earlier. Strong population growth in the age 65 and over cohort present an opportunity for the Region to achieving its forecast dwelling mix and rates of intensification in the SGAs.

Population growth in the 20 to 29 age cohort is also anticipated to result in demand for apartment units in Peel Region, as this demographic also has a relatively high propensity to live in this type of housing, particularly in Mississauga.

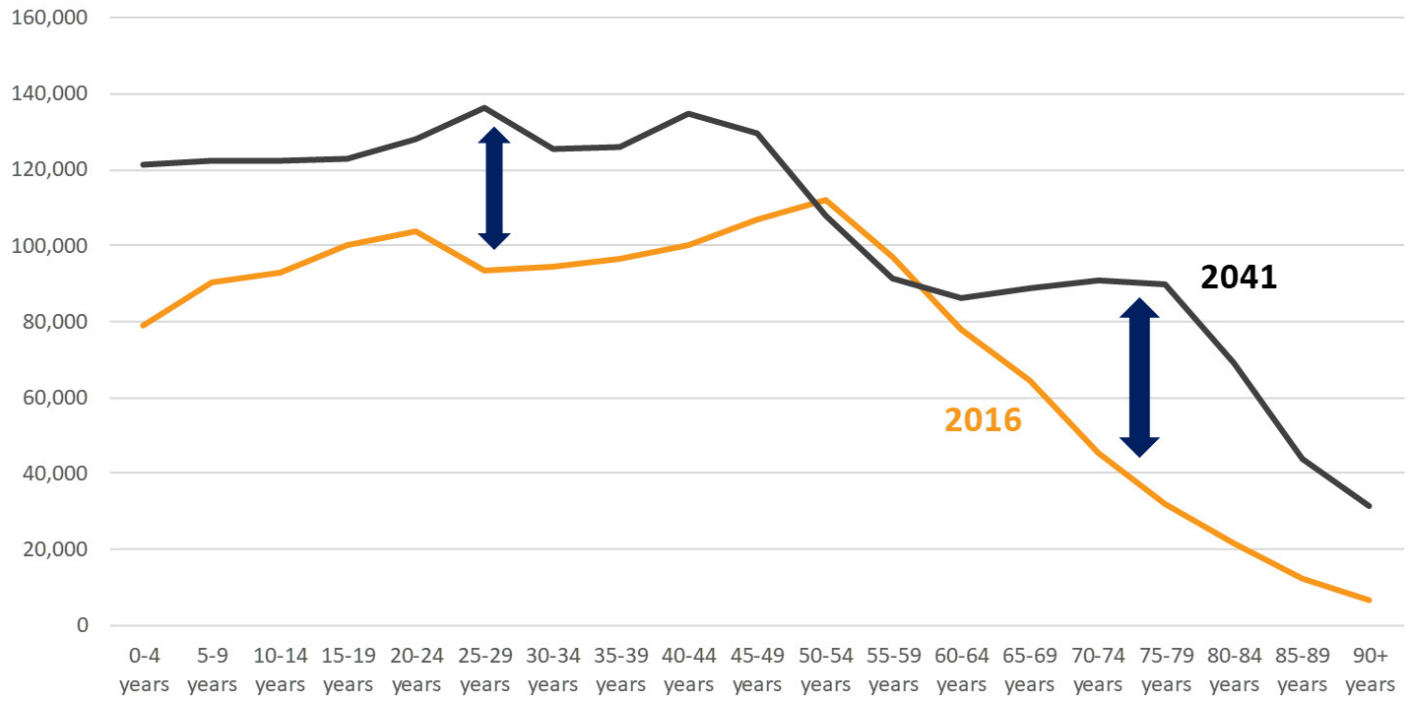



*Figure 19: Population by Age Group, Peel Region, 2016 and 2041*

*SOURCE: urbanMetrics inc. based on Greater Golden Horseshoe Growth Forecasts to 2041, Technical Report, November 2012, prepared by Hemson Consulting Ltd.*

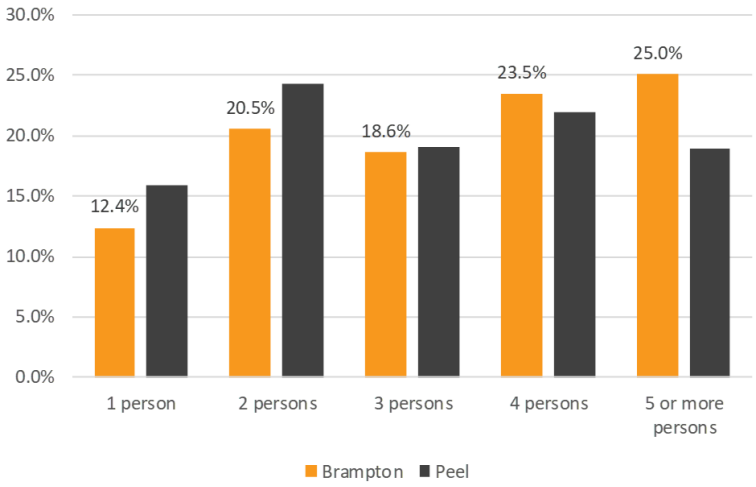
## Household Characteristics

The existing characteristics of households in each municipality is also anticipated to impact future demand for housing by unit type, as it will be more difficult to accommodate large household sizes and multi-generational households in apartment units.

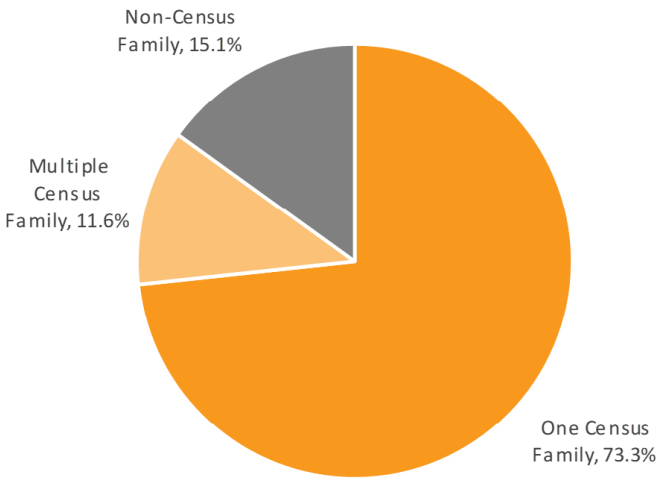
The table below examines the various household characteristics in Brampton, Caledon and Mississauga to assess, at a high level, the impact on the forecasted housing mix and rates of intensification in the SGAs.

## Brampton

Share of Households by Household Size, 2016



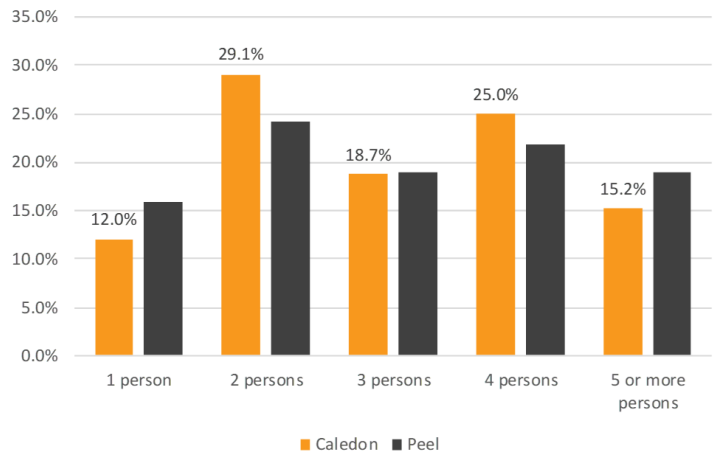

Share of Households by Household Type, 2016



- The City of Brampton has a relatively large share of households with 4 or more persons, in comparison to the Region-wide average. This could present a constraint to achieving the forecast housing mix, as it will be more difficult to accommodate large households in apartment units, in comparison to municipalities with small household sizes.
- The relatively large share of multi-family households, which are generally multi-generational households will also present a constraint to achieving the forecast housing mix. In Brampton, as people age, they are more likely to live with family members than move into an apartment unit on their own. This will impact demand for apartment units in Brampton in future years.

## Caledon

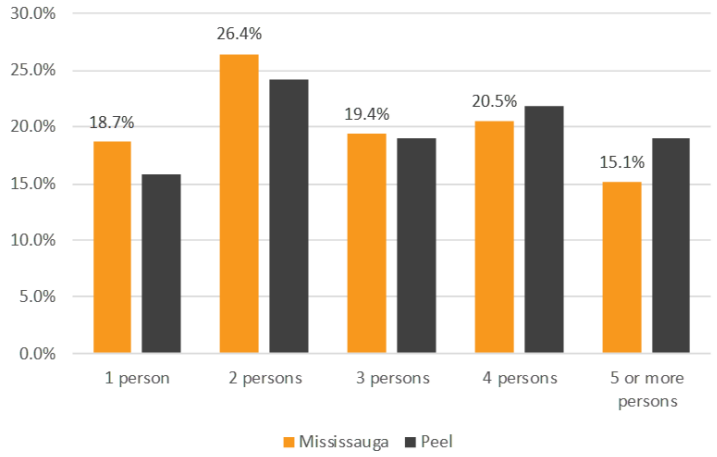
Share of Households by Household Size, 2016




- As shown earlier, Caledon has a relatively large share of its population in the age 50 and over cohort. Caledon also has a relatively large share of households with only two persons, which are generally couples without children at home.
- The large number of two person households presents an opportunity for apartment construction in Caledon, as these households may choose to downsize to apartment units.

## Mississauga

Share of Households by Household Size, 2016




- Mississauga also has a relatively large share of one and two person households. Over one-third of these households (36%) are in single and semi-detached units.
- Therefore, there is an opportunity to achieve the forecast housing mix and rate of intensification in the SGAs, as a portion of these one and two person households may downsize to apartment units over the forecast horizon.

*SOURCE: urbanMetrics inc. based on 2016 Census of Canada.*

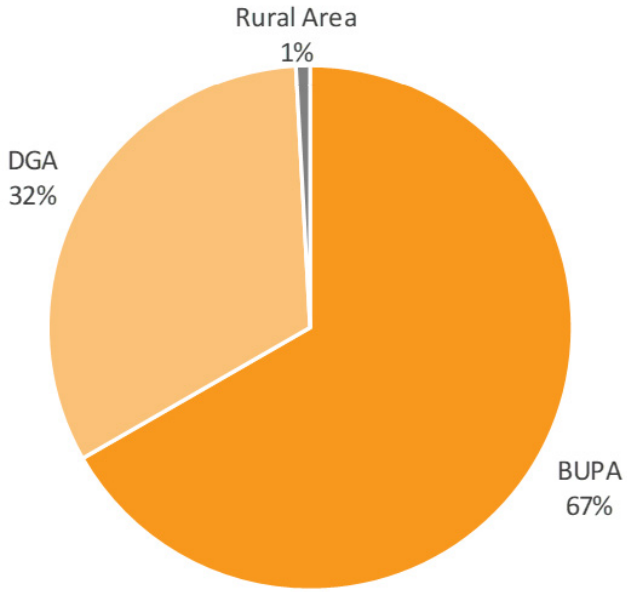
## 3.2 LAND SUPPLY

One factor that will likely impact the rate of intensification that can be achieved in the SGAs is the amount of DGA land that exists in a municipality. Municipalities with a large supply of vacant DGA lands are likely to face more constraints to achieving the forecast housing mix and rate of intensification in the SGAs, in comparison to municipalities that are largely built-out.

The table below summarizes the gross land area in the built-up area (BUPA), DGA and Rural Area of each municipality.

### Brampton

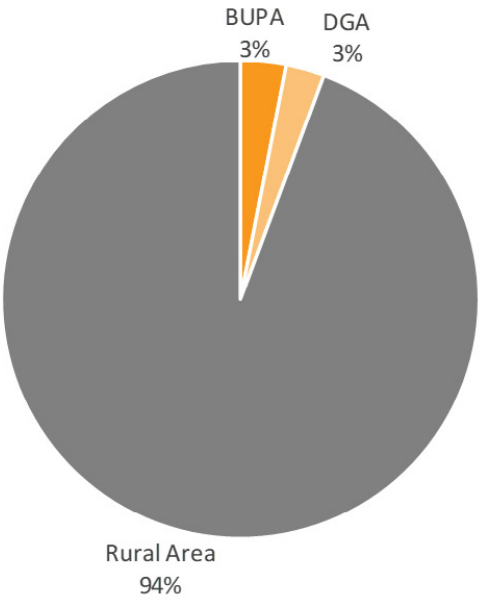
Gross Land Area (Ha) by Policy Area




- Among municipalities in Peel Region, Brampton has the largest amount of DGA land.
- Overall, Brampton is forecast to accommodate nearly 39,000 new households in the DGA between 2016 and 2031, or 71% of all Peel Region DGA household growth.
- Towards the end of the 2031 planning horizon, the City's greenfield housing opportunities will likely be approaching build-out. Therefore, post 2031, a greater share of residential development will likely be accommodated through intensification.
- The large supply of DGA land presents a potential constraint to achieving the rate of intensification in Brampton's SGAs in the early part of the forecast horizon.

### Caledon

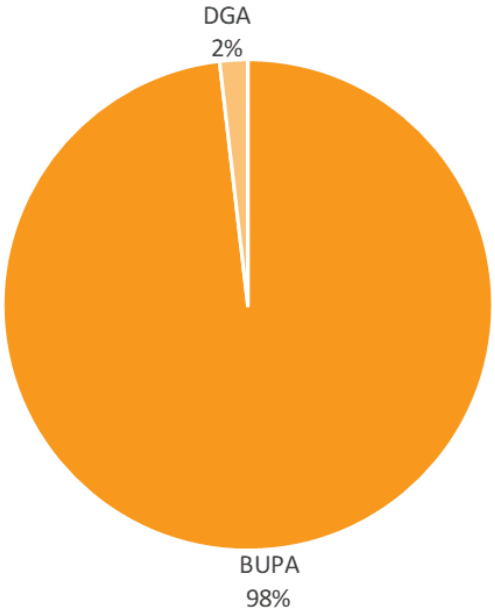
Gross Land Area (Ha) by Policy Area




- In Caledon, the amount of Rural Area and DGA lands presents a potential constraint to achieving the rate of intensification in the SGAs.
- Caledon is forecast to accommodate 12,730 new households in the DGA between 2016 and 2031, and 880 households in the Rural Area.

### Mississauga

Gross Land Area (Ha) by Policy Area




- Nearly all lands in Mississauga are within the Built-up Area of the municipality.
- There are a number of significant proposed residential developments, such as the redevelopment of Square One and Inspiration Lakeview. These developments present an opportunity to achieve the rate of intensification in the SGAs.

*SOURCE: urbanMetrics inc. based on Table 1 in Appendix III: Peel 2041 Growth Management ROPA – Request to Proceed with Consultation on Draft Amendment.*

## 3.3 NEW HOME CONSTRUCTION AND PRICES

Recent trends in housing construction and new house prices are also important in identifying the opportunities and constraints to achieving the forecast rate of intensification and housing mix in the SGAs.

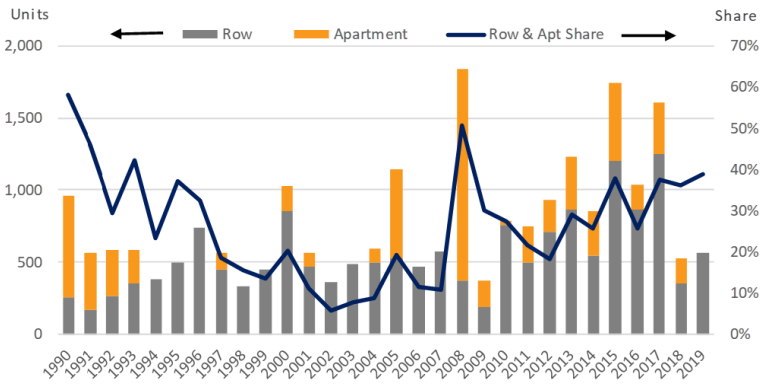
In municipalities already experiencing high rates of apartment construction or where the price of new ground-related housing is out of the reach of the average household, there are greater opportunities to achieving the forecast housing mix and rate of intensification in the SGAs.

### Housing Starts

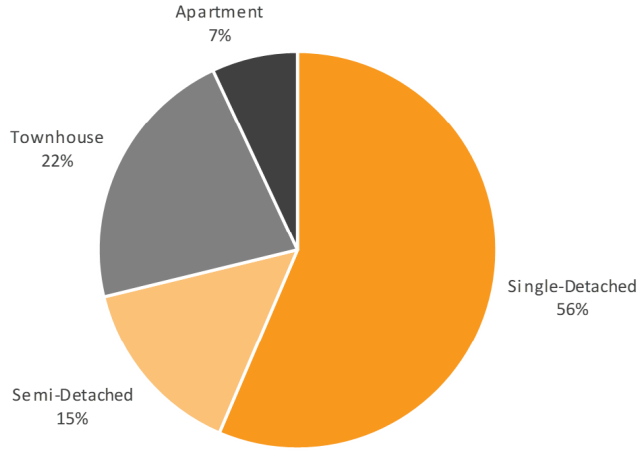
The following table examines housing construction in Brampton, Caledon and Mississauga to assess, at a high level, the impact on the forecasted housing mix and rates of intensification in the SGAs.

## Brampton

Housing Starts by Unit Type, 1990 to 2019



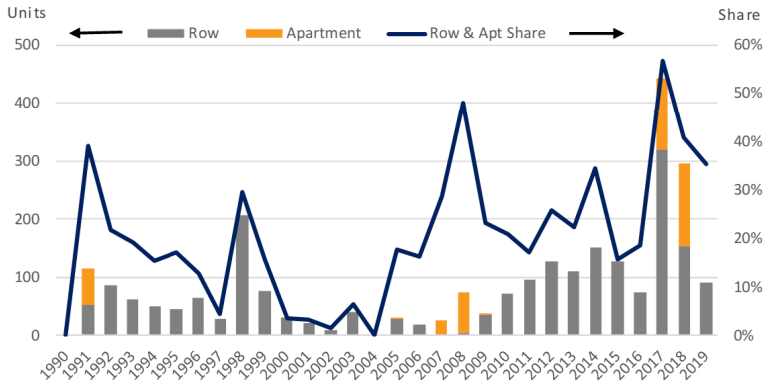

Share of Housing Starts by Unit Type, 2010 to 2019



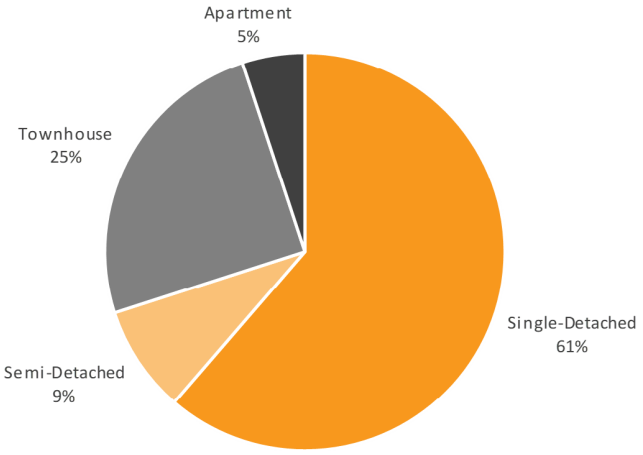

- Brampton has had a relatively steady pace of apartment construction in recent years, with an average of about 250 apartment starts per year over the last decade.
- The share of housing starts in Brampton that are either townhouse or apartment starts has generally been trending higher over the past two decades. The trend towards townhouse and apartment construction presents an opportunity to achieving the forecast housing mix and rate of intensification in the SGAs.

## Caledon

Housing Starts by Unit Type, 1990 to 2019



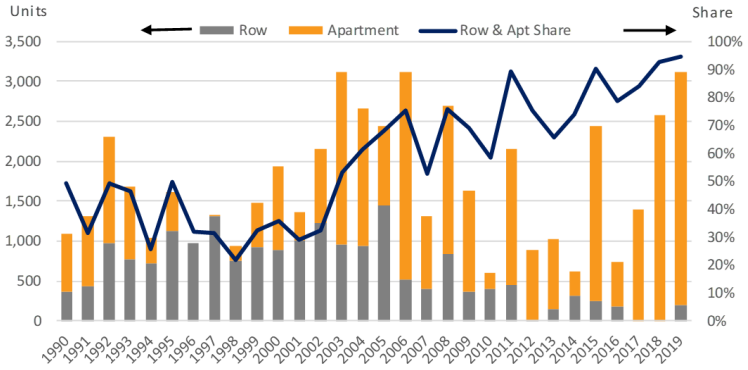

Share of Housing Starts by Unit Type, 2010 to 2019



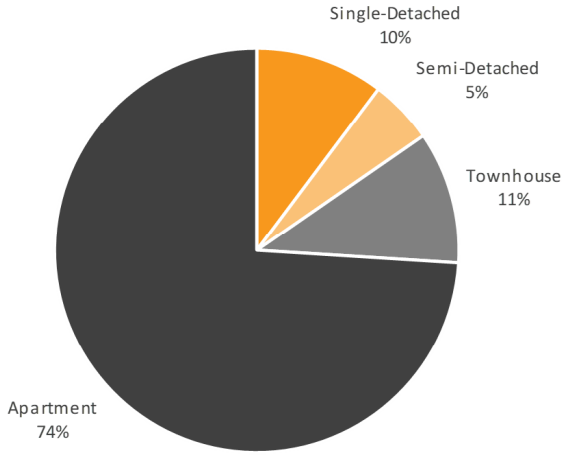

- The share of housing starts in Caledon that are townhouse units has been trending higher in recent years. Between 2010 and 2019, townhouse units accounted for 25% of housing starts and has been much higher than 25% in recent years. This presents an opportunity to achieving the forecast housing mix and rate of intensification in the SGAs.
- That being said, there has been very little apartment construction in Caledon in recent years, accounting for only 5% of housing starts over the past decade. This presents a potential constraint to achieving forecast growth in apartment units.

## Mississauga

Housing Starts by Unit Type, 1990 to 2019




Share of Housing Starts by Unit Type, 2010 to 2019




- In Mississauga, apartment construction, as a share of all residential construction, has been trending higher since the late 1990s. In recent years apartment units have accounted for over 90% of housing starts as the municipality becomes increasingly built-out.
- Going forward, there are a number of large apartment developments in the pipeline in Mississauga, particularly in the UGC and in Lakeview that will likely result in the apartments continuing to account for the vast majority of housing construction activity.

## New Home Prices and Household Income

The significant escalation in housing prices will continue to impact demand for housing by unit type, as certain types of housing become out of reach for the average household. As the price of new single-detached and semi-detached units rise, there will likely be stronger demand for townhouse and condominium apartment units as the only alternative for ownership housing. This will provide an opportunity for the municipalities to achieve their forecast housing mix and intensification in the SGAs.

To determine the types of housing that are attainable to the average household, we have compared new house prices to the maximum house price that can be purchased based on the estimated average household income in each municipality. This analysis makes a number of assumptions, which include:

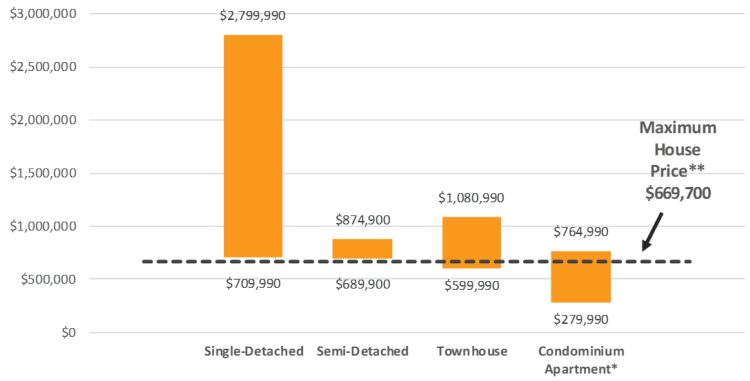
- **New House Prices** – New house prices are based on data from Altus Data Solutions. For the purpose of this analysis, we have considered the range of available house prices as of March 2020.
- **Household Income** – We have utilized average household income in each municipality based on the 2016 Census of Canada (2015 income) and inflated income to 2020 levels based on Statistics Canada survey of average weekly earnings (Table 14-10-0223-01) for the Province of Ontario.
- **Mortgage Assumptions** – We have assumed a gross debt service (GDS) ratio of 39%[2], a 10% down payment, 3.1% CMHC mortgage loan insurance premium, a 2.89% mortgage rate for a 5-year fixed mortgage and a 25-year amortization period.
- **Other Monthly Expenses** – We have assumed monthly property tax payments based on the maximum purchase price of the house and monthly utility costs of $150 per month.

While there are a range of assumptions that can be used, the purpose of this analysis is to highlight general trends in demand for housing based on new house prices and income. Overall, this analysis indicates that in all municipalities in Peel Region, condominium apartment units are within reach for a household with the average household income. In Brampton and Caledon, townhouse units are also within reach for units priced at the low end of the range. House prices and income suggest that townhouse and apartment units could account for a larger share of new housing demand going forward, which provides an opportunity to achieve the forecast housing mix and growth in the SGAs.

[2] https://www.canada.ca/en/department-finance/news/2016/10/technical-backgrounder-mortgage-insurance-rules-income-proposals-revised-october-14-2016.html

## Brampton

New House Price Range and Maximum Purchase Price Based on Household Income



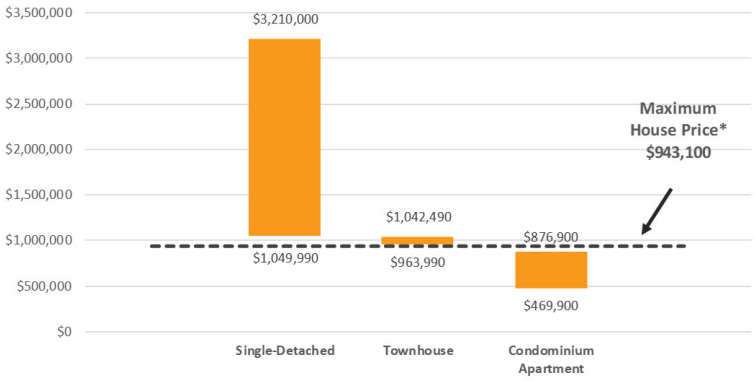

* includes condominium apartments and stacked townhouse units. Excludes pent-house units.

** calculated maximum house price that can be carried by the average household income in the municipality.

- In Brampton, a maximum purchase price of $669,700 can be carried by the average household income. This is sufficient to purchase a condominium apartment unit in the City.
- The low end of the price range for townhouse units is also within reach for a household with an average income.
- The price of a new single-detached and semi-detached unit is above the maximum purchase price for a household with an average income. This suggests that there could be a shift away from single and semi-detached units to townhouse and condominium apartment units in Brampton.
- Stronger demand for condominium apartment units could help the City achieve the forecast rate of intensification in the SGAs.

## Caledon

New House Price Range and Maximum Purchase Price Based on Household Income

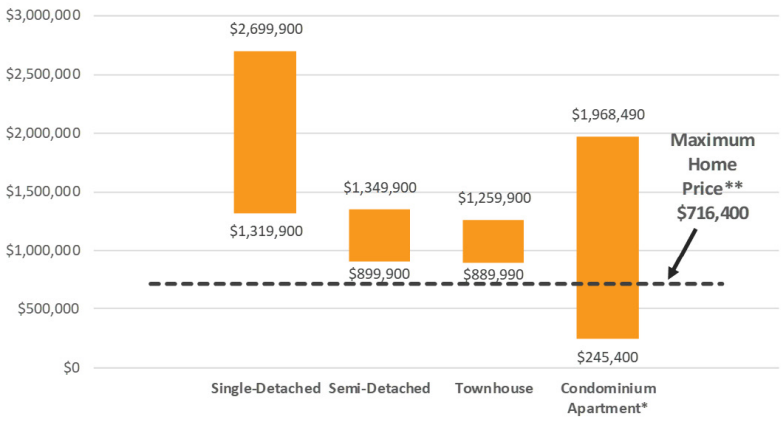



** calculated maximum house price that can be carried by the average household income in the municipality.

- With a calculated maximum purchase price of approximately $943,000, the price of a new condominium apartment unit is within reach for a household in Caledon with an average income.
- The lower end of the price range for townhouse units is also within reach for a household with an average income.
- As the price of a single-detached dwelling is out of reach for a household with an average income, it suggests that there could be a shift towards townhouse and condominium apartment units in the municipality over the forecast horizon.

### Mississauga

New House Price Range and Maximum Purchase Price Based on Household Income




* includes condominium apartments and stacked townhouse units. Excludes pent-house units.

** calculated maximum house price that can be carried by the average household income in the municipality.

- In comparison to Brampton and Caledon, the low end of the price range for a new single-detached, semi-detached and townhouse unit is out of reach for a household with an average income.
- As shown, the price of a new condominium apartment unit is well within reach for a household with an average income.
- This suggests that from a housing attainability perspective, there will continue to be strong demand for condominium apartment units in Mississauga.

*SOURCE: urbanMetrics inc. based on Altus Data Solutions, Statistics Canada, CMHC, municipal property tax rates and average mortgage rates from various financial institutions.*

## 3.4 RENTAL MARKET

In recent years, there has been a pronounced shift in the tenure of new apartment construction. While condominium apartments continue to account for a large share of construction, purpose-built rental buildings have started to gain market traction.

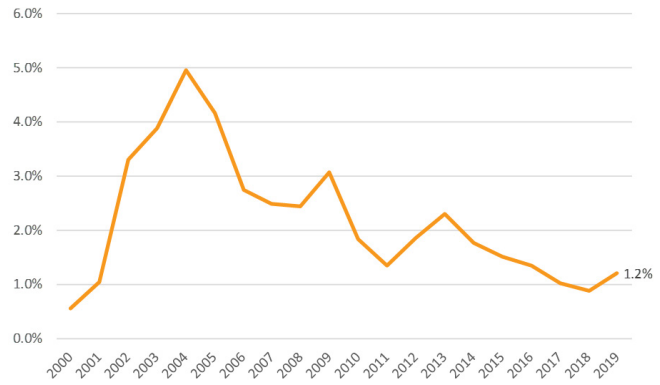
The shift towards rental apartment construction provides an opportunity for municipalities in Peel Region to achieve the rate of intensification and forecast housing mix in the SGAs. The renewed interest in purpose-built rental apartments is a result of a number of factors, including but not limited to:

- Strong house price appreciation, which has made owning a home less attainable for many households;
- Increased demand for purpose-built rental buildings from institutional investors seeking long-term stable returns; and,
- Record low interest rates and capitalization rates, which, together have pushed up prices for existing multi-tenant apartment buildings.

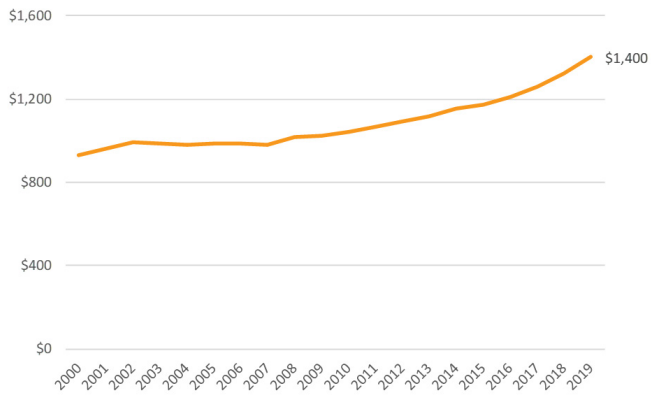
High prices for existing apartment buildings has encouraged the development of new buildings or re-development of existing apartment complexes. For example, owners of some apartment complexes are looking to maximize the value of underutilized parcels by adding additional apartment towers or infill townhomes. Similarly, some owners of low-rise rental apartment projects are looking to increase density on their sites by re-developing low-rise buildings and replacing them with high-rise buildings.

In municipalities across Peel Region, vacancy rates are near all-time lows and average monthly rent has been accelerating. These factors will likely contribute towards increased rental apartment construction in the Region and help achieve the forecast housing mix and potentially the rates of intensification forecast in the SGAs.

Rental Apartment Vacancy Rate, Peel Region




Rental Apartment Monthly Rent, Peel Region




*SOURCE: urbanMetrics inc. based on data from CMHC.*

## 3.5 ACCESS TO AMENITIES AND TRANSIT

In addition to factors noted above, access to amenities and transit are important factors that will influence demand for housing across the Region and within the SGAs.

Major transit investments are planned within most of the SGAs, particularly in the two UGCs and each of the MTSAs. These investments are likely to increase the rates of intensification in these SGAs. It is anticipated that SGAs where transit exists or is imminent, such as the GO Transit stations and the Hurontario LRT, are likely to accommodate intensification sooner than SGAs located along transit corridors where investment is expected to occur over the longer-term.

Increasingly, quality of life is becoming an important factor being considered by people when deciding where to live. SGAs with convenient access to retail amenities, schools, childcare, recreational opportunities (indoor and outdoor) and other urban amenities could be more successful in achieving forecast rates of intensification. As part of the analytical lens analysis, it was identified that many of the MTSAs and the UGCs scored highly in terms of these “community considerations”.

Municipalities in Peel Region are also making significant investments to help create a sense of ‘place’ in the various SGAs. For example, Brampton is making significant investments in the Downtown, such as a new university campus, the Centre for Innovation and the Riverwalk. These transformational investments will be important in helping to achieve the forecast rate of intensification.

## 3.6 ECONOMIC TRENDS

We have looked at long-term economic trends that are likely to influence population growth and the potential impact on intensification. Employment is one of the strongest predictors of net migration and housing growth within a municipality. The significant employment growth forecast in Peel Region and neighbouring municipalities will impact population growth and demand for housing in the Region.

[3] Unlocking the Potential of the Airport Megazone; Pamela Blais, October 2016

Peel Region is also home to the Airport Megazone (AMZ)[3], a regionally, provincially and nationally significant employment zone, which will continue to be an employment anchor in the Region and fuel employment growth. The AMZ has a diverse range of jobs in manufacturing, warehousing, transportation, as well as finance and business service jobs that will continue to attract both national and international investment. Investments in the GTA West Corridor will also create employment opportunities in areas of Peel Region that currently do not have strong highway access.

The AMZ and strong highway access has lent itself to Peel Region being logistics powerhouse in Southern Ontario. Based on data from Cushman and Wakefield, there were nearly 290 million square feet of industrial gross floor area (GFA) within Peel Region at the end of 2019, or about 22% of the total industrial space in the GTA. This was the largest concentration in any regional municipality in the GTA. Peel Region also has a significant concentration of office space within the GTA, accounting for approximately 18% of all office space in the GTA, based on properties tracked by Colliers.

Due to these factors, significant employment growth is forecast in Peel Region to 2041. The composition of this employment growth will also likely have an impact on intensification in the SGAs. As shown in Figure 10, while employment growth in Peel Region is forecast to slow between 2016-2021 and 2031-2036, major office employment is expected to account for a larger share of employment growth. There will be opportunities to accommodate this employment growth within SGAs and along transit corridors. For example, the proposed redevelopment of both Shoppers World Brampton and Square One include office components. The presence of office jobs within the SGAs could also attract residential uses, as some people will choose to live and work in the same community for improved quality of life. There will also be opportunities to accommodate population-related employment within the various SGAs to help create complete communities.

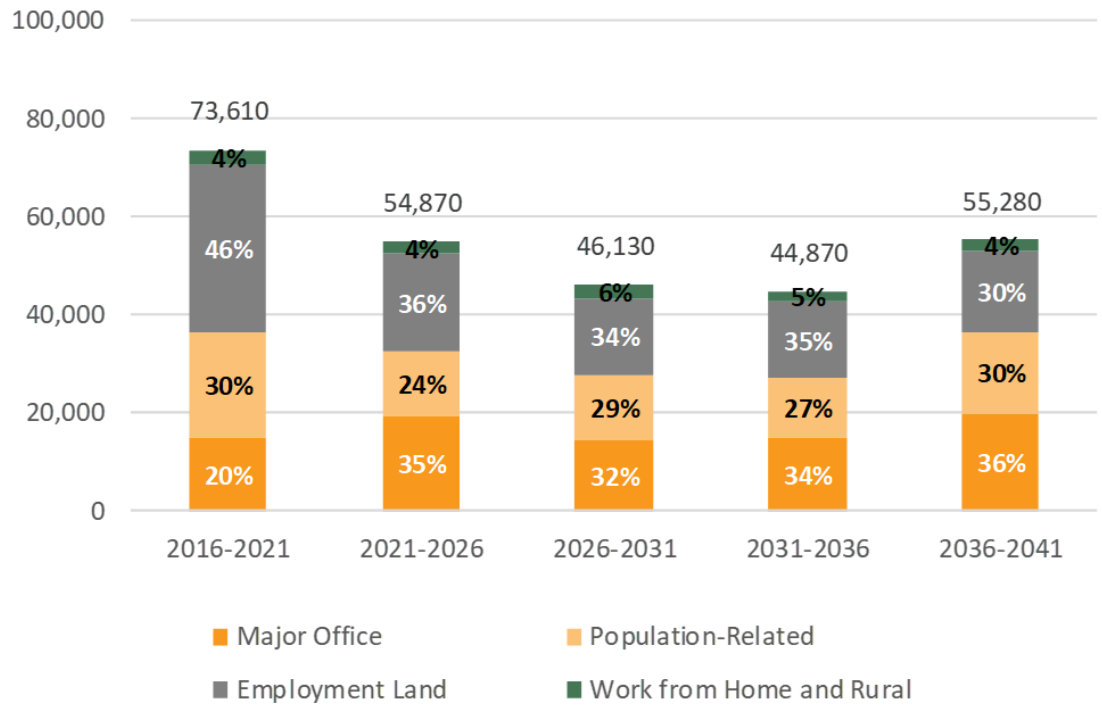



*Figure 20: Employment Growth, 2016-2041*

*SOURCE: urbanMetrics based on Peel Region 2041 Growth Allocations – Scenario 16.*

## 3.7 OPPORTUNITIES AND CONSTRAINTS

There are a number of factors that are expected to influence Region-wide development within the SGAs. As these SGAs represent an important opportunity for intensification within the Region, the intensification target can be achieved. Factors that are likely to result in increased development within the SGAs include population growth in the 20 to 39 age group and age 65 and over age cohort are likely to increase demand for apartment units over the forecast horizon.

There may also be renewed interest in purpose-built rental housing, driven, in part, by low vacancy rates and increased interest from institutional investors This is likely to help the Region achieve the rate of intensification in the SGAs and forecast housing mix.

Employment is one of the strongest predictors of net migration and housing growth within a municipality. The significant employment growth forecast in Peel Region and neighbouring municipalities will impact population growth and demand for housing in the Region.

The tables below summarize the opportunities and constraints that are expected to impact the rate of intensification and forecast housing mix in each of the municipalities in Peel Region.

### Brampton

**Opportunities**

- Population Growth – The City of Brampton is forecast to account for the majority of population growth in Peel Region to 2031. Strong population growth will increase demand for housing in general, a portion of which will likely be accommodated in SGAs.
- Age Structure – A relatively large share of Brampton's population is in the 25 to 34 age group. While this age group does not have a high proportion of apartment-dwellers, there is a longer-term opportunity to increase apartment demand as experienced in Mississauga.
- New Home Construction – Townhouse and apartment units have accounted for an increasing share of housing construction in Brampton.
- New House Prices - The low end of the price range for single-detached and semi-detached units is above the maximum purchase that is considered attainable for a household with an average income. This suggests that there could be a shift away from single and semi-detached units to townhouse and condominium apartment units in Brampton.

**Constraints**

- Age Structure – There is a relatively large share of the population under the age of 20 and in the 30 to 49 age group. The 30 to 49 age group is most likely to live in ground-related housing. This will limit demand for apartment units over the short to medium-term.
- Household Size– Brampton has a relatively large share of households with 4 or more persons, which could present a constraint to achieving the forecast housing mix, as it will be more difficult to accommodate large households in apartment units.
- Household Type – Brampton also has a relatively large share of multi-generational households, which could limit demand for apartment units, as people age 65 and over are more likely to live with family members than move into apartment units.
- Land Supply – Brampton has the largest supply of DGA land in Peel Region. The large supply of DGA land presents a potential constraint to achieving the rate of intensification in Brampton's SGA in the early part of the forecast horizon.

## Caledon

### Opportunities

- Population Growth – Population growth in Caledon is forecast to accelerate through the forecast period. Increasing from about 2,500 new residents per year during 2016-2021 period to almost 4,500 new residents per year during the 2036-2041 period.
- Age Structure – A relatively large share of Caledon residents are age 40 and over. Based on dwelling type propensities from the 2016 Census, after 65 years of age, the propensity to live in apartment units begins to increase. Therefore, there is an opportunity for stronger demand for apartment units, which could help Caledon achieve its forecast housing mix and rate of intensification in the SGAs.
- Household Size – Caledon has a relatively large share of two person households and households that are couples without children. There is an opportunity for these households to 'downsize' to apartment units and help Caledon achieve the forecast housing mix.
- New House Price - As the price of a single-detached dwelling is out of reach for a household with an average income, it suggests that there could be a shift towards townhouse and condominium apartment units in the municipality over the forecast horizon.

### Constraints

- Housing Propensities – While Caledon has a relatively large share of residents over 40 years of age, the age specific headship rates for single and semi-detached housing remains elevated in the older age cohorts, which could limit demand for apartment units.
- Land Supply – The large supply of Rural Area and DGA land in Caledon presents a potential constraint to achieving the rate of intensification in the SGAs.
- Housing Construction – While townhouse units are accounting for a larger share of construction activity in Caledon, there have been very few new apartment units built over the past decade.

## Mississauga

### Opportunities

- Age Structure – A relatively large share of Mississauga residents are age 50 and over. Based on dwelling type propensities from the 2016 Census, after 55 years of age, the propensity to live in apartment units begins to increase. Therefore, there is an opportunity for stronger demand for apartment units in future years, which could help Mississauga achieve its forecast housing mix and rate of intensification in the SGAs.
- Household Size - Mississauga also has a relatively large share of one and two person households. Over one-third of these households (36%) are in single and semi-detached units and could 'downsize' to apartment units in the future and help achieve the rate of intensification.
- Land Supply - There are a number of significant proposed residential developments, such as the redevelopment of Square One and Inspiration Lakeview. These developments present an opportunity for achieving the rate of intensification in the SGAs.
- Housing Construction - In recent years apartments have accounted for over 90% of housing starts as the municipality becomes increasingly built-out.
- New House Price - The low end of the price range for a new single-detached, semi-detached and townhouse unit is out of reach for a household with an average income, which should result in a further shift to apartment units.

### Constraints

- Population Growth – Average annual population growth in Mississauga is forecast to slow during the 2021-2026 period, which will impact rates of intensification over the short-term. However, after 2026, population growth is forecast to increase.

**Has the Region set an appropriate intensification target?**

The Region's intensification targets are aspirational, yet achievable. To 2031, the Region is using an intensification target of 51%, which is the minimum intensification target in A Place to Grow (50%). In 2021-2041, the Peel Region intensification rate is 58%. It does appear that the intensification target is achievable. In the early part of the forecast horizon (to 2031) the majority of the growth is anticipated to occur in Brampton, where most new development will likely occur in the DGA. That being said, the City of Brampton has been proactive in investing in the Downtown UGC (i.e. Riverwalk, new University campus and Centre for Innovation) to help attract future development to the area and increase rates of intensification. Post-2031, as the DGA in Brampton begins to build-out and growth shifts to the built-up areas in Mississauga and Brampton, the amount of growth accommodated through intensification will likely increase and the 60% intensification target could be achieved.

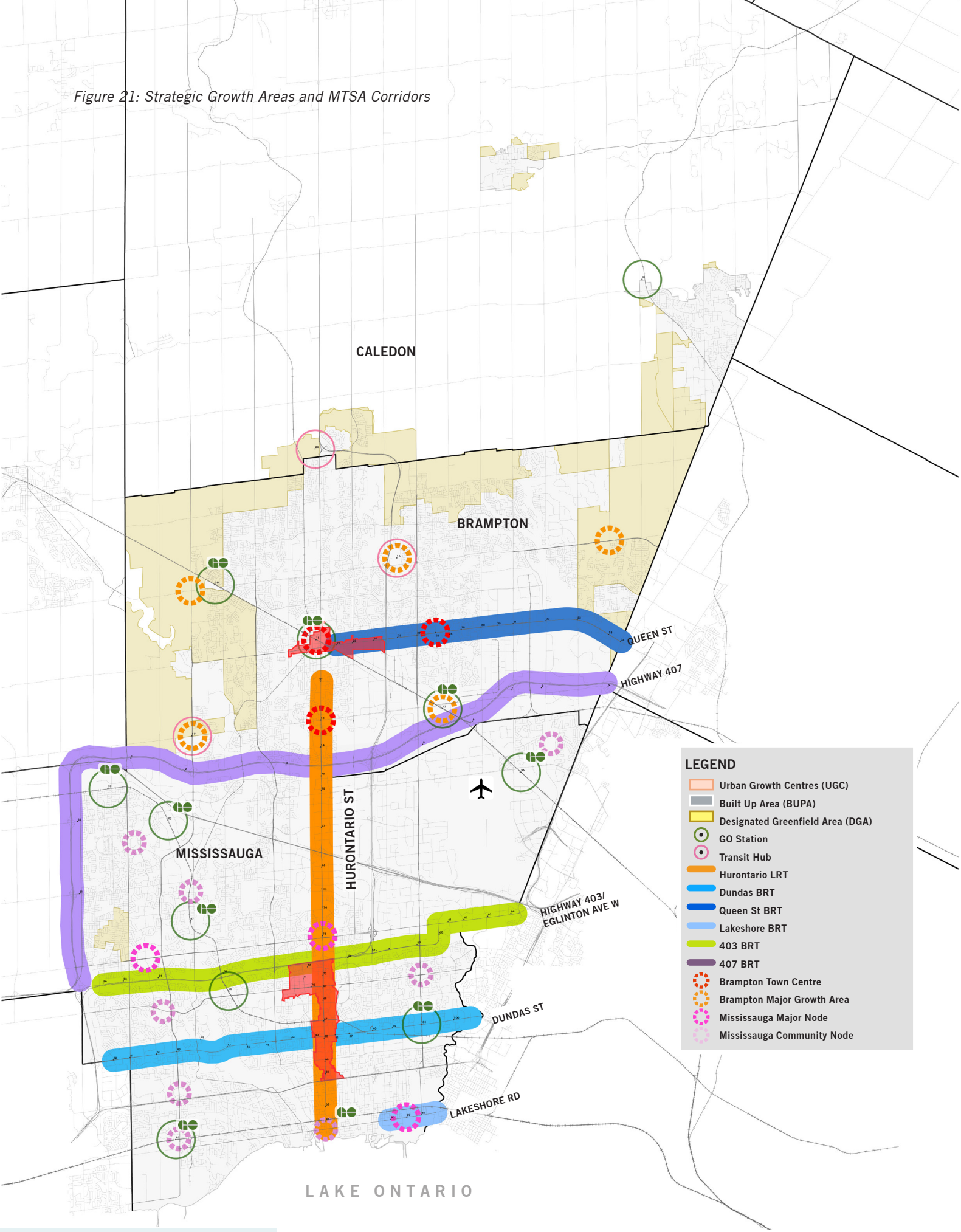
**How can the market demand Opportunities and Constraints be address to meet the intensification target?**

Certain market demand opportunities and constraints, such as demographics and household characteristics, will be beyond the control of the Region. That being said, the aging population and escalating house prices are expected to result in increased demand for apartment units in the Region. Therefore, if the Region and local municipalities are proactive in ensuring community infrastructure, active transportation and the public realm improvements are in place in the SGAs, it could help attract higher-density forms of development to these locations and achieve the intensification target.

**What SGAs should the Region be focusing on to 2041? Does growth allocation need to be shifted?**

The SGAs that are identified as have the highest potential for redevelopment based on community considerations, mobility, market readiness and land use should be the focus for growth to 2041. It does not appear to be necessary to shift the growth allocation among the SGAs, as most of the growth is already be directed towards UGCs and Priority Transit Corridors, which have the highest potential for intensification and redevelopment.

*Figure 21: Strategic Growth Areas and MTSA Corridors*



# SECTION 4: STRATEGIC GROWTH AREAS AND MTSA CORRIDORS

## 4.1 SGA HIERARCHY

This section articulates a hierarchy for Strategic Growth Areas (SGA) within the Region of Peel. The role of SGAs across the Region are varied and serve different functions in achieving target densities. A mix of complementary uses and amenities are require to support the development of complete communities within each SGA.

Every five years, the Growth Plan sets out the population and employment forecasts to be used by municipalities to plan and manage growth in the Region. The Growth Plan identifies land designated for urban development within Settlement Areas, which are comprised of Designated Greenfield Areas (DGA), Built-Up Areas (BUPA) and Intensification Areas. The Growth Plan Policy 1.2.1 states that intensification and higher densities should be prioritized in Strategic Growth Areas to make efficient use of land and infrastructure and support transit. Since the introduction of the Growth Plan, the Region has seen a shift to more compact development patterns, a greater variety of housing options, more mixed-use development in Urban Growth Centres (UGC) and Strategic Growth Areas (SGA), and greater integration of transit and land use planning

The map on page 56 illustrates the different Strategic Growth Areas that guide growth throughout the Region of Peel. The overlapping boundaries of regional and local municipal SGAs, illustrate the subsequent overlapping policies for the same geographic area. The following SGA hierarchy is a tool that policy makers can use to better understand the interconnected relationships between the various SGA policies, varying means that aim to achieve the same end of a transit-supported complete community.

The following inforgraphic illustrates a proposed organization for understanding the hierarchy of SGAs across the Region. Growth efforts should be focused within Built Up Urban Areas as the priority for future growth. Within the BUPA, the Downtown Mississauga and Downtown Brampton Urban Growth Centres are the highest priority areas for intensification in the Region due to their strategic location within their respective municipalities, access to higher-order transit, and market potential. Secondary to Urban Growth Centres are Major Transit Station Areas and Corridors, which are categorized based on their physical and geospatial relationship as singular nodes or connected corridors. The MTSA GO Station and Transit Hub nodes play an important role in terms of mobility and future growth potential. The MTSA Corridors are categorized by function and priority, as Primary MTSA Corridor, Secondary MTSA Corridor and Mobility MTSA Corridors. Tertiary, are the SGAs identified at the local municipal level. The City Mississauga identifies Community Nodes and Major Nodes under the Official Plan, and the City of Brampton identifies Town Centres and Major Growth Areas in the 2040 Vision Plan.

## SGA HIERARCHY

### WITHIN THE BUILT UP URBAN AREA

HIGH PRIORITY

#### URBAN GROWTH CENTRE (UGC)

- DOWNTOWN MISSISSAUGA
- DOWNTOWN BRAMPTON

#### MAJOR TRANSIT STATION AREA (MTSA)

##### PRIMARY MTSA CORRIDOR

- HURONTARIO LRT

##### SECONDARY MTSA CORRIDOR

- QUEEN ST BRT
- DUNDAS BRT
- LAKESHORE BRT

##### MTSA STATIONS

- GO STATION
- TRANSIT HUB

##### MOBILITY MTSA CORRIDOR

- 403 BRT
- 407 BRT

LOW PRIORITY

#### OTHER STRATEGIC GROWTH AREAS (SGA)

- MISSISSAUGA:
  COMMUNITY NODES, MAJOR NODES
- BRAMPTON:
  TOWN CENTRES, MAJOR GROWTH AREAS

The following SGA profiles summarize the common characteristics of each SGA including physical description, planning framework, and complimentary uses.

## URBAN GROWTH CENTRES: DOWNTOWN MISSISSAUGA, DOWNTOWN BRAMPTON

The Growth Plan defines Urban Growth Centres as planned focal areas for investment in mixed-use, high-density, and public-transit oriented developments across the Greater Golden Horseshoe. There are two UGCs within the Region of Peel, located in Downtown Mississauga and Downtown Brampton. UGCs are planned to accommodate and support major transit infrastructure and serve as high density major employment centres. UGCs will be planned to accommodate a significant share of population and employment growth, with a minimum gross density target of 200 people and jobs combined per hectare for each respective UGC by year 2031.

The Mississauga UGC is unique in that it was planned for mixed-use, high density development from the outset. The area is centred on the Square One commercial centre and includes Mississauga's civic core. Ongoing, high density residential development continues, and ambitious plans for the redevelopment of the Square One property point to strong market demand.

The Brampton UGC is centred around Brampton's historic downtown and includes a mix of traditional main street commercial buildings and contemporary mixed-use high density infill , surrounded by a grid of low-rise residential. Intensification has been more modest and significant opportunities exist for the redevelopment of highway commercial developments surrounding the historic downtown.

Both areas are well supported by a variety of amenities, however a detailed review of CS&F facilities is warranted given the scale of proposed intensification.

## PRIMARY MTSA CORRIDOR: HURONTARIO LRT

The Hurontario LRT corridor is identified as a primary MTSA corridor due to the planned higher order transit of the Hurontario LRT, interface with various transportation modes and ability to accommodate an intensive concentration of people and jobs along the corridor. Within the Region of Peel, there are 22 MTSAs identified along the Hurontario LRT corridor, with 3 MTSAs in Brampton and 19 MTSAs in Mississauga respectively. Policy 2.2.4.3.b of the Growth Plan identifies that Major Transit Station Areas will be planned for a minimum density target of 160 people and jobs combined per hectare for MTSAs served by light rail transit.

The Hurontario LRT corridor is comprised of a series of MTSAs that are closest to meeting intensification targets While a few of the Hurontario MTSAs have already met their planned density targets, the majority will require a mix of mid- to high-rise infill to meet their targets.

Existing planning documents have identified preliminary public amenities required to support this level of intensification and these should be monitored throughout implementation.

## SECONDARY MTSA CORRIDOR: QUEEN ST BRT, DUNDAS BRT, LAKESHORE BRT

**Description:**

The Queen St BRT, Dundas BRT and Lakeshore BRT all serve important roles from a Regional transit perspective in providing network connections. Lands adjacent to these corridors should be planend to be transit-supportive and supportive of active transportation and a range and mix of uses and activities. Within the Region of Peel, there are 33 MTSAs along these secondary corridors. Policy 2.2.4.3.b of the Growth Plan identifies that Major Transit Station Areas will be planned for a minimum density target of 160 people and jobs combined per hectare for MTSAs served by bus rail transit.

Secondary MTSA corridors are characterized by existing highway commercial land uses on large parcels. Many are over 30 years old and have attracted development interest. Typically, these MTSAs will require a mix of mid- to high-rise infill to meet their targets.

Most are poorly served by directly adjacent community amenities, however, those adjacent to residential neighbourhoods may benefit from amenities found therein.

## MTSA STATION: GO STATION

GO Station MTSAs are lands within an approximate 500-800 metre radius (10 minute walk) of a GO Station. MTSAs are intended to be developed as higher density, mixed-use, transit supportive neighborhoods that provide access to local amenities, jobs, housing and recreation opportunities. There are two active GO train lines that service the residents in the Region of Peel: Kitchener GO and Milton GO. Policy 2.2.4.3.c of the Growth Plan identifies that Major Transit Station Areas will be planned for a minimum density target of 150 people and jobs combined per hectare for MTSAs served by the GO Transit rail network. They are places of connectivity between regional rapid transit services, and also places where different modes of transportation, from walking to high-speed rail, come together seamlessly.

**Mix of Complementary Uses**

GO Station MTSAs can be characterized into two major groups:

1. Mixed Use GO Stations, like Port Credit, Cooksville or Brampton that permit a variety land uses and have an existing level of intensification (generally 1960s era residential slab towers). These areas have strong market demand and some (Port Credit) have already seen significant recent mixed-use intensification. Mount Pleasant and Streetsville GO Stations various on this type.

2. Employment GO Stations, like Bramalea or Clarkson that are characterized by existing employment uses. Intensification at these GO stations would require careful review of land use designations that would support desired intensification.

## TRANSIT HUB

**Description:**

In the Regional Transportation Plan, Transit Hubs are Major Transit Station Areas at key intersection points on the Frequent Rapid Transit Network. Also known as Mobility Hubs, Transit Hubs are intended to create important transit network connections, integrate various modes of transportation and accommodate an intensive concentration of places to live, work, shop or play. They are particularly significant because of their combination of existing or planned frequent rapid transit service with an elevated development potential. As defined in the Growth Plan, to be identified as a mobility hub, a major transit station area must be located at the interchange of two or more current or planned regional rapid transit lines as identified in the Regional Transportation Plan.

**Mix of Complementary Uses**

Transit Hubs are typically located at the intersection of major arterials and include a mid-size commercial property, surrounded by low-rise residential neighbourhoods. Opportunities for intensification, consistent with the scale of the transit infrastructure and built form context are anticipated.

## MOBILITY MTSA CORRIDOR: 403 BRT, 407 BRT

**Description:**

The 403 and 407 BRT mobility MTSA corridors serve an important function and role from a mobility perspective within the Region. The investments for MTSAs along highway corridors to support active transportation and intensification are relatively small compared to those along rapid transit, and any growth along these corridors is likely to occur in the post-2041 horizon. Policy 2.2.4.3.b of the Growth Plan identifies that Major Transit Station Areas will be planned for a minimum density target of 160 people and jobs combined per hectare for MTSAs served by bus rail transit.

Mobility MTSA Corridors are characterized by their location within or adjacent to major transportation rights of way (HWY 403 or 407), and are generally surrounded by employment uses immediately beyond.

There is limited intensification anticipated within these MTSAs however they serve important roles with the transportation network and will require targeted investments to transit, active transportatio and public realm networks.

## MISSISSAUGA SGA: COMMUNITY NODES, MAJOR NODES

Mississauga Official Plan Policy 5.3 outlines the City Structure as the basis of the urban hierarchy, which includes Communty Nodes and Major Nodes. The Downtown will contain the highest densities, tallest buildings and greatest mix of uses; Major Nodes will provide for a mix of population and employment uses at densities and heights less than the Downtown, but greater than elsewhere in the city; and Community Nodes will provide for a similar mix of uses as in Major Nodes, but with lower densities and heights. Major Nodes and Community Nodes are identified as Intensification Areas with the following density targets; OP Policy 5.3.2.4 states that Major Nodes will achieve a gross density of between 200 and 300 residents and jobs combined per hectare, and Community Nodes will achieve a gross density of between 100 and 200 residents and jobs combined per hectare.

Mississauga's Community Nodes and Major Nodes are characterized by existing commercial uses that are anticipated to experience intensification.

They will require a mix of contextual mid- to high-rise built form to meet targeted densities and a careful review of existing CS&F facilities to support planned intensification.

## BRAMPTON SGA: TOWN CENTRES, MAJOR GROWTH AREAS

Brampton identifies three Major Growth Areas for focused transit, infrastructure investments and growth at Uptown Brampton, Downtown Brampton and Bramalea. The growth projections identifed in the 2040 Vision Plan identify that Downtown Brampton is planned to achieve a household balance of 53,000 jobs and 30,000 households and Uptown Brampton is planned to achieve a household balance of 26,000 jobs and 20,000 households. The 2040 Vision Plan identifies Town Centres as secondary focus areas to Major Growth Areas that are planned to be complete, mixed-use, diverse communities with employment and multiple-family housing options. Five Town Centres were identified which include Bram East, Trinity Commons, Heritage Heights, BramGO and Bram West. Town Centres are identified to achieve a household balance of 46,000 jobs and 30,000 households within the post 2040 planning horizon.

Brampton's Major Growth Areas overlap other SGAs described in previous categories listed above. Town Centres are generally characterized by exisitng commercial uses that are anticipated to experience intensification.

They will require a mix of contextual mid- to high-rise built form to meet targeted densities and a careful review of existing CS&F facilities to support planned intensification.

## DESIGNATED GREENFIELD AREA

Designated Greenfield Areas are lands within a Settlement Area, that is not yet built up. The Growth Plan 2.2.7.1 identifies that new development taking place in Designated Greenfield Areas will be planned, designated, zoned and designed in a manner that supports the achievement of complete communities, supports active transportation and encourages the integration and sustained viability of transit services. New development within designated greenfield areas must meet minimum density targets of 50 residents and jobs per hectare, measured across the Regiont to achieve the minimum density required for basic transit service.

Designated Greenfield Areas are characterized by greenfield development with minimum density targets that can be met with a mix of low-rise residential building types, augmented by targeted mid-rise built form.

As greenfield sites, DGAs require the comprehensive provision of amenities and open spaces to support growth.

## 4.2 KEY OBSERVATIONS AND RECOMMENDED POLICY-IMPLEMENTATION APPROACHES

### 4.2.1. Centres will continue to intensify alongside continued Greenfield development

Built-up area intensification is especially strong in the Urban Growth Centres (UGCs) and Hurontario Street corridor, however, urban expansion development in the Designated Growth Areas (DGAs) will continue to be a component of Peel Region's population and employment growth. In the short term, Brampton will continue to experience a high rate of growth in the DGAs. Major Transit Station Areas (MTSAs) in Brampton will, with the exception of some areas along Queen Street and Hurontario-Main Street for example, largely develop and intensify post-2041. The ratio and type of development in the DGAs versus built-up areas, particularly in Brampton, should be monitored closely to identify opportunities to achieve a balanced market (e.g. range of housing and employment mix) and an increasing rate of intensification in the longer term (e.g. phase/design initial or interim development stages to facilitate future infilling).

### 4.2.2. UGCs should continue to remain the focus of future growth

The Brampton and Mississauga UGCs are well-positioned to meet and exceed 2041 Growth Plan intensification targets. Some policy and/or implementation intervention may be required, however, to support their evolution. The primacy of the Brampton UGC, as the most strategically important intensification node in the City, should be maintained as other Strategic Growth Areas (SGAs) such as the "Shoppers World" site (MTSA) begin to intensify significantly. A specialized suite of policies and investment strategies should be established to sustain and bolster the development of the Brampton UGC, where unique physical properties (e.g. built heritage, flood plains, rail connection and overpass) may become barriers to full build-out. The Mississauga UGC, already achieving the Growth Plan target density, should continue to develop and diversify (e.g. wider range of non-residential uses). While MTSA intensification in the Hurontario corridor will begin to increase significantly with the future opening of the LRT, monitoring and implementation tools should be applied to ensure that the planned role and function of the UGC is maintained and enhanced, as other SGAs grow and evolve.

### 4.2.3. Phased development hierarchy along key transit corridors

The MTSAs in the Queen, Dundas and Hurontario Street Corridors represent a significant share of planned growth in Peel Region, the timing and type of which should be carefully considered leading up to and possibly beyond 2041. A development phasing hierarchy should be established for MTSAs in these corridors, especially for that segment of Hurontario located north of the planned LRT terminus at Steeles Avenue. A combination of regulatory (e.g. zoning, conservation authority), infrastructure, service (e.g. public facilities) and market (e.g. reduced charges, fees) incentives and/or changes are recommended for those MTSAs having pre-2041 development priority.

### 4.2.4. GO stations at varying levels of 'readiness' based on existing context

GO Transit rail stations are significant potential intensification and community-building opportunities, each with physical and/or land use contexts presenting unique opportunities and constraints. There are some GO rail station MTSAs, such as Cooksville and Downtown Brampton, that are essentially "development-ready" and should be prioritized for any needed site-specific policy and/or implementation interventions required by the market to deliver projects (e.g. address flooding concerns, improve connectivity with surrounding lands, etc.). Employment-area GO rail stations MTSAs, such as Clarkson and Bramalea, require some degree of land use (including zoning) changes to better position these areas for achieving the Growth Plan density targets and a broader range of land uses including commuter-serving retail.

## 4.3 REGIONAL POLICY DIRECTIONS TO GUIDE INTENSIFICATION

The Region of Peel's Growth Management Focus Area Policy Directions Report (May 2020) introduced a number of options to update the Official Plan's Regional Structure including potential changes to the Section 5.3 - Urban System polices. These changes, towards conforming to the evolving Growth Plan structure and policies for the 2041 and now 2051 planning horizons, would refine the Regional intensification hierarchy by further articulating roles, functions and responsibilities for the detailed planning and implementation of SGAs having a Regional and/or area municipal interest. These policy changes include, but are not limited to:

- Delineating the specific boundaries of the Urban Growth Centres (UGCs) in Brampton and Mississauga on Official Plan Schedules;
- Adding a new Schedule showing the Strategic Growth Areas (SGAs) across the Region, including the specific boundaries of the approximately 100 Major Transit Station Areas (MTSAs); and
- Adding new policies to assist local municipalities in the delineation and implementation of local SGAs.

### 4.3.1 A new intensification hierarchy to build upon, support Regional policy directions

This Intensification Analysis was undertaken in coordination with, and will further shape, the Region's May 2020 policy directions work. Arising from a broad assessment of the Region's intensification framework and growth rates, including historical and forward-looking analyses, it is recommended that the Region consider adopting as policy a new intensification hierarchy as introduced in section 4.0 of this report. This hierarchy, shown on page 56, will further support the Region's current policy directions by:

- Reinforcing the primacy of the Brampton and Mississauga UGS as the most strategically important and highest density intensification areas in the Region;
- Establishing MTSAs as important, yet diverse, intensification nodes in ways that respond differently to a number of factors including transit service levels, growth rates, neighbourhood context, and infrastructure requirements; and
- Positioning other areas, including local community nodes and town centres, as being lower priority and yet more flexible locations for intensification.

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# APPENDIX

The following contains maps that visualize historic rates of intensification between 2006-2018 across Mississauga, Brampton and Caledon. The maps illustrate building permits for new buildings from building permit data (MPAC) provided by the Region of Peel.

# Mississauga 2006-2011

**Legend**

**Permits for New Buildings**

- 2006-2007
- 2008-2009
- 2010-2011

- MTSA (800m Boundary)
- Urban Growth Centre
- Built Up Area
- Designated Greenfield Area
- Regional Urban Boundary

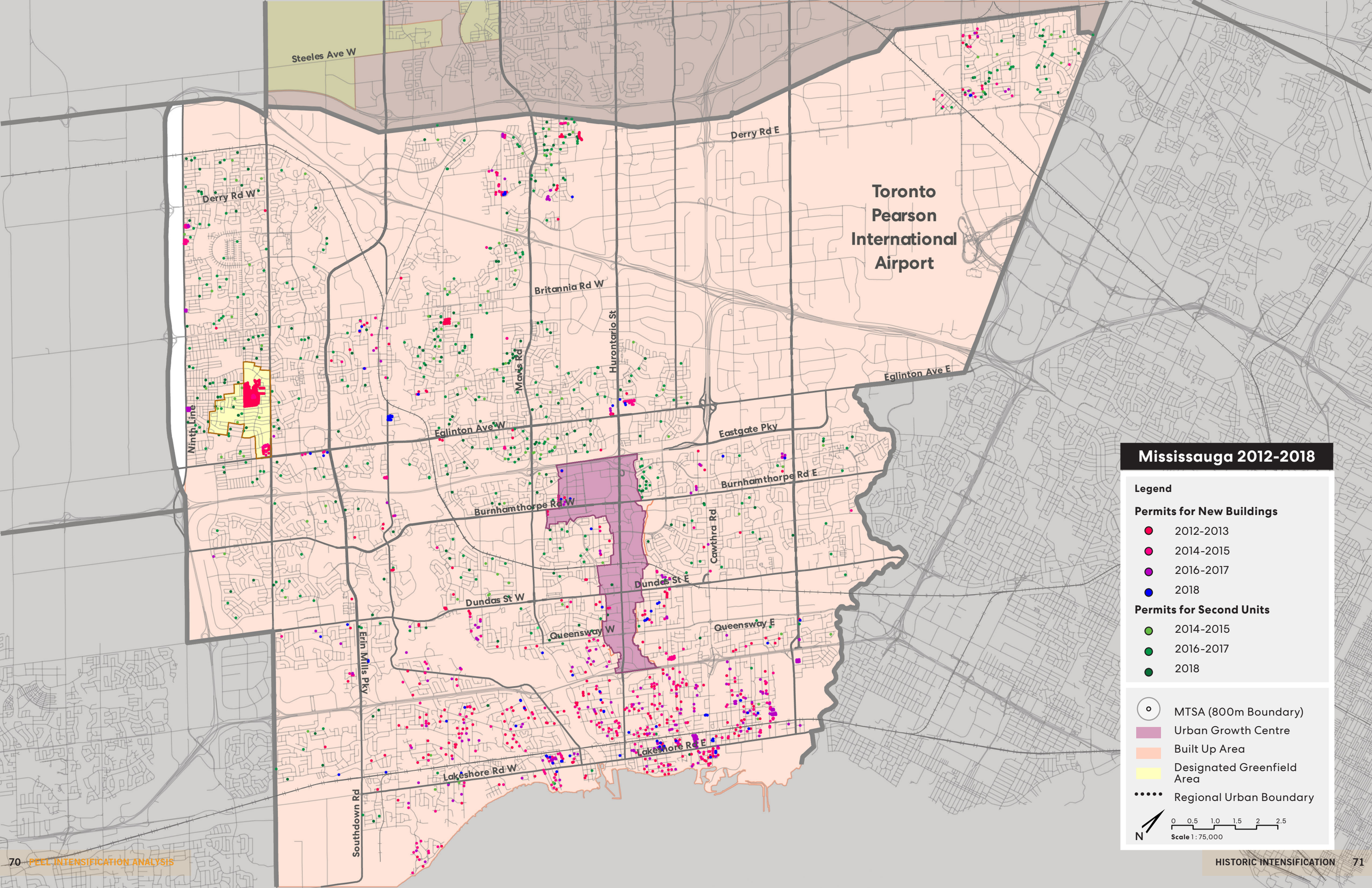
N

0 0.5 1.0 1.5 2 2.5

**Scale** 1 : 75,000

Toronto Pearson International Airport

Steeles Ave W
Derry Rd W
Derry Rd E
Britannia Rd W
Mavis Rd
Hurontario St
Eglinton Ave W
Eglinton Ave E
Eastgate Pky
Burnhamthorpe Rd W
Burnhamthorpe Rd E
Cawthra Rd
Dundas St W
Dundas St E
Queensway W
Queensway E
Erin Mills Pky
Lakeshore Rd W
Lakeshore Rd E
Southdown Rd
Ninth Line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Derry Rd E
Toronto Pearson International Airport
Britannia Rd W
Ninth Line
Mavis Rd
Hurontario St
Eglinton Ave W
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Eastgate Pky
Burnhamthorpe Rd W
Burnhamthorpe Rd E
Cawthra Rd
Dundas St W
Dundas St E
Queensway W
Queensway E
Erin Mills Pky
Lakeshore Rd W
Lakeshore Rd E
Southdown Rd
Mississauga 2012-2018
Legend
Permits for New Buildings
2012-2013
2014-2015
2016-2017
2018
Permits for Second Units
2014-2015
2016-2017
2018
MTSA (800m Boundary)
Urban Growth Centre
Built Up Area
Designated Greenfield Area
Regional Urban Boundary
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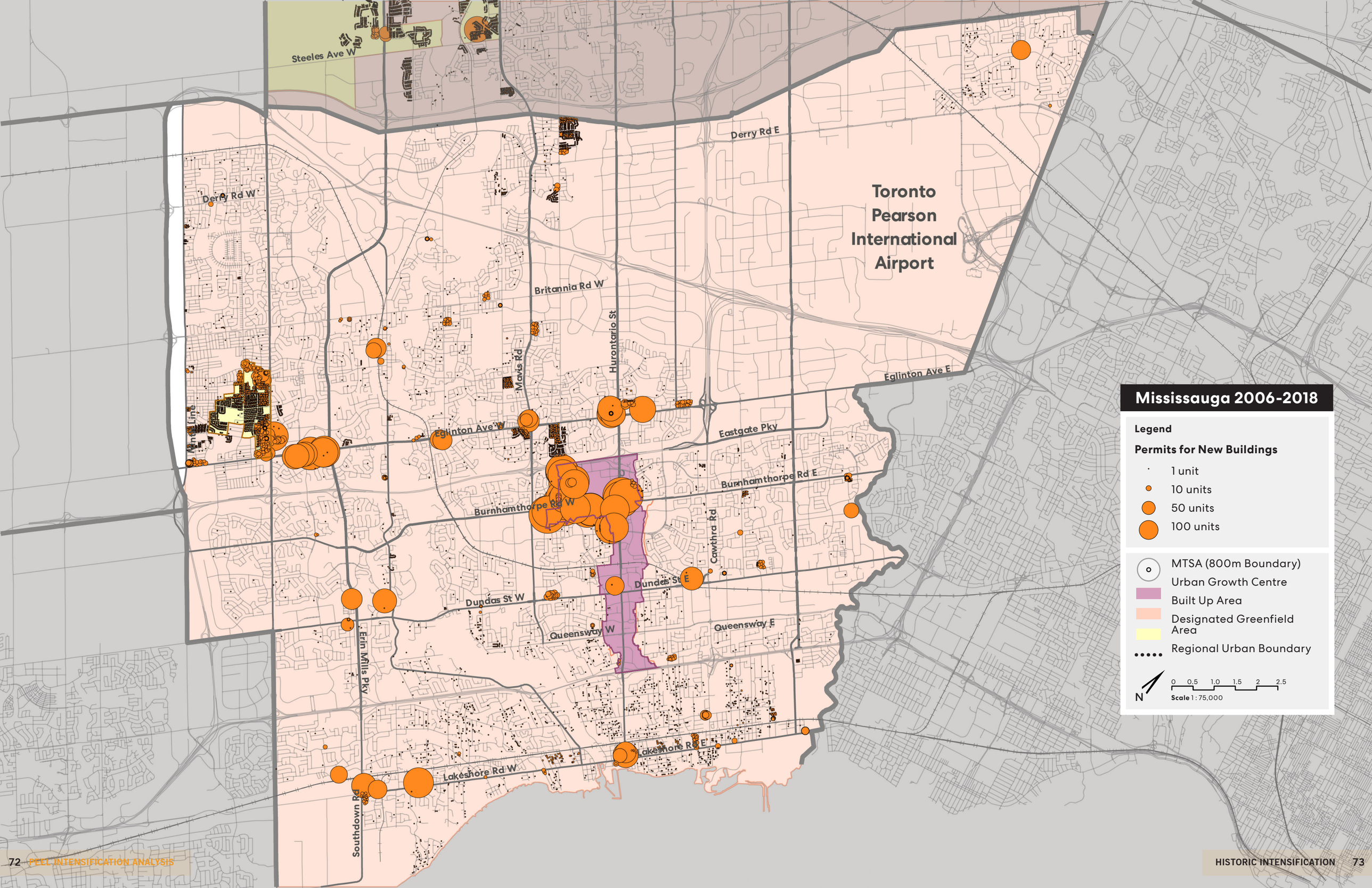
Scale 1 : 75,000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Queensway W
Queensway E
Erin Mills Pky
Lakeshore Rd E
Lakeshore Rd W
Southdown Rd
Mississauga 2006-2018
Legend
Permits for New Buildings
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10 units
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100 units
MTSA (800m Boundary)
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Built Up Area
Designated Greenfield Area
Regional Urban Boundary
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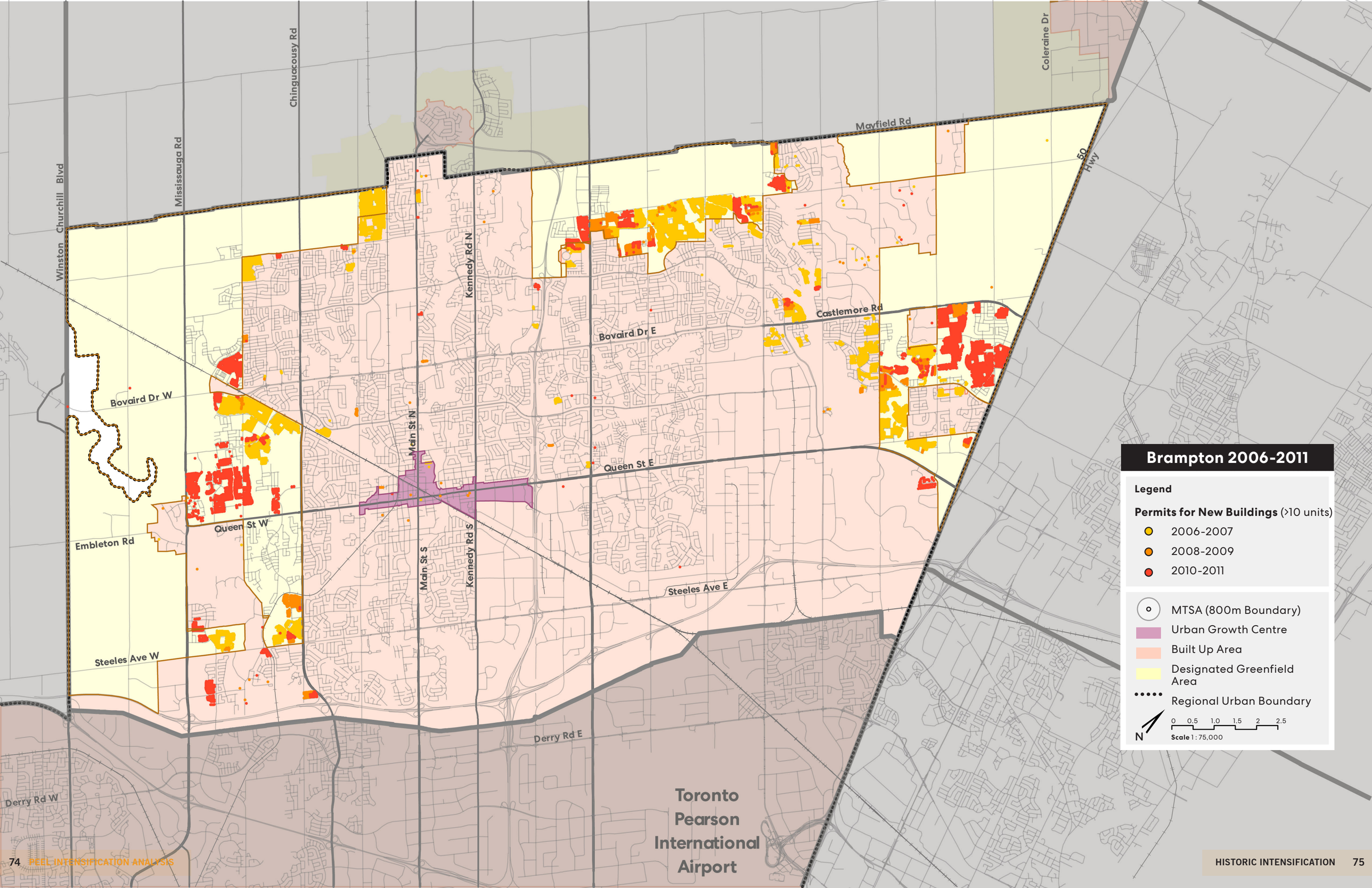
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Mayfield Rd
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Main St N
Queen St E
Queen St W
Embleton Rd
Main St S
Kennedy Rd S
Steeles Ave E
Steeles Ave W
Derry Rd E
Derry Rd W
Toronto Pearson International Airport
Brampton 2006-2011
Legend
Permits for New Buildings (>10 units)
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2008-2009
2010-2011
MTSA (800m Boundary)
Urban Growth Centre
Built Up Area
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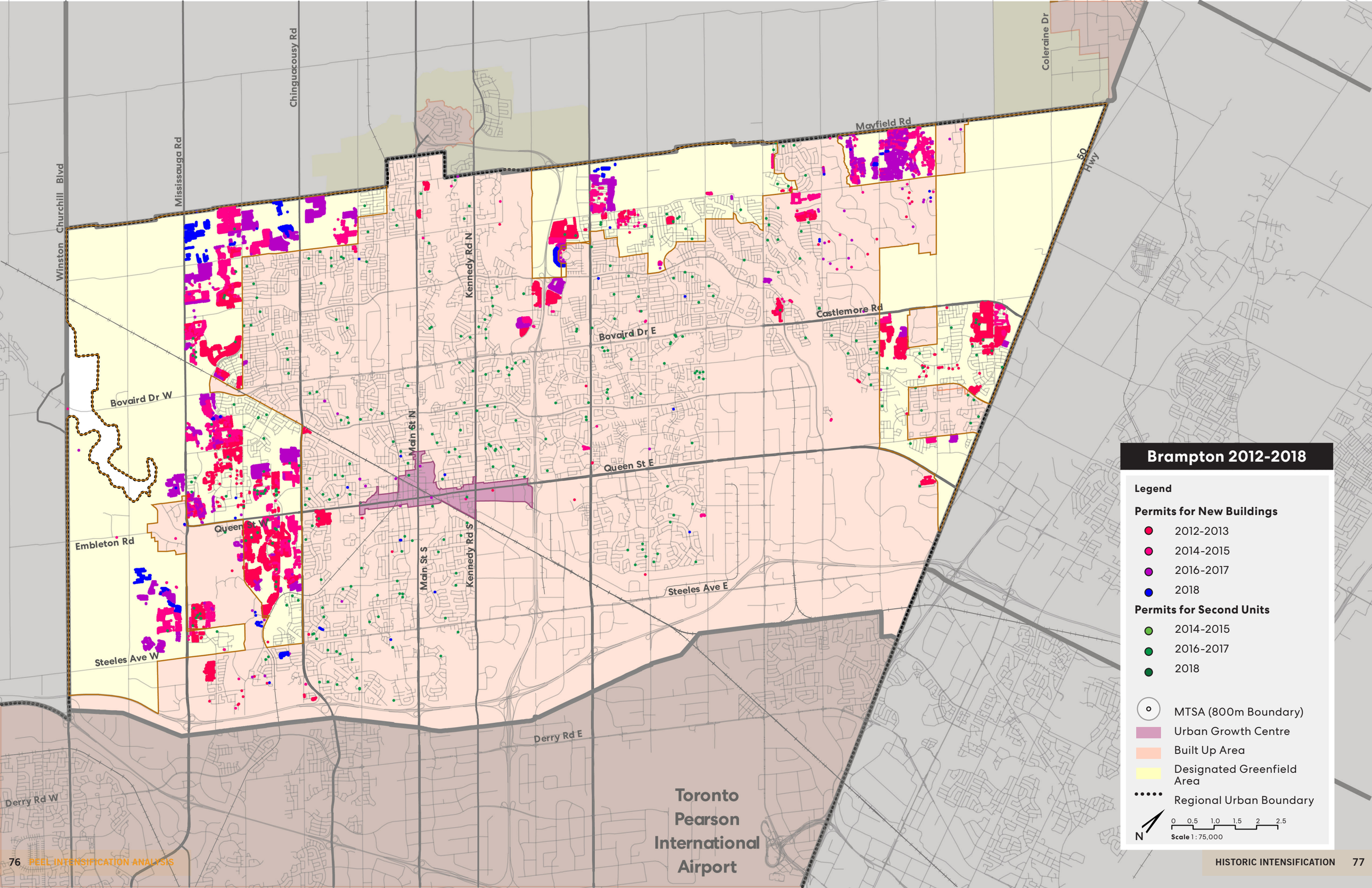
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Permits for Second Units
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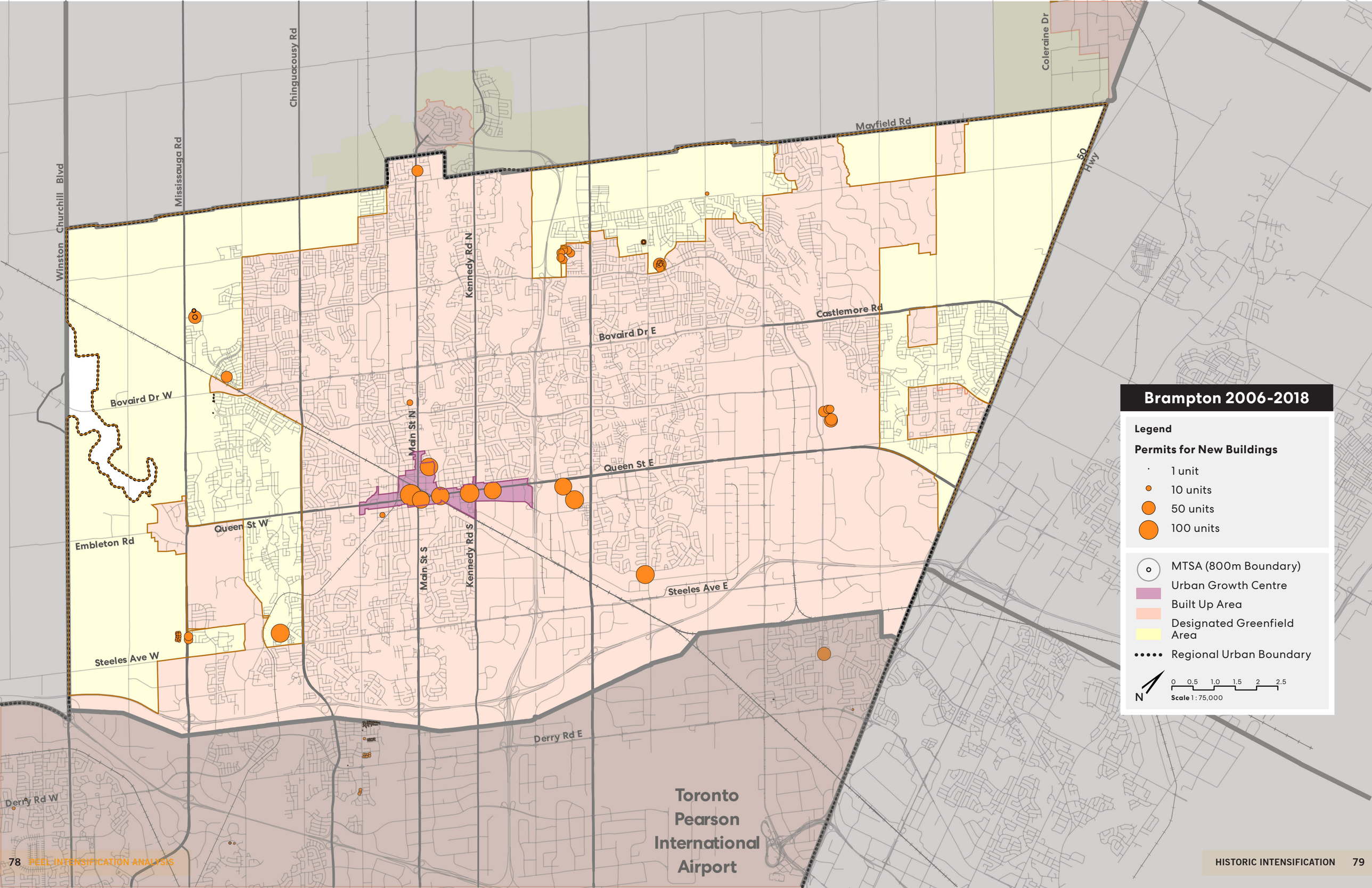
Brampton 2006-2018
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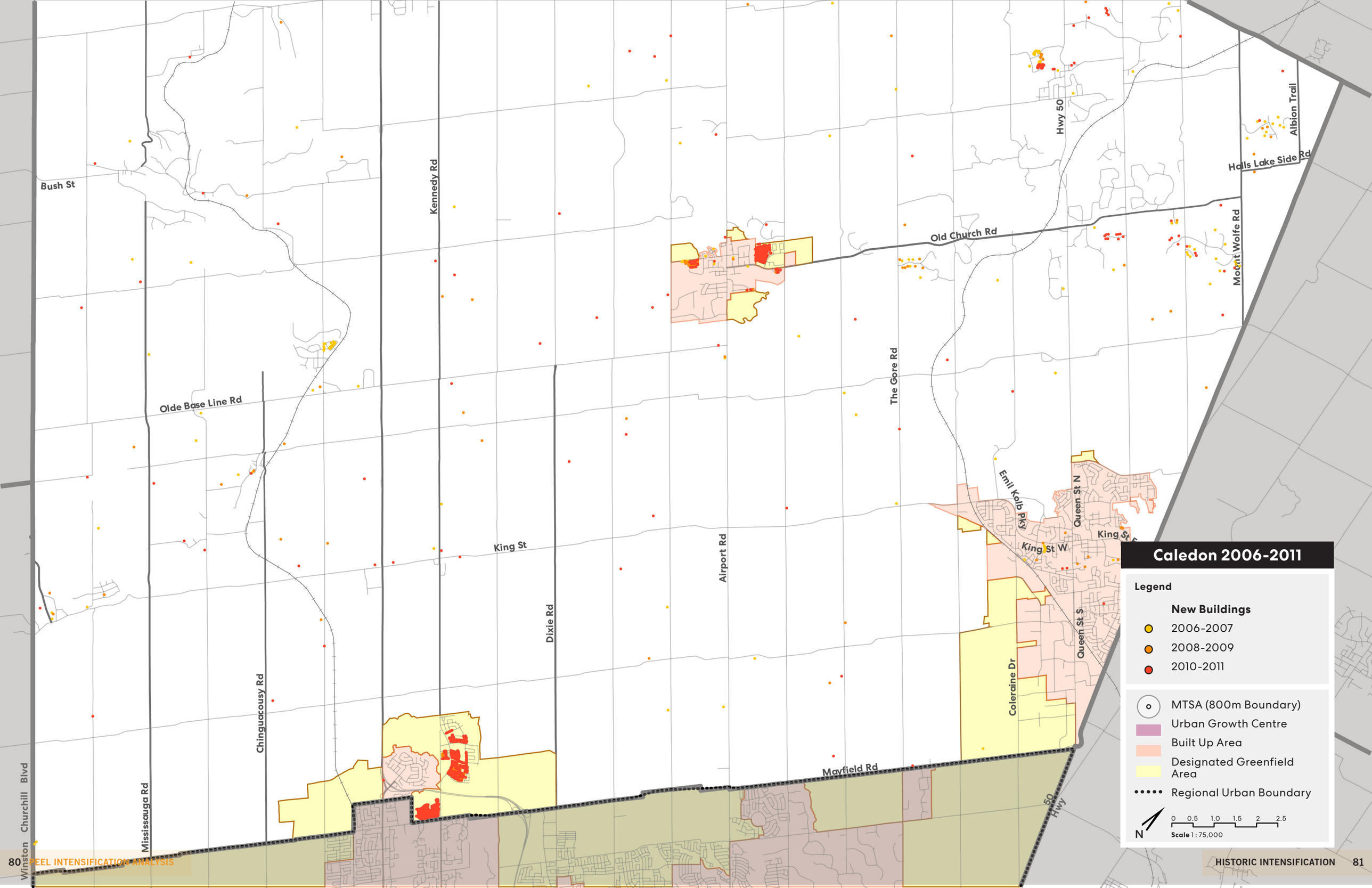
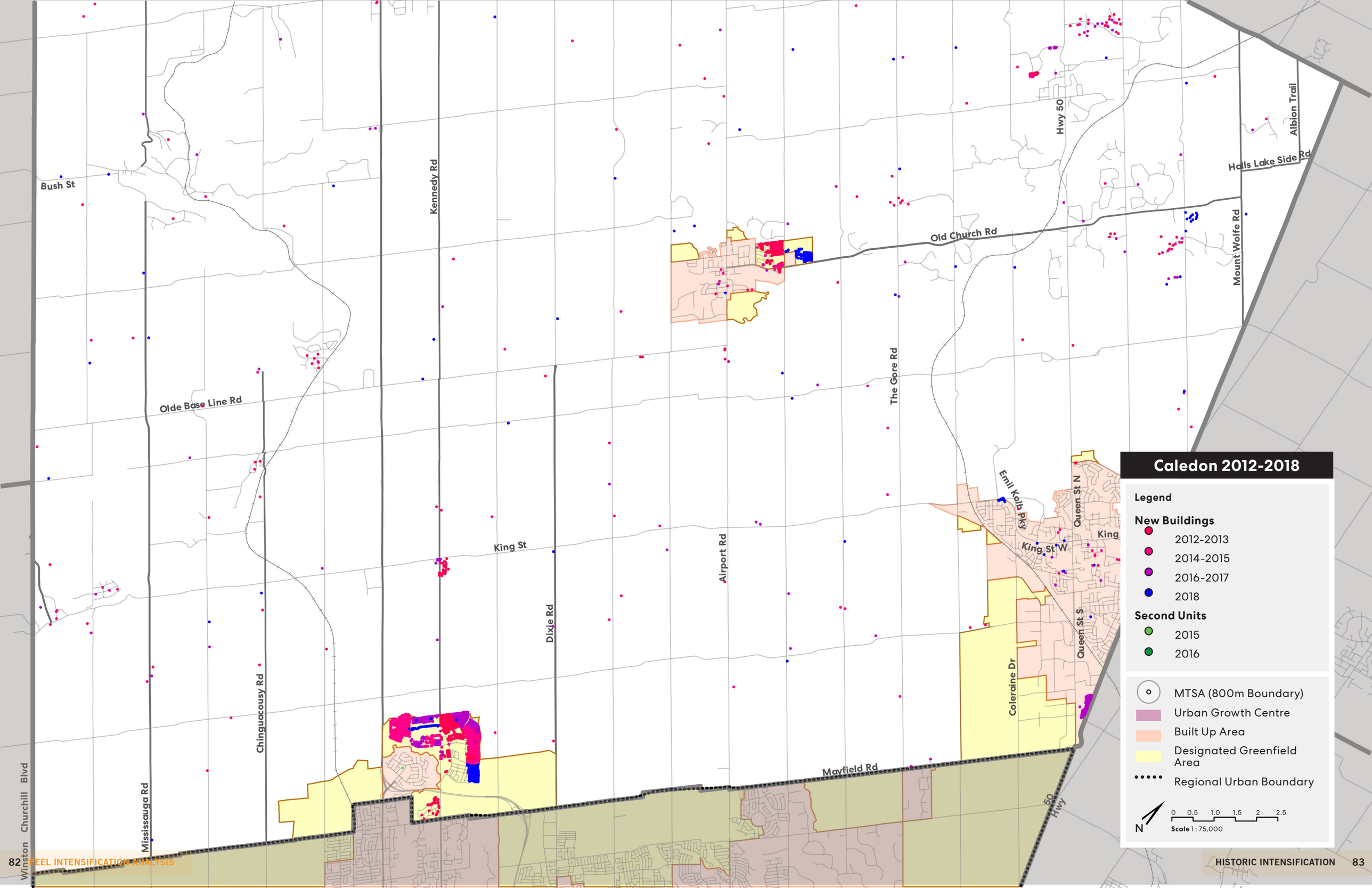
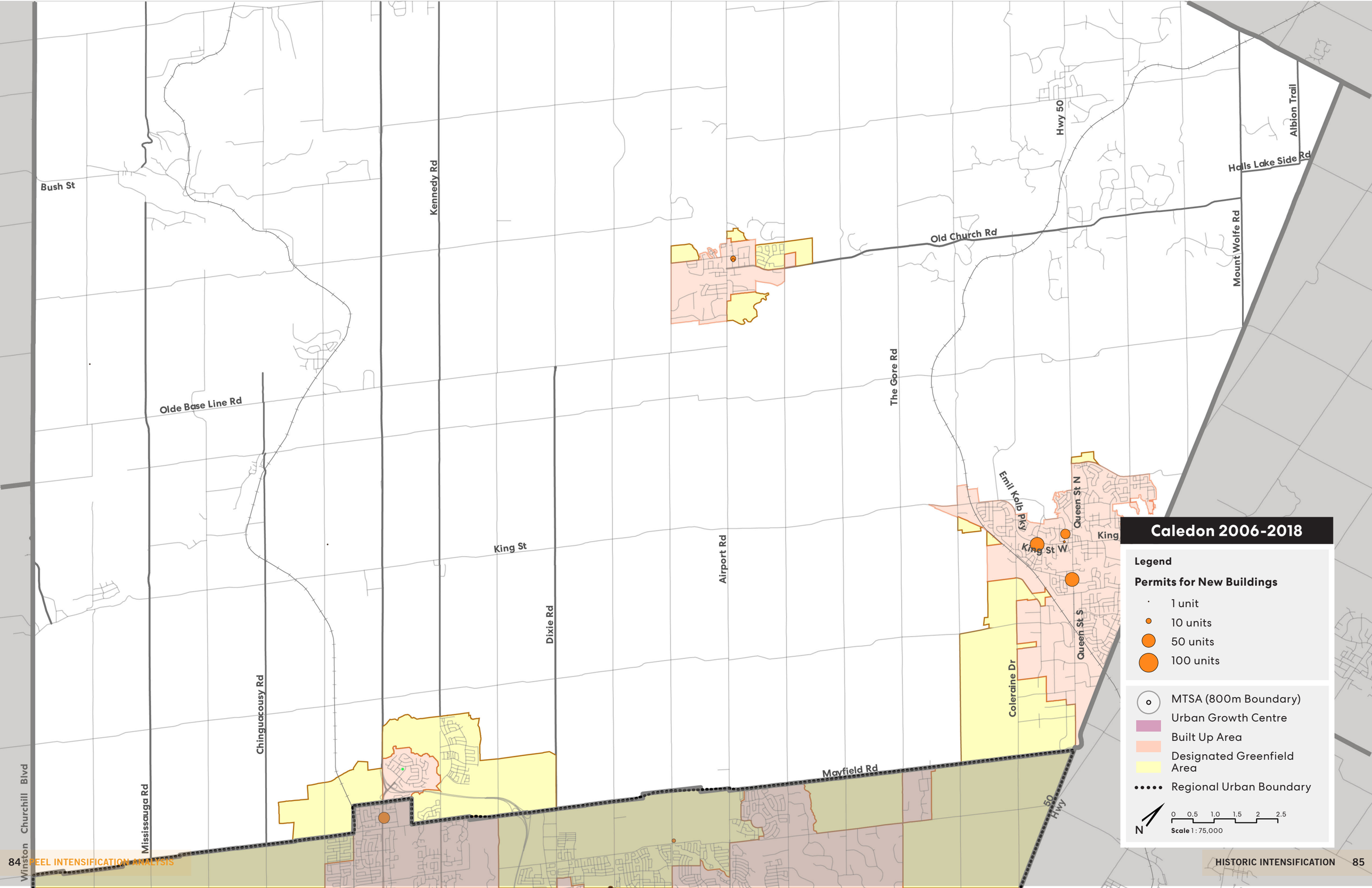
Queen St E
Queen St W
Embleton Rd
Main St S
Kennedy Rd S
Steeles Ave E
Steeles Ave W
Derry Rd E
Derry Rd W
Toronto Pearson International Airport


Bush St
Kennedy Rd
Hwy 50
Albion Trail
Halls Lake Side Rd
Old Church Rd
Mount Wolfe Rd
The Gore Rd
Olde Base Line Rd
King St
Dixie Rd
Airport Rd
Emil Kolb Pky
Queen St N
King St W
Queen St S
Coleraine Dr
Mayfield Rd
Hwy 50
Chinguacousy Rd
Mississauga Rd
Winston Churchill Blvd
Caledon 2006-2011
Legend
New Buildings
2006-2007
2008-2009
2010-2011
MTSA (800m Boundary)
Urban Growth Centre
Built Up Area
Designated Greenfield Area
Regional Urban Boundary
N
0 0.5 1.0 1.5 2 2.5
Scale 1 : 75,000


Caledon 2012-2018
Legend
New Buildings
2012-2013
2014-2015
2016-2017
2018
Second Units
2015
2016
MTSA (800m Boundary)
Urban Growth Centre
Built Up Area
Designated Greenfield Area
Regional Urban Boundary
N
0 0.5 1.0 1.5 2 2.5
Scale 1 : 75,000
Bush St
Kennedy Rd
Olde Base Line Rd
King St
Dixie Rd
Airport Rd
Chinguacousy Rd
Mississauga Rd
Winston Churchill Blvd
Old Church Rd
Hwy 50
Albion Trail
Halls Lake Side Rd
Mount Wolfe Rd
The Gore Rd
Emil Kolb Pky
King St W
Queen St N
Queen St S
Coleraine Dr
Mayfield Rd
50 Hwy


Bush St
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Dixie Rd
Chinguacousy Rd
Mississauga Rd
Winston Churchill Blvd
Mayfield Rd
Emil Kolb Pky
Queen St N
King St W
Queen St S
Coleraine Dr
50 Hwy
Caledon 2006-2018
Legend
Permits for New Buildings
1 unit
10 units
50 units
100 units
MTSA (800m Boundary)
Urban Growth Centre
Built Up Area
Designated Greenfield Area
Regional Urban Boundary
N
0 0.5 1.0 1.5 2 2.5
Scale 1 : 75,000