

City of Mississauga Agenda



Planning and Development Committee

Date

2017/02/27

Time

7:00 PM

Location

Civic Centre, Council Chamber,
300 City Centre Drive, Mississauga, Ontario, L5B 3C1 Ontario

Members

Councillor George Carlson	Ward 11 (Chair)
Mayor Bonnie Crombie	
Councillor Jim Tovey	Ward 1
Councillor Karen Ras	Ward 2
Councillor Chris Fonseca	Ward 3
Councillor John Kovac	Ward 4
Councillor Carolyn Parrish	Ward 5
Councillor Ron Starr	Ward 6
Councillor Nando Iannicca	Ward 7
Councillor Matt Mahoney	Ward 8
Councillor Pat Saito	Ward 9
Councillor Sue McFadden	Ward 10

Contact

Mumtaz Alikhan, Legislative Coordinator, Legislative Services
905-615-3200 ext. 5425
mumtaz.alikhan@mississauga.ca

Find it Online

<http://www.mississauga.ca/portal/cityhall/planninganddevelopment>

PUBLIC MEETING STATEMENT: In accordance with the *Ontario Planning Act*, if you do not make a verbal submission to the Committee or Council, or make a written submission prior to City Council making a decision on the proposal, you will not be entitled to appeal the decision of the City of Mississauga to the Ontario Municipal Board (OMB), and may not be added as a party to the hearing of an appeal before the OMB.

Send written submissions or request notification of future meetings to:

Mississauga City Council
c/o Planning and Building Department – 6th Floor
Att: Development Assistant
300 City Centre Drive, Mississauga, ON, L5B 3C1
Or Email: application.info@mississauga.ca

1. CALL TO ORDER
2. DECLARATION OF CONFLICT OF INTEREST
3. MINUTES OF PREVIOUS MEETING
4. MATTERS TO BE CONSIDERED
 - 4.1. Back to Back and Stacked Townhouses (formerly Horizontal Multiple Dwellings) – Proposed Zoning By-law Amendments and Urban Design Guidelines
File: CD.06.HOR
 - 4.2. Imagining Ward 3 – A Pilot Project for Neighbourhood Planning
File: CD.04-WAR
 - 4.3. Update on Dundas Connects – The Dundas Corridor Master Plan
File: CD.04-DUN
 - 4.4. Municipal Comprehensive Review of Employment Lands – 2016 Update
File: CD.15.EMP
5. ADJOURNMENT

City of Mississauga

Corporate Report



Date: February 3, 2017

To: Chair and Members of Planning and Development Committee

From: Edward R. Sajecki, Commissioner of Planning and Building

Originator's file:
CD.06 HOR

Meeting date:
2017/02/27

Subject

Back to Back and Stacked Townhouses (formerly Horizontal Multiple Dwellings) - Proposed Zoning By-law Amendments and Urban Design Guidelines (All Wards)
File: CD.06 HOR

Recommendation

1. That the report dated February 3, 2017, from the Commissioner of Planning and Building titled "Back to Back and Stacked Townhouses (formerly Horizontal Multiple Dwellings) - Proposed Zoning By-law Amendments and Urban Design Guidelines (All Wards)", be received for information.
2. That staff report back to Planning and Development Committee at a future statutory public meeting with the results of the consultation on the proposed Zoning By-law amendments and Urban Design Guidelines for Back to Back and Stacked Townhouses.

Report Highlights

- The Planning and Building Department is receiving an increasing number of development applications for Back to Back and Stacked Townhouses (formerly Horizontal Multiple Dwellings)
- Proposed Urban Design Guidelines and Zoning By-law amendments for Back to Back and Stacked Townhouses will be available on the City's website by March 3, 2017
- Staff is seeking direction from Council to hold a formal public meeting to give the public and the development industry an opportunity to provide feedback on the draft documents

Background

Planning and Development Committee	2017/02/03	2
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Originator's file: CD.06.HOR

On September 19, 2016, Planning and Development Committee (PDC) received a report titled "Horizontal Multiple Dwellings – Urban Design Guidelines (All Wards)". PDC passed Recommendation PDC-0071-2016 which was adopted by Council as follows:

1. That the report titled "Horizontal Multiple Dwellings – Urban Design Guidelines (All Wards)", dated August 30, 2016 from the Commissioner of Planning and Building, be received for information.
2. That Urban Design Guidelines for horizontal multiple dwellings be prepared by staff to be brought forward to a future Planning and Development Committee meeting for Council endorsement.
3. That staff review the current zoning terminology and **RM8** and **RM9** zone regulations for horizontal multiple dwellings and determine if amendments to the by-law are required.

The Corporate Report is attached as Appendix 1.

Comments

On November 29, 2016, staff attended a Building Industry Liaison Team (BILT) meeting to discuss the issues related to Back to Back and Stacked Townhouses, and to hear views from the development industry. Staff has also been in discussion with various members of the development industry over the past several months to obtain feedback regarding some of the challenges and successes with this built form. Staff will continue to consult with these stakeholders to get their input throughout the process.

Based on the feedback received to date, and as a result of the issues that are arising through the review of applications, a number of Zoning By-law amendments should be considered and supported by Urban Design Guidelines to provide assistance to applicants designing Back to Back and Stacked Townhouses.

The existing Zoning By-law regulations and definitions that apply to "Horizontal Multiple Dwellings" do not reflect the attributes of the many building types that are now captured by this broad term. For example, the majority of older "Horizontal Multiple Dwellings" are "stacked" (i.e. two or more units stacked on-top of each other) and have surface parking either at the rear of the unit or in a centralized surface parking lot. As land values increased, the configurations of "Horizontal Multiple Dwellings" have changed. In addition to "stacked" units, "back to back" units (i.e. units sharing a common rear wall) and "back to back stacked" units (i.e. units sharing a common rear wall and units stacked on-top of each other) are becoming increasingly common in an effort to maximize unit yield. Also, underground parking is more typical as it allows for more developable land above ground.

The current **RM9** zone was carried forward from the previous Zoning By-law (By-law 5500) and thus many of the existing regulations are outdated. Also, the current **RM9** zone does not include

regulations for "back to back" units and "back to back stacked" units. The following draft Zoning By-law revisions are being considered that will better address the unique characteristics of these building types:

1. Replacing the term "Horizontal Multiple Dwelling" with "Back to Back Townhouse" and "Stacked Townhouse" and proposing a set of regulations to deal with each building type.
2. Modifying the existing **RM9** zone regulations. These regulations will apply to Stacked Townhouses only. The following modifications are being considered:
 - Increase in the minimum lot frontage (for the entire site) from 30 m (98.4 ft.) to 42 m (137.8 ft.) to allow for adequate building setbacks, minimum landscape buffers and acceptable road and sidewalk widths
 - Introduce a minimum dwelling unit width of 5 m (16.4 ft.) and a maximum block length of 41 m (134.5 ft.)
 - Include a maximum number of 4 storeys and maximum dwelling height of 13 m (42.7 ft.) for flat roof dwellings and 17 m (55.8 ft.) for sloped roof dwellings
 - Simplify the minimum yard and internal setback regulations by converting the majority of encroachment regulations to setback regulations
 - Introduce a minimum walkway width of 1.8 m (5.9 ft.), a minimum landscape buffer of 3 m (9.8 ft.) around the perimeter of the site and a minimum contiguous private outdoor amenity area of 6 m² (64.6 ft²) for each unit
 - Introduce regulations that apply to rooftop amenity areas, including a minimum 1.2 m (3.9 ft.) setback from the building edge to reduce privacy and overlook conditions
3. Create 3 new RM zones and regulations for Back to Back Townhouses. Depending on the tenure, the new RM zones are variations of the modified **RM9** zone, taking into consideration the unique qualities of Back to Back Townhouses
 - RM10: Back to Back Townhouse on a Condominium Road
 - RM11: Back to Back Townhouse on a Common Element Condominium Road
 - RM12: Back to Back Street Townhouse
4. Create a new definition of average grade that will apply to Back to Back and Stacked Townhouses. The definition will relate proposed site grades to existing grades on the property and adjacent lands, and will establish a consistent baseline from which to measure building height.
5. Define the following terms:
 - Back to Back Townhouse
 - Stacked Townhouse
 - Sidewalk
 - Walkway

A draft of the Urban Design Guidelines and Zoning By-law amendments will be available on the City's website <http://www.mississauga.ca/portal/residents/townhouse>. Through the public consultation process, staff will seek feedback from the development industry and the community on the proposed Zoning Amendments, draft Urban Design Guidelines and any additional issues. This will allow Planning and Building staff to test the proposed modifications prior to bringing forward a draft Zoning By-law to a formal public meeting.

The following public consultation process is proposed:

- An open house is scheduled for March 29, 2017 from 1:30 p.m. to 4:30 p.m. in the Bank of Montreal Room at the Living Arts Centre. The proposed City-initiated Zoning By-law amendments and draft Urban Design Guidelines will be presented and discussed
- The draft documents will be available on the City's website by March 3, 2017
- The proposed Zoning By-law amendments and draft Urban Design Guidelines will be brought to the Mississauga Urban Design Advisory Panel for input
- A formal Public Meeting at Planning and Development Committee will be held once the consultations have concluded. The timing of the Public Meeting will be dependent on the number and range of comments received at the open house and from the Urban Design Advisory Panel
- A Recommendation report with the final Zoning By-law and Urban Design Guidelines will be presented at a subsequent Planning and Development Committee meeting once the comments from the Public Meeting have been addressed

Staff will also be undertaking a review of the relevant provisions of Mississauga Official Plan to ensure consistency with the proposed Zoning By-law amendments and draft Urban Design Guidelines. Through this exercise, amendments to the Official Plan may also be required.

Financial Impact

Not applicable.

Conclusion

The proposed City-initiated Zoning By-law amendments and draft Urban Design Guidelines for Back to Back and Stacked Townhouses will be subject to stakeholder and public meetings with a final report brought forward at the conclusion of the public consultation process. In the meantime, applications will be evaluated based on the existing Official Plan policies and Zoning By-law regulations.

Attachments

Appendix 1: Corporate Report dated August 30, 2016 entitled "Horizontal Multiple Dwellings - Urban Design Guidelines (All Wards)"

Planning and Development Committee

2017/02/03

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Originator's file: CD.06.HOR



Edward R. Sajecki, Commissioner of Planning and Building

Prepared by: Edward Nicolucci, Urban Designer

City of Mississauga

Corporate Report



<p>Date: August 30, 2016</p> <p>To: Chair and Members of Planning and Development Committee</p> <p>From: Edward R. Sajecki, Commissioner of Planning and Building</p>	<p>Originator's file: CD.06 HOR</p>
	<p>Meeting date: 2016/09/19</p>

Subject

Horizontal Multiple Dwellings - Urban Design Guidelines (All Wards)

File: CD.06 HOR

Recommendation

1. That the report titled "Horizontal Multiple Dwellings – Urban Design Guidelines (All Wards)", dated August 30, 2016, from the Commissioner of Planning and Building, be received for information.
2. That urban design guidelines for horizontal multiple dwellings be prepared by staff to be brought forward to a future Planning and Development Committee Meeting for Council endorsement.
3. That staff review the current zoning terminology and **RM8** and **RM9** zone regulations for horizontal multiple dwellings and determine if amendments to the by-law are required.

Report Highlights

- The Planning and Building Department is receiving an increasing number of development applications that include horizontal multiple dwellings
- This form of housing has a number of positive qualities, but also presents a number of challenges if not designed well
- Urban design guidelines are proposed to assist landowners, applicants, the development industry and the public by outlining the framework and urban design principles to ensure the highest quality of development and compatibility with the surrounding neighbourhood
- A review of current **RM8** and **RM9** zone regulations and zoning terminology for horizontal multiple dwellings is recommended to determine if amendments are required.

Background

Given that the City is at the end of its greenfield development phase, new growth is being accommodated through infilling and redevelopment. Conventional forms of housing including, detached and semi-detached homes and traditional townhouses are becoming less common as the development industry proposes more compact and transit supportive development patterns that use land, resources, infrastructure and community services more efficiently.

Horizontal multiple dwellings (herein referred to as "HMDs") are becoming more popular throughout the GTA. The Planning and Building Department has seen an increase in the number of development applications proposing this form of housing. Currently there are 12 active development applications and 9 preliminary meetings/inquiries for potential applications (see Appendix 1).

Although HMDs have a number of positive qualities, several issues have emerged among recent applications. These issues impact site layout and building design, as well as compatibility with adjacent properties and land uses. Urban design guidelines specific to this form of housing should be developed to establish a design expectation for landowners, applicants, the development industry and the public, to ensure the highest quality of development and to meet the City of Mississauga's minimum standards of development. The purpose of this report is to inform Planning and Development Committee of some of the issues that are arising in a number of development applications currently under review and to recommend that a detailed set of design guidelines be prepared to address these issues and other design related matters.

Comments

The term Horizontal Multiple Dwelling is unique to the City of Mississauga and applies to those housing types commonly referred to as stacked townhouses, back-to-back townhouses and back-to-back stacked townhouses. Historically, the term has been used to describe unique forms of housing that do not fit into one of the other conventional built forms defined in the Zoning By-law (i.e. Detached Dwelling, Semi-Detached Dwelling, Duplex Dwelling, Townhouse Dwelling, Apartment Dwelling, etc.). Zoning By-law 0225-2007 defines Horizontal Multiple Dwelling as:

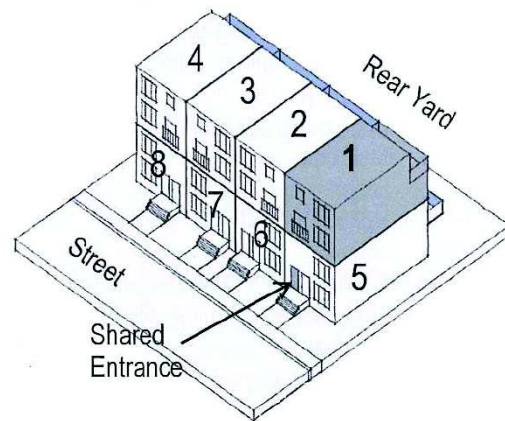


Figure 1 - Stacked Townhouses

A building, other than a townhouse dwelling, or apartment dwelling, not exceeding four (4) storeys in height, containing more than three (3) attached dwelling units that are divided horizontally and/or vertically, each with an entrance that is independent or through a common vestibule.

This form of housing is not new to Mississauga. Also known as walk-up apartments, garden flats, maisonettes and skylight apartments, a number of these types of developments are located throughout the City (see Appendices 2 and 3). Some have been more successful than others, which in most cases is attributed to good design and property maintenance.

In recent years, HMDs have become increasingly popular for a number of reasons. These include:

- Increased densities in a low-rise form of housing
- A sensitive way to transition between low-density and high-density built forms
- Diversity of housing choices to meet different needs and preferences
- Less expensive construction methods and reduced maintenance fees allow for a more affordable form of housing
- Grade related housing, with a front door directly to the outside
- Profitable for the development industry

As densities increase and developments become more compact it can be challenging to balance functional requirements with good site design. As a result, a number of common issues have emerged among recent development applications for this form of housing (see Appendix 4). These include:

Exposed Parking Structures

To avoid extensive excavation for underground parking structures, parking is proposed in the first level of buildings. This raises the finished floor elevation of the first habitable storey, resulting in an increased number of stairs into units and an undesirable pedestrian experience. Excessive stairs are not age-friendly or universally accessible and can be hazardous if not well maintained and during winter months.

Grading and Retaining Walls

Existing site grades are being modified such that numerous retaining walls are required. This is a concern for a number of reasons; including safety, maintenance, site circulation and aesthetics.

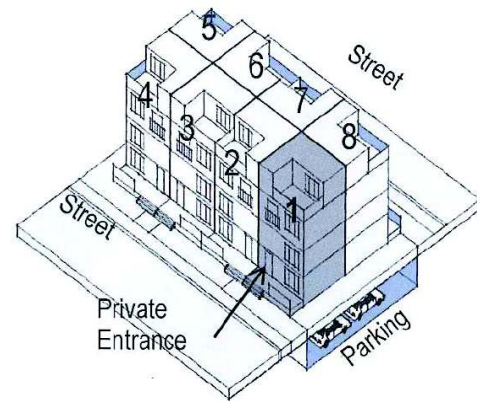


Figure 2 - Back-to-back Townhouses

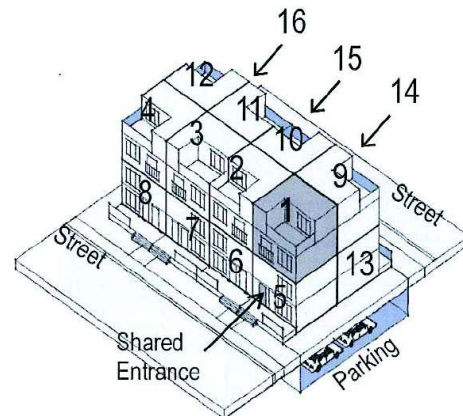


Figure 3 - Back-to-back Stacked Townhouses

Common Amenity Area

Residential developments, with the exception of freehold developments, are required to provide common outdoor on-site amenity areas. Insufficient and in some cases no common on-site amenity area is proposed, resulting in no communal gathering space and requiring residents to travel off-site for active and passive recreation.

Below Grade Units

An increasing number of below grade units are being proposed. Lack of sunlight, fresh air and usable private amenity space are some of the issues with below grade units.

Compliance with Zoning Standards

Zoning By-law 0225-2007 permits Horizontal Multiple Dwellings in the **RM8** (Horizontal Multiple Dwellings with 4 to 6 Dwelling Units) and **RM9** (Horizontal Multiple Dwellings with more than 6 Dwelling Units) zones. Modifications to the **RM8** and **RM9** zone standards to accommodate development proposals are common; including reduced building setbacks, reduced landscape buffers, increased building heights and increased encroachments into required yards. Rationales for proposed changes to the zone standards are not being provided. Changes to zone standards effect site design, create overlook and privacy issues, limit the amount of landscaping, and often result in unacceptable impacts on adjacent properties.

Building Height

HMDs typically range in height from 3 to 4 storeys. An increasing number of development applications are proposing 5 or more storeys to accommodate exposed first level parking structures or below grade units. Additionally, the majority of development applications are proposing roof top patios to compensate for the limited amenity area on-site. This causes compatibility concerns due to buildings being 2 to 3 storeys taller than buildings on adjacent properties and can result in privacy and overlook issues, as well as shadowing if not well designed.

Waste Collection and Storage

Waste collection and storage areas are being proposed in visible locations, abutting dwelling units and blocking parking spaces. If not appropriately designed these areas can cause noise and odour issues, generate unsightly views and become a safety concern.

Adequate Parking

Reduced parking rates are common and in some cases no visitor parking is proposed, which can result in on-street parking issues and parking on adjacent properties.

Reduced Landscape Area

Rather than providing wider landscape buffers to allow for gradual changes in grading, space is so restricted that retaining walls are required to achieve grade changes in less area. These reduced landscape areas and buffers also limit the amount of space available for planting and vegetation on-site.

Utilities and Servicing

Applicants are waiting until late in the process to design and locate utilities and servicing. Poorly designed electrical and gas meters, transformers, air conditioning units, mechanical equipment and other servicing features reduce the usable landscape area, create an unattractive condition and can impact how the site functions. Since most of the site is used for buildings, parking and driveways, there is little opportunity to develop creative solutions to correct these issues at a later stage in the development process.

Unit Size and Storage

Although appealing to different demographics, HMDs are particularly popular among young families since they are an affordable form of grade-related housing. Unfortunately, unit sizes are small and provide little storage space. Unlike apartment buildings that offer storage lockers for large items like bicycles and strollers, space in HMDs is confined such that bulky items are stored on patios, porches and in parking spaces. Therefore, while HMDs are attractive for young families they may not adequately address their needs.

Property Management and Maintenance

Good property management is critical to the long term maintenance and upkeep of multiple unit residential developments, including HMDs. This is often overlooked during the development process as the responsibility is ultimately passed onto the condominium corporation and unit owners. To keep maintenance fees low, developers are not proposing full-time on-site property management, which is a concern given the number of units in these types of developments. It is therefore important that developments are thoughtfully designed from the outset to minimize costly maintenance issues in the future.

Financial Impact

Not applicable.

Conclusion

Although HMDs offer many advantages, a number of issues have emerged among recent development applications for this form of housing. Urban design guidelines should be prepared to establish a design expectation for landowners, applicants, the development industry and the public to ensure the highest quality of development and compatibility with site conditions and the surrounding neighbourhood. Development applications will be evaluated using these urban design guidelines, as well as the policies of Mississauga Official Plan, Zoning By-law regulations and other Council endorsed documents.

In addition to the guidelines, a review of the existing **RM8** and **RM9** zone regulations and zoning terminology is proposed in order to determine if changes to the Zoning By-law are appropriate.

Planning and Development Committee

2016/08/30

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Originator's file: CD.06 HOR

Attachments

Appendix 1: Proposed Developments with Horizontal Multiple Dwellings

Appendix 2: Photos of Existing Horizontal Multiple Dwellings

Appendix 3: Existing Developments with Horizontal Multiple Dwellings

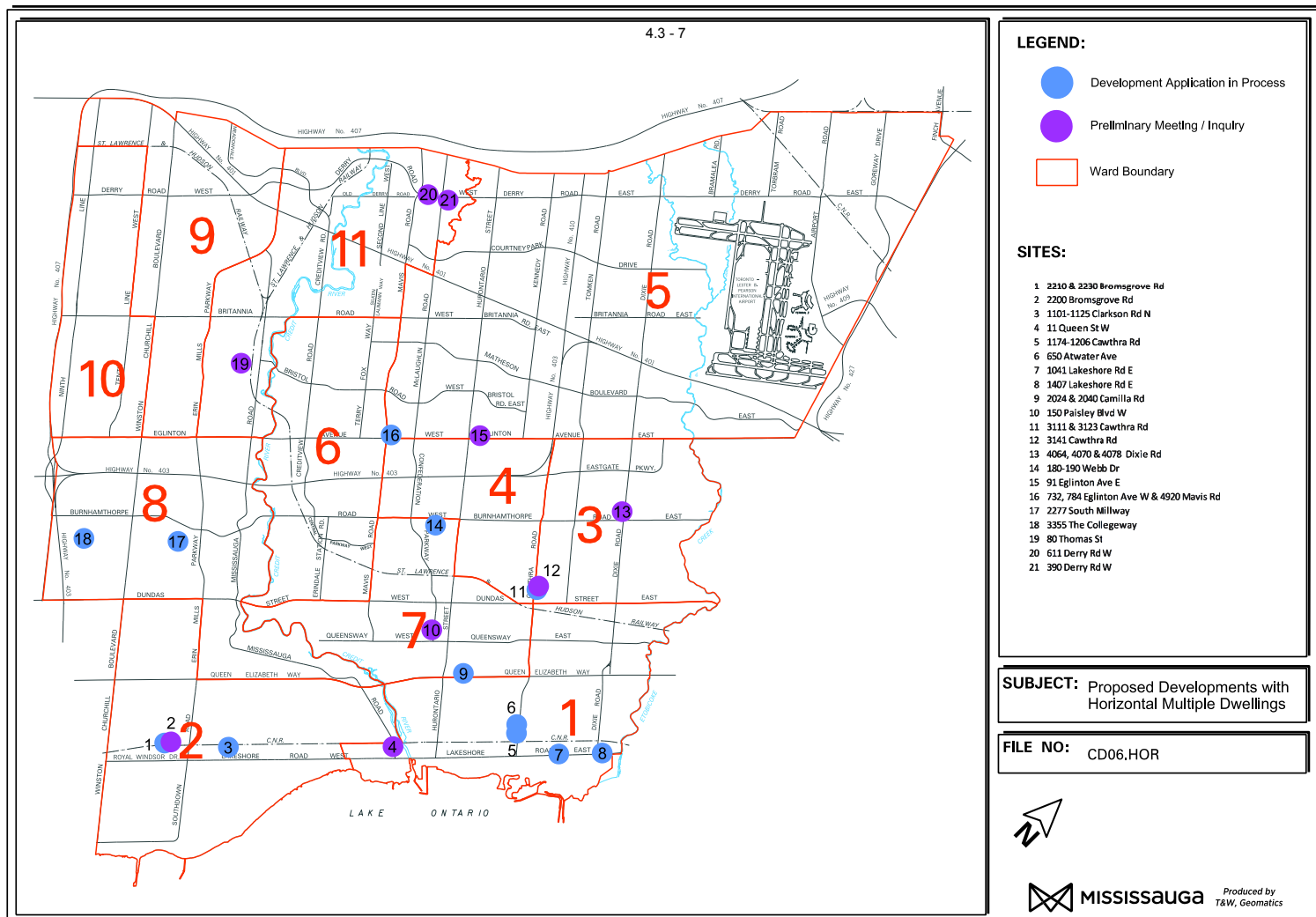
Appendix 4: Photos of Design Issues in Existing Developments



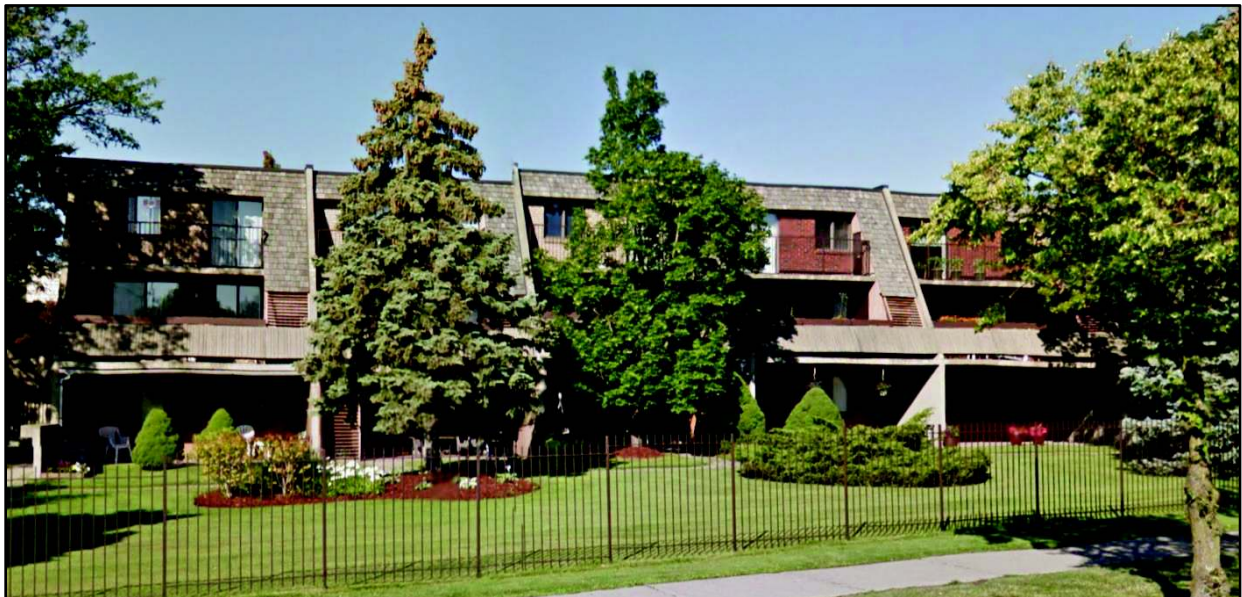
Edward R. Sajecki

Commissioner of Planning and Building

Prepared by: Ashlee Rivet, Development Planner



Photos of Existing Horizontal Multiple Dwellings



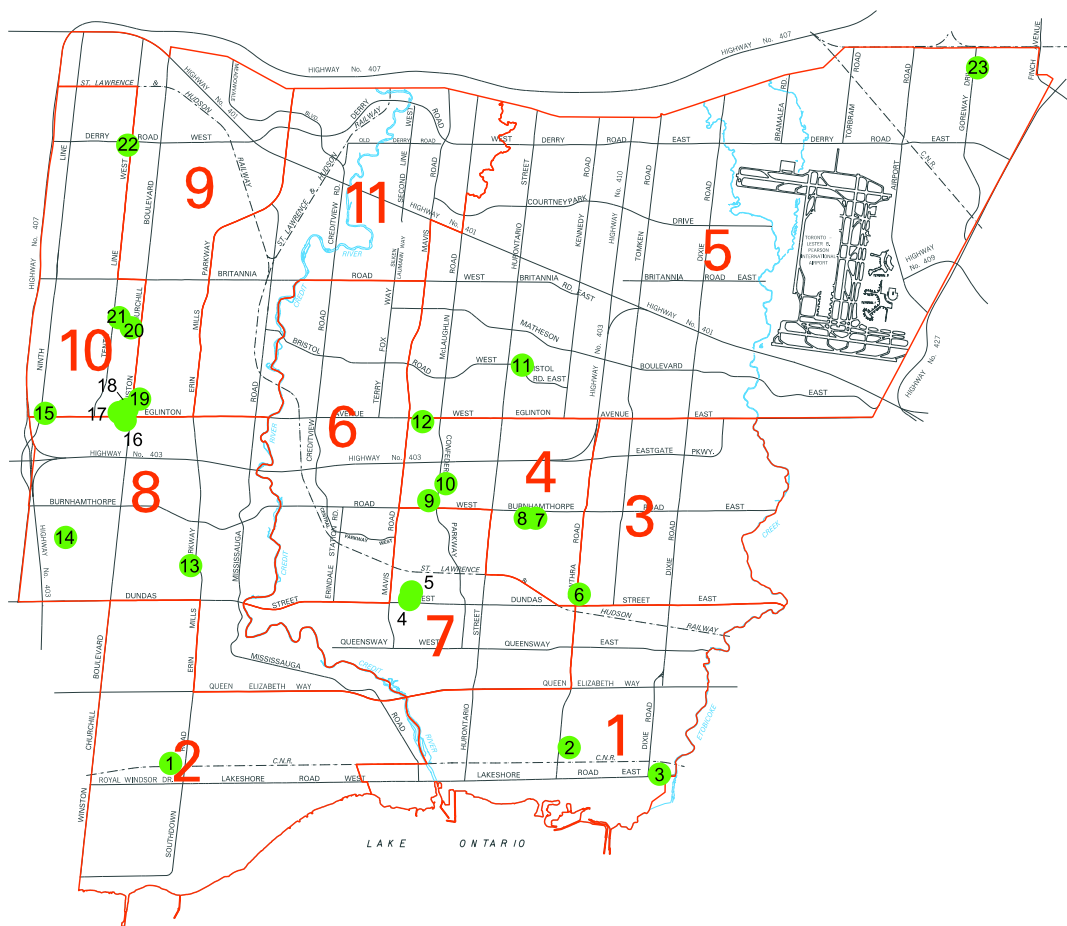






Source: Google Streetview 2016

4.3 - 12

**LEGEND:**

- Existing Development
- Ward Boundary

SITES:

- 1 2170 Bromsgrove Rd
- 2 1211-1241 Parkwest Pl
- 3 1439, 1451 Lakeshore Rd E & 1013, 1017 Deta Rd
- 4 600 Shoreline Dr
- 5 601 Shoreline Dr
- 6 3071-3083 Cawthra Rd
- 7 1250 Mississauga Valley Blvd
- 8 1330 Mississauga Valley Blvd
- 9 4010-4080 Parkside Village Dr
- 10 360-370 Square One Dr
- 11 45-85 & 99-119 Bristol Rd E
- 12 4620 Guildwood Way
- 13 2035 South Millway
- 14 3470 & 3480 Colonial Dr
- 15 5050 Intrepid Dr
- 16 4975 Southampton Dr
- 17 5005 Oscar Peterson Blvd
- 18 5030-5070 Harvard Rd & 3100-3190 Boxford Cres
- 19 2891 Rio Crt
- 20 3069 Thomas St
- 21 5700-5750 Tosca Dr, 3335-3395 Thomas St, 5725-5755 Tenth Line W & 3200-3250 Bentley Dr
- 22 6950 Tenth Line W
- 23 7555 Goreway Dr

SUBJECT: Existing Developments with Horizontal Multiple Dwellings

FILE NO: CD06.HOR

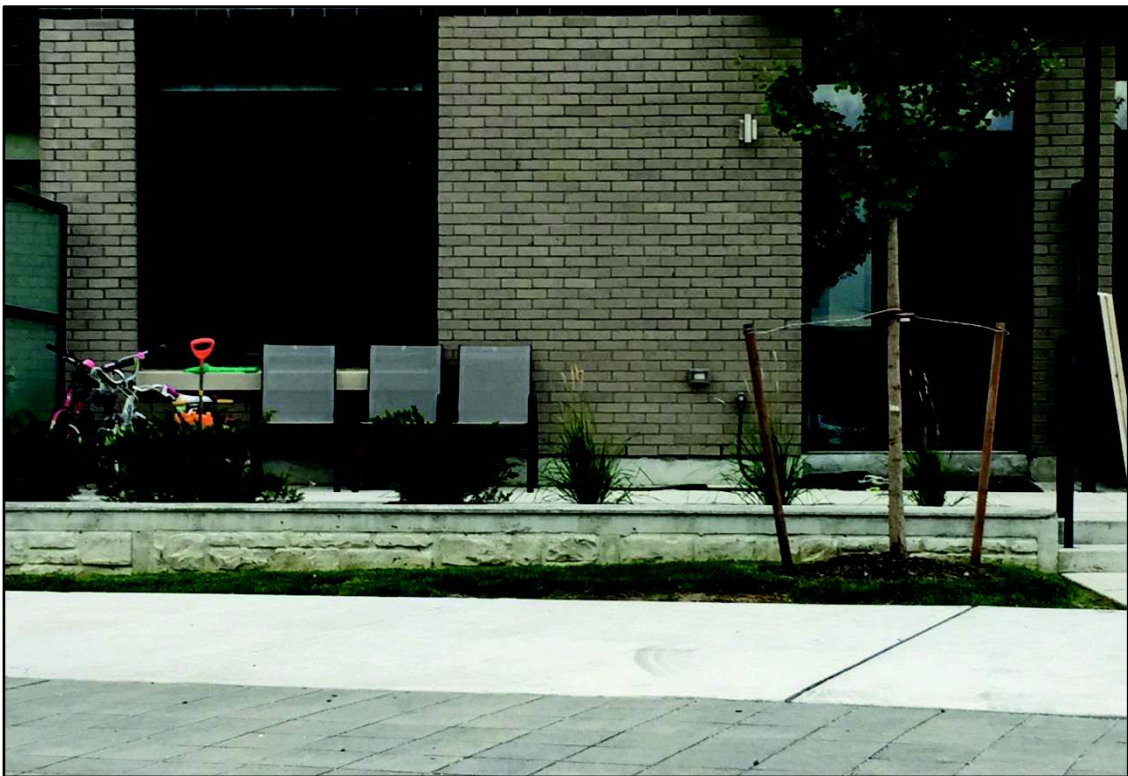


MISSISSAUGA Produced by T&W, Geomatics

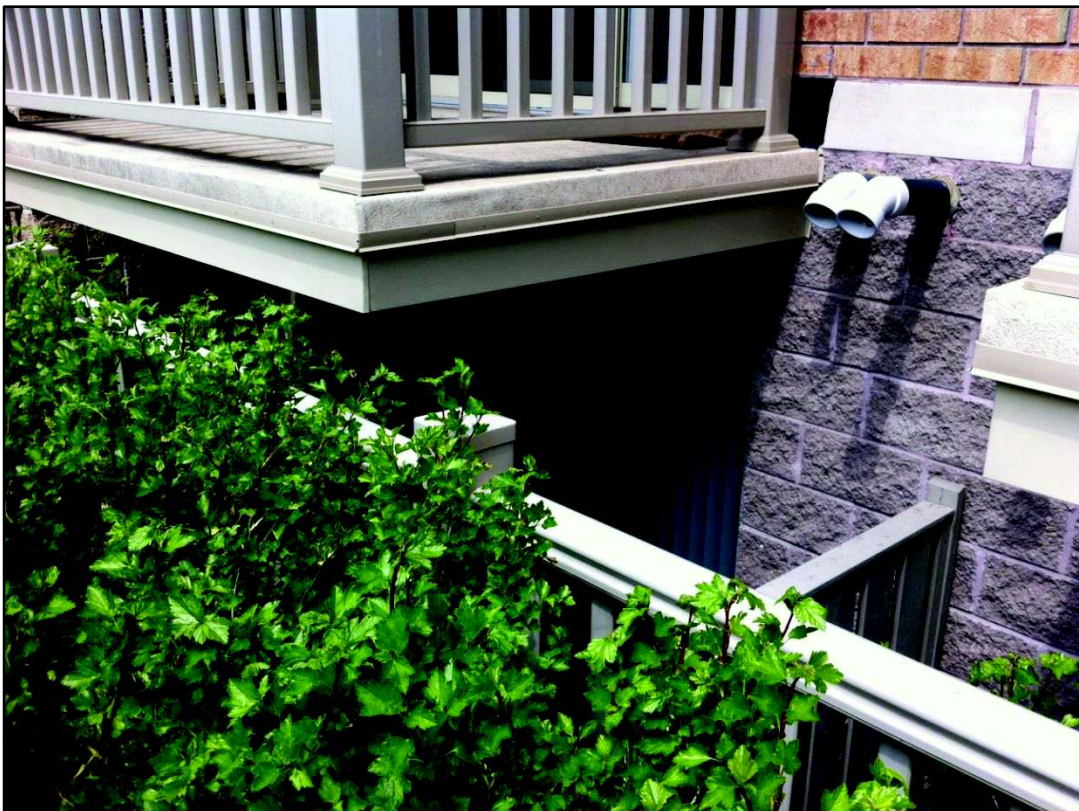
Photos of Design Issues in Existing Developments



Appendix 4, Page 2



Appendix 4, Page 3



Appendix 4, Page 4



City of Mississauga

Corporate Report



Date: 2017/02/03

To: Chair and Members of Planning and Development Committee

From: Edward R. Sajecki, Commissioner of Planning and Building

Originator's files:
CD.04- WAR

Meeting date:
2017-02-27

Subject

Imagining Ward 3- A Pilot Project for Neighbourhood Planning

Recommendation

1. That the report entitled *Imagining Ward 3 – A Pilot Project for Neighbourhood Planning* dated February 3, 2017, from the Commissioner of Planning and Building, be received for information.
2. That a public meeting be held to consider proposed amendments to the Applewood Neighbourhood and Rathwood Neighbourhood Character Area Policies of Mississauga Official Plan as outlined in the report entitled *Imagining Ward 3 – A Pilot Project for Neighbourhood Planning* dated February 3, 2017, from the Commissioner of Planning and Building.

Background

The Imagining Ward 3 pilot project, launched in 2016, enabled residents of the Applewood and Rathwood neighbourhoods to proactively engage in a new approach to neighbourhood planning that focused on helping residents manage physical changes in their communities.

The dialogue with resident members resulted in a successful engagement process. Residents explored key issues and opportunities within their communities; and learned about the official plan and planning tools which could assist with managing local change (see Appendix 1).

The key findings from that community dialogue have been used to develop an educational brochure titled *Imagining Ward 3* (See appendix 2). In addition, a clear definition of neighbourhood character was established, which staff will form into plan policy through amendments to Mississauga Official Plan (MOP).

Comments

Neighbourhoods evolve and change over time. However, change is often perceived negatively in that it is viewed by residents as contrary to their established neighbourhood character, or something that will impact their existing quality of life.

Therefore, good neighbourhood planning requires a focus on two key elements: (1) proactive community engagement, and (2) a supportive regulatory planning framework (i.e. Official Plan policy).

Proactive Community Engagement & Local Neighbourhood Capacity Building

Proactive community engagement is an essential component of the neighbourhood planning process. As part of the Ward 3 pilot project, staff began talking to the residents on the planning process and the Official Plan policy intent. This helped to build knowledge and capacity of area residents, positioning them to proactively engage and influence future change.

An important deliverable of the Imagining Ward 3 process is a brochure highlighting the vision for the Rathwood and Applewood neighbourhoods, key priorities for change and the current policy direction of MOP. It is intended to better inform residents about the planning process, where infill and redevelopment opportunities may occur, and how best to ensure it is sensitively integrated to the respect the neighbourhood character.

Briefly, the themes of the brochure are as follows:



Housing and Built Form

Protect existing neighbourhoods from overdevelopment by considering appropriate, context-sensitive development



Streetscapes and Urban Design

Improve the existing streetscapes, where appropriate, through additional landscaping, wider sidewalks, and street furniture



Parks and Open Space

Retain and enhance the existing parks and open space system



Redevelopment Sites

Direct intensification to appropriate areas while reinforcing appropriate development that is sensitive to core neighbourhood areas

Supportive Regulatory Framework

In order to protect neighbourhood character, the current policy planning context was identified as needing enhancement. While Applewood and Rathwood are not identified in MOP as areas for major intensification, growth is expected through future redevelopment and infill development.

At present MOP policies generally speak to appropriate redevelopment and infill development that respects the existing and planned neighbourhood character within these neighbourhoods. It does not, however, specifically define a neighbourhood's existing character. Therefore, to effectively manage change, neighbourhood character policies should be added to the Applewood and Rathwood character areas in the Official Plan. Such changes would guide future development applications in Ward 3.

What will the New Policies Aim to Do?

New policies should reflect the 'principles for change' identified in the pilot project, as highlighted in the educational brochure. Specifically, the proposed MOP policies will aim to:

- Recognize the Applewood and Rathwood neighbourhoods as well-established, stable residential areas with a mix of dwelling types, community infrastructure and services
- Ensure new development in these neighbourhoods consider transitions in built form, density and scale
- Require a range of housing types and tenure be provided to meet the housing needs and preferences of all residents
- Recognize and reference the existing neighbourhood character to ensure future development is compatible with existing land uses while encouraging higher densities on and adjacent to corridors and the Rathwood-Applewood Community Node

What will the Policies Include?

It is proposed that Applewood and Rathwood Neighbourhood Character Area policies make specific reference to the following:

- In the neighbourhood cores, within areas like Rockwood Village and Applewood Heights, existing housing is mainly single-detached homes built primarily between 1960 and 1980
- Semi-detached units are dispersed throughout the neighbourhoods
- Medium density townhouse and high density apartment development is primarily located along Rathburn Road and portions of Ponytrail Drive, Tomken Road and Dixie Road
- Apartment dwellings are predominantly located along existing corridors and major streets – Bloor Street, Burnhamthorpe Road, Dixie Road and some areas on Dundas Street
- Areas like the East Bloor neighbourhood have established "tower in the park" apartment sites that were generally built in the 1960s and 1970s. These existing apartment sites are an important component of the neighbourhood housing stock and should be protected

- The existing parks and open space system consists of areas such as Garnetwood Park, Applewood Hills Park, Applewood Heights Park, Fleetwood Park, Cherrywood Park, and the Applewood Trail. Opportunities for additional community programming and improvements to site furnishings should be explored
- Higher density developments should be directed to corridors such as Burnhamthorpe Road, Cawthra Road, Tomken Road and Dixie Road, as well as Fieldgate Drive and Ponytrail Drive
- Lands within and surrounding the Rockwood Mall that form part of the Rathwood-Applewood Community Node are identified for intensification. These lands should be encouraged to develop as a high-density, mixed use focal point to create a central hub and destination for the community
- Dundas Street is identified as an Intensification Corridor where higher densities and a greater mix of uses are encouraged to support the future vision of this corridor as a high-order transit corridor. The vision will be further refined through the Dundas Connects planning initiative.

Financial Impact

None

Conclusion

Imagining Ward 3: A Pilot Project for Neighbourhood Planning was a new approach to assist the community in managing local change. Through a focused dialogue about physical change in the Applewood and Rathwood Neighbourhoods, an educational brochure was produced and the need for new character area policies identified. A public meeting to consider the new policies will be held upon Committee's receipt of this report.

Attachments

Appendix 1: *Imagining Ward 3: A Pilot Project for Neighbourhood Planning: Information Report*, dated May 24, 2016

Appendix 2: Brochure titled *Imagining Ward 3*



Edward R. Sajecki, Commissioner of Planning and Building

Planning and Development Committee

2017/02/03

5

Originators files: CD.04-WAR

Prepared by: Frank Marzo, Policy Planning

City of Mississauga Corporate Report



Date: 2016/05/24

To: Chair and Members of Planning and Development Committee

From: Edward R. Sajecki, Commissioner of Planning and Building

Originator's files:
CD.04-WAR

Meeting date:
2016/06/13

Subject

Imagining Ward 3: A Pilot Project for Neighbourhood Planning Information Report

Recommendation

That the report entitled "Imagining Ward 3: A Pilot Project for Neighbourhood Planning", dated May 24, 2016, from the Commissioner of Planning and Building, be received for information.

Background

The Mississauga Official Plan (2011) (MOP) envisions within Ward 3 a community node surrounded by a number of residential neighbourhoods. Specifically, the MOP identifies the Rathwood-Applewood Community Node, as an area where intensification should be directed. A community node is viewed as providing access to a multitude of uses that are required for daily living – local shops and restaurants, community facilities, cultural, heritage and entertainment uses, schools, parks, open space as well as a diverse housing stock that meets the housing needs of the adjacent population as they move through their lifecycle. They contain a variety of community infrastructure such as, recreational facilities, libraries, police stations and places of religious assembly.

Surrounding the Community Node are a variety of neighbourhoods reflecting different stages of the city's development. Neighbourhoods are characterized as physically stable areas with a character that is to be protected. Therefore, they are not appropriate areas for significant intensification. This does not mean that they will remain static or that new development must imitate previous development patterns, but rather that when development does occur it should be sensitive to the neighbourhood's existing character.



Project Kick-off Meeting

Community Focus Group Meeting #1

Community Focus Group Meeting #2

Community Focus Group Meeting #3

Update Report

Summary of Recommendations

Figure 1

Scope of Pilot Project

Recognizing that change will occur within neighbourhoods, a neighbourhood planning initiative to engage the Ward 3 community in a forward thinking dialogue about the future of their neighbourhoods was developed. The project specifically focused on the Rathwood and Applewood Neighbourhoods, which have been the subject of several recent development applications. The process engaged local residents around how best to manage neighbourhood change effectively. Figure 1 identifies the six steps involved in the Imagining pilot project.

Comments

The Imagining Ward 3 process was initiated to pilot a new approach to neighbourhood planning. Specifically, the process is founded on a principle of working collaboratively with local residents to examine and understand the factors driving change (e.g., demographics, development trends, and market conditions) and to identify opportunities through land use policy and other city service to assist in managing potential impacts. In doing so, as the change process occurs and development applications are considered, the neighbourhood is in a better position to proactively guide versus respond to change.

Critical to success of this initiative is building positive relationships with residents, and educating and informing them of the existing land use planning framework. The process aimed to educate residents on what they can do to inform and guide future plan policy, specifically on matters related to, but not limited to:

- Housing choices and land uses
- Neighbourhood built form
- Streetscapes, parks and open spaces
- Greyfield and redevelopment sites

a) The Engagement Process

An initial kick-off meeting for the Imagining process was held in January 2016. This meeting outlined the purpose of the new engagement process. Staff emphasized the importance of facilitating an open two-way dialog around existing plan policy as it pertains to Ward 3 and to clarify and address questions about potential development pressures in Ward 3.

Volunteer Working Group

From the launch meeting, staff solicited a group of community volunteers to participate in a protracted dialogue about their neighbourhoods. The group would represent the demographics and views of the community while representing the individual views of their respective neighbourhoods. While not a large number of volunteers registered for this process, those that did actively participated and provided great insight.

Workshops

Consultants from Brook McIlroy led the working group through workshop-style meetings. The meetings engaged residents in a discussion about the future of their neighbourhoods over the next 15-20 years. The group discussed how best to manage and respond to change and identified planning tools which could be used to help produce positive change. A list of potential recommended policy amendments, as well as improvements to existing city programs and services were identified. The following summarizes the key discussion points at each of the three group meetings:

- *Community Focus Group Meeting #1:*
Discuss and obtain feedback on key opportunities to enhance their community and identify areas of concern.
- *Community Focus Group Meeting #2:*
A detailed, focused discussion around key themes that emerged from the first session. A discussion on the establishment of a set of guiding principles to inform future plan policy or service changes to better manage change in Ward 3.
- *Community Focus Group Meeting #3:*
A discussion on opportunities and constraints within the neighbourhoods, and the potential planning tools to manage change.

b) Key Issues & Opportunities In Managing Neighbourhood Change

The Imagining pilot project provided a forum to share information and hear from local residents. Some of the themes emerging through the process include:

1. Housing and Built Form

- The neighbourhoods and sub-neighbourhoods of Applewood and Rathwood are primarily characterized by single-detached homes with moderate to wide lot frontages of at least 50 feet (15 metres) that front on to local roads which should be protected from over-development to ensure that there is appropriate form, massing and density of any new development to enhance neighbourhood pride and identity;
- Existing higher density apartment sites within the neighbourhood should be well-kept and any new development on these sites should be respectful of the neighbourhood character and consider green development standards.

2. Redevelopment Sites

- Lands within and surrounding the Rathwood-Applewood Community Node (e.g. Rockwood Mall site) may be appropriate for mid-rise mixed use, residential apartment buildings and street-related retail to create a sense of vibrancy and animation;
- New development should be directed along major arterial roads to establish a sense of place and more 'village-like' character with the buildings.

3. Streetscapes & Urban Design

- Consider wider sidewalks and landscaped boulevards and incorporating multi-use trails along arterial roads;

- Consider improving the safety of crossings, lighting and wayfinding signage;
- Arterial roads could benefit from additional street furniture, pedestrian-scaled lighting, street trees, wider sidewalks, and landscaped boulevards which can create a more improved pedestrian-oriented streetscape;
- Consider softening the appearance of existing noise walls through improved landscape buffers.

4. Parks and Open Spaces

- Retain and enhance the existing network of parks, open spaces and natural heritage features within Applewood and Rathwood.
- Promote additional community recreational activities within the existing park network and consider basketball courts, soccer fields, ultimate Frisbee and playgrounds, among others to foster an active, healthy community and prioritize community building.
- Consider barrier-free access, new park furniture and enhanced recreational activities in parks for seniors.
- Consider incorporating traffic calming measures and increase pedestrian crossings.

c) **Preferred Tools For Managing Neighbourhood Change**

This pilot project created an open forum to better understand the character of these neighbourhoods. Translating this feedback into policy or services to ensure future development is effective and sensitive to this is important. The following tools were identified as opportunities to manage change within the Applewood and Rathwood neighbourhoods:

1. Plan Policy Amendments:

Consider updating Mississauga Official Plan policies in both Section 14: Community Nodes (14.8 Rathwood- Applewood) and Section 16: Neighbourhoods (16.1 Applewood and 16.21 Rathwood) to reflect the individual character of these neighbourhoods.

2. Zoning Amendments:

Consider site and area-specific zoning regulations for the Applewood and Rathwood neighbourhoods to regulate appropriate infill.

3. Design Guidelines:

Consider urban design guidelines specifically for Ward 3 neighbourhoods that might address how to appropriately integrate new buildings into the existing character.

4. Incentives:

Identify financial incentives or program funding which may be available to retain and facilitate needed improvements to existing affordable housing stock.

Financial Impact

No financial implications at this time.

Conclusion

The Imagining Ward 3 pilot is a new way of engaging local residents. While significant development is not intended for stable residential neighbourhoods, some infill and redevelopment is. Traditionally, residents often find they are in a reactive position to proposed projects. The pilot process aimed to educate local residents and stakeholders on planning, equip them with the knowledge on planning applications, and identify tools available to manage change in their neighbourhoods.

In the fall, staff will table a final Imagining Ward 3 Report with detailed summaries of the meetings and key recommendations.

Overall, the Imagining Ward 3 pilot has been a success in facilitating a conversation about change and providing an avenue for staff and residents to build respectful collaborative working relationships.

With any Pilot project, improvements can be made. However, staff believe this approach to neighbourhood planning is valuable, and should be used elsewhere in Mississauga where neighbourhoods are facing similar issues.

Attachments

Appendix 1: Rathwood-Applewood Map



Edward R. Sajecki, Commissioner of Planning and Building

Prepared by: Frank Marzo, Policy Planning

IMAGINING WARD



4.2

Housing and
Built Form



Streetscapes and
Urban Design



Redevelopment
Sites



Parks and
Open Space



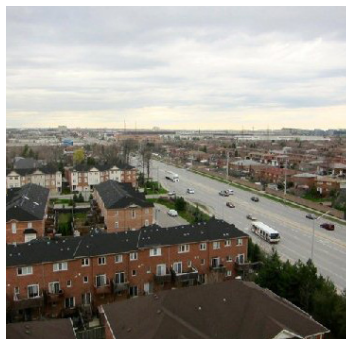
Planning for Change in Ward 3

Managing change is integral to Mississauga's continued success and prosperity. As Mississauga is now at the end of its greenfield growth phase, new growth is to be accommodated through redevelopment and intensification within the city's already developed areas. This new era in development has generated the need to review goals, objectives and development growth strategies, which will continue to provide places to live and work and meet services and amenities to meet the needs of daily living. The City promotes sustainable development to create healthy and complete communities.

Creating a Community Dialogue

Critical to managing change is building relationships within the community and informing residents and business owners about the existing land use planning framework. To accomplish this, the City's Planning and Building Department initiated *Imagining Ward 3: A Pilot Project for Neighbourhood Planning*.

The Imagining Ward 3 engagement process was launched in January 2016 and focused on how change can impact a neighbourhood's character, specifically within the Rathwood and Applewood Neighbourhoods. Through a community dialogue, residents helped create a vision to manage change and direct future growth within their community.



Emerging Vision for Neighbourhood Character

Ward 3's Applewood and Rathwood Neighbourhoods are well-established, stable residential areas with a mix of dwelling types, community infrastructure and services. They are primarily characterized by single-detached homes built between 1960 and 1980, with moderate to wide frontages of (eg. 15 meters, 45 feet). Additionally, semi-detached houses, townhomes, and apartment buildings are dispersed throughout. Streets are moderate to wide, and typically have sidewalk space on at least one side of the road. Various parks and open space create a network of "green gems" for passive and active recreation.

How can we maintain this character while planning for the future?



Housing and Built Form

- Ensure appropriate form, massing and density of new development, as well as an appropriate mix of uses
- Protect existing neighbourhoods from over-development



Streetscapes and Urban Design

- Improve the public realm by widening sidewalks and including landscaping and street furniture
- Activate street frontages along main roads



Parks and Open Space

- Retain and enhance the existing network of parks, open spaces and natural heritage features
- Create pocket parks and spaces for social encounters



Redevelopment Sites

- Create a sense of vibrancy and identity
- Promote cultural and built heritage
- Determine and reinforce a sense of livable density on a neighbourhood-wide basis

Priorities for Change

Housing and Built Form



Neighbourhood core areas, like Rockwood Village and Applewood Hills/Heights, are not intended for significant intensification and are protected from over-development. However, where appropriate development opportunities exist, development should respect the existing lotting and street pattern, height, scale and typology of the area.

Parks and Open Space



Parks such as Fleetwood Park, Garnetwood Park, Rathwood Park, and Applewood Trail network are important to the neighbourhood. As such, opportunities should be explored to enhance access, programming and facilities.

Streetscapes and Urban Design



Busy roads, like Cawthra Road, Dixie Road, Rathburn Road, and Bloor Street could benefit from streetscape improvements such as landscaping, wider sidewalks, street trees, and multi-use trails, to improve public realm.

Redevelopment Sites



New development should be directed to Rockwood Mall, as well as streets like Tomken Road, Dixie Road, Bloor Street, Cawthra Road, Burnhamthorpe Road, and Dundas Street. These areas are appropriate for low to mid-rise mixed use development with a mix of commercial, office, and residential uses.

Managing Change in Ward 3

4.2



Our Official Plan

While the Applewood and Rathwood neighbourhoods are not identified in Mississauga's Official Plan as specific areas for major intensification, some growth is expected through redevelopment and infill development. However, Mississauga Official Plan identifies Applewood-Rathwood Community Node (i.e. Rockwood Mall), Intensification Corridors like Dundas Street, and Corridors like Burnhamthorpe Road and Cawthra Road as areas where new growth should be directed. These areas should include a mix of uses to further support the daily needs of residents of all ages and abilities. The following summarizes the themes and current policy direction of Mississauga Official Plan as it applies within the Rathwood and Applewood communities:

1. Build a Desirable Urban City

- Create a strong sense of place with uses that are culturally vibrant, attractive, liveable and of a high quality design
- Appropriate redevelopment and infill development will revitalize local neighbourhoods but also 'fit' into the surrounding community; it does not have to be exactly the same as what exists but will respect the existing and planned neighbourhood character

2. Direct Growth

- Residential intensification within Neighbourhoods will generally occur through infilling and the redevelopment of existing commercial sites as mixed use areas
- Higher density development should be located along corridors or on existing apartment sites
- Significant intensification is to be directed to Rockwood Mall and provide a mix of uses



3. Complete Communities

- Create communities that enable people to not only live and work, but also thrive. Consider opportunities to improve community amenities such as public art, affordable housing, daycare, and parks and open spaces
- Significant new development may be required to provide a Community Infrastructure Impact Study that will review existing community services to ensure increased demand caused by proposed intensification can be met

4. Neighbourhood Character Area

- For medium and high density development, new development should not exceed the height of any existing buildings on the property
- Heights greater than 4 storeys in neighbourhood areas must appropriately transition to the surrounding area and enhance the existing/ planned community

Continuing the Conversation

Interested in learning more about managing change in Ward 3, and other areas of the City? Visit the [City's Planning Hub](#).

For more information, please go to:
mississauga.ca/portal/residents/cityplanning

or visit us at :
Planning Services Counter 3rd floor
City of Mississauga, 300 City Centre Drive,
Mississauga ON L5B 3C1

City of Mississauga

Corporate Report



Date: 2017/02/01

To: Chair and Members of Planning and Development Committee

From: Edward R. Sajecki, Commissioner of Planning and Building

Originator's files:
CD.04-DUN

Meeting date:
2017/02/27

Subject

Update on Dundas Connects - the Dundas Corridor Master Plan

Recommendation

That the report titled 'Update on Dundas Connects – The Dundas Corridor Master Plan', dated February 1, 2017, from the Commissioner of Planning and Building, be received.

Background

In February 2015, Planning and Development Committee (PDC) approved the Dundas Connects project. This project, which applies to the subject lands generally illustrated in Map 1 (Appendix 1), aims to:

- Test several rapid transit scenarios for the Dundas Corridor, and recommend the transit mode that best provides cost-effective mobility appropriate to anticipated demand, while also unlocking growth and development potential
- Identify appropriate changes to land use along the Dundas Corridor that support intensification and transit-supportive development
- Identify the location and boundaries of the Dixie-Dundas Community Node
- Update the boundaries of the Provincial Special Policy Areas (i.e. flood prone areas), and identify mitigation measures as necessary to reduce flood risk, and support intensification and higher-order transit
- Estimate the cost to implement the study's rapid transit proposals, and recommend, if any, innovative financing tools necessary to facilitate implementation
- Be conducted in a manner that conforms to the requirements of Phases 1 and 2 of the Municipal Class Environmental Assessment approval process.

Comments

Dundas Connects is on track to complete on time and on budget in Q3 2017.

Since approval by PDC, the City engaged in a careful, multi-stage procurement process to retain an experienced consulting team. That team, consisting of AECOM, SvN, and Swerhun Facilitation, began work in fall 2015. Since that time, the team has:

Planning and Development Committee	2017/02/01	2
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Originators file: CD.04-DUN

- Designed and implemented two waves of public-engagement exercises, complemented by innovative in-person and digital tools
- Based on feedback received, drafted a vision for the corridor
- Completed a scan of problems and opportunities
- Developed alternatives for transit technology, land-use, and corridor-design scenarios.

These alternatives have been given to the public for comment, and based on the feedback received, the team is finalizing its recommendations. The expected project timeline is as follows:

- Brief Council Working Group on final recommendations, February and March 2017
- Finalize public materials, March 2017
- Present final plan to public, April 2017
- Take input from public on final plan, April – May 2017
- Complete final plan, June – August 2017
- Present final plan to Planning and Development Committee for endorsement, September 2017.

The project team is also working with the Province and with the Toronto and Region Conservation Authorities to update the boundaries of the Special Policy Areas in the vicinity of Dundas and Dixie (Credit Valley Conservation is being briefed as well). Special Policy Areas have the practical effect of limiting intensified development within their borders. The City will work with its partners to update these boundaries to reflect the actual areas of flood risk. Additionally, the final report will propose mitigation measures that, if implemented, might eliminate the risk of flooding in the area.

Strategic Plan

The Dundas Connects study will advance the Move: Developing a Transit-Oriented City and Connect: Completing our Neighbourhoods pillars. Relevant actions include:

- Action 5 – Provide alternatives to the automobile along major corridors
- Action 18 – Require development standards for mixed-use development to support transit
- Action 19 – Accelerate the creation of higher-order transit infrastructure.

Financial Impact

The study is funded by a dedicated grant from the Province of Ontario.

Conclusion

The City is developing a master plan for the Dundas Corridor. The plan will make recommendations for higher-order transit along the Dundas Corridor, as well as for land use changes to support intensification and transit-supportive development. The plan will also update the boundaries of the Provincial Special Policy Areas (i.e., flood prone areas) along Dundas

Planning and Development Committee	2017/02/01	3
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Originators file: CD.04-DUN

Street East and make recommendations as necessary for mitigation of flood danger. The final master plan will be brought to Council for approval in September 2017.

Attachments

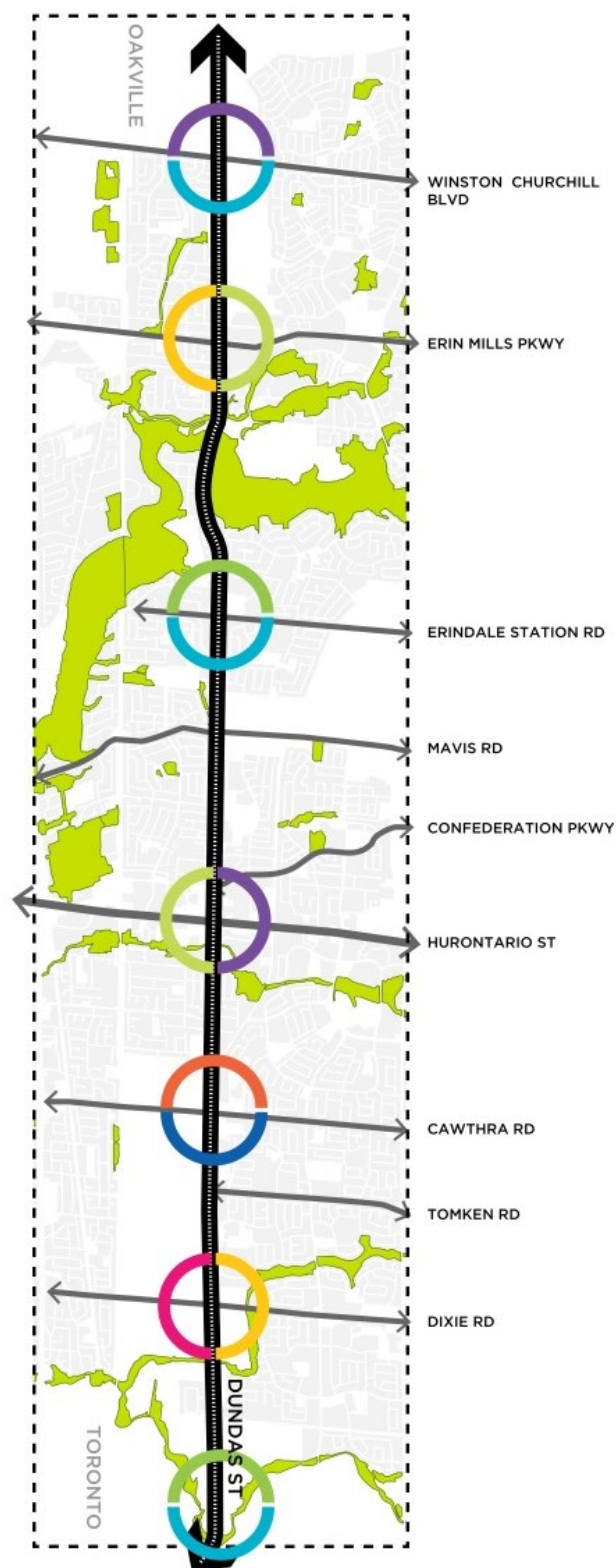
Appendix 1: Map – Dundas Street Corridor Study Area



Edward R. Sajecki, Commissioner of Planning and Building

Prepared by: Andrew Miller, Strategic Leader, Dundas Corridor

Appendix 1: Dundas Street Corridor Study Area



City of Mississauga

Corporate Report



Date: 2017/02/03

To: Chair and Members of Planning and Development Committee

From: Edward R. Sajecki, Commissioner of Planning and Building

Originator's files:
CD.15.EMP

Meeting date:
2017/02/27

Subject

Municipal Comprehensive Review of Employment Lands - 2016 Update

Recommendation

1. That the strategic conversion of lands within the Major Transit Station Areas identified in the report titled *Municipal Comprehensive Review of Employment Lands – Update 2016*, from the Commissioner of Planning and Building, dated February 3, 2017, be approved.
2. That planning staff be directed to initiate a detailed planning process including the preparation of transit station area plans for selected Major Transit Station Areas as identified in the report titled *Municipal Comprehensive Review of Employment Lands – Update 2016*, from the Commissioner of Planning and Building, dated February 3, 2017.
3. That the report titled *Municipal Comprehensive Review of Employment Lands – Update 2016*, from the Commissioner of Planning and Building, dated February 3, 2017, be circulated for information to the Region of Peel, Mississauga Board of Trade and to the Building Industry and Land Development Association (BILD).

Report Highlights

- There is a need to intensity densities at Major Transit Station Areas (MTSAs) as a result of proposed provincial minimum density targets, good planning and supporting transit infrastructure investment projects
- 12 of 44 MTSAs are located in employment areas or include employment lands adjacent to residential areas which have potential for intensification through the strategic conversion of some "Mixed Use" designated employment lands
- Staff initiated an update to the Municipal Comprehensive Review of Employment Lands 2015 report which concluded that there is sufficient employment land supply to accommodate forecasted employment growth to 2041 provided the City is a good steward of its employment lands and implements the policies and vision of the Mississauga Official Plan
- The updated report also considered and recommended against permitting car dealerships

 in employment areas

Background

Employment lands are vital to the economic well-being of the city and the businesses and jobs they accommodate are a key component of a complete and balanced community. In Mississauga, where there is limited greenfield land left for development, competition for land puts pressure on employment lands for conversion to non-employment uses.

In response to this conversion pressure, the Province has legislative requirements and policy directives that address the long term protection of employment lands and conversion conditions. Every five years the City is required to conduct a Municipal Comprehensive Review (MCR) of its employment lands and policies to ensure it has enough employment lands to accommodate future employment growth and the policy framework to protect its inventory of employment lands from conversion to other land uses.

Municipal Comprehensive Review of Employment Lands 2015

A review of the city's employment land inventory was completed in 2015 (herein referred to "MCR 2015") which applied three employment land demand scenarios used to examine different employment land use patterns and the resulting vacant employment land requirements to 2041.¹ The report recommended the City follow through with the vision and city structure of the Mississauga Official Plan (MOP) to effectively and efficiently accommodate the city's future employment land needs. Additionally, to capitalize on the planned infrastructure investments and direct employment, particularly freestanding office, to mixed use areas including the Downtown, Major Nodes, Intensification Corridors and Major Transit Station Areas (MTSAs).²

The final report recommended three conversion areas as supporting the City's strategic objectives or community building goals. These were the Lakeview Employment Area, in its entirety, portions of the Dixie Employment Area; and the Northeast Employment Area, in immediate proximity to the Malton Neighbourhood Character Area. The extent of area to be

¹ The three employment land demand scenario assumptions: Scenario 1 (Base Case) assumed a continuation of current density and employment type mix; Scenario 2 (Nodes and Corridors Evolution) assumed a more concentrated form of employment growth in mixed use nodes, corridors, and intensification areas with an emphasis on major office employment growth. This scenario supported and would implement Mississauga Official Plan policies; and Scenario 3 (Employment Lands- Focused Growth) assumed a less dense form of employment development with all major office employment allocated to employment lands instead of the Downtown and other mixed use areas.

² The Growth Plan defines an MTSA as the area including and around any existing or planned higher order transit station or stop (measured by a 500m radius, representing a 10-minute walk) within a settlement area; or the area including and around a major bus depot in an urban core.

converted was to be determined through a detailed local planning exercise. These are all underway and include the draft Lakeview Waterfront Major Node Policies, The Dundas Connects Study and the MyMalton study.

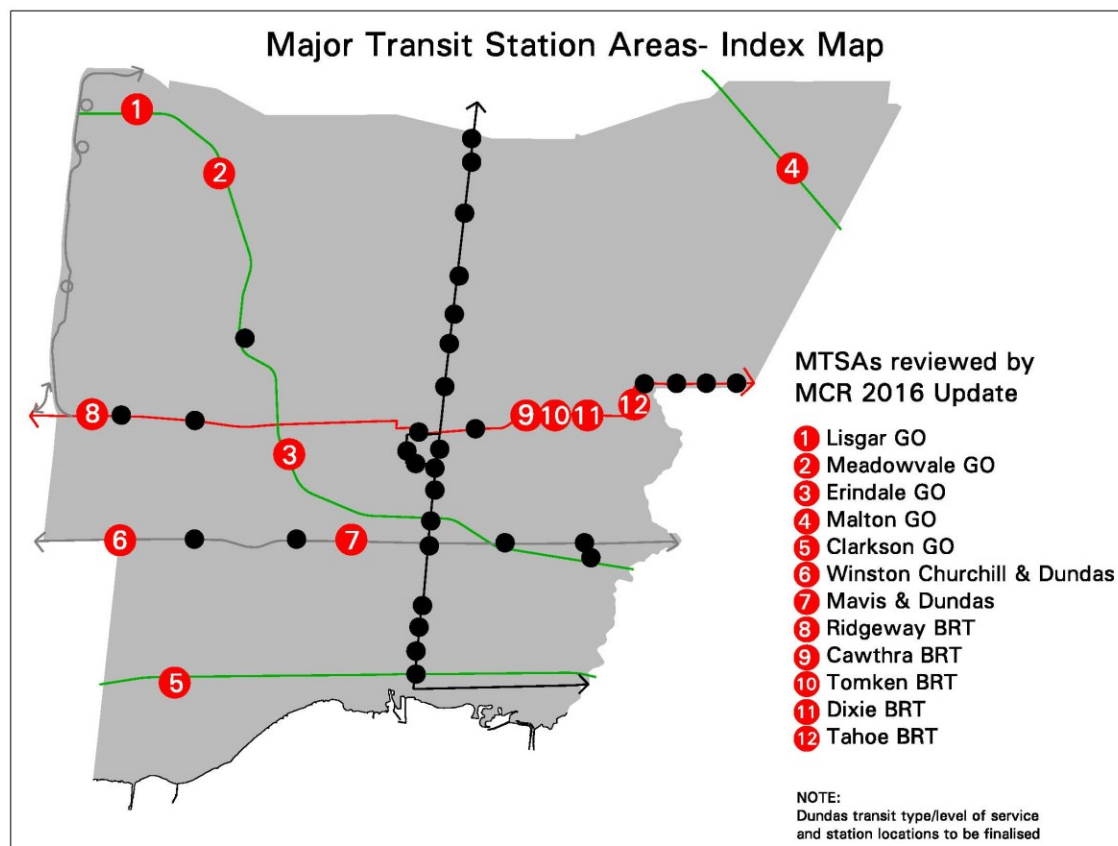
Lands located outside of the recommended conversion areas were not going to be considered for conversion to non-employment uses until the next five-year MCR process (2020). The MCR 2015 report also did not contemplate conversions within MTSAs which is a new focus of the Growth Plan.

Why update the Municipal Comprehensive Review of Employment Lands 2015 report?

There is a growing need to increase densities within MTSAs across the City since the MCR 2015 report was completed. The Province has recently proposed an update to the Growth Plan which will require municipalities to achieve minimum density targets for all MTSAs by 2041 or sooner (see Appendix 1). The City and Province have made significant investments in several higher order transit projects which will result in a total of approximately 44 MTSAs across Mississauga as shown on the map below.³ There is general consensus that increasing densities and providing a mix of uses around higher order transit stations represents good planning.

The City has undertaken a preliminary review of its MTSAs and has determined that there are opportunities to intensify many of them to support transit infrastructure investments and help implement the vision and policies of MOP. A number of MTSAs are in employment areas or include employment lands adjacent to residential areas which have potential for intensification but were not considered for conversion by the MCR 2015 study. An update to the employment market data and land supply inventory was necessary in order to consider any potential impacts of employment land conversions to non-employment uses.

³ The Mississauga Bus Rapid Transit (BRT) is expected to be completed in 2017. The Hurontario Light Rail Transit (LRT) project is planned to start construction in 2018. Regional Express Rail (RER) projects are currently underway by Metrolinx which include the introduction of electrified trains on the Lakeshore West and Kitchener GO rail lines, providing all day 15 minute service, in both directions. Service improvements are also planned for the Milton rail line. In addition, studies for the Dundas Corridor and the Ninth Line lands are underway which are considering higher order transit for these corridors.



Car Dealerships within Employment Lands

Updating the MCR has provided the opportunity for the City to consider the impact of permitting motor vehicle sales (herein referred to as “car dealerships”) on lands designated “Business Employment” given the continued interest expressed by the development community and the large number of Committee of Adjustment applications received on this matter. Car dealerships are a retail use, and not currently permitted on employment lands. Currently, the MOP permits car dealerships on lands designated “Mixed Use”.

It has been asserted that car dealerships may be evolving into a smaller, more compact type of model, providing a higher employment density than they have in the past. Given pressure from the development industry it is prudent to better understand this potential trend and assess the impact of car dealerships on the viability and supply of employment lands if they were to be permitted on employment lands.

Comments

The City retained Cushman & Wakefield (C&W) to provide an update to the MCR 2015 report that they prepared. Their report titled “Municipal Comprehensive Review of Employment Lands – 2016 Update”, herein referred to as “MCR 2016 Update” (see Appendix 3) provided an update

to the industrial and office market data to evaluate the ability of employment land conversions at 12 MTSA's that border or are near residential areas and considered the impact of permitting car dealerships in employment areas.

Employment Lands Performance

The key industrial and office market data findings from the MCR 2016 Update are as follows:

- The industrial market is showing early signs of transition as new supply slows and it is transitioning from greenfield to a more fragmented infill development
- The outlook for industrial-type employment growth will play a significant factor in the amount of industrial land that will be required to meet future demand. Future land efficiencies may change based on future differences in employment densities
- Mississauga remains well positioned as a preferred suburban location for office employers in the Greater Toronto Area and has a suitable amount of vacant land to accommodate future office growth despite recent market weakness as a result of Downtown Toronto growth
- The city's supply of 782 ha (1,932 acres) of vacant employment lands will accommodate growth to 2041 based on projected employment growth provided the City is a good steward of its employment lands and conforms to the vision and policies of the MOP

What does this mean for the future of Major Transit Station Areas?

Staff will continue to study all existing and proposed MTSA's (see Appendix 3) to make sure there is a land use planning framework in place to intensify MTSA's and support transit infrastructure investments. The MCR 2016 Update report has indicated that some of the 12 MTSA's reviewed have potential opportunities to increase densities. The target conversion areas which focus on "Mixed Use" designated employment lands within certain employment areas currently contain jobs predominantly servicing the residential areas with little or no chance of the lands being used for employment lands employment⁴ type jobs in the future.

With the creation of detailed transit area plans for select MTSA's any conversion of employment lands to non-employment uses would be subject to the following requirements:

- Only the following medium and high density uses to be promoted as suitable for targeted conversions subject to specific conditions:
 - Offices

⁴ Employment Land Employment (ELE) jobs are principally industrial-type jobs, including manufacturing, research and development, warehousing and distribution, and wholesale trade.

- Other non-residential uses including institutional designation to an office use – where appropriate
- Medium and high density residential
- Small-scale retail-commercial uses ancillary to the above uses, in a broader mixed use redevelopment
- Require replacement of existing employment type at a minimum 1:1 ratio (office or employment lands employment jobs should not be replaced by population related employment jobs⁵)
- Retain certain strategic employment lands that are a component of a larger employment area that is well-functioning (e.g., low vacancy, evidence of new supply or property reinvestment) may be of strategic importance and should be retained

Recommendation:

It is recommended that transit station area planning studies be completed for MTSAAs that are not currently or have not recently been subject to a land use intensification or transit oriented development study (see Appendix 2). Further, it is recommended that subject to the conditions and recommendations identified by the consultant in their MCR 2016 Update, the studies for the following MTSAAs consider the opportunity of converting lands in employment areas for higher density uses:

- *Clarkson GO*
- *Malton GO*
- *Erindale GO*
- *Meadowdale GO*
- *Lisgar GO*
- *Winston Churchill & Dundas*
- *Mavis & Dundas*
- *Erin Mills Parkway & Dundas*
- *Ridgeway BRT*

Car Dealerships in Employment Areas

Car dealerships are considered a major retail use and therefore are not permitted on lands designated “Business Employment” in Employment Character Areas. They are permitted on lands designated “Mixed Use” in both residential and employment areas, however most “Mixed Use” lands are in Intensification Areas and the traditional, land extensive nature of car dealerships is not consistent with the transit oriented vision for these areas. Because of the

⁵ *Population Related Employment (PRE) jobs include retail, educational services, health care, government, and accommodation and food services, and are generally accommodated within existing neighbourhoods and commercial areas and primarily serve a residential population but may locate on employment lands to support the employment base.*

difficulty in directing car dealerships to an appropriate land use designation the consultant was asked to consider the impact on the employment land supply if employment land conversions to permit car dealerships were approved.

The key findings of this review are as follows:

- Average new car dealership occupies 1.8 ha (4.4 ac) of land, average site coverage of 14% and provides 46 jobs compared to 63 jobs for an industrial building on a 1.8 ha (4.4 ac) site with a site coverage of 30% to 40%
- Based on current growth, 53 ha (131 ac) of land for car dealerships would be required to 2041 resulting in a significant decline in overall availability of vacant employment land
- The consultant does not recommend car dealerships be permitted in employment areas even if they do not undermine the viability or integrity of employment areas because of the following concerns:
 - inadequate employment land supply – priority should be given to employment lands employment and office employment uses to meet their job growth targets
 - clustering of automotive uses and the risk of displacing established employment uses
 - car dealerships desire prime sites which are ideal for office and prestige industrial users
 - car dealerships are a low employment density land use that would not maximize the productivity of lands
 - non-complimentary use – automotive sales is not a land use that benefits other employment area businesses, unlike restaurants and financial services

The issue of permitting car dealerships in employment areas should be considered more comprehensively. The use is classed as major retail which includes other uses such as home improvement and other large format retailers. Further review is necessary to better understand the implications of permitting major retailers in employment areas on a city-wide basis.

Consideration of locational and other development criteria needs to be explored. In addition, the changing nature and modernization of employment land based businesses needs to be further studied as does the potential impact on job and employment land densities from the rise of automation and other technological advancements. Staff will scope this research project and report back at a future date.

Financial Impact

Not Applicable.

Conclusion

There is a need to intensify residential and employment densities within Mississauga's MTSAs as a result of minimum density targets proposed by the Province, good planning principles, and to support the investments being made into building the City's transit infrastructure. An update

to the MCR 2015 report was required to consider the conversion of some employment lands within MTSA's to help achieve higher densities. The updated report concluded that within the context of the current MOP, the City has a sufficient supply of employment lands. It recommends that while being cautious, strategic employment land conversions targeting "Mixed Use" designated lands within employment areas could be considered at 12 of the 44 MTSA's. The conversions would be subject to specific conditions and further transit station area planning studies.

The consultant does not recommend car dealerships be permitted in employment areas. Further review should be undertaken to better understand the locational and development requirements of car dealerships and other major retailers as these uses are not consistent with the vision for intensification areas or along major transit corridors where they are currently permitted and located.

Attachments

Appendix 1: Growth Plan Update Density Targets

Appendix 2: MTSA Study Review Status

Appendix 3: C&W MCR 2016 Update Report



Edward R. Sajecki, Commissioner of Planning and Building

Prepared by: Romas Juknevicius, Policy Planner

APPENDIX 1

Proposed Growth Plan Minimum Density Targets for Major Transit Station Areas.

The current Growth Plan (2006) does not establish any growth thresholds or targets for Major Transit Station Areas (MTSAs). The Province recently proposed changes to the Growth Plan that would require all MTSAs to achieve, by 2041 or earlier, the following minimum gross density targets:

- 160 residents and jobs combined per hectare for MTSAs served by light rail transit or bus rapid transit
- 150 residents and jobs combined per hectare for all MTSAs served by express rail service on the GO transit network

The Growth Plan also speaks to planning around these areas including the need to pre-zone lands, plan for affordable housing, reduce parking standards and prohibit land uses and built form that would adversely affect the achievement of the minimum density targets.

MISSISSAUGA - Major Transit Station Areas Review Status

	MTSA Name	Transit	Study Status
Studies Complete and Densities Exceeding or On Track to 150/160 PPJ/ha			
1	Matthews Gate	LRT	Hurontario Master Plan - complete
2	Main	LRT	Downtown 21 Master Plan - complete
3	Robert Speck	LRT	Downtown 21 Master Plan - complete
4	Duke of York	LRT	Downtown 21 Master Plan - complete
5	Queensway	LRT	Hurontario Master Plan - complete
6	Central Parkway	LRT	Hurontario Master Plan - complete
7	Etobicoke Creek	BRT	No Study but exceeds 150 ppj
8	Cooksville	GO/LRT	Hurontario Master Plan - complete
9	Dundas	LRT	Hurontario Master Plan - complete
10	Orbitor	BRT	Airport Corporate Special Site 1 Policies - complete
11	Eglinton	LRT	Hurontario Master Plan - complete
12	Matheson	LRT	Hurontario Master Plan - complete
13	Port Credit	GO(RER)/LRT	Hurontario Master Plan / Port Credit GO Station Master Plan – complete
14	North Service	LRT	Hurontario Master Plan - complete
Studies Complete/Underway to Increase Densities			
15	Erindale Station	Tbd	Dundas Connects - Underway
16	Cawthra	Tbd	Dundas Connects - Underway
17	Dixie	Tbd	Dundas Connects - Underway
18	Erin Mills Pkwy.	Tbd	Dundas Connects - Underway
19	Dixie	GO	Dundas Connects - Underway
20	Bristol	LRT	Hurontario Master Plan - complete
21	Renforth	BRT	Airport Corporate Special Site 1 Policies - complete
22	Rathburn/City Centre	LRT/BRT	Downtown 21 Master Plan - complete
23	Britannia	LRT	Hurontario Master Plan - complete
24	Derry	LRT	Hurontario Master Plan - complete
25	Highway 407	LRT	Hurontario Master Plan - complete
26	Courtneypark	LRT	Hurontario Master Plan - complete
27	Spectrum	BRT	Airport Corporate Special Site 1 Policies - complete
28	Mineola	LRT	Hurontario Master Plan - complete
29	Winston Churchill	Tbd	Dundas Connects - Underway
30	Mavis	Tbd	Dundas Connects - Underway
Studies Required to Increase Densities			
31	Winston Churchill	BRT	Study Required
32	Erin Mills	BRT	Study Required
33	Ridgeway	BRT	Study Required
34	Cawthra	BRT	Study Required
34	Tomken	BRT	Study Required
36	Dixie	BRT	Study Required
37	Tahoe	BRT	Study Required
38	Streetsville	GO	Study Required
F 39	Central Parkway	BRT	Study Required
40	Lisgar	GO	Study Required
41	Meadowvale	GO	Preliminary Concept Master Plan completed by Metrolinx and City – Further Study Required
42	Erindale	GO	Study Required
43	Malton	GO (RER)	PRIORITY - Study Required
44	Clarkson	GO (RER)	PRIORITY - Study Required
Note: MTSA's in bold text are being considered for strategic conversion opportunity			



MUNICIPAL COMPREHENSIVE REVIEW OF EMPLOYMENT LANDS – 2016 UPDATE

PREPARED FOR:

CITY OF MISSISSAUGA





December 30, 2016

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Policy Planning Division
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Regarding: Municipal Comprehensive Review of Employment Lands – 2016 Update

The following report provides a summary of the analysis and recommendations related to the 2016 update to the City of Mississauga's Municipal Comprehensive Review of Employment Lands. The City engaged Cushman & Wakefield to update portions of its prior work, as well as undertake new analysis on two topics related to potential employment land conversions. A summary of this work is as follows:

1. Updates to 2015 Report
 - a. Industrial and Office Market Data Update
 - b. Land Demand and Supply Conclusions Update
2. Analysis of Impact of Employment Land Conversions at Major Transit Station Areas
3. Analysis of Impact of Permitting Motor Vehicle Sales on Employment Lands

Cushman & Wakefield is pleased to once again have the opportunity to demonstrate its market intelligence capabilities to support the City of Mississauga's planning efforts to promote a robust and diverse economy, backed by a defined urban structure developed through its respective Character Areas.

Respectfully submitted,

Cushman & Wakefield Ltd.

A handwritten signature in black ink, appearing to read "abrowning", written over a horizontal line.

Andrew Browning
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Appendix A – Mapping

1.0 INTRODUCTION

1.1 Overview

The City of Mississauga has engaged Cushman & Wakefield to provide an update to the Municipal Comprehensive Review of Employment Lands report that was completed in 2015. This project is focused on three specific areas of analysis:

1. Updates to 2015 Report
 - a. Industrial and Office Market Data Update
 - b. Land Demand and Supply Conclusions Update
2. Analysis of Impact of Employment Land Conversions at Major Transit Station Areas
3. Analysis of Impact of Permitting Motor Vehicle Sales on Employment Lands

The project consists of updates to certain components of the original work to reflect current market data, and an up-to-date employment land supply. There are also two new areas of analysis that were not considered at the time of the original report: the impact of converting employment lands in certain Major Transit Station Areas to non-employment use; and the impacts of permitting automotive retailing in employment areas. A more complete description of each of these elements is included in the respective report sections below.

2.0 UPDATES TO 2015 REPORT

2.1 Introduction

The Municipal Comprehensive Review of Employment Lands (2015) report was guided by market data from year-end 2012, which was compiled at the outset of the assignment. The following industrial and office market data and exhibits from that report have been updated with currently available information, along with commentary to discuss any pertinent changes since the data of the original data (year-end 2012):

- industrial market statistical summary
- industrial new supply – Mississauga versus other GTA
- industrial vacancy rate
- industrial rental rates
- indicators of industrial areas health (in particular noting any changes since prior report date)
- office market statistical summary
- GTA West office inventory by concentration
- office vacancy rate
- office rental rates
- indicators of office market health

In addition to providing an update to select market data described above, the city's employment land inventory has been updated to reflect the most current data available (year-end 2015). This provides a current indication of the supply of employment lands city-wide. Utilizing this data, Cushman & Wakefield has revised its land supply conclusions, while holding the assumptions that generated the three land demand scenarios unchanged. This has led to revised overall land supply (or deficit) conclusions for each of the three scenarios (Scenario 1 – Base Case; Scenario 2: Nodes & Corridors Evolution; and Scenario 3 – Employment Land-Focused Growth).

2.2 Industrial Market Data Update

2.2.1 Industrial Market Statistical Summary

The following exhibit profiles key metrics from Cushman & Wakefield's 2016 Q3 industrial market survey.

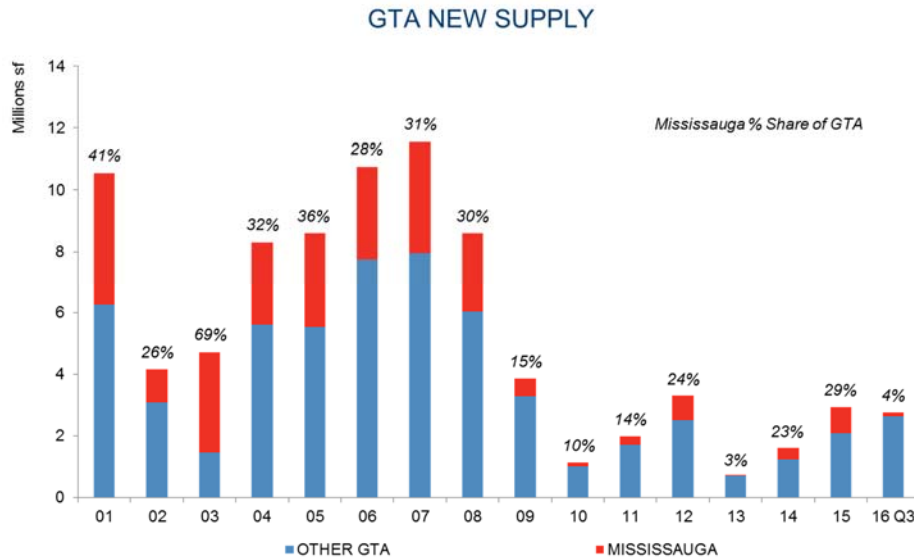
INDUSTRIAL MARKET STATISTICAL SUMMARY – 2016 Q3							
Submarket/ Concentration	Inventory (sf)	% Share of GTA	Vacant Space (sf)	Vacancy Rate (%)	New Supply YTD (sf)	Net Rent (\$psf)	Gross Rent (\$psf)
Bolton/Caledon	13,198,710	1.7%	1,540,946	11.7%	1,491,814	\$5.54	\$8.25
Brampton	95,284,696	12.2%	2,293,868	2.4%	0	\$5.92	\$8.89
Burlington	22,336,465	2.9%	807,291	3.6%	0	\$5.54	\$8.65
Milton/Halton Hills	25,047,320	3.2%	2,836,488	11.3%	838,603	\$6.55	\$9.06
Mississauga	171,554,778	22.0%	6,822,580	4.0%	106,435	\$5.80	\$8.96
Oakville	23,109,355	3.0%	820,864	3.6%	0	\$6.32	\$9.30
GTA West	350,531,324	45.0%	15,122,037	4.3%	2,436,852	\$5.96	\$8.89
East York	9,411,375	1.2%	22,000	0.2%	0	N/A*	N/A*
Etobicoke	73,114,400	9.4%	2,386,253	3.3%	17,298	\$4.98	\$8.29
North York	75,295,299	9.7%	1,605,992	2.1%	0	\$5.83	\$9.46
Scarborough	60,895,648	7.8%	1,725,300	2.8%	0	\$5.26	\$8.86
Toronto	26,036,509	3.3%	34,262	0.1%	0	N/A*	N/A*
York	5,378,742	0.7%	13,500	0.3%	0	\$9.77	\$12.77
GTA Central	250,131,973	32.1%	5,787,307	2.3%	17,298	\$5.34	\$8.83
Aurora	5,853,090	0.8%	112,102	1.9%	0	\$5.43	\$8.38
Markham	32,900,835	4.2%	1,059,469	3.2%	0	\$6.07	\$9.35
Newmarket	6,325,137	0.8%	444,663	7.0%	0	\$5.15	\$8.19
Richmond Hill	12,677,567	1.6%	216,183	1.7%	0	\$6.41	\$9.95
Vaughan	91,985,454	11.8%	2,146,540	2.3%	294,122	\$5.72	\$8.98
GTA North	149,742,083	19.2%	3,978,957	2.7%	294,122	\$5.77	\$9.01
Ajax	7,519,643	1.0%	84,404	1.1%	0	\$4.79	\$8.62
Oshawa	5,278,774	0.7%	412,411	7.8%	0	\$4.77	\$7.84
Pickering	8,785,131	1.1%	338,779	3.9%	0	\$4.63	\$7.90
Whitby	7,814,478	1.0%	399,522	5.1%	0	\$4.93	\$8.12
GTA East	29,398,026	3.8%	1,235,116	4.2%	0	\$4.78	\$8.00
TOTAL GTA	779,803,406	100.0%	26,123,417	3.4%	2,748,272	\$5.74	\$8.86

Note: The square footage figures cited above reflect gross leasable area.

**Rental rates are not tracked for all submarkets illustrated on this exhibit. This is because the amount of vacant space with a known asking rental rate is relatively small, and therefore the rental rate data can be skewed by a few buildings (i.e. may not be representative of the broader submarket).*

2.2.2 Industrial New Supply – Mississauga versus Other GTA

Mississauga has seen a dramatic decline in the amount of new industrial construction post-recession. The annual average new supply from 2001-2008 was just less than 3 million sf; from 2009-onward, the annual average has been just 400,000 sf. A similar, but less extreme decline has been seen across the entire GTA, which has seen average annual new construction decline from 8.4 million sf from 2001-2008 to just 2.3 million sf post-recession. A cautious approach by industrial occupiers in the post-recession recovery period is attributable to the absence of demand for new facilities.



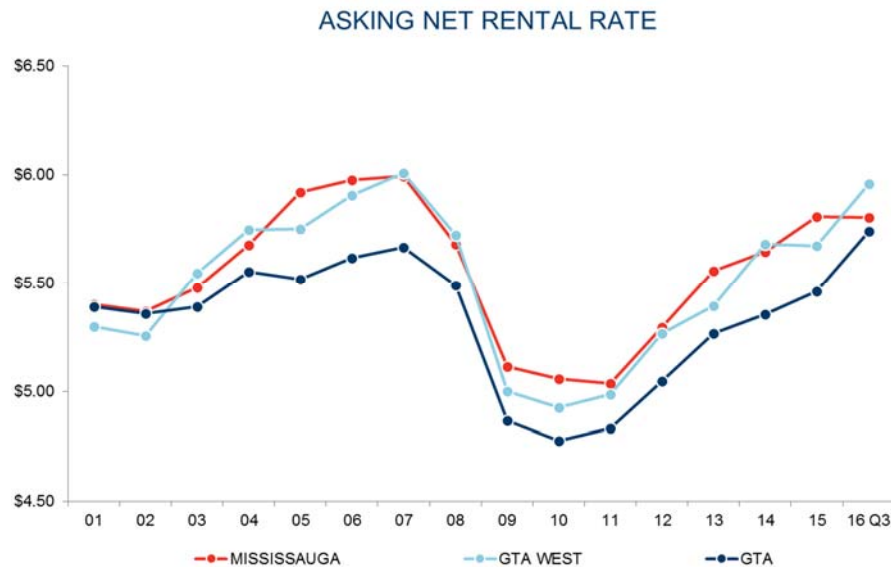
2.2.3 Industrial Vacancy Rate

Vacant space is defined as buildings or units within buildings that are either currently physically vacant or are available for occupancy within the next three months from the date of the market survey. A “balanced” leasing market is thought to be in the range of 5% - 7% vacancy, with equal leverage between the landlord and tenant. Mississauga has a current vacancy rate of 4.0%; this amounts to approximately 6.8 million sf of vacant space. This is slightly above the GTA average of 3.4% vacancy. These vacancy rates – on par with 2013 figures – represent a significant decline from the rates seen for much of the past decade or more, and in part reflect the slowdown in new supply activity in recent years.



2.2.4 Industrial Rental Rate

The average asking net rental rate for industrial space in Mississauga has trended upwards post-recession, in tandem with conditions seen across the broader GTA West market and the overall GTA. Mississauga's current average asking net rent is \$5.80 psf – up from a low of \$5.05 at year-end 2011. Rates are approaching the recent market peak seen back in 2007.



2.2.5 Indicators of Industrial Areas Health

The preceding analysis has profiled various dimensions of the industrial market in Mississauga. The following exhibit is intended to summarize and illustrate some of the key metrics that are determinants of the health and viability of industrial areas.

INDICATORS OF INDUSTRIAL AREAS HEALTH

Indicator	Analysis	Conclusions
Land vacancy	There are roughly 782 hectares of vacant land across Mississauga's Employment Areas and Corporate Centres. This equates to an 8.4% vacancy rate for lands that have an employment designation (Business Employment [BE], Industrial [IND], Mixed Use [MU], and Office [O]).	From year-end 2012 to year-end 2015, the amount of vacant employment-designated lands declined by 143 hectares within the city's Employment Areas and Corporate Centres.
Building vacancy	Mississauga's industrial vacancy rate has moved in tandem with trends across the GTA in recent years. Having reached a recent peak high cyclical vacancy level in 2008 of 7.7%, Mississauga's vacancy rate has since declined to a current level of 4.0%. Limited new supply additions and some recovery in occupier demand have together caused this decline in overall vacancy.	Mississauga's vacancy rate has historically exceeded the GTA average, due to the significant new supply activity in the market. Recent performance demonstrates ongoing demand for industrial space in this location.

Rental rates	Asking net rental rates continue to trend upward in Mississauga, as well as the broader GTA West suburban market (and overall GTA).	Rental rates are approaching the recent cyclical peak recorded in 2007. Declining vacancy levels are indicative of sustained occupier demand. Coupled with limited new supply additions, there has been upward pressure on rental rates.
New construction	The pace of new industrial construction in the post-recession era has slowed dramatically. GTA-wide, the annual average new supply (2.3 million sf annually) has been approximately 27% of the volume seen in the 2001-2008 period (8.4 million sf annually).	Mississauga had accounted for a 35% of overall GTA new supply from 2001-2008. Post-recession, this share has fallen to 17%. Increased development activity in emerging markets such as Milton/Halton Hills and Bolton/Caledon – as well as continued demand for space in established markets such as Brampton and Vaughan – has impacted Mississauga’s share of the overall market.

2.2.6 Conclusions

Mississauga’s vacancy rate has declined since the data reported in the 2015 Municipal Comprehensive Review of Employment Lands (which contained data from year-end 2012). Asking net rental rates continue to trend upward in Mississauga, and are approaching the recent cyclical peak recorded in 2007. Mississauga’s landlords achieve rental rates at the upper end of the GTA suburbs. It has the largest inventory of any GTA municipality, and the considerable new supply added over the past 15 years provides users with a range of options and locations for their operations. These signs point to a healthy local industrial market, and potential for a new cycle of industrial new construction, to address rising occupier demand.

It remains our conclusion that the overall picture is an industrial market that may be showing the early signs of transition, as new supply has been relatively modest since the 2008 recession in Mississauga and across the GTA. This transition is from the past pattern of greenfield development across the city, to a more fragmented form of development on remaining lands. Other GTA municipalities will rise in prominence over time – from a new development perspective – as Mississauga’s remaining employment lands are absorbed. The outlook for industrial-type employment growth will play a significant factor in the amount of industrial land that will be required to meet future demand.

2.3 Office Market Data Update

2.3.1 Office Market Statistical Summary

The exhibit below illustrates select market metrics for the Mississauga office market, compared to the broader GTA West submarket, the overall Suburbs, and the total GTA. Mississauga is currently performing on par with the broader GTA West office submarket market (of which it accounts for a 70% share of inventory).

OFFICE MARKET STATISTICAL SUMMARY – 2016 Q3							
Submarket/ Concentration	Inventory (sf)	% Share of GTA	Vacant Space (sf)	Vacancy Rate (%)	New Supply YTD (sf)	Net Rent – Class A (\$psf)	Gross Rent – Class A (\$psf)
Mississauga and GTA West							
Airport Corporate Centre	8,103,413	4.6%	977,008	12.1%	0	\$16.10	\$30.30
Meadowvale	5,854,867	3.3%	685,777	11.7%	101,706	\$19.10	\$32.00
Airport – Other [1]	4,063,072	2.3%	956,077	23.5%	0	N/A*	N/A*
Hurontario Corridor	4,337,312	2.5%	578,811	13.3%	71,169	\$15.80	\$28.90
Mississauga City Centre	3,414,174	1.9%	415,590	12.2%	0	\$18.40	\$35.60
Sheridan	805,835	0.5%	77,953	9.7%	0	N/A*	N/A*
Cooksville	646,893	0.4%	60,191	9.3%	0	N/A*	N/A*
TOTAL MISSISSAUGA	27,225,566	15.5%	3,751,407	13.8%	172,875	\$17.20 [2]	\$31.30 [2]
Other GTA West	11,456,231	6.5%	1,791,450	15.6%	321,132	N/A*	N/A*
TOTAL GTA WEST	38,681,797	22.1%	5,542,857	14.3%	494,007	\$17.30	\$31.60
GTA Central Area and Suburbs							
Central Area							
Downtown Toronto	72,257,641	41.2%	2,937,413	4.1%	1,020,000	\$26.10	\$52.30
Midtown Toronto	16,486,181	9.4%	718,654	4.4%	0	\$22.10	\$46.40
TOTAL CENTRAL AREA	88,743,822	50.6%	3,656,067	4.1%	1,020,000	\$25.50	\$51.50
Suburbs							
GTA East	33,059,222	18.9%	3,300,057	10.0%	31,3476	\$15.70	\$31.00
GTA North	14,828,233	8.5%	878,886	5.9%	0	\$17.30	\$35.80
GTA West	38,681,797	22.1%	5,541,857	14.3%	194,007	\$17.30	\$31.60
TOTAL SUBURBS	86,569,252	49.4%	9,721,800	11.2%	807,483	\$16.70	\$32.10
TOTAL GTA	175,313,074	100.0%	13,377,867	7.6%	1,827,486	\$21.20	\$41.90

Note: The square footage figures cited above reflect gross leasable area.

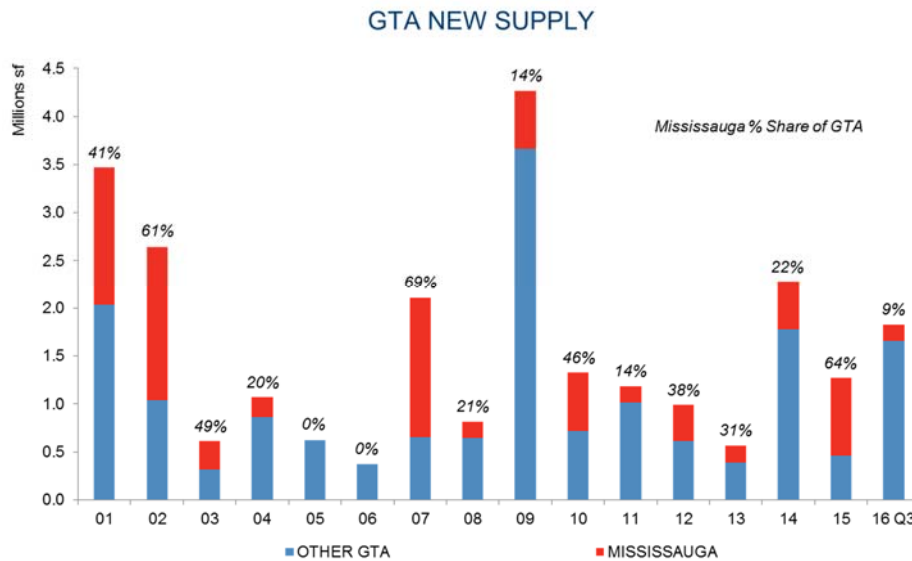
**Rental rates are not tracked for all submarkets illustrated on this exhibit. This is because (a) the submarket illustrated above has been shown for reference purposes only, and is not regularly tracked by Cushman & Wakefield, or (b) the inventory is relatively small, and therefore rental rate data can be skewed by a few buildings.*

[1] "Airport – Other" totals just over 4 million sf, and is comprised on buildings situated in Mississauga as well as Etobicoke. For the purposes of this report, we have included the entire office concentration in the reporting figures for Mississauga.

[2] The average rental rates for the City of Mississauga were determined as a weighted average of the rental rate for the available space in each submarket.

2.3.2 Office New Supply – Mississauga versus Other GTA

Total office space (the existing inventory) across Mississauga accounts for a 16% share of the overall GTA. Notably, however, the city has accounted for a 33% share of all new office supply GTA-wide since 2001. Mississauga averaged 650,000 sf of new office supply annually from 2001-2008, a rate which has fallen to 425,000 post-recession.



2.3.3 Office Vacancy Rate

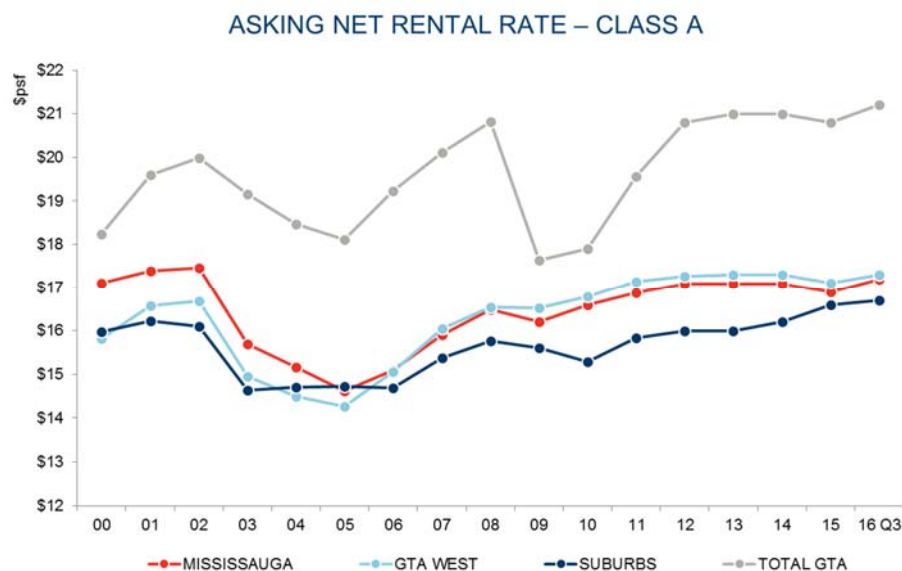
Vacant space is defined as buildings or units within buildings that are either currently physically vacant or are available for occupancy within the next three months from the date of the survey. A “balanced” office leasing market is thought to be in the range of 7% vacancy.

Mississauga has a current overall vacancy rate of 13.8%, for the buildings tracked by C&W across the seven area office concentrations. There is currently about 3.8 million sf of vacant space across all classes of office space in Mississauga. This rate falls within the recent peak of 14.1% recorded in 2002 and the recent low of 5.9% recorded in 2008. It reflects a continuing trend of rising vacancy seen across Mississauga – and the GTA Suburbs more broadly – since 2008. Rising demand for premises in Downtown Toronto is the principal cause for this increasing suburban vacancy.



2.3.4 Office Rental Rate

The current average asking net rental rate for Class A office space in Mississauga is \$17.20 psf. Over the past several years, rental rates have remained relatively flat across Mississauga, as well as the GTA West and overall Suburban market. The more dramatic trend in rental rates for the Total GTA is influenced by the Downtown Toronto office market, and the pronounced decline in rents in 2009 (recession) and subsequent recovery.



2.3.5 Indicators of Office Market Health

The preceding analysis has examined various aspects of the office space market in Mississauga. The following exhibit is intended to illustrate and summarize some of the key metrics that are determinants of the health and viability of the local office market.

INDICATORS OF OFFICE MARKET HEALTH

Indicator	Analysis	Conclusions
Land vacancy	Given their built form and density, office developments can be accommodated on relatively small parcels of land (especially with structured parking). Offices are well suited to employment lands as well as mixed use areas.	There is a suitable amount of vacant land in numerous locations throughout the city – on employment lands and in planned intensification areas – to accommodate future growth.
Building vacancy	Mississauga had an overall vacancy rate of 13.8% at 2016 Q3, which represents a continuation of the trend towards higher vacancy since 2008. This rate is above the overall GTA Suburban average of 11.2%. Mississauga's vacancy rate has varied from around 6% to 14% since 2000, so the current rate is at the upper end of this range.	New construction activity in the Downtown Toronto office market has responded to demand from tenants for a central work location that is easily accessible by transit. Mississauga and other GTA suburban office markets have been impacted by this structural change.

Rental rates	While vacancy has moved upwards, the average asking Class A rental rate has remained flat over the past several years across Mississauga's office submarkets.	In the absence of renewed space demand by office tenants, it is inevitable that rental rates will have to adjust downward as a reaction to rising vacancy levels.
New construction	The city has seen new office supply added in each of the past 10 years. The annual average from 2000-2016 Q3 has been approximately 575,000 sf; however, the annual average since 2008 has been lower, at some 425,000 sf, reflecting a declining rate of new construction.	Mississauga – along with the GTA Suburbs as a whole – has seen a decline in the volume of new office construction. This has coincided with renewed demand for office space in Downtown Toronto.

2.3.6 Conclusions

Conditions in Mississauga's office market have weakened compared to the data reported in the 2015 Municipal Comprehensive Review of Employment Lands (which contained data from year-end 2012). The office vacancy rate has been trending upward in the post-recession years, while rental rates have remained fairly flat. These trends have mirrored the performance for the GTA Suburbs as a whole, which have suffered at the expense of Toronto's thriving Downtown office market. Substantial new supply brought to market in Downtown Toronto in recent years has been targeted to attracting skilled, young workers who value the urban, accessible, and amenity-rich environment that a Downtown Toronto office location provides.

The site selection factors for the Mississauga office market remain intact: good multiple highway access; existing and improving public transit options; an entrenched base of major offices and head offices; access to clients; and a growing, diverse labour pool; to name a few. Mississauga's Employment Areas and Corporate Centres provide a range of types, sizes, and quality of office space to appeal to prospective tenants and owner-occupiers. Mississauga is positioned to remain a preferred suburban location for office employers in the GTA.

2.4 Land Demand and Supply Conclusions Update

2.4.1 Static Land Demand Projection

Three scenarios were prepared in the 2015 Municipal Comprehensive Review of Employment Lands report that tested the impact of various employment densities by type of employment, and the share of those jobs that would locate on employment lands. The scenarios reflect different land use outcomes, varying from a continuation of the status quo; to a more concentrated (dense) form of development in growth centres and along major corridors – which is consistent with the direction of Mississauga's Official Plan; to a less dense form of development concentrated on employment lands. For the purposes of this 2016 update, these assumptions are unchanged. As well, the employment growth projection itself is unchanged. Thus, the land demand projections for each scenario are identical to the 2015 report.

The following exhibit identifies the key variables across the three land demand scenarios.

LAND DEMAND SCENARIOS			
Variable	Scenario 1	Scenario 2	Scenario 3
Employment Density			
ELE Density (jobs/ha)	35	50	25
MOE Density (jobs/ha)	265	285	265
PRE Density (jobs/ha)	80	80	80
Share on Employment Lands			
ELE Jobs	100%	100%	100%
MOE Jobs	80%	50%	100%
PRE Jobs	15%	10%	25%
<i>Note: ELE – Employment Land Employment; MOE – Major Office Employment; and PRE – Population-Related Employment</i>			

The following describes the assumption that inform the land demand forecast scenarios:

- Scenario 1: This can be considered the “Base Case Scenario”, as it incorporates all of the analysis detailed in the 2015 Municipal Comprehensive Review of Employment Lands report regarding employment densities and distribution of employment across the city.
- Scenario 2: This scenario imagines a different pattern of land use emerging in Mississauga over time, which capitalizes on the planned future transit infrastructure, and directs employment to mixed use areas, and particularly along arterials in a “nodes and corridors” approach. This is consistent with the direction of Mississauga’s Official Plan. In this scenario, ELE employment intensification takes place at a rate that reflects a higher office component within “flex” industrial properties, as seen in Markham and Richmond Hill (50 jobs per hectare). This is due to a higher proportion of office space locating adjacent to industrial and research and development-type facilities. This is not consistent with recent trends in Mississauga (and elsewhere), which has seen declining ELE densities due to a high proportion of low intensity warehousing and distribution-type facilities being constructed during the past decade. MOE density is slightly increased to 285 jobs per hectare, as more of the office space locates along major arterials with structured/underground parking, rather than office campuses with surface parking. Correspondingly, the share of the growth of MOE jobs on employment lands is reduced to 50% from the Base Case figure of 80%. As well, the proportion of PRE that locates on employment lands is reduced to 10% from the Base Case 15% figure, to incorporate more of these functions in mixed use buildings.
- Scenario 3: This scenario envisions all of Mississauga’s future ELE and MOE job growth seeking employment land sites in the Employment Areas and Corporate Centres. The ELE density has been reduced to 25 jobs per hectare, reflecting a greater proportion of warehousing and logistics functions (including e-commerce related goods fulfilment), and increased employee productivity via technology and automation, versus the more employment-intensive uses considered in Scenario 2. The MOE density is in line with the Base Case scenario, however, all jobs are allocated to employment lands. This scenario could be viewed as a failure of the Downtown area and other Mixed Use areas to attract office development. The proportion of PRE employment targeted for employment lands has been increased to a 25% share of future job growth in this category.

2.4.2 Updated Employment Land Supply

City staff have provided Cushman & Wakefield with an updated survey of employment lands across Mississauga. This current data indicates that there are 782 hectares of vacant employment lands citywide (i.e. lands in Employment Areas and Corporate Centres that are designated: Business Employment [BE], Industrial [IND], Mixed Use [MU], and Office [O]). This compares to a figure of 925 hectares at year-end 2012 (the figure which was used in the Municipal Comprehensive Review of Employment Lands report completed in 2015). This revised vacant land supply figure is used to update the land supply and demand conclusions from the original report, which is illustrated in the exhibit below.

2.4.3 Vacancy Factor

In all markets, there are land parcels that will remain vacant over the long term, for a variety of reasons. These may include factors such as the motivations of the landowner (owner/user or developer); land contamination; site attributes such as size, configuration and accessibility; incompatible adjacent land uses; and other constraints. For the purposes of our analysis, a 5% structural vacancy factor is considered appropriate for the city's employment lands. Within the Employment Areas and Corporate Centres, this equates to 463 hectares of the total 9,262 hectares of land.

2.4.4 Conclusions

The adjusted vacant employment land supply figure of 782 hectares – combined with the assumption that 5% of lands in Employment Areas and Corporate Centres remain vacant for the long term – results in a deficit of employment lands under most scenarios by 2031 (only Scenario 2 indicates a modest surplus), and in all scenarios by 2041.

LAND DEMAND AND SUPPLY			
Variable	Scenario 1 (ha)	Scenario 2 (ha)	Scenario 3 (ha)
Land Demand to 2031	442	291	609
Land Demand to 2041	506	330	697
Total Vacant Employment Land Supply	782	782	782
Less Vacancy Factor (5%)	(463)	(463)	(463)
Adjusted Vacant Land Supply	319	319	319
Surplus/(Deficit) to 2031	(123)	28	(290)
Surplus/(Deficit) to 2041	(187)	(11)	(378)

3.0 IMPACT OF CONVERSION OF EMPLOYMENT LANDS AT MAJOR TRANSIT STATION AREAS

3.1 – Introduction

In recognition of Provincial planning policy that seeks to increase population and employment in the vicinity of public transit infrastructure, and good planning principles, the City has asked Cushman & Wakefield to assess the impact of potential land use conversions in select Major Transit Station Areas (MTSAs) from an employment use (which is often a relatively low density land use – with the exception of offices) to an alternative use.

The following are the key scope of work tasks for this analysis:

- Review the amount of occupied and vacant employment land within 500 metres of the 12 MTSAs identified by City staff.
- Review the amount of existing employment (from the City's Employment Survey) on lands that lie within transit station areas that may be considered for conversion.
- Utilize the revised land supply and demand conclusions generated in section 2.3 (above) to evaluate the impact of the potential reduction in employment lands via land use conversions.
- Identify conditions that should apply to employment land conversions at MTSAs, if any.

The following MTSAs have been identified by City staff for inclusion in this analysis because they are in an employment area, or include employment lands adjacent to a residential area. Mapping of these MTSAs is included in Appendix A.

MTSAS FOR CONSIDERATION	
MTSAs by Type	Count
Mississauga Transitway BRT Stations:	5
Ridgeway, Cawthra, Tomken, Dixie, and Tahoe	
GO Regional Express Rail Stations:	2
Lakeshore West Line – Clarkson	
Kitchener Line – Malton	
GO Train Stations:	3
Erindale, Meadowvale, Lisgar	
Dundas Connects – Future Higher-Order Transit Stations:	2
Mavis & Dundas, Winston Churchill & Dundas	
TOTAL	12

3.2 – Employment Land Supply at Select MTSAs

3.2.1 Employment Land Supply per MTSA

The following exhibit identifies the amount of employment land located within 500 metres of each MTSA. The amount of developed and vacant employment land is identified.

EMPLOYMENT LAND SUPPLY

MTSA	Total Land (ha)	Count of Parcels	Developed Land (ha)	Count of Parcels	Vacant Land (ha)	Count of Parcels	% Vacant (by area)
Mississauga Transitway BRT Stations:							
Ridgeway	29.1	11	14.8	6	14.3	5	49%
Cawthra*	19.3	4	0.8	0	18.5	4	96%
Tomken*	33.6	27	17.4	20	16.2	7	48%
Dixie*	38.7	64	38.0	63	0.7	1	2%
Tahoe	59.1	25	40.1	19	19.1	6	32%
GO Regional Express Rail Stations:							
Lakeshore West Line – Clarkson	35.7	20	35.7	20	0.0	0	0%
Kitchener Line – Malton	64.7	35	51.9	34	12.8	1	20%
GO Train Stations:							
Erindale	20.4	9	20.4	9	0.0	0	0%
Meadowvale	62.0	27	62.0	27	0.0	0	0%
Lisgar	44.1	8	42.2	5	1.9	3	4%
Dundas Connects – Future Higher-Order Transit Stations:							
Mavis & Dundas	33.0	20	33.0	20	0.0	0	0%
Winston Churchill & Dundas	41.9	27	41.9	26	0.1	1	0%
TOTAL	467.5	265	392.0	238	75.5	27	16%
<i>*Note: These MTSA employment lands areas include parcels that are “double counted” with another adjacent MTSA. However, the TOTAL at the bottom of the exhibit excludes the double counting.</i>							

Of the 265 “unique” parcels (excluding “double-counting”, which is explained below), 84% of the lands are developed, while 16% are vacant. There are several Mississauga Transitway BRT Stations that have a significant share of undeveloped employment lands within 500 metres of the MTSA: Cawthra (96% vacant), Ridgeway (49%), Tomken (48%), and Tahoe (32%). In contrast, within 500 metres of most other MTSA's examined, the designated employment lands are fully or substantially built-out.

3.2.2 Double-Counting Lands

There are instances where two MTSA's are within a 500 metre separation of one another; therefore, some “double-counting” of employment land-designated parcels must be reconciled.

- The Cawthra and Tomken MTSA's have a modest overlap of their 500 metre radii. A small portion of a single land parcel measuring 7.9 hectares lies within both 500 metre radii. This parcel (denoted as “1” on the exhibit below) is currently vacant (undeveloped). Roughly one-half of this parcel lies within the Cawthra MTSA, while an estimated two-thirds lies within the Tomken MTSA (including the overlapping portion). For the purposes of this high-level analysis, we will ignore this modest “double counting” of lands.
- The Tomken and Dixie MTSA's have a modest overlap of their 500 metre radii. Altogether, 11 parcels, or portions of parcels, measuring a total of 6.3 hectares, lie within both 500 metre radii (note that the 6.3 hectares is the total area of the 11 parcels; the area of lands that are only partly within the 500 metre radii is not calculated). These parcels (denoted as “2A” and “2B” on the exhibit below) are all developed (none are vacant). For the purposes of this high-level analysis, we will ignore this modest “double counting” of lands.



3.3 – Employment at Select MTSAs

The following exhibit presents the employment within the MTSAs. Tahoe and Meadowvale feature significant clusters of employment. In contrast, employment in the vicinity of Cawthra (nil), Tomken, and Lisgar is relatively modest.

EMPLOYMENT	
MTSA	Jobs on Employment Lands within MTSA
Mississauga Transitway BRT Stations	
Ridgeway	1,022
Cawthra*	0
Tomken*	328
Dixie*	1,647
Tahoe	4,874
GO Regional Express Rail Stations:	
Lakeshore West Line – Clarkson	1,188
Kitchener Line – Malton	1,030
Erindale	1,956
Meadowvale	4,218
Lisgar	548
Dundas Connects – Future Higher-Order Transit Stations:	
Mavis & Dundas	706
Winston Churchill & Dundas	1,145
TOTAL	18,663
*Note: These MTSA employment lands areas include parcels that are “double counted” with an adjacent MTSA. Therefore, TOTAL employment is slightly overstated.	

3.4 – Impact of Land Conversion

3.4.1 Overview

As identified in the revised Land Demand and Supply Conclusions stated above (section 2.4), the adjusted employment land supply figure of 782 vacant hectares – combined with the assumption that 5% of lands in Employment Areas and Corporate Centres remain vacant for the long term – results in a deficit of employment lands under most scenarios by 2031 (only Scenario 2 indicates a modest surplus), and in all scenarios by 2041. Therefore, any conversion of employment lands at MTSA would result in a more dramatic shortfall in the required amount of employment lands needed to accommodate the projected employment forecast.

There are an identified 75.5 hectares of vacant, designated employment lands within 500 metres of the MTSA reviewed in this report. This accounts for roughly 10% of the city's overall vacant employment land supply. There are an additional 392 hectares of employment lands within 500 metres of the MTSA which are already developed.

- If any of these MTSA vacant employment lands are converted to a non-employment use, then the overall shortfall of required employment lands to accommodate projected employment will be increased.
- If any of the MTSA developed (currently occupied) employment lands are converted to a non-employment use, then alternative lands to accommodate this existing employment must be identified elsewhere, placing further pressure on the constrained employment lands inventory.

Five of the 12 MTSA examined (Clarkson, Erindale, Meadowvale, Mavis & Dundas, and Winston Churchill & Dundas) have no vacant designated employment lands within a 500 metres radius. This suggests that these employment areas are mature, and any land use conversions may disrupt the ongoing planned function of these areas.

There are various MTSA identified in this report with a substantial amount of vacant designated employment lands in the vicinity of the station (Cawthra, Ridgeway, Tomken, and Tahoe – all of which are Mississauga Transitway BRT Stations). While they have not yet been built out, their planned function as an area of employment would be impacted by allowing employment land conversions.

3.4.2 Recommendations

While Cushman & Wakefield understands and accepts the planning rationale for considering select conversions of employment lands (typically a low density land use) to a higher density use to leverage the nearby transit infrastructure (existing or planned), we caution that there is a need to balance this objective with the preservation of key employment areas that are currently functioning well. We also note the potential disruptive nature of introducing alternative land uses that may not be complimentary to existing uses. It is our view that contemplating the conversion of *vacant* sites should generally be a priority over the conversion of lands with *existing* employment uses.

The City may consider a strategy to allow conversion at some MTSA sites and not others – particularly where there are few sites that may realistically be converted to a non-employment use (i.e. no critical mass of non-employment uses could reasonably be established; more isolated sites in the midst of a broader employment zone; etc.). In this scenario, larger, well-established employment zones may be protected, and those MTSA areas that do not feature a predominant employment-type land use may be targeted for conversion. It is not the intent of this report to specify which MTSA may be best suited to accommodate land use conversion to a non-employment use; rather, it is the intent of Cushman & Wakefield to suggest guidelines for the consideration of such conversions.

3.5 – Suggested Conditions for Employment Land Conversions

The following conditions should be considered in the evaluation of whether a site may be permitted to undergo a land use conversion from an employment-designated use to an alternative use:

1. **Only permit conversion to medium and high density uses** – Employment lands are commonly home to lower employment density uses, including manufacturing, warehousing, and distribution functions. Compared to commercial office buildings and institutional-type settings, many employment land uses occupy a relatively high proportion of land relative to the amount of jobs that are generated. Replacing such low density land uses with higher intensity uses in proximity to transit stations is a defensible strategy to increase ridership to leverage the infrastructure that is in place (or pending). However, replacing industrial-type uses with commercial-retail uses (such as strip plazas or big box-style retail) will not meaningfully increase the employment density of the lands. Also, retail jobs are a population-related type of employment (PRE), as opposed to major office employment (MOE) or employment land employment (ELE) that is targeted for these lands.

It is recommended that only the following uses be promoted as suitable for those employment lands that are targeted for conversion, where it is demonstrated that such uses can be effectively integrated with remaining adjacent land uses in the employment area, to mitigate the potential impact (i.e. noise, odour, vibration, operating hours, truck movements, etc.) of nearby employment functions:

- a. Offices (actually reflecting a change from an industrial designation to an office use – not a change from employment to non-employment land use).
- b. Other non-residential medium and high density uses, including institutional uses, where the siting of such a use is considered appropriate.
- c. Medium and high density residential.
- d. Small-scale retail-commercial uses ancillary to the above uses, in a broader mixed use redevelopment.
- e. Where an existing population-related employment use is to be replaced by another population-related use, an increased utilization of the site should be encouraged.

This conversion to medium and higher density land uses will be conditional upon replacing the existing employment (as described below in #2).

2. **Replacement of existing employment** – Ensure that as a condition of the land use conversion that the proposed re-use of the lands incorporates an element of employment use – either vertically integrated in the development, or on a stand-alone portion of a larger site. Alternatively, it could be arranged that this employment function be relocated to an adjacent or other nearby site that could accommodate such a use, in retaining or increasing the overall level of employment land employment (ELE) and major office employment (MOE) within the Employment Area or Corporate Centre. This employment replacement should be a minimum ratio of 1:1 (1 job on the site for every job displaced). These replacement jobs could be either ELE or MOE. Any population-related employment (PRE) would not be counted as part of the replacement jobs – except in the case of one existing population-related use on an employment land designated site being replaced by another.
3. **Retention of certain strategic employment lands** – Evaluate the strategic importance of the employment lands in the context of the broader Employment Area or Corporate Centre. If the employment lands are a component of a large employment area that is well-functioning (i.e. low level of vacancy, evidence of new supply or property reinvestment, etc.), then these lands may be considered to be of strategic importance – whether currently developed or vacant – and therefore not contemplated for conversion, despite their proximity to the major transit station.

4. **Addressing Existing Mixed Use Development on Employment Lands** – There are various Mixed Use designated lands within the 12 MTSAs examined in this report. For the most part, these lands are already developed, with in-place uses including neighbourhood-scale retail plazas, power centres, and other uses. There are also a few vacant parcels at select MTSAs. While these lands form part of an employment area, they are not currently accommodating employment land employment or major office employment.

Given that these lands are (mostly) occupied, they are not being counted upon to meet future employment growth targets for employment lands, as identified in the earlier discussion around land demand and supply. Accordingly, these sites are considered particularly appropriate for conversion to a higher density land use (across the range of uses described above in #1). Given the realities of land economics (land values), it is unlikely that these mixed use sites will revert to an employment land function; they are already “lost” for this purpose. Therefore, maximizing the utility of these mixed use sites can protect existing employment uses from conversion pressures, and support transit-oriented development at these locations.

4.0 IMPACT OF PERMITTING MOTOR VEHICLE SALES ON EMPLOYMENT LANDS

4.1 – Introduction

City staff have received inquiries to permit motor vehicle sales on employment lands. This is presently not a permitted land use in Employment Areas and Corporate Centres. Staff have engaged Cushman & Wakefield to profile this business use and consider the impact of facilitating land use conversions in employment areas to permit motor vehicle sales.

The following are the key scope of work tasks for this analysis:

- Identify current employment at new and used car dealerships in Mississauga.
- Identify size of land parcels and resultant employment density at new and used car dealerships in Mississauga.
- Assemble information regarding new motor vehicle dealerships that have been added in the Mississauga market – as well as the broader Greater Toronto Area – over the recent past, such as building size and total land area. The purpose is to identify whether there is any changing dynamic in the type of dealership that is being created compared to the traditional format (which has been a land-extensive use).
- Consider how many additional motor vehicle sales businesses would seek to locate on employment designated lands, if permitted.
- Examine the impact on employment land supply if car dealerships, which provides auto sales and repair services, were to be permitted in employment areas.
- Consider whether expanding employment uses to include motor vehicle sales may undermine the supply, viability, or integrity of employment lands.
- If permitted, identify conditions that should apply to employment land conversions in order to minimize the impact on the employment land supply.

4.2 – Employment Survey Data for Car Dealerships

4.2.1 Employment

The following are highlights of our analysis of the City of Mississauga's 2015 Employment Survey with respect to employment at car dealers:

- The survey identified 121 car dealers city-wide. Of these businesses, 65 were new car dealers (54% share), and 56 were used car dealers (46% share).
- There are 19 car dealers with no employee information identified in the survey. For the purposes of this report, these businesses will be excluded from further analysis, from an employment perspective.
- There were 2,686 full-time employees (91%) and 264 part-time employees (9%) identified in the survey, totaling 2,950 employees. Temporary employment has been ignored for the purposes of our analysis (as there are only 14 "temporary" employees identified).

4.2.2 Employment Density

For the 102 businesses that are included in our analysis, the following exhibit profiles the employment density at car dealerships – both new and used.

EMPLOYMENT AND EMPLOYMENT DENSITY BY TYPE OF DEALERSHIP					
Type of Dealership	Count of Dealerships	Full + Part-Time Employees	Total Site Area (ha)	Average Site Area (ha)	Average Employment Density (employees/ha)
New Car Dealerships	57	2,613	100.3	1.8	26.0
Used Car Dealerships	45	337	47.6	1.1	7.1
TOTAL	102	2,950	148.0	1.5	19.9

There are notable differences between new and used car dealers:

- New car dealers occupy an average of 1.8 hectares, versus 1.1 hectares for used car dealers. The overall average size was 1.5 hectares.
 - Three new car dealerships exceeded 10 hectares in size, while the vast majority (48 out of 57, or 84%) were in the range of 0.5-2.5 hectares).
 - One used car dealership exceeded 10 hectares in size, while the vast majority (33 out of 45, or 73%) were in the range of 0.2-1.0 hectares).
- New car dealers have an average employment density of 26.0 employees per hectare, versus a figure of 7.1 for used car dealers. This is likely attributable to new car dealerships offering service as well as sales, while used car dealerships are generally focused only on sales. For comparison, our land demand scenarios discussed in Section 2.4 (above) allowed for an employment density of 35 jobs per hectare for employment land employment (ELE), and 80 jobs per hectare for population-related employment (PRE).

Employment density can be examined in more detail by comparing densities for different sizes of businesses (by number of employees).

EMPLOYMENT AND EMPLOYMENT DENSITY BY SIZE OF DEALERSHIP					
Type of Dealership	Count of Dealerships	Full + Part-Time Employees	Total Site Area (ha)	Average Site Area (ha)	Average Employment Density (employees/ha)
New Car Dealerships					
50+ Employees	27	2,013	43.4	1.6	46.4
20-49 Employees	16	475	45.4	2.8	10.5
1-19 Employees	14	125	11.6	0.8	10.8
TOTAL	57	2,613	100.0	1.8	26.0
Used Car Dealerships					
50+ Employees	1	52	0.7	0.7	73.1
20-49 Employees	5	141	2.5	0.5	56.0
1-19 Employees	39	144	44.0	1.1	3.2
TOTAL	45	337	48.0	1.1	7.1
<i>Note: TOTAL figures may not equal the exhibit presented above due to rounding.</i>					

The following summarizes some key observations from the analysis of dealerships by size:

- Not surprisingly, the larger (by number of full and part-time employees) car dealerships have a much greater average employment density compared to the smaller dealerships.
- There are few used car dealerships with more than 20 employees (only 6 of 45).

4.3 Car Dealership Development Trends

4.3.1 Newer Developments in Mississauga

Cushman & Wakefield reviewed new non-residential building permit data provided by City staff from 2002-present, in order to identify new automotive dealerships that have been added during this time. While the data set has some description limitations – such as identifying the description of a property as “commercial shell building, tenant not determined”, or “new commercial spec building” – we have been able to definitively identify 19 car dealerships¹ that have been completed during the past 15 years (we caution the reader that this may be an underestimate). The purpose of our analysis is to profile the characteristics of more recently established car dealerships versus the city average, identified in Section 4.2 (above).

AUTO DEALERSHIPS COMPLETED 2002-2016 IN MISSISSAUGA

Address	Company/ Brand	Building Permit Year	Building Size (m ²)	Site Area (ha)	Site Coverage (%)
1385 Aerowood Dr.	Infiniti	2002	591	1.2	5%
5500 Dixie Rd.	Volkswagen	2002	591	1.2	5%
6120 Mavis Rd.	Mercedes-Benz	2002	N/A	1.7	N/A
5505 Ambler Dr.	Kia	2002	N/A	N/A	N/A
830 Bancroft Dr.	Subaru	2003	N/A	N/A	N/A
6160 Mavis Rd.	Subaru	2003	N/A	N/A	N/A
2360 Motorway Blvd.	Lexus	2003	1,553	0.6	28%
787 Bancroft Dr.	Audi	2004	2,162	0.9	24%
797 Bancroft Dr.	Volvo	2005	2,440	3.6	7%
777 Bancroft Dr.	Chrysler	2006	2,830	3.6	8%
2210 Battleford Rd.	Mazda	2006	1,937	1.5	13%
2580 Motorway Blvd.	Nissan	2007	2,323	1.9	12%
2950 Argentia Rd.	Toyota	2007	4,509	2.5	18%
2290 Battleford Rd.	Mitsubishi	2008	N/A	0.7	N/A
2560 Motorway Blvd.	Infiniti	2011	1,708	1.9	9%
6225 Mississauga Rd.	Hyundai	2011	848	0.2	49%
765 Boyer Blvd.	Mercedes-Benz	2013	2,108	1.6	13%
2960 Argentia Rd.	Kia	2013	1,596	2.5	6%
860 Ivandale Dr.	Acura	2015	2,179	1.3	17%
TOTAL			27,375	26.8	
AVERAGE			1,955	1.7	14%

¹ There is also a Harley Davidson dealership at 2815 Argentia Road, with a building permit issued in 2002. For the purposes of our analysis, this business has been excluded, as it is not listed among the new and used car dealers discussed in Section 4.2.

The preceding is a list of car dealerships with a new building permit issued since 2002 (note that the company/brand may have changed over time; the company/brand is that listed at the building permit stage). The following are notable highlights from an analysis of this data:

- Over this 15 year period, there were 19 new dealerships added city-wide. This is an average of just greater than one per year.
- A broad range of companies/brands is evident; there are 4 duplicate brands among the 19 total dealerships, meaning that there are 15 unique brands represented.
- Most of these dealerships (13 out of 19) have been added adjacent or in proximity to other new dealerships:
 - 2950 & 2960 Argentia Rd. (2)
 - 777, 787, 797 & 830 Bancroft Dr. (4)
 - 2210 & 2290 Battleford Rd. (2)
 - 6120 & 6160 Mavis Rd. (2)
 - 2360, 2560 & 2580 Motorway Blvd. (3)
- The average site coverage of these dealerships is 14%. While they range from a low of 5% to a high of 49%, the majority fall within a range of 5%-20%.
 - This compares to a typical site coverage of around 30%-40% for industrial-type buildings.
- The analysis of all new and used car dealerships presented above (Section 4.2) indicated that the average new car dealership occupied a 1.8 hectare site (while the average used car dealership occupied a 1.1 hectare site). Further analysis of these more recently completed dealerships reveals an average site size of 1.7 hectares.
 - For comparison, a 1.8 hectare site can accommodate a roughly 6,300 m² industrial building, at a 35% site coverage. This industrial building would accommodate 63 jobs, at a benchmark ratio of 35 jobs per hectare. In contrast, the typical new car dealership provides 46 jobs, based on analysis from the City's 2015 Employment Survey, discussed above (2,613 jobs at 57 new car dealerships equals an average of 46 jobs per dealership).

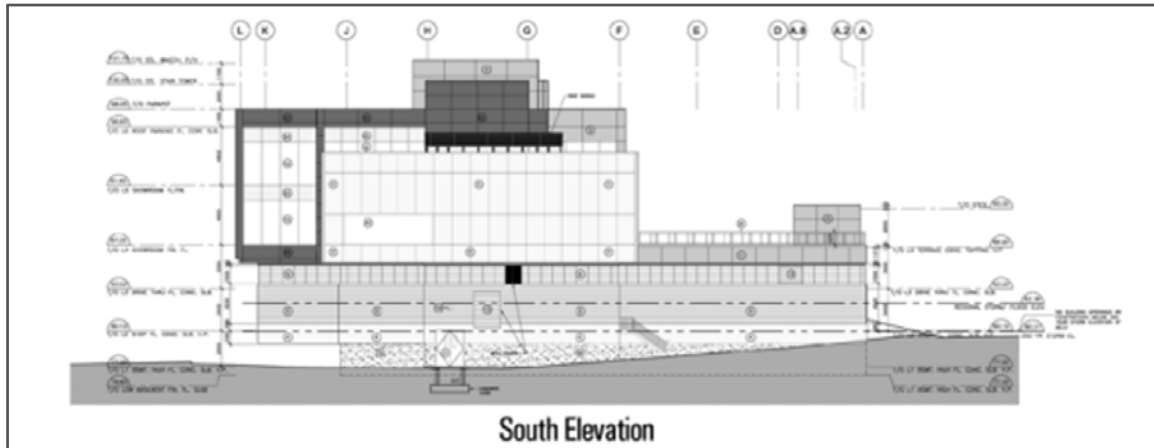
4.3.2 Examples of Alternative Dealership Formats in the GTA

While traditional format automotive dealerships (single or two-storey retail and service building, with extensive on-site, at-grade vehicle parking) remain the norm, there are examples of some innovative models in urban locations where land prices, land scarcity, and marketing decisions have led to some alternative dealership formats. The following are some case examples:

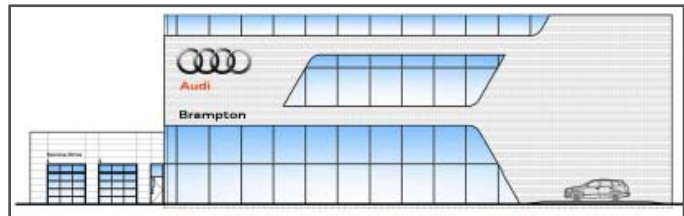
- In 2002, Mini Downtown opened its showroom space in “brick and beam” streetfront commercial-retail space, leased from Allied Properties REIT. This property is located on King Street West, west of Spadina Avenue, in Downtown Toronto. Mini Downtown has since relocated to 20 Sunlight Park Road, located off Eastern Avenue, just east of the Don Valley Parkway, in a more traditional format property. The retail space is now occupied by Patagonia.



- Currently under construction is a new, four-storey, multi-brand luxury car dealership, located at 777 Dundas Street East, just east of the Don Valley Parkway. It measures a planned gross floor area of approximately 13,100 m², which includes showroom space and vehicle servicing. This translates to a floor space index of 1.61 for the 0.81 hectare site. There will be 146 vehicular parking spaces, which represents a ratio of 1.1 parking spaces per 100 m² of gross floor area, or 180 parking spaces per hectare of site area. The applicant advised the City of Toronto that approximately 150 people will be employed in the car dealership.



- Planned to open in the summer of 2017, Audi Brampton is under construction at 25 Coachworks Crescent. This three-storey, approximately 6,185 m² building, occupies a 1.0 hectare site, equating to a floor space index of approximately 0.6. The property will feature showroom space and vehicle servicing, with 151 parking spaces. The parking ratio is 2.4 parking spaces per 100 m² of gross floor area, or 151 parking spaces per hectare of site area. The building will feature a car elevator.



- The recently completed Audi Midtown Toronto is a striking example of a new format auto dealership. Prominently located at the Highway 410 and Don Valley Parkway/ Highway 401 interchange in north Toronto, the seven-storey dealership is located in the Consumers Road Business Park, at 175 Yorkland Boulevard. The building totals approximately 15,180 m² (including rooftop parking area), and the site measures 1.03 hectares. The floor space index is 1.48. The site has parking for 147 vehicles, and the building has parking for 195 vehicles, totaling 342 spaces. The parking ratio (considering only the parking spaces located outside, not inside the building) is 1.0 parking spaces per 100 m² of gross floor area, or 143 parking spaces per hectare of site area. There are 29 service bays, 6 detail bays, and considerable showroom space.



With the exception of the former Downtown Mini (which was strictly showroom space), all of these dealerships feature on-site vehicle servicing. They also feature extensive on-site vehicle parking (although some of this is internal to the structure). The floor space indices range from 0.6 to 1.61, which is much higher than seen for the recent developments in Mississauga, which have ranged from 0.05 to 0.49 (but have averaged 0.15). The average site sizes have ranged from 0.81 hectares to just over 1.0 hectare, which is notably smaller than seen in most of Mississauga's newer developments (which averaged 1.7 hectares).

4.4 – Impact of Land Conversion

4.4.1 Overview

Recent building permit activity suggests that there is an average of approximately one new car dealership added in Mississauga annually (1.25 annually from 2002-2016, to be precise). This figure of 1.25 dealerships per year will be used as the basis for examining the potential impact of motor vehicle sales being permitted as a land use in Employment Areas and Corporate Centres.

The following identifies key assumptions in our analysis:

- 1.25 new car dealerships added annually going forward.
- Forecast horizons are 2017-2031 and 2017-2041.
- Assumed land requirement of 1.7 ha per dealership – consistent with recent figures for Mississauga.

LAND DEMAND PROJECTION		
Metric	2017-2031	2017-2041
# of Forecast Years	15	25
# of New Dealerships (@ 1.25 annually)	19*	31*
Land Required (@ 1.7 ha per dealership)	32.3	52.7
<i>*Note: Figures are rounded to nearest whole number.</i>		

The City of Mississauga has a vacant employment land inventory of 782 hectares. However, deducting for a 5% vacancy factor – there is an effective land supply of 319 hectares. If all of the new auto dealerships that are projected to be added from 2017-2031 were to locate on employment lands, this would result in the absorption of some 32 hectares of land, or around 10% of the remaining employment land supply. By 2041, the nearly 53 hectares of land required for new auto dealerships would have absorbed roughly 17% of the currently vacant employment land supply. It is apparent that the introduction of automotive retailing on employment lands would result in a significant decline in overall land availability. While Cushman & Wakefield accepts that it is not be realistic to assume that all new dealerships would seek locations on employment lands, the land price variance between industrial lands and commercial-retail lands is notable, and would encourage developers to consider employment lands sites for their new dealerships.

It must also be acknowledged that some existing auto dealerships may seek to relocate to employment land sites (if permitted) in order to leverage the land value of their existing locations (with alternate sites in employment areas being less costly than the underlying land value of the existing dealership). This would create further strain on the supply of vacant employment lands.

4.4.2 Recommendations

It is the view of Cushman & Wakefield that while expanding employment uses to include motor vehicle sales may not undermine the viability or integrity of employment areas, such a use is not recommended. Although there are examples in urban areas of newer format dealerships that feature a vertical design, more internal parking, and higher site coverage, the following concerns are noted:

1. **Inadequate employment land supply** – It has already been demonstrated in the land demand and supply scenarios reviewed previously (Section 2.4) that there is an insufficient amount of employment land to meet projected ELE and MOE job growth targets.
2. **Clustering of automotive uses** – It has been shown that auto dealerships have a propensity of clustering. This could lead to significant land demand where dealerships seek to co-locate (at times different brands are operated by a single business owner/corporation), potentially displacing established employment land uses.
3. **Desire for prime sites** – It is likely that dealerships would seek sites on the periphery of employment areas to leverage the accessibility and visibility of arterial roadways. Such sites are considered optimal to accommodate office uses, as well as prestige industrial users.
4. **A low employment density land use** – Automotive dealerships tend to have a lower employment density compared to jobs in employment areas (employment land employment) – although this is less of a concern in newer format dealerships. Permitting a land use conversion to allow automotive retailing is not seen as maximizing the productivity of these lands.
5. **Non-complimentary use** – Automotive sales is not a land use that benefits the other businesses in an employment area, in the way that restaurants, financial services, or other business services provide goods or services that are needed on a daily or periodic basis by area workers.

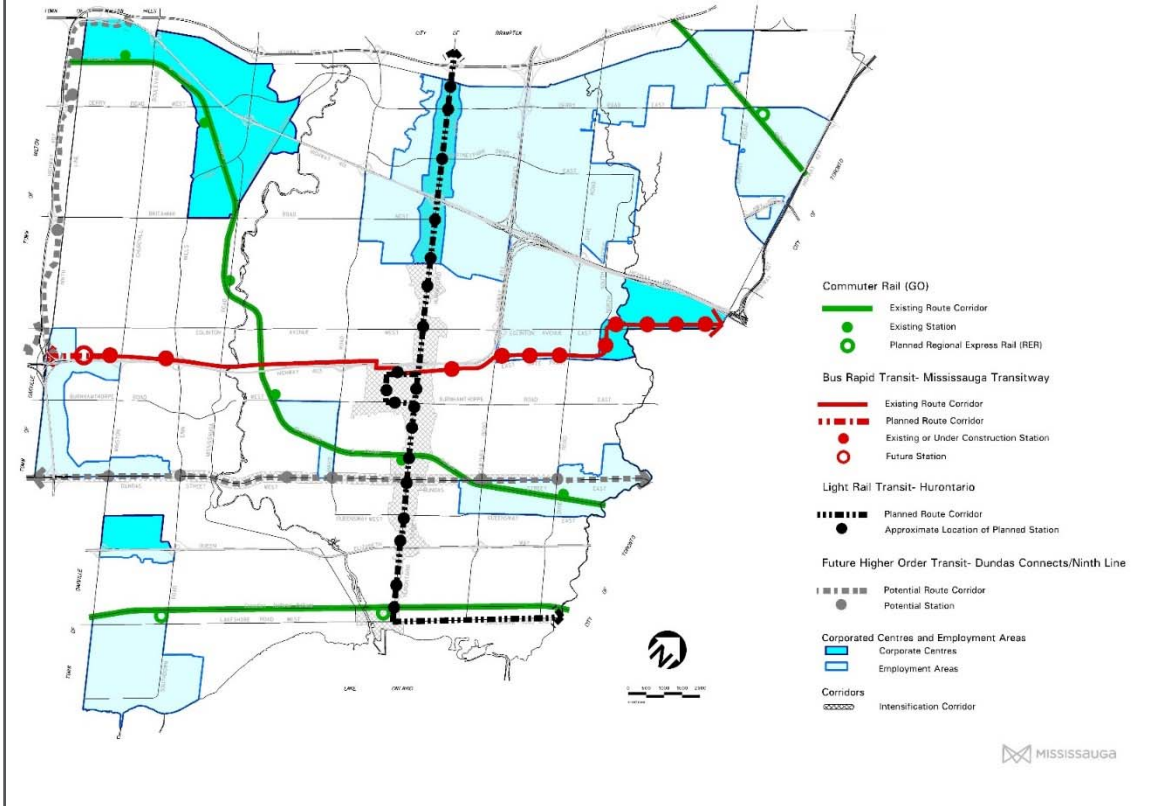
As it has been recommended that automotive uses not be added as a permitted use within Employment Areas and Corporate Centres, we have not contemplated the conditions that should be considered in evaluating such a proposal.

APPENDIX A – MAPPING

Overview

The following Appendix provides a map for each of the 12 MTSA's discussed in this report. There is also a Context Map and Index Map included.

Major Transit Station Areas- Context Map



Major Transit Station Areas- Index Map

