



Addendum #1 to the October 24, 2024 Phase 1 – Residential and Non- Residential Needs Analysis Town of Milton

February 28, 2025

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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
M.T.S.A.	major transit station area
O.P.R.	official plan review
U.G.C.	urban growth centre



Addendum Report to the October 24, 2024 Phase 1 – Residential and Non- Residential Needs Analysis



1. Background

As part of the Official Plan Review (O.P.R.) process, the Town of Milton undertook a growth update study to ensure that anticipated long-term development trends were reflected in the Town's long-term growth forecasts. This study was largely completed during the early part of 2024. In the spring of 2024, the Phase 1 – Residential and Non-Residential Needs Analysis was presented to local Council, and the document was circulated to the public for comments as part of the Town's consultation process and finalized on October 24, 2024. The Town of Milton received comments from Conestoga College and Wilfred Laurier University. The purpose of this addendum is to reflect the following changes:

- Acknowledge the final 2021 undercount in Section 6.3;
- Acknowledge these comments from the post-secondary institutions and update the information herein;
- Update the Milton GO/M.T.S.A. housing potential in Section 5.1.1. to reflect total housing potential; and
- Correct the total housing units in the Vacant Community Areas in Figure J-2 in Appendix J.

2. Discussion

This section of the addendum report provides an explanation for the above-noted refinements. It is noted the remaining sections of the Phase 1 – Residential and Non-Residential Needs Analysis report have not been adjusted. Please note that the growth analysis incorporates the best available information at the time when the report was conducted (early 2024). Since the release of this report, new data sources have been updated such as residential and non-residential building permits, residential development applications to name a few. These updates are not reflected in this addendum. It is suggested that this report is regularly monitored to reflect updated data sources that may impact near-term and long-term growth trends.

2.1 Updated 2021 net Census Undercount

During the study, the 2021 net Census undercount was not finalized, therefore the 2016 undercount figure of 3.3% was used in the analysis. Following the release of the study,



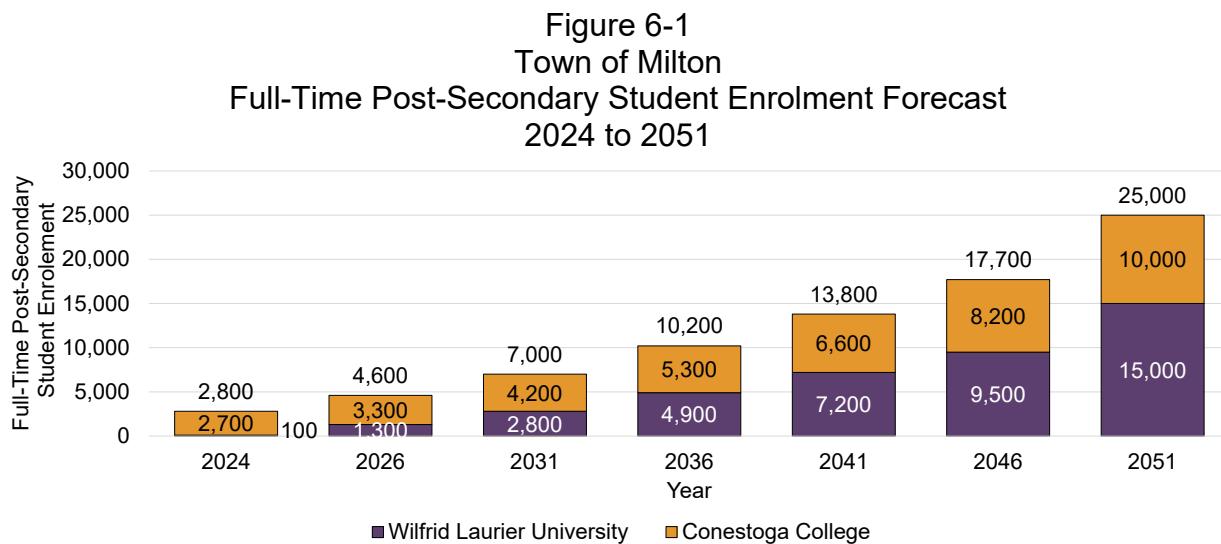
the 2021 net Census undercount has now been confirmed at 3.9%. In Section 6.3 the following footnote has been added to the report:

At the time of this study, the 2021 net Census undercount had not yet been finalized, so the 2016 undercount (3.3%) was used. Since the study's release, the 2021 net Census undercount has been finalized at 3.9%.

2.2 Post-Secondary Student Enrolment Forecast Refinements

As a result of consultation with post-secondary institutions, both Conestoga College and Wilfred Laurier University have lowered their respective enrollment projections as a result of more recent targets issued by the federal government in October 2024 showing previous targets decreasing by about 21%. As a result of these announcements, the Laurier campus in Milton has further lowered their enrollment projections and adjusted the amount of international and domestics students.

As presented in the October 2024 report:

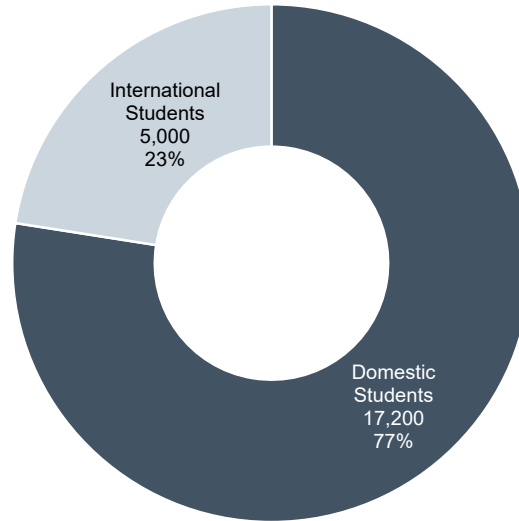


Note: Figures have been rounded and may not add up precisely.

Source: Data derived from discussions with Town staff and Conestoga College prepared by Watson & Associates Economists Ltd.

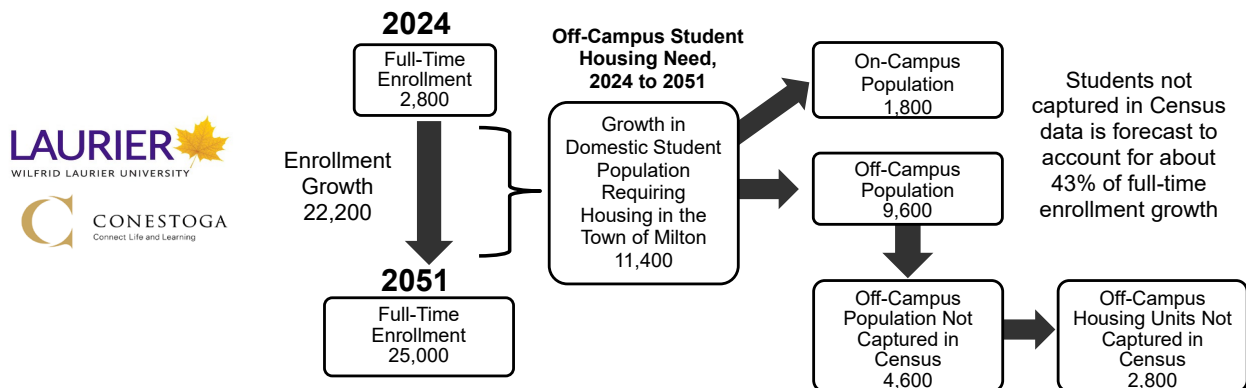


Figure 6-2
Town of Milton
Share of International and Domestic Students
2024 to 2051



Note: Figures have been rounded and may not add up precisely.
Source: Data derived from Wilfrid Laurier University’s Milton campus, Conestoga College campus locations, and discussions with Town staff prepared by Watson & Associates Economists Ltd.

Figure 6-3
Town of Milton
Post-Secondary Student Forecast, 2024 to 2051

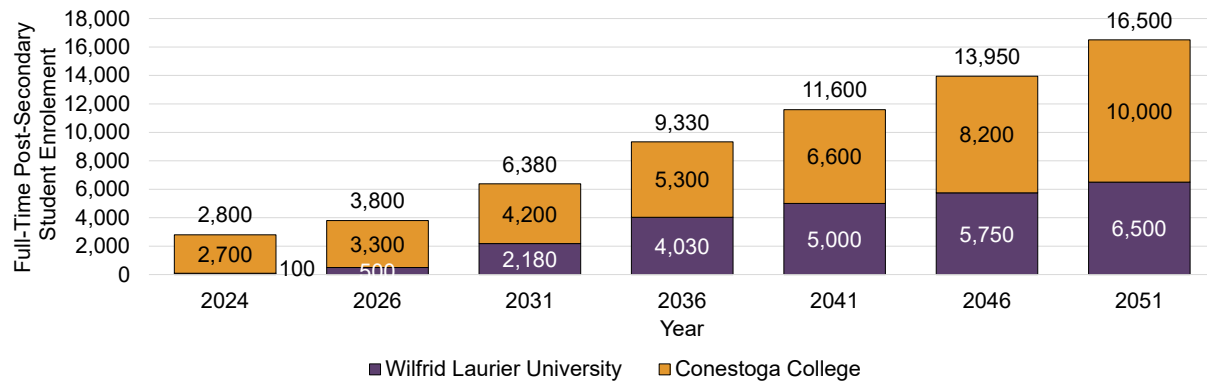


Note: Figures have been rounded and may not add up precisely.
Source: Watson & Associates Economists Ltd.



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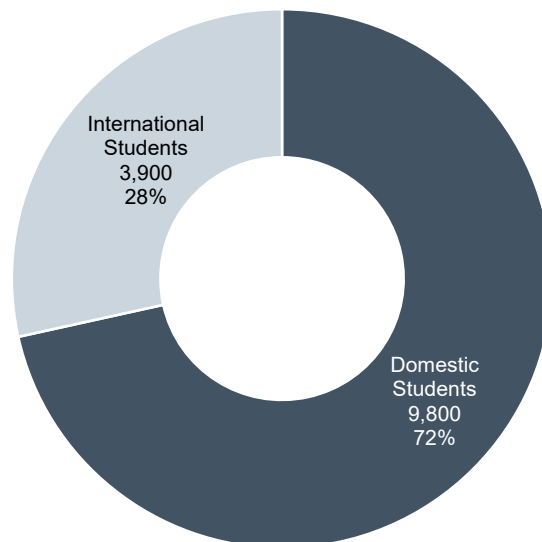
Figure 6-4
Town of Milton
Full-Time Post-Secondary Student Enrolment Forecast
2024 to 2051



Note: Figures have been rounded and may not add up precisely.

Source: Data derived from discussions with Town staff and Conestoga College prepared by Watson & Associates Economists Ltd.

Figure 6-5
Town of Milton
Share of International and Domestic Students
2024 to 2051

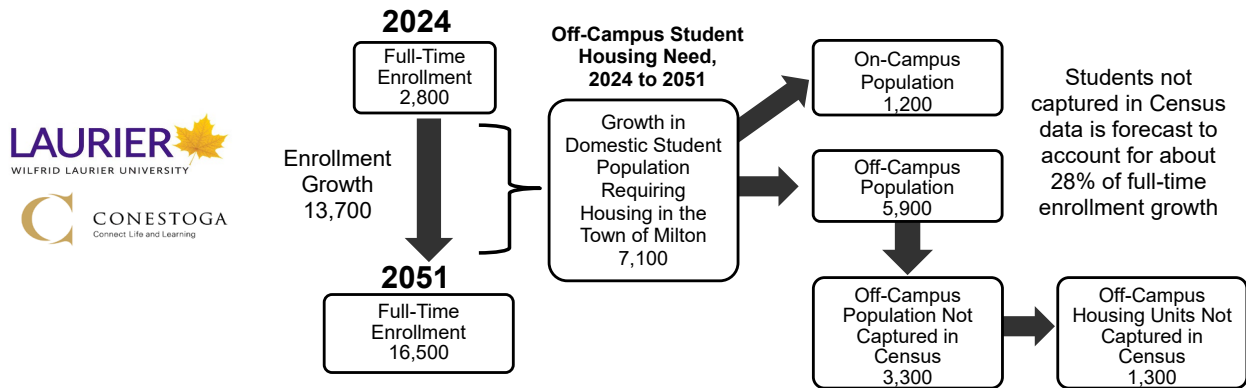


Note: Figures have been rounded and may not add up precisely.

Source: Data derived from Wilfrid Laurier University's Milton campus, Conestoga College campus locations, and discussions with Town staff prepared by Watson & Associates Economists Ltd.



Figure 6-6
Town of Milton
Post-Secondary Student Forecast, 2024 to 2051



Note: Figures have been rounded and may not add up precisely.
Source: Watson & Associates Economists Ltd.

2.3 Housing Potential in the Milton U.G.C./M.T.S.A.

The following text in Section 5.1.1. has been updated to reflect the total housing potential in the Milton Urban Growth Centre (U.G.C.)/ Major Transit Station Area (M.T.S.A.) of 8,400 units rather than total proposed units (4,100 units).

The Milton U.G.C./M.T.S.A. (8,400 housing units) accounts for 31% of the total identified housing supply potential in the Developed/Developing Community Areas. All units are anticipated to be within high-density forms within this M.T.S.A.

2.4 Total Housing Units in the Vacant Community Areas in Figure J-2 in Appendix J

Figure J-2 in Appendix J has been updated to reflect the total units in the Vacant Community Area, ensuring alignment with Figure 7-4 in the report. The existing figures and updated figures are presented below.



As presented in the October 2024 report:

Figure J-2
Town of Milton
Total Housing Growth by Area Allocations
2021 to 2051

	2021 to 2026	2026 to 2031	2031 to 2036	2036 to 2041	2041 to 2046	2046 to 2051	2021 to 2051
Low Density ^[1]	1,170	3,660	2,100	1,650	1,140	1,030	10,750
Medium Density ^[2]	1,260	5,120	4,320	4,390	3,200	1,800	20,090
High Density ^[3]	-	1,100	2,120	2,030	2,100	2,300	9,650
Total Housing Units	2,430	9,880	8,540	8,070	6,440	5,130	40,490
Vacant Community Area							

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Note: Figures have been rounded and may not add precisely.

Source: Watson & Associates Economists Ltd.

Updated:

Figure J-2
Town of Milton
Total Housing Growth by Area Allocations
2021 to 2051

	2021 to 2026	2026 to 2031	2031 to 2036	2036 to 2041	2041 to 2046	2046 to 2051	2021 to 2051
Low Density ^[1]	1,170	3,660	2,100	1,650	1,140	1,030	10,750
Medium Density ^[2]	1,260	5,300	4,320	4,390	3,200	1,800	20,270
High Density ^[3]	510	1,630	2,630	2,540	2,340	2,510	12,160
Total Housing Units	2,940	10,590	9,050	8,580	6,680	5,340	43,180
Vacant Community Area							

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Note: Figures have been rounded and may not add precisely.

Source: Watson & Associates Economists Ltd.



Phase 1 – Residential and Non-Residential Needs Analysis (as amended February 28, 2025)

Town of Milton

Final Report

October 24, 2024

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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
B.U.A.	built-up area
C.D.	Census Division
C.M.A.	Census Metropolitan Area
CN	Canadian National Railway
COVID-19	coronavirus disease
D.G.A.	designated greenfield area
G.D.P.	gross domestic product
G.G.H.	Greater Golden Horseshoe
E.L.E.	employment land employment
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto Hamilton Area
ha	hectare(s)
I.M.F.	International Monetary Fund
J.B.P.E.	Joint Best Planning Estimates
L.Q.	location quotient
M.E.V.	Milton Education Village



List of Acronyms and Abbreviations (Cont'd)

M.O.E.	major office employment
M.O.F.	Ministry of Finance
M.T.S.A.	major transit station area
M.Z.O.	Minister's Zoning Order
N.F.P.O.W.	no fixed place of work
N.P.R.	non-permanent residents
O.P.	Official Plan
P.M.I.	Purchasing Managers' Index
P.P.S.	Provincial Planning Statement/Provincial Policy Statement
P.P.U.	persons per unit
P.R.E.	population-related employment
R.O.P.A.	Regional Official Plan Amendment
S.A.B.E.	Settlement Area Boundary Expansion
S.G.A.	Strategic Growth Area
sq.ft.	square foot/feet
U.G.C.	Urban Growth Centre
U.S.	United States



Executive Summary

The Town of Milton retained Watson & Associates Economists Ltd. (Watson), in association with Malone Given Parsons (MGP) and Tim Welch Consulting (TWC), in 2023 to prepare a residential and non-residential needs analysis. This study is being undertaken in two phases. As part of the Phase 1 work program, Watson and MGP are responsible for assessing the Town of Milton's long-term population, housing, and employment potential by planning policy area and development phase to the year 2051. The primary objective of Phase 2 is to provide an assessment of current and future housing needs to help inform the development of inclusionary zoning policies.

This study will be used to provide strategic planning policy recommendations with respect to residential intensification, affordable housing policies specifically related to inclusionary zoning Official Plan (O.P.) policies, the phasing of residential greenfield urban development, and the long-range planning for evolving Employment Areas and commercial mixed-use areas over the next three decades. This study will also provide recommended approaches to growth monitoring and long-term growth management.

The primary purpose of Phase 1 is to ensure that anticipated long-term development trends are reflected in the Town's revised long-term growth forecasts and considered through provincial policy. Recent changes to planning policy at the provincial level, through amendments to the *Planning Act* and the Provincial Planning Statement (P.P.S.), 2024, recommend an updated land use planning framework for Ontario municipalities to address rising urban development pressures and housing needs. This evolving planning framework, has fundamental implications on how Ontario municipalities approach required updates to O.P.s, including key supporting documents related to housing, development phasing, and long-term growth management.

Macro-Economic Trends Influencing Growth Trends in the G.T.H.A.

A range of macro-economic and demographic factors are anticipated to influence future population and employment growth by sector across the Greater Toronto Hamilton Area (G.T.H.A.) and more specifically within the Town of Milton. These factors are anticipated to influence future growth trends on residential and non-residential lands within Milton and the broader regional market (i.e., the G.T.H.A.) over the coming decades.



Technological changes, including automation and the rise of artificial intelligence, have major impacts on traditional employment and labour force patterns. The increasing use of technology in commercial services is also leading to alternative platforms to purchase and share products. Technological innovation and the coronavirus disease (COVID-19) pandemic have increased opportunities related to work at home and hybrid work at home/at office models and distributed work/learning. The continued rise of the gig economy^[1] also has individuals utilizing technology to supplement their income in more flexible ways. As a result of continuing structural changes occurring in the macro-economy, it is important to recognize that the above-mentioned trends will generate both disruptive economic impacts (both positive and negative) related to labour force supply and demand as well as employment growth trends by sector.

Over the past two decades the G.T.H.A. has captured most of the population growth in Ontario. Recent trends between 2016 and 2021, however, suggest that while the G.T.H.A. is expected to continue to experience steady population growth, the share of the provincial population growth is anticipated to continue to shift outward into the Greater Golden Horseshoe (G.G.H.) Outer Ring and the remaining areas of Southern Ontario. Between 2001 and 2006, York and Peel Region, combined, accounted for 68% of the G.T.H.A.'s population growth. Since then, the share of population growth for these Regions has declined, accounting for 40% of growth between 2016 and 2021. Conversely, Durham Region, Halton Region, and the City of Hamilton have collectively experienced an increasing share of population growth over the three Census periods, most notably during the most recent 2016 to 2021 period. Recent (i.e., post 2021) residential building permit activity and housing completions across these three municipalities indicates that this trend has continued and potentially accelerated over the past few years since the onset of COVID-19 in 2020.

Within the G.T.H.A., the erosion of housing affordability places a greater emphasis for a broader range of housing options. When considering low-density housing prices over the past few years across the G.T.H.A., Halton Region has provided somewhat more affordable options, particularly in the Town of Milton and the Town of Halton Hills, when compared to other municipalities across the Region. In Halton Region, approximately 40% of new low-density units absorbed over the past three years were priced under

[1] Gig economy refers to a general workforce environment, which includes short-term employment, contractual jobs, and independent contractors such as Uber drivers, social media platforms, or crowdfunding.



\$1 million. Comparably, average prices for new homes in other areas within the G.T.H.A. such as York Region and the City of Toronto were higher, where 28% and 4%, respectively, of low-density units were under \$1 million. As of 2023, the average price of a single detached home in Milton was \$1.5 million, which is slightly lower than Halton Region's average price of \$1.6 million. Across Halton Region, and more broadly throughout the Province, household income levels have not kept pace with housing carrying costs for ownership and rental housing over the past decade.

Milton Profile and Growth and Trends

Milton's population has experienced significant growth over the past two decades. Between 2001 and 2021, the Town grew at an annual average growth rate of 7.4%, or approximately 5,200 people per year. During this same time period, Halton Region grew at an annual average rate of 2.3%.

Demographic trends strongly influence both housing need and form. Compared to the Province and Halton Region, the average age of the population base in Milton is relatively younger. Approximately 68% of the Town's population in 2021 was under 44 years of age, compared to 56% in Halton Region. Unlike the Region of Halton and the Province as a whole, the Town of Milton has not experienced a significant increase in the percentage share of seniors (aged 65+) over the past 20 years. Notwithstanding these historical trends, the Town's share of population in the 65+ age group is forecast to increase over the next 30 years, primarily driven by the aging of the Town's existing Baby Boomer^[2] population. This is important to recognize as it has implications regarding housing demand by structure type, tenure, and municipal service needs.

Over the past two decades, the Town of Milton has averaged 1,470 new housing units per year. The highest annual growth rates for low- and medium-density housing were between 2001 and 2006, growing at an annual rate of 12.2% and 17.9%, respectively. Since then, the rate of medium-density housing development has remained strong but has decreased steadily. In the most recent 2016 to 2021 Census period, low- and medium-density housing units grew at an annual average rate of 2.5% and 4.7%, respectively. In contrast, high-density housing construction has increased within the Town of Milton. Between 2001 and 2006, high-density housing grew at an annual rate of 0.3%; since then, it has been steadily growing, reaching a peak of 14.3% between

^[2] Baby Boomers are defined as those born between 1946 and 1964.



2011 and 2016, and moderating to 4.3% during the 2016 to 2021 period. Steady demand for higher-density forms is expected to increase over the forecast due to eroding housing affordability, combined with increasing needs from a growing population of young adults and seniors.

The strength of the Town of Milton economy is strongly correlated to the competitiveness of the broader G.T.H.A. regional economy. Within this regional economy, labour force trends are regularly monitored within the Toronto Census Metropolitan Area (C.M.A.), which covers a large extent of the G.T.H.A. The Toronto C.M.A. labour force has steadily recovered since the 2008/2009 recession, particularly between 2015 and 2019. More recently, the regional economy has sharply rebounded from the impacts of COVID-19, since labour force levels bottomed out in June 2020.

Milton's employment base is largely concentrated in transportation and warehousing, wholesale trade, and manufacturing. These employment sectors have also experienced various levels of labour force growth over the past five years and generally represent the established economic clusters within the regional economy. In contrast, certain employment sectors, including finance and insurance, professional, scientific and technical services, and health care and social assistance are less concentrated but have recently been experiencing moderate to strong labour force growth. These employment sectors generally represent emerging economic clusters within the Town.

Town of Milton Growth Outlook to 2051

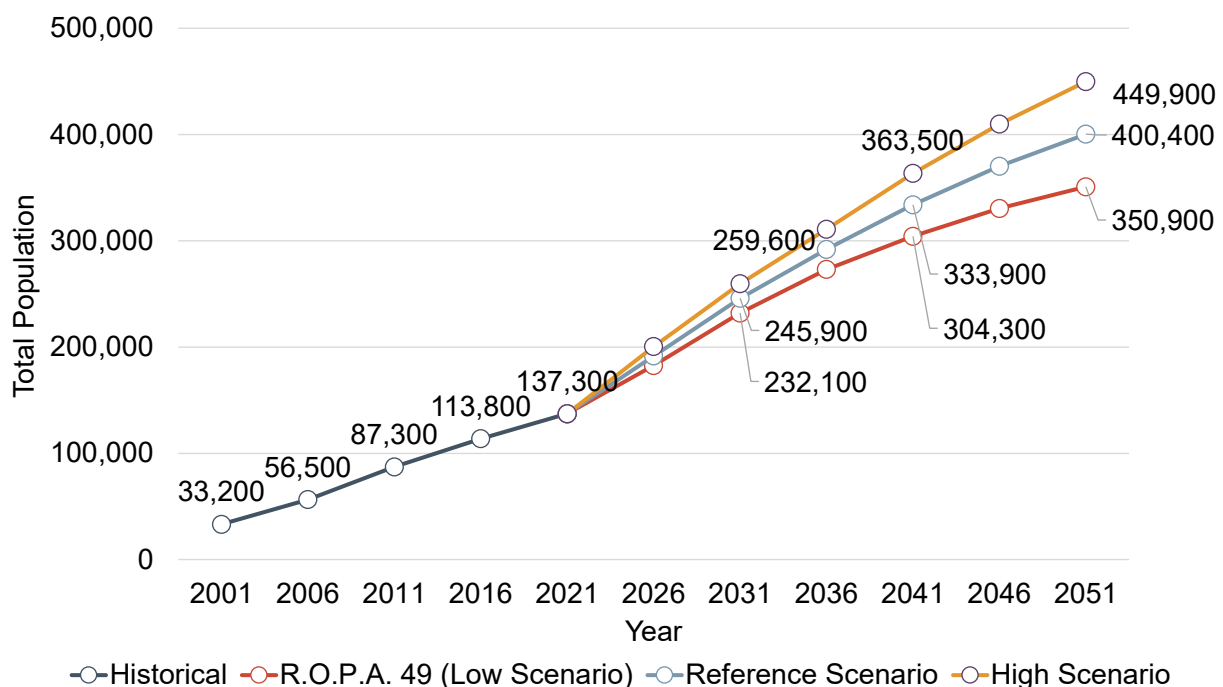
A broad range of considerations related to demographics, economics, and socio-economics are anticipated to impact future population and employment growth trends throughout Milton over the 2021 to 2051 planning horizon. These factors will not only affect the rate and magnitude of growth but will also influence the form, density, and location of residential and non-residential development.

Figure ES-1 summarizes three long-term population forecast scenarios for the Town of Milton over the 2021 to 2051 forecast period, relative to historical population between 2001 and 2021. The Low Growth Scenario is based upon Regional Official Plan Amendment (R.O.P.A.) 49 as approved by the Ministry in November 2022; please refer to section 2.2.1 for additional information. In developing alternative long-term growth scenarios for the Town, the Consultant Team has undertaken a comprehensive assessment of the long-term population growth outlook for the Province of Ontario, the



G.T.H.A., and Halton Region, considering existing population forecasts which have been developed at these broader levels of geography. By 2051, Milton’s total population base is forecast to grow to between 350,900 and 449,900 residents. This represents an increase of approximately 213,600 to 312,600 people between 2021 and 2051. For the purposes of long-term planning, the Reference Growth Scenario is recommended.

Figure ES-1
Town of Milton
Total Population, 2001 to 2051



	2021	2051	2021 to 2051	Annual Growth	Annual Growth Rate
R.O.P.A. 49 (Low Scenario)	137,300	350,900	213,600	7,100	3.2%
Reference Scenario	137,300	400,400	263,100	8,800	3.6%
High Scenario	137,300	449,900	312,600	10,400	4.0%

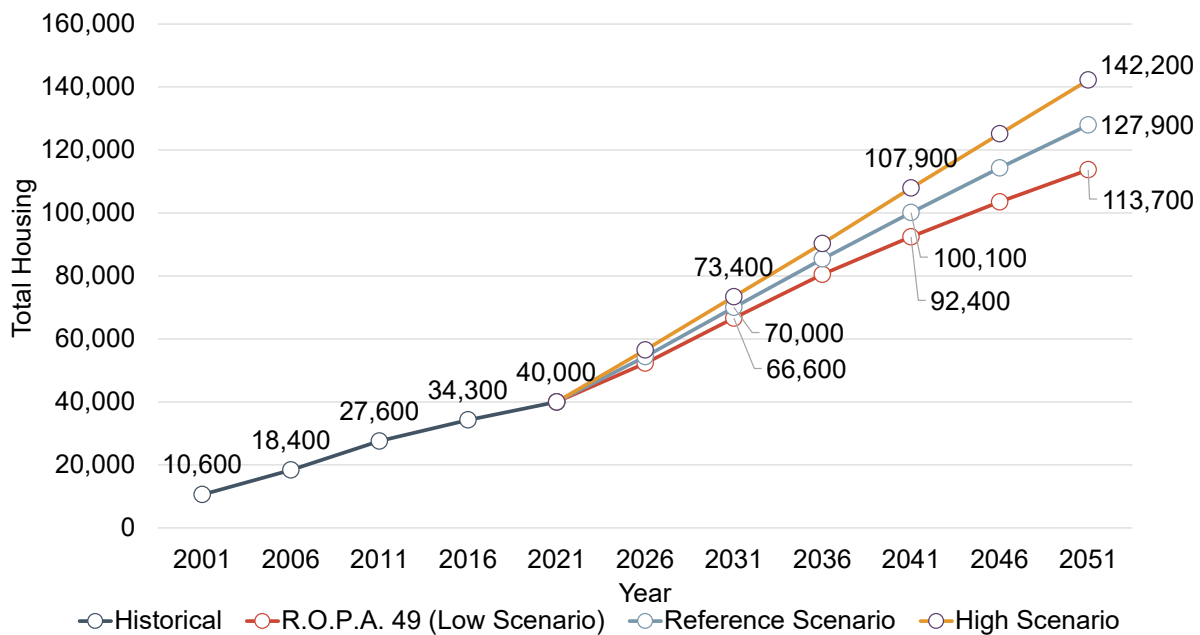
Note: Population figures include a net Census undercount. Figures have been rounded.
Source: Historical data derived from Statistics Canada Table: 17-10-0140-01 and Table: 17-10-0139-01; forecast prepared by Watson & Associates Economists Ltd.

To accommodate the long-term Population Growth Scenario, the Town will require between 73,700 and 102,100 additional households over the 2021 to 2051 planning



horizon. Figure ES-2 provides a summary of the Town’s anticipated housing needs in five-year increments from 2021 to 2051. Over the 30-year forecast period, Milton is forecast to average between 2,500 and 3,400 new households per year, more than double the historical annual housing development over the past 20 years.

Figure ES-2
Town of Milton
Total Housing, 2001 to 2051



	2021	2051	2021 to 2051	Annual Growth	Annual Growth Rate
R.O.P.A. 49 (Low Scenario)	40,000	113,700	73,700	2,500	3.5%
Reference Scenario	40,000	137,900	87,900	2,900	3.9%
High Scenario	40,000	142,200	102,100	3,400	4.3%

Note: Figures have been rounded.

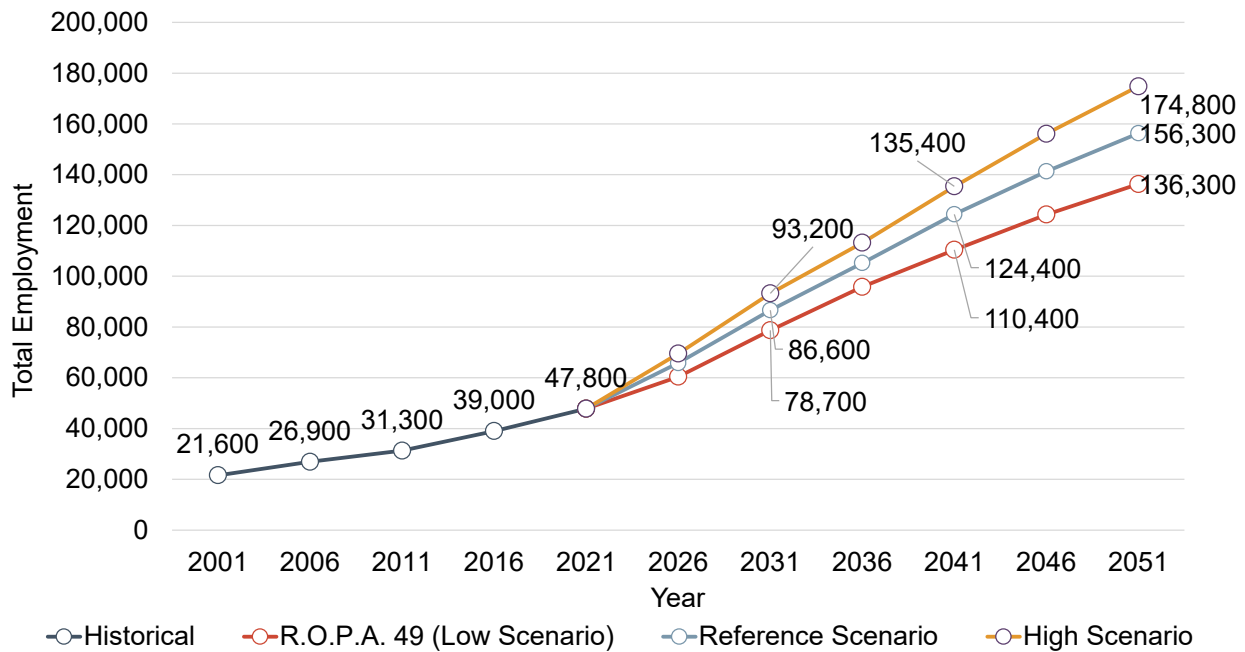
Source: Historical data derived from Statistics Canada Census Profile; forecast prepared by Watson & Associates Economists Ltd.

Figure ES-3 summarizes three long-term employment forecast scenarios for Milton over the 2021 to 2051 forecast period relative to historical employment trends between 2001 and 2021. By 2051, Milton’s employment base is forecast to grow to between



approximately 136,300 and 174,800 jobs. This represents an increase of approximately 88,500 to 127,000 jobs between 2021 and 2051.

Figure ES-3
Town of Milton
Total Employment, 2001 to 2051



	2021	2051	2021 to 2051	Annual Growth	Annual Growth Rate
R.O.P.A. 49 (Low Scenario)	47,800	136,300	88,500	3,000	3.6%
Reference Scenario	47,800	156,300	108,500	3,600	4.0%
High Scenario	47,800	174,800	127,000	4,000	4.4%

Note: Figures have been rounded.

Source: Historical data derived from Statistics Canada Place of Work data; forecast prepared by Watson & Associates Economists Ltd.

As previously noted, the Reference Scenario is the recommended growth forecast scenario for the Town of Milton, as it represents a reasonable future rate of population growth relative to historical trends, considering recent and forecast immigration levels expected for Canada and Ontario over the next several years and longer-term population growth forecasts for the Province. Furthermore, the share of net migration and population growth in the 15-64 age group is reasonable within the context of



historical migration patterns and broader demographic trends anticipated across the Province and the G.T.H.A.

Population and Employment Growth Allocations by Development Area, 2021 to 2051

Figure ES-4 provides a map of the Town by development area, and Figures ES-5 through ES-7 summarize the Town's long-term population and employment forecast by development area over the 2021 to 2051 planning horizon under the Reference Growth Scenario.

Historically, the Town of Milton has experienced limited residential development within the provincially defined built-up area (B.U.A.), averaging approximately 4% since 2006. It is important to note, however, that the intensification rate has been steadily increasing in the Town. In the most recent 2016 to 2021 period, the Town of Milton has achieved an overall intensification rate of 10% within the B.U.A. Over the next three decades, it is expected that the Town will accommodate 12,200 units within the B.U.A., generating an overall intensification rate of close to 15%.

Over the 2021 to 2051 planning horizon, the Town's vacant Community Areas^[3] lands are expected to account for almost half the Town-wide population growth, with 128,200 people, and almost one-third of the Town's employment growth, accommodating 30,060 jobs. The Town's Developed/Developing and vacant Community Area lands are forecast to average an overall density of 85 people and jobs per hectare by 2051. The Developed/Developing Community Areas^[4] are expected to accommodate 28% of the Town's overall population growth (72,500 people) and 21% of the Town's employment growth (22,890 jobs). Over the forecast period, the Community Area Expansion lands are anticipated to account for 23% of the Town-wide population growth, representing approximately 60,900 people, and 9% of the Town-wide employment growth, representing approximately 9,900 jobs. Combining the Vacant Community Area lands

^[3] Includes the Agerton Secondary Plan, the Britannia Secondary Plan, the Milton Education Village Secondary Plan, and the Trafalgar Secondary Plan.

^[4] Includes the provincially defined built-up area (B.U.A.), which includes the Milton U.G.C./M.T.S.A., in addition to the Bristol Survey Secondary Plan, the Sherwood Survey Secondary Plan, and the Boyne Survey Secondary Plan.



with the Community Area Expansion lands, the overall density target is 99 people and jobs per hectare by 2051.

As of 2021, Milton's Employment Areas support approximately 21,200 jobs, generating an overall density of 17 jobs per hectare. Over the next three decades, it is estimated that 37% of the Town-wide employment growth will be directed into Employment Areas. By 2051, the Town's Employment Areas are expected to accommodate 60,900 jobs, generating an overall density of 27 jobs per hectare. The Employment Area Expansion lands are expected to account for 5% of the Town-wide employment growth by 2051. These Employment Area Expansion lands have the potential to accommodate an additional 16,200 jobs at full buildout.

Figure ES-4
Town of Milton
Development Area

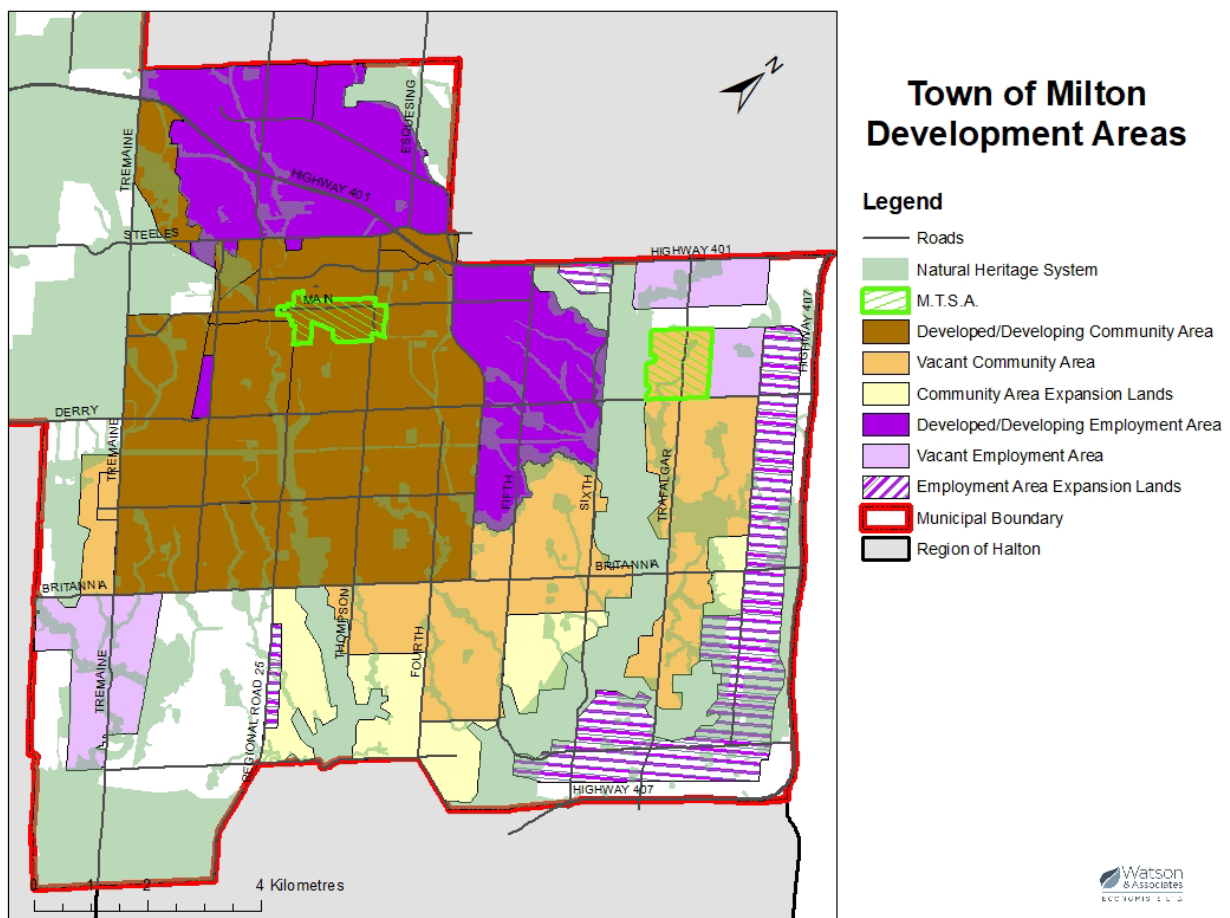
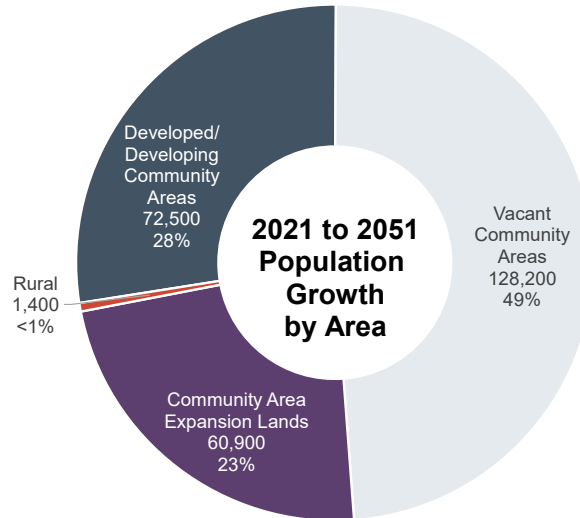


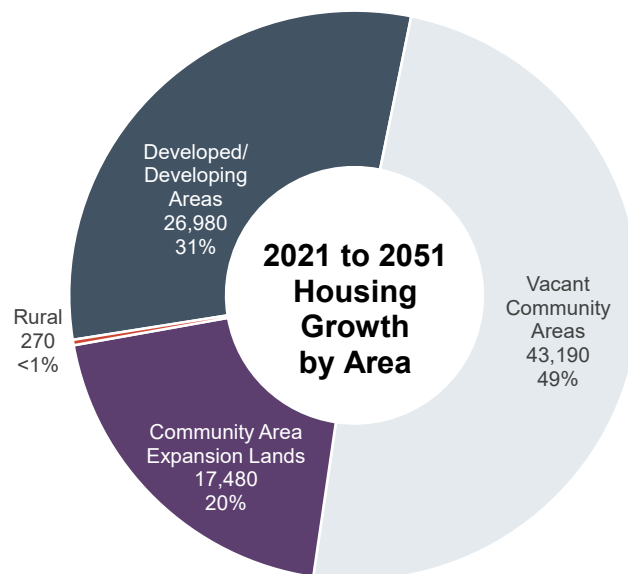


Figure ES-5
Town of Milton
Total Population Growth, 2021 to 2051



Note: Figures have been rounded and may not add precisely.
Source: Watson & Associates Economists Ltd.

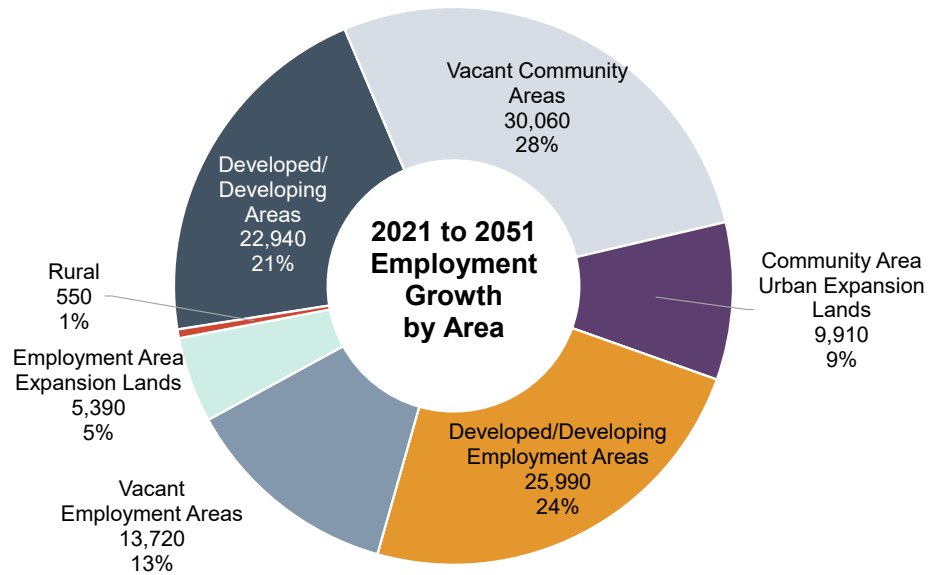
Figure ES-6
Town of Milton
Total Housing Growth, 2021 to 2051



Note: Figures have been rounded and may not add precisely.
Source: Watson & Associates Economists Ltd.



Figure ES-7
Town of Milton
Total Employment Growth, 2021 to 2051



Note: Figures have been rounded and may not add precisely.
Source: Watson & Associates Economists Ltd.



1. Introduction

1.1 Terms of Reference

The Town of Milton retained Watson & Associates Economists Ltd. (Watson), in association with Malone Given Parsons (MGP) and Tim Welch Consulting (TWC), in 2023 to undertake a residential and non-residential needs analysis. This study is being undertaken in two phases. As part of the Phase 1 work program, Watson and MGP are responsible for assessing the Town of Milton’s long-term population, housing, and employment potential by planning policy area and development phase to the year 2051. The primary objective of Phase 2 is to provide an assessment of current and future housing needs to help inform the development of inclusionary zoning policies.

This analysis will be used to provide strategic planning policy recommendations with respect to residential intensification, affordable housing policies specifically related to inclusionary zoning Official Plan (O.P.) policies, the phasing of residential greenfield urban development, and the long-range planning for evolving Employment Areas and commercial mixed-use areas over the next three decades. This study will also provide recommended approaches to growth monitoring and long-term growth management.

1.2 Study Purpose

The analysis outlined in this report focuses on Phase 1 of this study. The primary purpose of this phase of the study is to ensure that anticipated long-term development trends are reflected in the Town’s revised long-term growth forecasts and considered through existing and proposed provincial policy. Recent changes to planning policy at the provincial level, through amendments to the *Planning Act*, and Provincial Planning Statement (P.P.S.), 2024, recommend an updated land use planning framework for Ontario municipalities to address rising urban development pressures and housing needs. This evolving planning framework, has fundamental implications on how Ontario municipalities approach required updates to O.P.s, including key supporting documents related to housing, development phasing, and long-term growth management.

This analysis will form a critical background document to inform the Town’s O.P. policies and service delivery needs across Milton. Key components of this assignment include:



- A 30-year demographic analysis and forecast of permanent population and household growth for Milton from 2021 to 2051 (in five-year intervals).
 - A total of three growth scenarios including a Low, Medium, and High Scenario, and a recommended scenario, have been prepared.
- A housing forecast by structure type outlining forecast demand for ownership and rental housing in the Town of Milton.
- Allocation of population, housing, and employment by policy area and development phase, including developed/developing urban lands, vacant designated and planned urban lands, and proposed urban expansion lands in five-year intervals to the year 2051.
- Strategic planning recommendations regarding residential intensification, housing mix by structure type and tenure, development phasing, residential density, employment trends in Community Areas and Employment Areas, and urban expansion requirements.



2. Planning Policy Context

2.1 Provincial Policy Contact

This study was prepared under the purview of the Provincial Policy Statement (P.P.S.), 2020. On April 7, 2023, the Province of Ontario released a new P.P.S. in concert with introducing Bill 97: *Helping Homebuyers, Protecting Tenants Act, 2023*. Bill 97 proposes amendments to seven provincial statutes, including the *Planning Act*. The proposed P.P.S., 2023 was intended to simplify and integrate existing provincial policies established in A Place to Grow: Growth Plan for the Greater Golden Horseshoe (the Growth Plan) and the P.P.S., 2020, while providing municipalities and the Province with greater flexibility to deliver on housing objectives. A key focus of the proposed P.P.S., 2023 was that it recognized that the approach for achieving housing and employment outcomes will vary by municipality and, as such, moved away from a prescriptive guideline approach to growth analysis and urban land needs assessments.

On April 10, 2024, the Province released Bill 185, *Cutting Red Tape to Build More Homes Act*. A few months later, on August 19, 2024, the Province released the P.P.S., 2024, which replaces the P.P.S., 2020 and a Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 as an integrated document.^[5] It is important to note that the P.P.S., 2024 will not be in effect until October 20, 2024. Prior to this date, the Province intends to provide guidance on the implementation of the P.P.S., 2024. The following summarizes key highlights on the P.P.S., 2024:

- Compared to the P.P.S., 2020, the P.P.S., 2024 presents a more flexible horizon for planning for growth by providing a planning horizon with a minimum of 20 years and a maximum of 30 years. Additionally, it allows for planning of infrastructure, public service facilities, strategic growth areas, and Employment Areas to extend beyond this time horizon.^[6] As such, this suggests that municipalities are to designate land to accommodate growth for at least 20 years, but not more than 30 years with the opportunity to designate additional land

^[5] <https://ero.ontario.ca/notice/019-8462>.

^[6] P.P.S., 2024, policy 2.1.3, p. 6.



beyond the 30-year time horizon for Employment Areas, strategic growth areas, and planning for infrastructure.^[7]

- The P.P.S., 2024 requires municipalities to consider population and employment growth forecasts prepared using the Ministry of Finance’s projections and allows municipalities to modify these forecasts as appropriate.^[8] It is important to note that the M.O.F. population forecasts are provided at the Census division level only, which typically represents upper-tier municipalities, including separated municipalities and large urban single-tier municipalities. The M.O.F. does not provide forecasts at the area municipal level. The use of the Ministry of Finance forecasts is not meant to replace long-term forecasting by municipalities, but the forecasts are to be used as a starting place in establishing forecasts and testing the reasonableness of alternative regional forecasts and area municipal growth allocations. This approach was carried out for this study.^[9]
- According to the P.P.S., 2024, Minister’s Zoning Orders (M.Z.O.s) are to be treated as “in addition to projected needs” over the planning horizon established in the O.P. In planning for M.Z.O. lands, the P.P.S., 2024 states these lands must be incorporated into the O.P. and related infrastructure plans at the time of the municipality’s next O.P. update.^{[10], [11]}
- Generally unchanged from the P.P.S., 2020, the P.P.S., 2024 still requires planning authorities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands that are designated and available for residential development. It is noted, however, that the emphasis on intensification and redevelopment in this regard has been removed. Planning authorities are also required to maintain at all times, where new development is to occur, lands with servicing capacity sufficient to provide at least a three-year supply of residential units, available through lands suitably zoned, including units in draft approved or registered plans.
- According to the P.P.S., 2024, a Settlement Area Boundary Expansion (S.A.B.E.) is allowed at any time and without the requirement of a Comprehensive Review,

^[7] Ibid.

^[8] Ibid.

^[9] At the time of this study, the Summer 2023 M.O.F. projections were utilized. On October 1st, 2024, M.O.F. released new projections. For Halton Region, this resulted in a decrease in population from the previous year.

^[10] P.P.S., 2024, policy 2.1.1, p. 6.

^[11] Does include the Minister Zoning Order 476/21 for the Milton Education Village.



provided that all P.P.S. policies under subsection 2.3.4 are considered. Furthermore, the policies allow for a simplified and flexible approach for municipalities to undertake a S.A.B.E. which would require a demonstrated need for urban expansion.

- The P.P.S., 2024 includes an updated definition of Employment Area based on the amendment of the *Planning Act* on June 8, 2023. The *Planning Act* was amended under subsection 1 (1) to include a new definition of “area of employment.” The amendment to the *Planning Act* received Royal Assent as part of Bill 97 on June 8, 2023. The definition change in the *Planning Act* would require proclamation before it becomes in effect. In light of the definition change of Employment Area, a key concern for municipalities will be their ability to provide an urban structure that will support employment uses outside of Employment Areas, particularly non-retail commercial and institutional uses (e.g., office uses, training and education, entertainment, wholesale trade and service repair centres). Traditionally, Employment Areas have been regarded as areas protected for key targeted employment sectors, especially those in the export-based sectors.
- The P.P.S., 2024 requires that municipalities unlock more opportunities for housing, stating that municipalities should support redevelopment of commercially designated retail lands (e.g., underutilized shopping malls and plazas) to support mixed-use residential.^[12] Furthermore, the P.P.S., 2024 notes that Employment Areas that do not meet the definition of Employment Area, referred to as “employment outside of Employment Areas” should support a diverse mix of land uses, including residential uses.^[13] These lands generally would include office business parks, commercial and institutional lands, and employment lands that do not meet the definition of Employment Area. It is also suggested that specific industrial, manufacturing, and small-scale warehousing uses that do not require separation from sensitive land uses are to be encouraged to locate in mixed-use areas or Strategic Growth Areas (S.G.A.s) where frequent transit service is available, outside of Employment Areas.^[14]
- Under the P.P.S., 2024, municipalities are provided with greater control over Employment Area conversions (now referred to as Employment Area removals)

^[12]P.P.S., 2024, policy 2.4.1.3, p. 9.

^[13] Ibid., policy 2.8.1.3, p. 13.

^[14] Ibid., policy 2.1.8.2, p. 11.



with the ability to remove lands from Employment Areas at any time. Previously, under the P.P.S., 2020 and the Growth Plan, municipalities were required to review changes to designated Employment Areas during a Municipal Comprehensive Review or Comprehensive Review. Under the P.P.S., 2024, municipalities are required to demonstrate that there is an identified need for the removal and the land is not required for Employment Area uses over the long term.

- The Provincially Significant Employment Zones identified in the Growth Plan are not proposed to be carried forward in the P.P.S., 2024. The Province has suggested in the P.P.S., 2024 proposal summary that the policies in the P.P.S. are sufficient for protection for Employment Areas.^[15]
- Generally unchanged from the P.P.S., 2020, the P.P.S., 2024, in rural areas, rural settlement areas shall be the focus of growth and development and their vitality and regeneration shall be promoted.^[16] Furthermore, when directing development in rural settlement areas in accordance, municipalities are to give consideration to locally appropriate rural characteristics, the scale of development and the provision of appropriate service levels.^[17] In prime agricultural areas, permitted uses and activities are: agricultural uses, agriculture-related uses and on-farm diversified uses based on provincial guidance, according to the P.P.S., 2024.^[18] Compared to the P.P.S., 2020, this policy has been modified in the P.P.S., 2024 and adds provincial guidance.

A key policy change resulting from Bill 185 that will have impacts on the Town of Milton relates to the removal of planning responsibilities for upper-tier municipalities. This concept of “upper-tier municipalities without planning responsibilities” and “upper-tier municipalities with planning responsibilities” was first introduced under the *Planning Act* as part of Bill 23, *More Homes Built Faster*, which was released on October 25, 2022. “Upper-tier municipalities without planning responsibilities” includes a list of seven municipalities comprising all the upper-tier municipalities in the Greater Toronto Area (G.T.A.), plus the County of Simcoe, the Region of Niagara, and the Region of Waterloo. Bill 185 builds upon this and amends the *Planning Act* to implement changes

[15] Environmental Registry of Ontario, ERO 019-8462, Review of Proposed Policies for a New Provincial Planning Policy Instrument, Proposal Summary, Section 2.

[16] P.P.S., 2024, policy 2.5.2, p. 11.

[17] Ibid., P.P.S., 2024, policy 2.5.2, p. 11.

[18] P.P.S., 2024, policy 4.3.2, p. 23.



to certain upper-tier municipalities, “upper-tier municipalities without planning responsibilities.”

Under Bill 185, the Region of Halton, the Region of Peel, and the Region of York will become “upper-tier municipalities without planning responsibilities” on July 1, 2024. The County of Simcoe, the Region of Durham, the Region of Niagara, and the Region of Waterloo will become “upper-tier municipalities without planning responsibilities” at a future date to be named by proclamation of the Lieutenant Governor. We anticipate that there will continue to be a strong need for impacted upper-tier municipalities, including Halton Region, to address regional growth management coordination efforts (e.g., coordination of local municipal growth forecasts, assessment of regional infrastructure needs, and review of cross-jurisdictional issues) working with their area municipalities.

A cohort survival forecast methodology has been utilized to generate the population and housing forecast for the Town of Milton (see Appendix A or Chapter 6 for further details). This methodology is recognized in the Province’s 1995 “Projection Methodology Guidelines” as one of the more common, provincially accepted approaches to growth forecasting.^[19] The P.P.S., 2024 does not require adherence to standard guidelines regarding growth projection and urban land needs. In place of specific guidelines, the P.P.S., 2024 indicates that the long-term need for urban lands will be informed by “provincial guidance.” Notwithstanding these changes to the P.P.S., long-range demographic and economic growth forecasts and urban land needs assessments remain a fundamental background component to the O.P. review process. Following our initial assessment of the P.P.S., 2024 and Bill 185, it is expected that the key conclusions of this report concerning long-term population, housing, and employment growth forecasts, along with the associated urban land needs, will remain unchanged.^[20]

2.2 Region of Halton

As part of the Region’s O.P. review process, the Region undertook a growth strategy to accommodate population, housing, and employment growth to 2051 in accordance with

^[19] Province of Ontario Projection Methodology Guideline: A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements. 1995.

^[20] It is noted that the key technical findings of this report were developed prior to the release of Bill 185 and P.P.S., 2024.



provincial planning requirements. This process, referred to as the Halton Region Integrated Growth Management Strategy, provided a comprehensive examination of the long-term growth outlook for the Region of Halton, including four long-range growth concepts for the Region to the year 2051. Each of these growth concepts explored various forward-looking assumptions regarding residential intensification and greenfield density by Area Municipality within the context of provincial planning policy. Provided below is a brief chronology of the key deliverables and outcomes of this process to provide context for this local growth analysis study for the Town of Milton.

- In July 2020, the Region presented the *Regional Official Plan Review – Regional Urban Structure Discussion Paper* to Regional Council.^[21]
- Following the Regional Urban Structure Discussion Paper, Regional Council directed staff to develop a scoped Regional Official Plan Amendment (R.O.P.A.) from the *Advancing Key Planning Priorities of the Halton Municipalities* report.^[22] In February 2021, the Growth Concepts Discussion Paper was presented to Regional Council and subsequently released to the public for consultation and feedback in order to develop a preferred growth concept.^[23]
- On July 7, 2021, the Region adopted R.O.P.A. 48,^[24] which brought the Regional O.P. into conformity with the Growth Plan by extending the forecast for the Region to 2051. R.O.P.A. 48 also established S.G.A. boundaries for Urban Growth Centres (U.G.C.s), Major Transit Station Areas (M.T.S.A.s), Regional Nodes, and incorporated Employment Area conversions.

Through the I.G.M.S., the Region provided a draft preferred growth concept that identified the following requirements:

- Accommodation of 80% of population growth within existing, approved, urban areas of the Region;

^[21] Report No: LPS56-20 “Regional Official Plan Review – Regional Urban Structure Discussion Paper” July 2020.

^[22] Report No: LPS84-20 “Advancing Key Planning Priorities of the Halton Municipalities,” September 2020.

^[23] Report No: LPS18-21 – Regional Official Plan Review – Integrated Growth Management Strategy – Growth Concept Discussion Paper, February 2021.

^[24] Report No: LPS60-21 – Adoption of Regional Official Plan Amendment (ROPA) 48 – “An Amendment to Define a Regional Urban Structure”



- A shift in future housing towards higher density forms such as apartments;
- A boundary expansion of approximately 1,120 hectares (ha) of new Community Area, 710 ha of which are located in Milton and the remaining in the Town of Halton Hills; and
- A boundary expansion of 1,070 ha of new employment land in the Towns of Milton and Halton Hills, approximately 670 ha within Milton, and the remaining 400 ha in Halton Hills.

2.2.1 Regional Official Plan Amendment 49

After the passing of R.O.P.A. 48, three Council Workshops starting in November 2021 ending in February 2022, were held to provide Regional Council and the public with information about how the draft preferred growth concept was formulated. Following the February 16, 2022, Council Workshop, Regional Council directed Regional staff to prepare another R.O.P.A. that would implement a preferred growth concept to examine growth in Halton Region in two phases – growth prior to 2041 and growth between 2041 and 2051.^[25]

In June 2022, the Region adopted R.O.P.A. 49, which provided growth direction for the Region and its area municipalities to the year 2041. R.O.P.A. 49 identified a boundary expansion of approximately 25 ha around the Trafalgar M.T.S.A. No other urban boundary expansions were identified.

^[25] Amendment No. 49 to The Regional Plan Official Plan for the Halton Planning Area Regional Municipality of Halton – an Amendment to Implement the Integrated Growth Management Strategy – June 2022.



In November 2022,^[26] the Province approved R.O.P.A. 49 with modifications, which brought into effect the following:

- Updates to the population and employment forecasts for Halton Region to 2051;
- Distribution of population and employment growth to 2051 by area municipality;
- Updates to the intensification and density targets by changing the residential intensification target from 40% to 45%;
- Revisions to the policy and identification of Regional Intensification Corridors by adding an additional M.T.S.A. – Milton Trafalgar GO;
- Updates to the policy regarding Regional Employment Areas;
- Mapping updates, including delineating existing Regional Urban Boundary and Regional Employment Areas; and
- A boundary expansion of approximately 700 ha of new community land (as mentioned in section 2.2., previously 710 ha, and 804 ha of new employment lands (130 ha more than what was identified in the preferred growth concept primarily located around Highway 407 along the southern part of the Town) in the Town of Milton.

The population and employment growth allocations, by area municipality, as per R.O.P.A. 49 are as follows:

Figure 2-1
Halton Region
R.O.P.A. 49 – Population Distribution by Area Municipality

Municipality	2021	2041	2051
Burlington	195,000	240,050	265,160
Oakville	220,000	313,460	349,990
Milton	137,980	227,000	350,870
Halton Hills	66,010	98,890	132,050
Halton Region	620,990	929,400	1,098,070

Source: Region of Halton – Regional Official Plan Amendment 49 – Table 1.

^[26] Halton Regional Official Plan Amendment 49, as approved with modifications by the Minister, November 4, 2022.



Figure 2-2
Halton Region
R.O.P.A. 49 – Employment Distribution by Area Municipality

Municipality	2021	2041	2051
Burlington	98,340	114,330	124,390
Oakville	111,980	160,880	181,120
Milton	44,390	100,120	136,270
Halton Hills	24,510	45,900	65,460
Halton Region	279,220	421,230	507,240

Source: Region of Halton – Regional Official Plan Amendment 49 – Table 1

In December 2023, the Province of Ontario passed Bill 150, which includes Schedule 1 – *Official Plan Adjustments Act, 2023*. This bill rescinds the decisions made by the Province and reverts back to the O.P. or O.P. Amendment that was adopted with the exception of certain modifications outlined in Column 3.^[27] For the Town of Milton, this would result in a boundary expansion of 25 ha that was adopted by Regional Council in June 2022.

In February 2024, the Province announced Bill 162; as of May 16, 2024, it has received Royal Assent. Schedule 3 of Bill 162 includes a table of the adjustments that were made to various O.P.s across the Province.^[28] In the Town of Milton, this included all the lands that were identified in R.O.P.A. 49 that were approved by the Province on November, 2022. The urban boundary expansion included approximately 700 ha of new Community Area lands (10 ha less than what was identified through the Preferred Growth Concept) and 800 ha of Employment Area lands (130 ha more than what was identified through the Preferred Growth Concept). Figure 2-3 below illustrates the expansion lands that the Province has identified for Halton Region.^[29]

^[27] Bill 150 2023: Schedule 1 – Official Plan Adjustments Act, 2023, section 3.

^[28] Bill 162: Schedule 3 – Official Plan Adjustments Act, section 7 iA.

^[29] In accordance with Map 1h – Regional Urban Structure, there is approximately 10 ha less Community Area lands and 130 ha more Employment Area lands than what was identified in the I.G.M.S. Preferred Growth Concept dated February 2022.



Figure 2-3
Halton Region
Regional Urban Structure

Map 1h
Regional Urban Structure



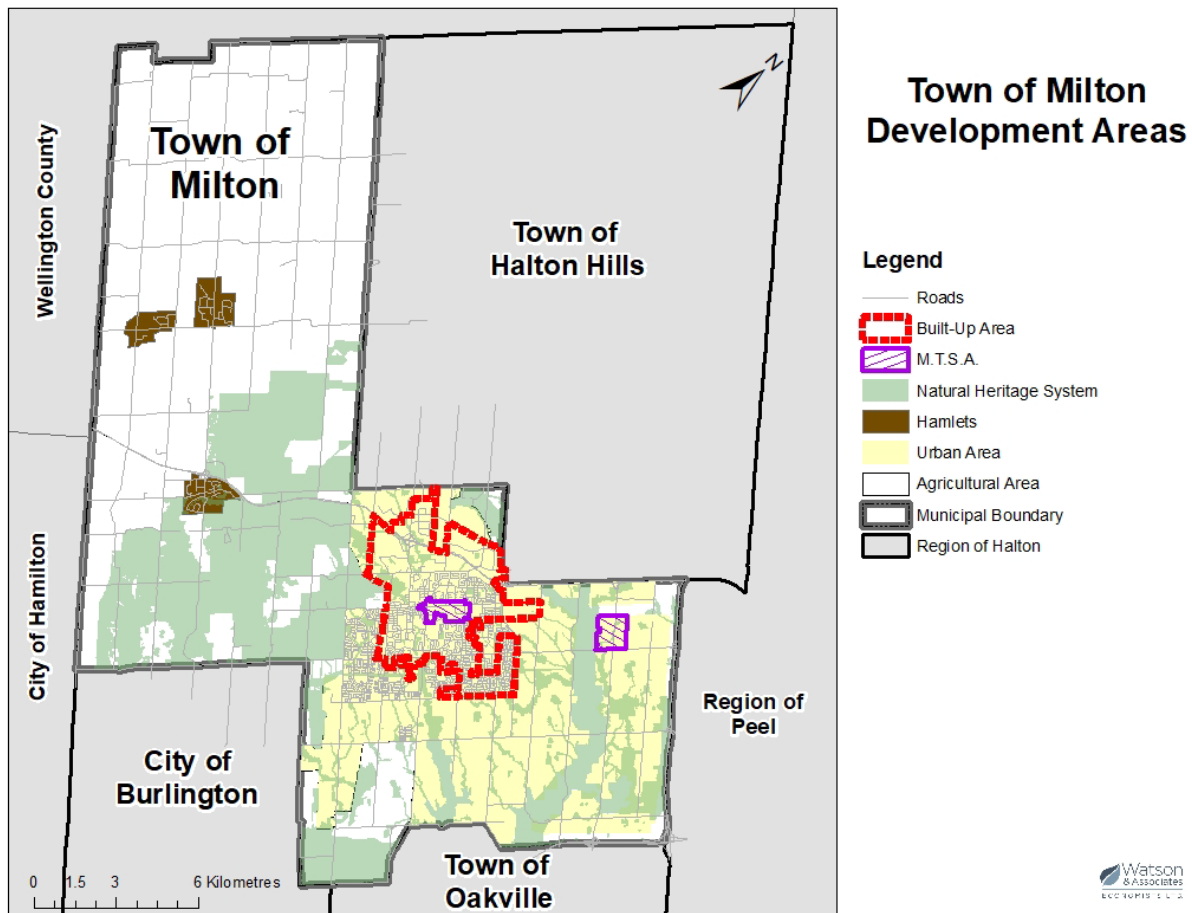
Source: Map 1h – Regional Urban Structure from Halton Region Official Plan, May 16, 2024.



2.3 Town of Milton

The Town of Milton is currently in the process of an O.P. Review to update their O.P. Milton's Town structure has two main components: urban and rural areas. The map below illustrates the major land use areas in the Town, which include the lands added to the urban boundary through R.O.P.A. 49 in the Town.

Figure 2-4
Town of Milton
Town Structure Plan



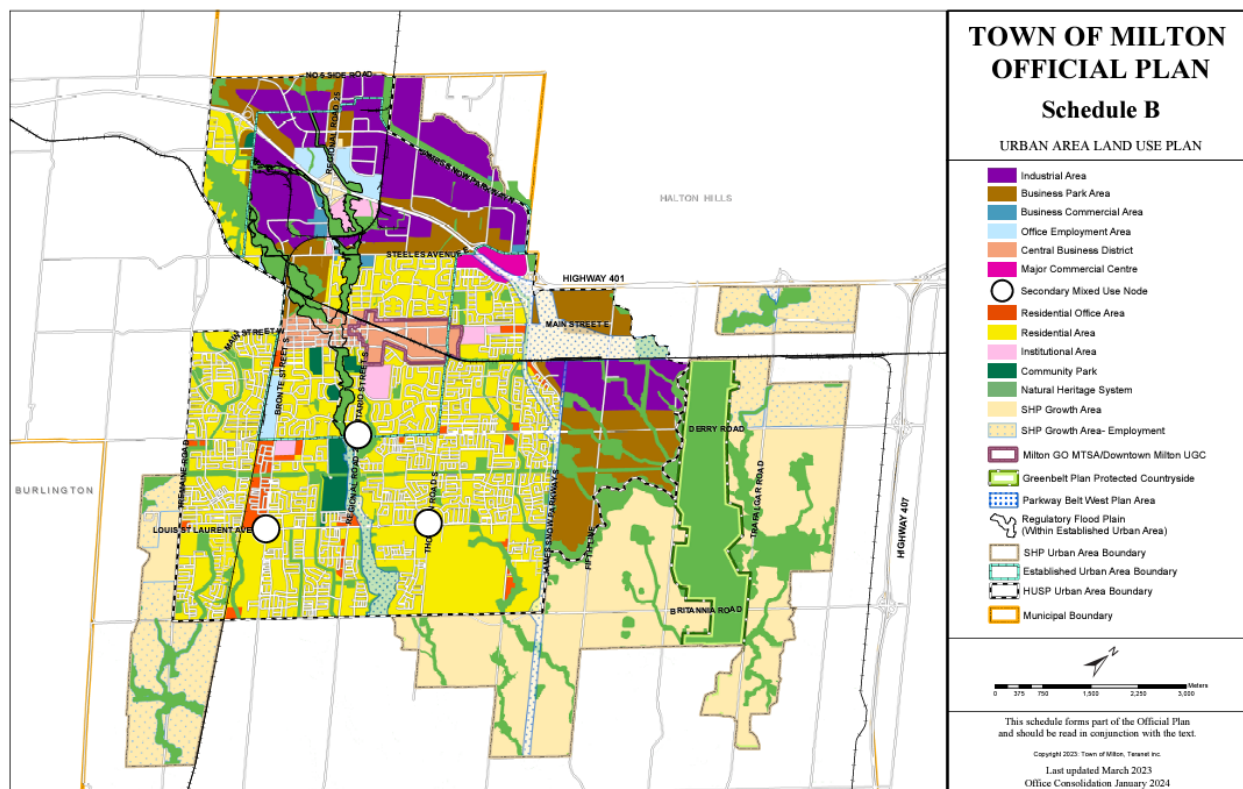
Source: Data provided by the Town of Milton, presented by Watson & Associates Economists Ltd.



2.3.1 Urban Area

Milton's Urban Area includes lands that are to accommodate most of the Town's future residential and non-residential development. A key objective of the urban area is to direct growth where there is existing and planned infrastructure in a manner that supports principles of complete communities. Complete communities include a diverse mix of land uses that provide opportunities to live, shop, and work in the same community. The Town's Urban Area (pre-R.O.P.A. 49) is illustrated below in Figure 2-5.

Figure 2-5
Town of Milton
Urban Land Use Plan



Source: Town of Milton Official Plan – Schedule B – Urban Area Land Use Plan

2.3.1.1 Intensification Area

The Town's current Official Plan directs intensification to be prioritized within the built-up area (B.U.A.) in accordance with the Growth Plan (please refer to Figure 2-4 for delineation of the B.U.A.). The B.U.A. was delineated by the Province to represent the



approximate area that was developed as of 2006, the year the Growth Plan came into effect. In addition to the B.U.A., the Town of Milton has also identified S.G.A.s that prioritize intensification growth. Per the Town's current Official Plan, as shown on Schedule K, S.G.A.s consist of the Urban Growth Centre (U.G.C.), Major Transit Station Areas (M.T.S.A), Intensification Corridors and Secondary Mixed-Use Nodes along with specific sites. The Town's urban structure, including S.G.A.s is being reviewed through the Town's Official Plan review.

Major Transit Station Areas

Outlined in the Growth Plan, 2019, an M.T.S.A. is defined as an area including and around any existing or planned higher-order transit station or stop within a settlement area; or the area including and around a major bus station in an urban core. M.T.S.A.s are generally defined as the area within an approximate 500- to 800-metre radius of a transit station, representing approximately a 10-minute walk.^[30]

M.T.S.A.s are designated as a focus for intensification and are planned to meet minimum density targets, potentially beyond the 2051 planning horizon. Land uses within these areas will be planned to be transit supportive, with planned developments serving as a destination site for transit riders. Residential development in these areas will largely include medium- and high-density development such as townhouses or apartments. These areas will also contain intensified commercial and employment uses. The Town of Milton has two M.T.S.A.s: Milton U.G.C. and Trafalgar GO.

2.3.1.2 Community Area

Community Areas are the lands within the Urban Area that exclude Employment Areas. These lands accommodate residential uses and non-residential uses that support local residents and visitors/tourists. Non-residential uses on lands not classified as Employment Areas are a part of the Community Area that supports the settlement area.

2.3.1.3 Employment Area

Employment Areas accommodate uses in a range of industrial sectors, in addition to limited office and retail uses that are associated with the industrial uses please refer to

^[30] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Office Consolidation 2020, Definitions, p. 75.



Section 2.1 regarding the P.P.S., 2024 definition of Employment Areas. Employment Areas provide opportunities for economic activities that cannot be accommodated in other areas, given the potential for incompatibility of surrounding uses. Land uses such as major retail, large institutional uses (e.g., schools), and residential uses are considered sensitive uses and are not permitted within an Employment Area. The Growth Plan requires upper- and single-tier municipalities, in consultation with lower-tier municipalities, to designate all Employment Areas in the O.P. and protect them for appropriate employment uses over the long term.^[31] As previously identified, the P.P.S., 2024 also contains policies regarding the protection of Employment Areas.

2.3.2 Rural Area

The Rural Area is generally the area within the municipality with partial or no municipal servicing (water/wastewater servicing). According to the Growth Plan, 2019, the Rural Area comprises natural heritage features, rural settlement areas, rural lands, and prime agricultural lands.^[32]

Hamlets

Within the Town of Milton there are three existing Hamlets – Brookville, Campbellville, and Moffat. These communities are typically serviced by individual, private, on-site water and/or private wastewater systems.^[33] It is expected that a limited amount of growth is allocated to these Hamlets.

Agricultural Area

Milton's agricultural areas are generally located to the north and west of the Urban Area. These lands are considered to be an active farming area and are to be preserved.

^[31] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Office Consolidation 2020, Policy 2.2.5., p. 19.

^[32] Ibid., Definitions, p. 81.

^[33] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Office Consolidation 2020, Definitions, p. 81.



3. Overview of Macro-Economic and Regional Employment Trends

3.1 Global Economic Trends

In its latest World Economic Outlook, the International Monetary Fund (I.M.F.) is forecasting global economic growth to slightly decline from 3.3% in 2023 to 3.2% in 2024 but rebound to 3.3% in 2025. For advanced economies, the project economic growth of 1.7% in 2024 slightly higher than the I.M.F.'s forecast of 1.5% from its January 2024 projections. Looking forward, the outlook has slightly improved from I.M.F.'s January 2024 projections, with forecast growth of 1.7% in 2024 and 1.8% in 2025. Forecast economic growth for advanced economies, however, is little over half what was achieved in 2022, with 90% of advanced economies projected to experience a sharp slowdown due to higher unemployment. Growth prospects for emerging markets and developing economies are much more varied, but overall have strengthened from the I.M.F.'s January 2024 outlook and are noticeably stronger relative to advanced economies with economic growth projections of 4.3% in 2024 and in 2025.^[34]

Within the United States (U.S.), real gross domestic product (G.D.P.) grew by a relatively moderate 2.5% in 2023; for the remainder of 2024, the U.S. economic growth is projected to decrease to 2.6% before further moderating to 1.9% in 2025. This outlook is due to several factors, including high household debt, rising interest rates, relatively high inflation, a tightening in financial conditions, and a slowdown in global trade.

3.2 Provincial Economic Outlook within the Broader National and Global Context

3.2.1 *Evolving Macro-Economic Trends and COVID-19*

Since being declared a pandemic by the World Health Organization on March 12, 2020, the economic impacts of the coronavirus disease (COVID-19) on global economic output have been significant. Economic sectors such as travel and tourism,

^[34] International Monetary Fund, World Economic Outlook Update July 2024: The Global Economy in a Sticky Spot.



accommodation and food, manufacturing, and energy were hit particularly hard by COVID-19 social distancing measures. On the other hand, many employment sectors, particularly knowledge-based sectors, that have been more adaptable to the current remote work environment and evolving hybrid work-from-home/work-at-office environment have been less negatively impacted, and in many cases have prospered. Furthermore, required modifications to social behavior (i.e., physical distancing) and increased work at home requirements resulting from government-induced containment measures have resulted in significant ongoing economic disruption, largely related to changes to the nature of work. Lastly, escalating tensions and constraints to international trade and heightened geopolitical unrest, increasingly point to potential vulnerabilities of globalization and logistical challenges associated with global supply chains which were severely disrupted during the peak of the pandemic.

Following a sharp national economic recovery in 2020 in response to COVID-19 policy measures, federal economic support and fiscal stimulus, and vaccine rollouts, the Canadian economy experienced a sharp economic recovery in 2021 and 2022. Notwithstanding this recovery, there are growing macro-economic headwinds of which to be aware, that are influencing the economy at national, provincial, and regional levels. Most notably, persistently high global and national inflation levels have required an aggressive response by central banks to tighten monetary conditions through sharp increases in interest rates and quantitative tightening.^[35] It is noted that as of August 2024, Canada's inflation rate was at 2.0%, which is down from its recent peak of 2.9% in May 2024.^[36] Current measures by central banks are anticipated to continue to cool economic output and consumer demand; however, ongoing trade disruptions, geopolitical conflict and tight labour conditions continue to aggravate global supply shortages of goods and services. In turn, this somewhat limits the ability of tighter monetary conditions to ease rising inflationary pressures.

Rising public-sector debt due to pandemic response measures and increasing household debt loads resulting from sharp housing price appreciation in many areas of Canada, most notably the Country's largest urban centres, is also a concern. Since reaching a peak in February 2022, the national housing market has shown cooling signs

^[35] Quantitative tightening is a process whereby a central bank reduces the supply of money circulating in the economy by selling its accumulated assets, mainly bonds.

^[36] Statistics Canada, The Daily, Consumer Price Index: August 2024, September 17, 2024.



with respect to sales and price appreciation; however, it is important to note that recent trends in the housing market vary by region across Canada. Higher mortgage rates, rising borrowing costs, fuel costs, and upward pressures on rents are further exacerbating challenges associated with declining housing affordability through increases in monthly household carrying costs. These impacts, combined with the broader inflationary concerns outlined above, are increasingly likely to result in potential near-term setbacks in the path to economic recovery for Ontario and Canada. Despite these consequences of COVID-19 and the near-term economic headwinds discussed herein, the longer-term economic and housing outlook for Canada remains very positive.

3.2.2 COVID-19 and the Changing Nature of Work

In addition to its broader impacts on the economy, COVID-19 is also accelerating changes in work and commerce as a result of technological disruptions which were already taking place prior to the pandemic. Businesses are increasingly required to rethink the way they conduct business with an increased emphasis on remote work enabled by technologies such as virtual private networks, virtual meetings, cloud technology and other remote work collaboration tools. These disruptive forces continue to broadly impact the nature of employment by place of work and sector, and have a direct influence on commercial, institutional, and industrial real-estate space needs.

As of 2016, it was estimated that approximately 11% of the Town's workforce was working from home on a full-time basis. This estimate has increased to about 21% in 2021.^[37] This estimate excludes hybrid workers, who are captured as residents with a usual place of work. From a municipal planning and urban development perspective, it is important to consider the impact of hybrid workers when assessing non-residential space needs, particularly in the office sector.

^[37] It is important to note that the 2021 Census enumeration occurred during the COVID-19 pandemic, when many employees across Canada were required to work remotely, making it likely that this number is higher than the actual work at home number.



In addition to work at home employment, there are workers within the Town who have no fixed place of work (N.F.P.O.W.).^[38] The percentage of workers within the Town who reported N.F.P.O.W. was approximately 11% in 2016 and has since remained relatively stable, according to the 2021 Census.^[39] It is anticipated that the percentage of people who work from home on a full-time and part-time basis and those who do not have a fixed place of work will remain relatively high across the Town of Milton over the long term, driven by continued growth in knowledge-based employment sectors and technological advancement.

3.2.3 National and Provincial Gross Domestic Product Trends and Near-Term Forecasts

Similar to the broader Canadian economy, the economic base of Ontario, as measured by G.D.P. output, has shifted from goods-producing sectors (i.e., manufacturing and primary resources) to services-producing sectors over the past several decades. This shift has largely been driven by G.D.P. declines in the manufacturing sector which were accelerated as a result of the 2008/2009 global economic downturn. It is noted, however, that these G.D.P. declines in the manufacturing sector have started to show signs of stabilization over the past few years, both prior to the pandemic and through the more recent economic recovery.

Over the past decade, the Ontario export-based economy experienced a rebound in economic activity following the 2008/2009 downturn; however, this recovery was relatively slow to materialize with levels sharply rebounding by 2014, as illustrated in Figure 3-1. This economic rebound has been partially driven by a gradual recovery in the manufacturing sector, fueled by a lower-valued Canadian dollar combined with the gradual strengthening of the U.S. economy.^[40] Provincial G.D.P. growth eased in 2019

[38] Statistics Canada defines N.F.P.O.W. employees as “persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.”

[39] Work at home and N.F.P.O.W. employment derived from 2016 and 2021 Statistics Canada Census data. It is noted that the 2021 Census data may not be reliable due to timing of enumeration coinciding with provincial lockdowns during the COVID-19 pandemic.

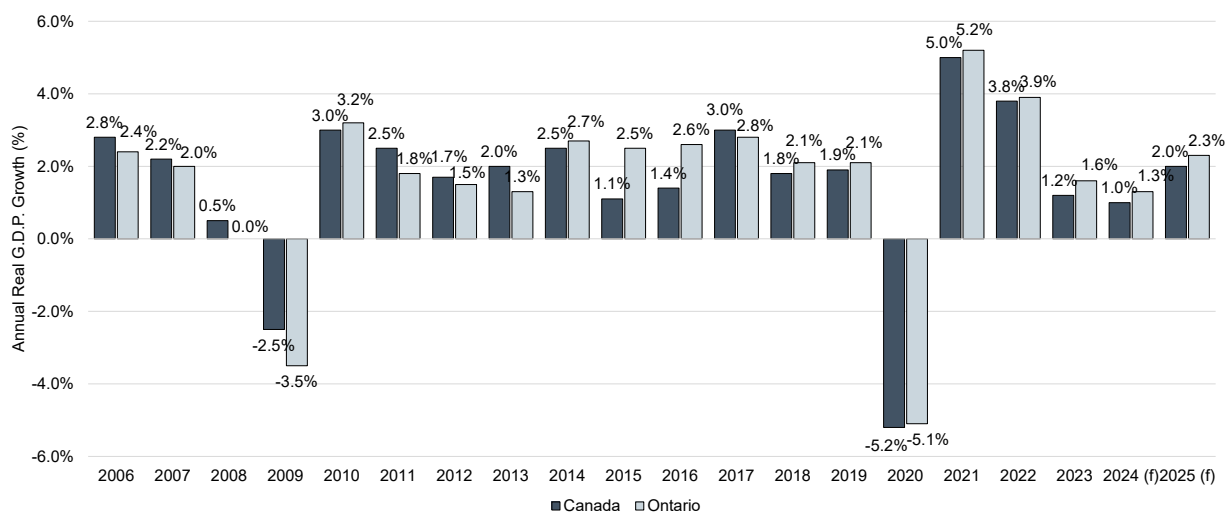
[40] Valued at approximately \$0.74 U.S. as of October 4, 2024.



to 2.1%, largely as a result of a tightening labour market and slowing global economic growth.^[41]

As illustrated in Figure 3-1, the Ontario economy contracted by 5.1% in 2020, before rebounding by 5.2% in 2021. Throughout 2022, the Ontario economy continued to expand and grew by 3.9%, while the overall Canadian economy grew by 3.8%. BMO Capital Markets has forecast that G.D.P. growth will further decline to 1.3% in Ontario and 1.0% overall for Canada in 2024. For 2025, an annualized G.D.P. growth rate of 2.3% is forecast for Ontario and 2.0% for all of Canada.

Figure 3-1
Province of Ontario and Canada
Annual Real G.D.P. Growth, Historical (2006 to 2023), and Forecast (2024 to 2025)



Note: The years 2024 and 2025 are forecasts by BMO Capital Markets Economics.
Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, July 26, 2024, by Watson & Associates Economists Ltd.

3.2.4 Canadian Immigration Targets

In November 2023, the Canadian federal government released its Immigration Levels Plan for the next three years. Canada has continued to raise its immigration targets and aims to welcome 485,000 new permanent residents in 2024, 500,000 in 2025, and 500,000 in 2026. At the end of July 2024, Canada has welcomed 303,600 new

^[41] Provincial Economic Outlook, BMO Capital Markets, July 26, 2024.



permanent residents, achieving approximately 62% of the target for 2024.^[42] The federal government will also be stabilizing targets for permanent residents at 500,000 per year after 2026 to allow for successful integration and sustainable growth. Immigration accounts for almost 100% of Canada's labour force growth and nearly 80% of its population growth. With 960,000 currently unfilled positions across all sectors and an estimated worker-to-retiree ratio of only 3:1 by 2030, Canada has a strong economic need for increased immigration.^{[43], [44]}

Figure 3-2 shows annual admissions to Canada and Ontario since 2015. In 2020, national and provincial immigration levels sharply declined due to COVID-19. Immigration in 2021 rebounded strongly, resulting in 405,000 permanent residents admitted to Canada in 2021, roughly half of which were accommodated in the Province of Ontario that year. Based on 2024 data and looking forward through 2024 and beyond, immigration levels to Canada and Ontario are anticipated to remain strong, exceeding pre-pandemic averages between 2015 and 2019.

^[42] Permanent Residents – Monthly I.R.C.C. Updates, September 9, 2024.

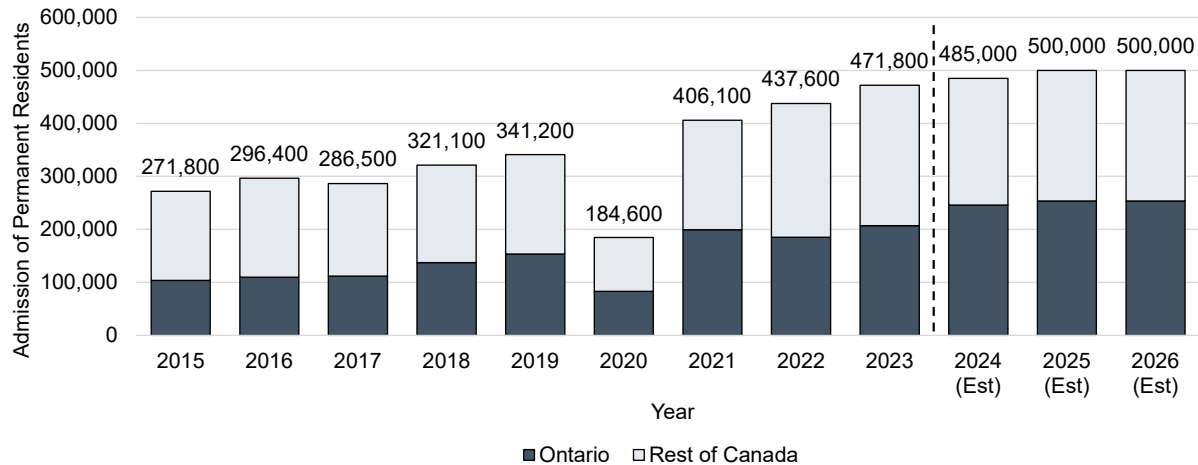
^[43] <https://www.canada.ca/en/immigration-refugees-citizenship/news/notices/supplementary-immigration-levels-2024-2026.html>

^[44] <https://www.canada.ca/en/immigration-refugees-citizenship/news/2022/02/infographic-immigration-and-canadas-economic-recovery.html>



Figure 3-2
Canada and Ontario

International Immigration Trends, Historical (2015 to 2023) and Forecast (2024 to 2026)



Source: 2015 to 2023 derived from Immigration, Refugees and Citizenship Canada (I.R.C.C.) September 9, 2024 data; 2024 to 2026 federal targets from Government of Canada's Immigration Levels Plan for 2024-2026; and Ontario target estimated based on historical share of about 45% of the Canadian Permanent Residents Admissions from 2018 to 2023, by Watson & Associates Economists Ltd.

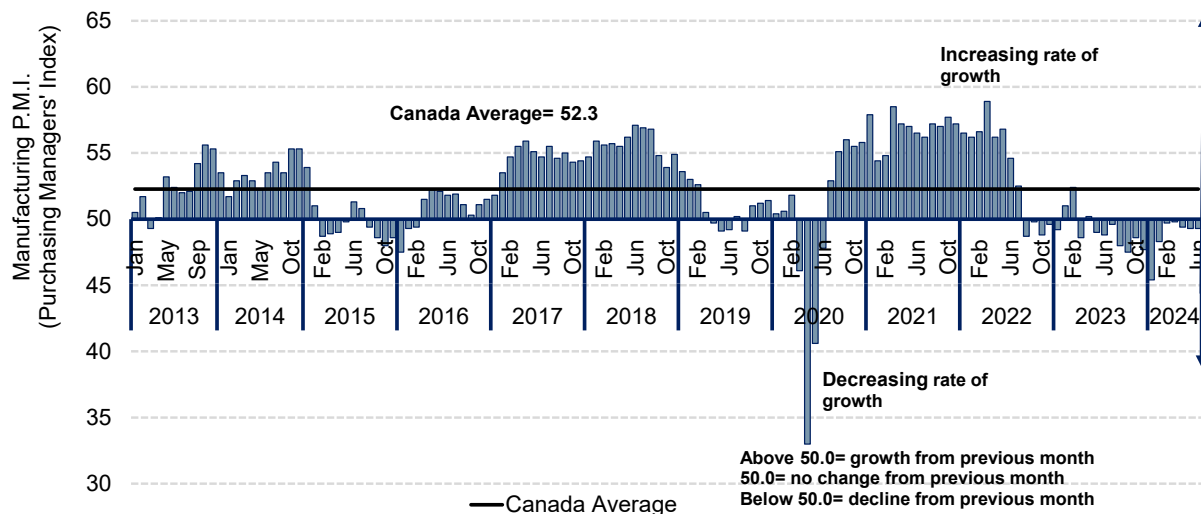
3.2.5 Outlook for the National and Provincial Manufacturing Sector

The Purchasing Managers' Index (P.M.I.) is a prevailing economic indicator for economic trends in the manufacturing and services sectors, which is based on the purchasing managers' market condition outlook and serves as a key measure of the direction of the manufacturing sector on a monthly basis. The P.M.I. index ranges between a number of 1 to 100. A P.M.I. value greater than 50 represents an expansion relative to the previous month, while a P.M.I. value less than 50 represents a contraction. Figure 3-3 summarizes the P.M.I. index for Canada between 2012 and 2024 (June). As illustrated in Figure 3-3, the P.M.I. index largely exhibited moderate to strong expansion between 2012 and 2018, with the exception of 2015 and 2019 which experienced contractions. Also, 2013 and 2016 experienced periods of brief economic contraction. The P.M.I. index showed steep contractions at the beginning of March 2020 in manufacturing and services-sector activity due to the negative effects of COVID-19 on the global economy, international trade, and the general demand for goods and services. These conditions worsened into April 2020; however, they showed signs of a moderate rebound by June 2020 and sustained strong growth until



moderating by July 2022. For the remainder of 2022 and most of 2024, the index showed sustained contractions.

Figure 3-3
Canada
Purchasing Managers' Index, 2012 to 2024 Y.T.D.

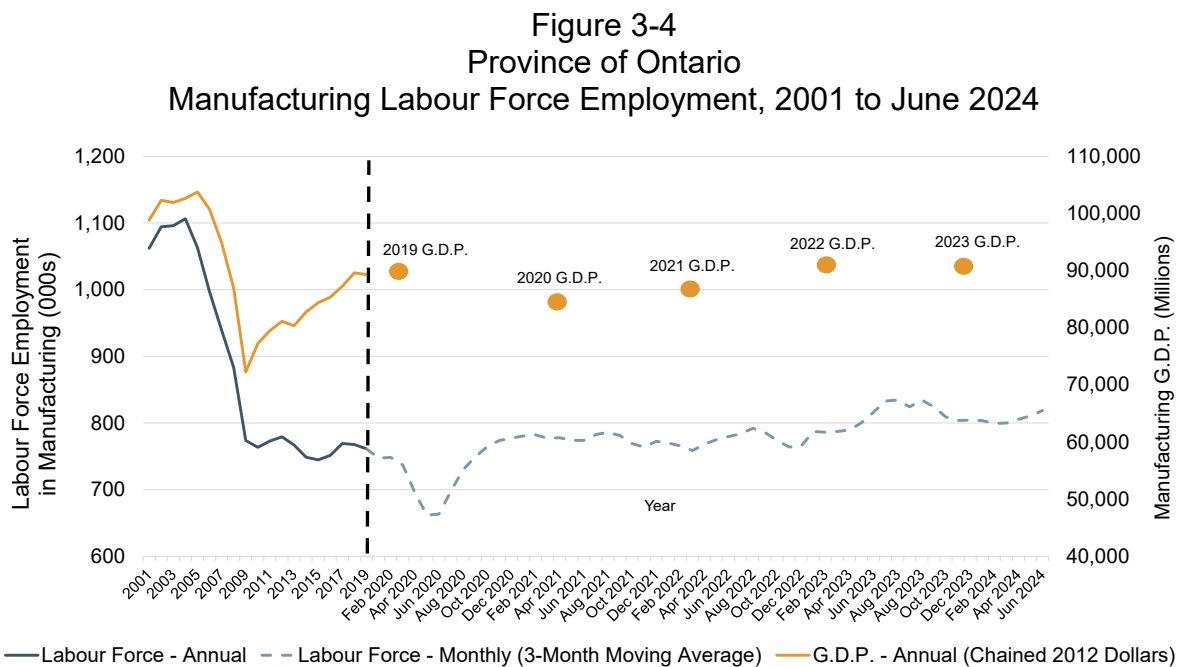


Note: Above 50.0 indicates growth from the previous month, 50.0 indicates no change from the previous month, and values below 50.0 indicate a decline from the previous month.
Source: HIS Markit Canada, Canada P.M.I. Index, June 2012–June 2024 summarized by Watson & Associates Economists Ltd..

While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate a high rate of labour-force growth across the Province over the coming decades, as globalization has led to increased outsourcing of manufacturing processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario, the nature of industrial processes is rapidly shifting, becoming more capital/technology intensive and automated, with lower labour requirements. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive. As a result of increased efficiencies in the manufacturing sector, G.D.P. has increased relative to generally flat labour force trends as G.D.P. output per employee rises.



As summarized in Figure 3-4, the manufacturing sector in Ontario experienced significant declines between 2004 and 2009 with respect to labour force and G.D.P. Between 2009 and 2019, however, provincial labour force levels in the manufacturing sector stabilized, while G.D.P. output steadily increased. While showing modest growth since 2016, labour force levels in the manufacturing sector declined in early 2020 due to the impacts of COVID-19 but showed a steady rebound between June 2020 and June 2024.



Source: Annual labour force data from Statistics Canada Labour Force Survey, Table: 282-0125, and monthly data from Table: 14-10-0091-01. Annual G.D.P. data from Statistics Canada Table: 36-10-0402-01. Derived by Watson & Associates Economists Ltd.

3.3 Regional, Labour Force and Population Growth Trends

3.3.1 Regional Labour Force Trends

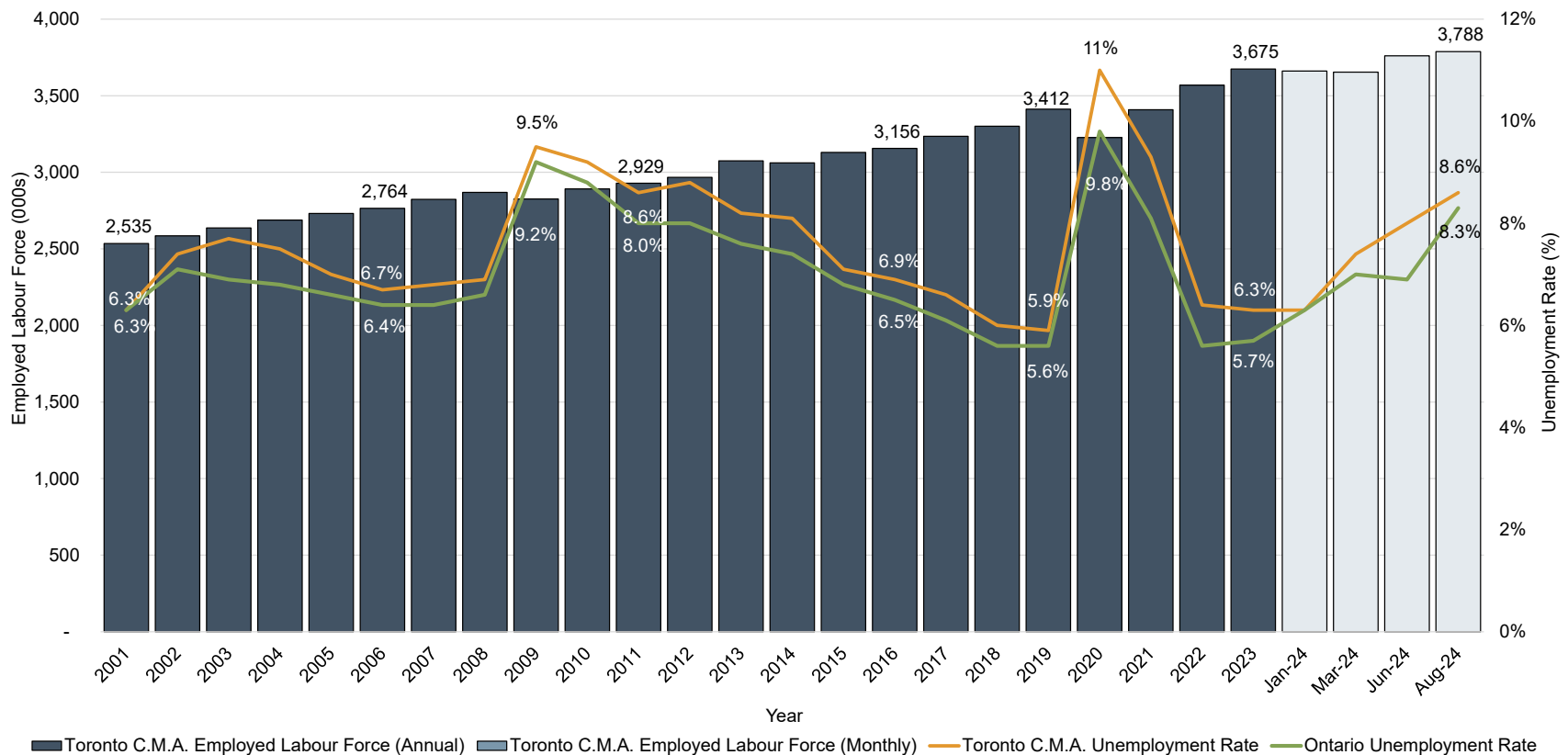
Figure 3-5 illustrates total labour force and unemployment rate trends for the Toronto Census Metropolitan Area (C.M.A.). Labour force data is not available for the Town of Milton, but it is captured in the broader Toronto C.M.A. Key observations include the following:



- The total labour force within the Toronto C.M.A. has steadily increased over the past two decades from 2.5 million in 2001 to 3.7 million by the end of 2023. This represents a total labour force increase of 2.2 million, or 1.7% annual growth.



Figure 3-5
 Toronto Census Metropolitan Area (C.M.A.)
 Labour Force Trends, 2001 to August 2024



Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.

Source: Toronto C.M.A. employed labour force and unemployment rate from Statistics Canada Table: 14-10-378-01, Table: 14-10-0385-01, and Table: 14-10-0096-01. Province of Ontario unemployment rate from Statistics Canada Table: 14-10-0327-01.

Derived by Watson & Associates Economists Ltd.



- The unemployment rate in the Toronto C.M.A. peaked at 11% in 2020 coinciding with the COVID-19 pandemic but has subsequently fallen to 6.3% as of 2023 driven by steady regional economic growth in both goods-producing and services-producing sectors.
- To ensure that economic growth is not constrained by future labour shortages, continued effort will be required by the Town, Region and Province to explore ways to attract and accommodate new skilled and unskilled working residents to this economic region, including the Town of Milton within a broad range of housing options.

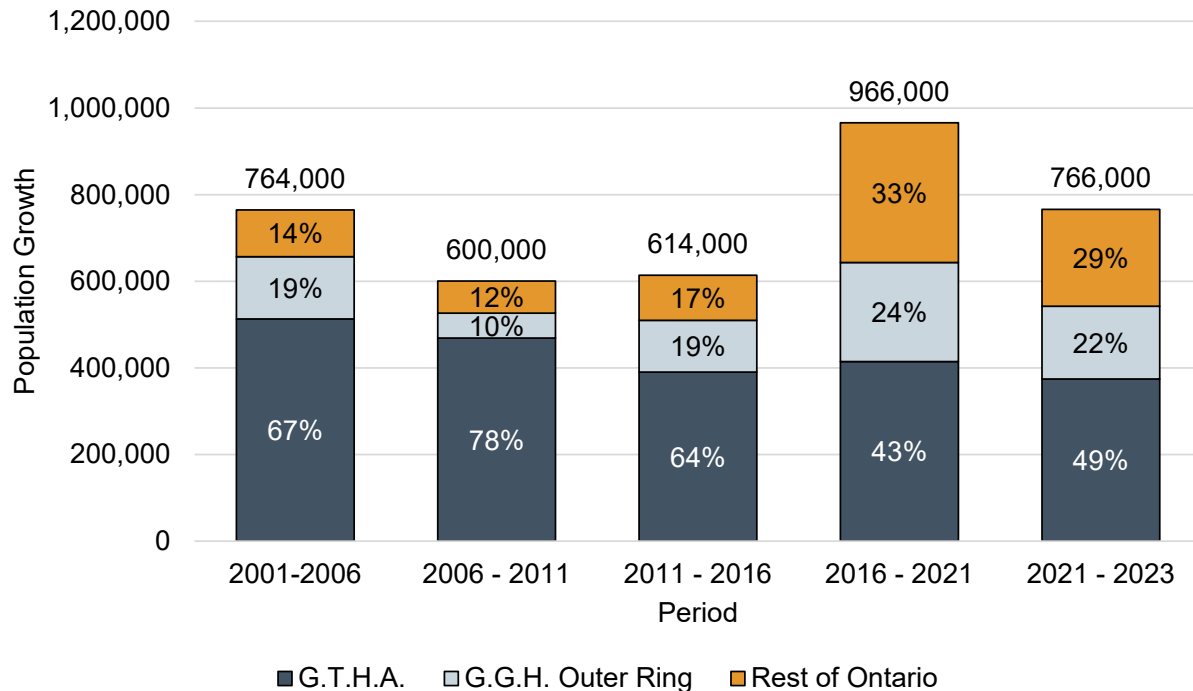
3.3.2 Regional Population Growth Trends

Figure 3-6 illustrates the population growth in the Province by regional area. Key observations include the following:

- In the most recent 2016 to 2021 Census period, the Province's population grew at an annual average rate of 1.1%. A large share of this growth was concentrated in the Greater Toronto Hamilton Area (G.T.H.A.), accounting for 42% of the Province's population growth.
- The share of provincial population growth in the G.T.H.A. has declined in recent years, falling from 78% between 2006 and 2011, to 64% from 2011 to 2016 and then to 43% between 2016 and 2021. However, in the 2021 to 2023 it is noted that the G.T.H.A. has picked up its share now accounting for nearly half of the Province's total population growth.
- In contrast to the G.T.H.A., the share of provincial population growth in the G.G.H. Outer Ring increased to 24% between 2016 and 2021, up from 10% during the 2006 to 2011 period and 19% between 2011 and 2016.
- The share of population growth outside the G.G.H., across the rest of Ontario, has also steadily increased over the past 15 years, most notably during the most recent Census period (i.e., 2016 to 2021), from 12% between 2006 and 2011, to 17% from 2011 to 2016, and 33% over the most recent Census period.
- This analysis suggests that while the G.T.H.A. is expected to continue to experience steady population growth, the share of provincial population growth is anticipated to continue to shift outward into the G.G.H. Outer Ring and the remaining sub-areas of Southern Ontario.



Figure 3-6
Province of Ontario by Regional Area
Population Growth, 2001 to 2023



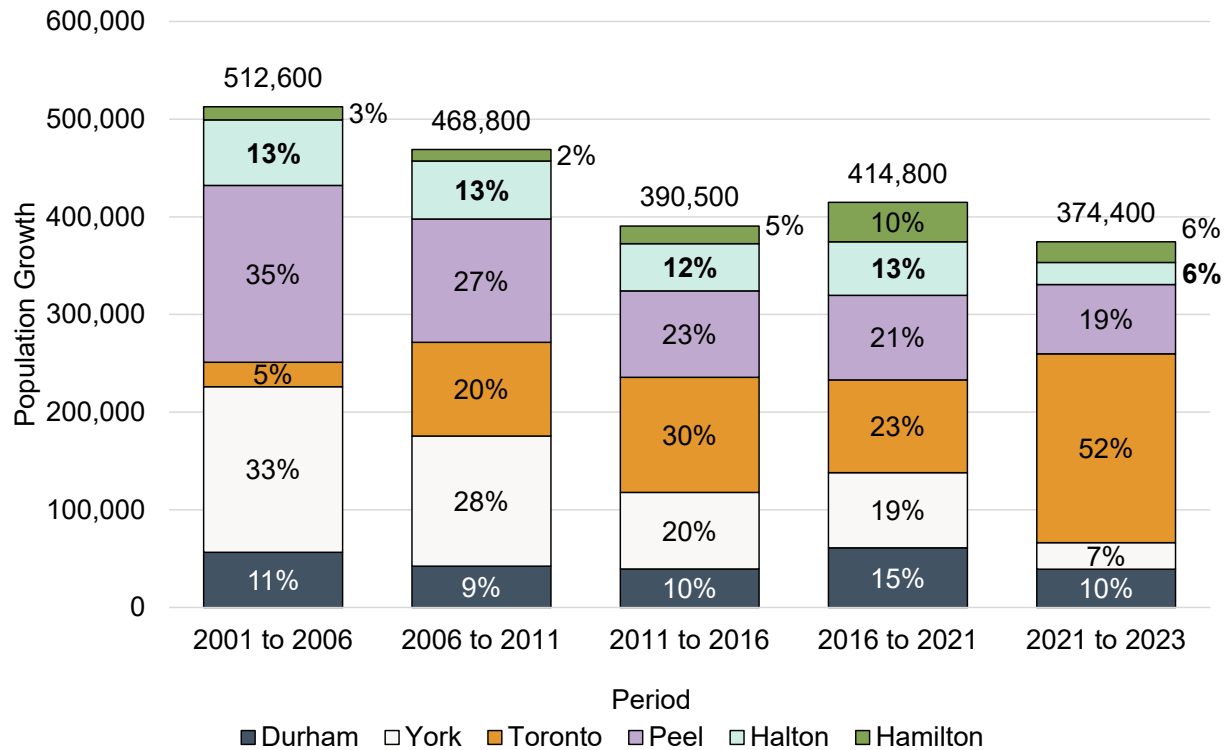
Note: Population includes net Census undercount.

Source: Statistics Canada Table: 17-10-0139-01, summarized by Watson & Associates Economists Ltd.

Building on Figure 3-6, Figure 3-7 illustrates the population growth within the G.T.H.A. by single- and upper-tier municipality. Between 2001 and 2006, York and Peel Region, combined, accounted for 68% of the G.T.H.A.'s population growth. Since then, the share of population growth for these two Regions has declined to 34% of growth between 2021 and 2023. Conversely, Durham Region, Halton Region, and the City of Hamilton have collectively experienced an increasing share of population growth over the past three Census periods, most notably during the recent 2016 to 2021 period. It is noted that during the most recent postcensal period between 2021 and 2023 a significant increase in the share of population growth has occurred within the City of Toronto representing approximately 52% of total G.T.H.A. population growth, largely driven by increased population growth levels associated with non-permanent residents (N.P.R.) in the City of Toronto during this time period.



Figure 3-7
Greater Toronto Hamilton Area
Historical Population Growth, 2001 to 2023



Note: Population includes net Census undercount.

Source: Statistics Canada Table: 17-10-0139-01, summarized by Watson & Associates Economists Ltd.

3.3.3 Components of Population Growth

There are two main components of population growth,^[45] natural increase (births less deaths) and net migration, which is further broken down into three broad categories including:

- International Net Migration** – represents international immigration less emigrants, plus net non-permanent residents (N.P.R.s). Over the last decade, this component of net migration represented an increasing source of net migration for Halton Region;

^[45] The smallest geographic dissemination of this information is available at the Census Division (C.D.) level (i.e., Halton Region)



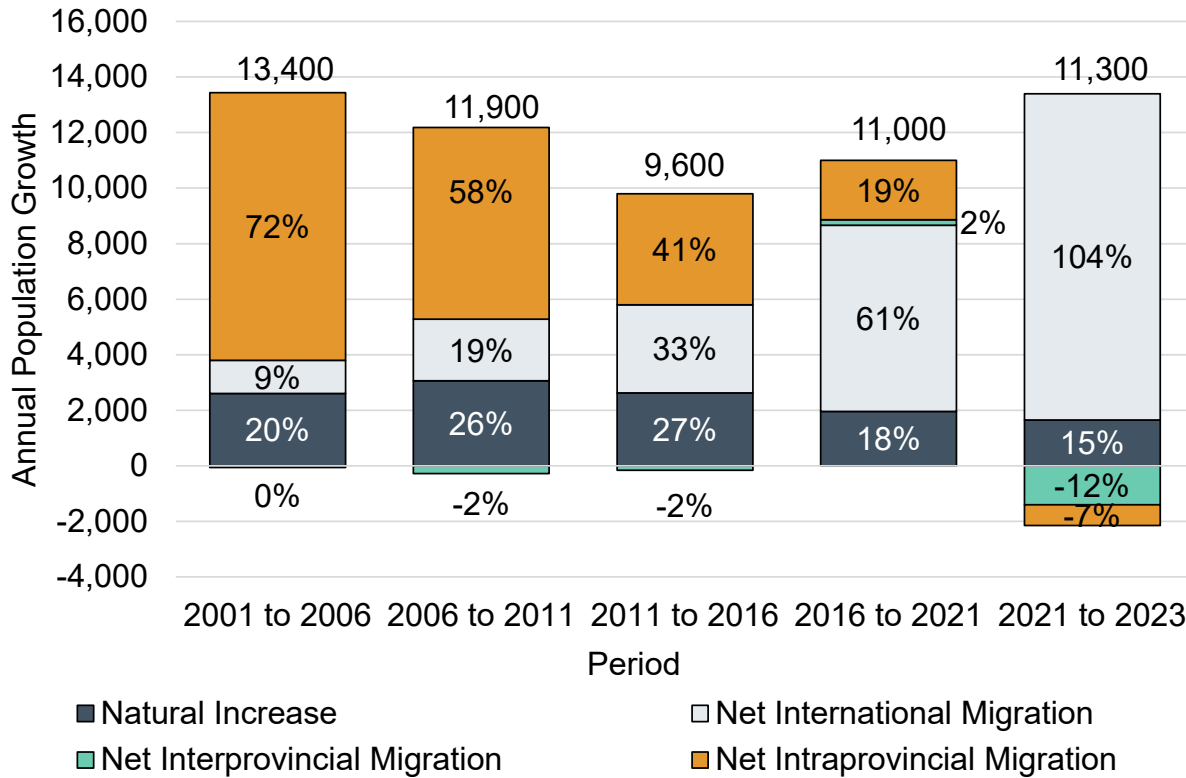
- **Inter-provincial Net Migration** – comprises in-migration less out-migration from other Canadian Provinces/territories. Historically this has also not been a major source of net-migration for Halton Region; and
- **Intra-provincial Net Migration** – includes in-migration less out-migration from elsewhere within the Province of Ontario. This has been a significant source of net migration over the last decade for Halton Region.

Figure 3-8 illustrates the components of population growth within Halton Region over the past 20 years. Historically, between 2001 and 2023, Halton's population growth has largely been driven by net migration, more specifically net intra-provincial migration and net international migration. Of the net intra-provincial migration Halton Region has experienced over the past two decades, approximately 79% is from the G.T.H.A., more specifically from Peel Region and the City of Toronto.

While net intra-provincial migration represents the largest component of population growth in Halton Region, it has experienced a decline in the share of population growth over the past two decades, falling from 72% between 2001 and 2006 to 19% between 2016 and 2021. In the most recent period, between 2021 and 2023, net intra-provincial migration represents -7% of the Region's population growth. In contrast, net international migration has experienced a significant increase during the same time period. Between 2001 and 2006, net international migration accounted for 9% of the Region's population growth, while over the most recent period, this share increased to 104%. It should also be noted that Halton has experienced positive growth in natural increase, driven by the Region's relatively high share of young adults and children, most notably in the Town of Milton.



Figure 3-8
Halton Region
Components of Population Growth, 2001 to 2023



Note: Population includes net Census undercount. Figures have been rounded and may not add up precisely.

Source: Statistics Canada Table: 17-10-0139-01 and Table: 17-10-0140-01, summarized by Watson & Associates Economists Ltd.

3.4 Observations

Over the past several decades, the provincial economy has been steadily shifting away from goods-producing sectors and increasingly moving towards services-producing and knowledge-based sectors. As a result of these continued structural changes occurring in the macro-economy, it is important to recognize that the trends mentioned within this chapter will generate both positive and disruptive economic impacts related to employment growth, local business investment, and labour force demand. These disruptive forces are also anticipated to have long-term impacts on non-residential space requirements and population growth patterns.



Population growth rates have been decreasing across the G.T.H.A. over the past 20 years. Halton Region experienced an increase in growth between 2016 and 2021 and during the post-2021 period, attributed to an outflow from the rest of the G.T.H.A. which accelerated during the COVID-19 pandemic. Despite the near-term economic headwinds discussed in this chapter, the longer-term economic and housing outlook for the G.T.H.A. and Halton Region remains very positive. The Town of Milton's growth outlook is largely tied to the economic outlook of the broader regional economy, which comprises a large portion of the Town's commuter-shed. Most of the future population growth identified for the Town of Milton is anticipated to be driven by outward growth pressures (intra-provincial migration and international migration) from within the G.T.H.A.



4. Town of Milton Recent Residential and Non-Residential Development Trends

4.1 Introduction

This chapter provides a review of recent demographic, socio-economic, and housing trends within the Town of Milton during the 2001 to 2021 period. This analysis has been assembled to provide insight regarding the future long-term population, housing, and employment outlook for the Town. It is noted that the historical time period examined throughout this chapter differs, subject to data availability.

4.2 Population Growth Trends

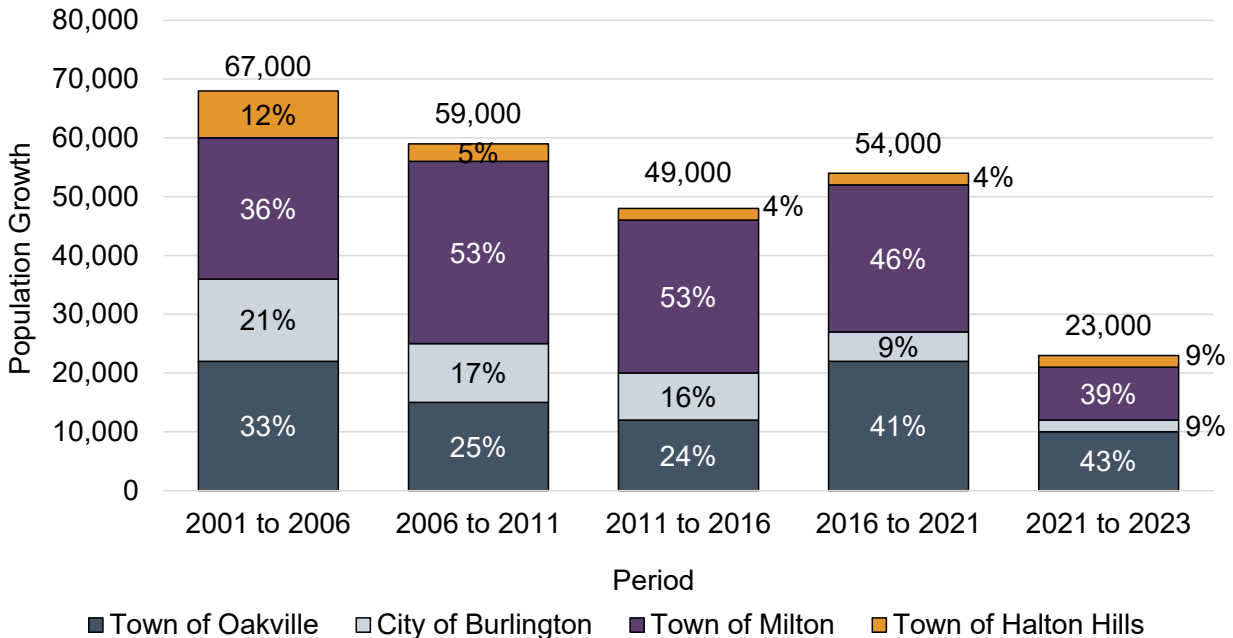
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Figure 4-1 summarizes total population growth in Halton Region and the share of total by area municipality over the 2001 to 2023 historical period. Key observations include the following:

- While Halton Region has experienced steady population growth over the past 20 years increasing by approximately 229,400 persons, incremental population growth in the Region declined between 2001 and 2016 before stabilizing during the 2016 to 2021 period;
- The Town of Milton accounted for the largest share of growth in the Region in all historical periods, which steadily increased between 2001 and 2016, before declining slightly during the last Census period to 46% of Region-wide population growth.
- In accordance with recent residential building permit activity between 2020 and 2023 (new units only), the Town of Milton represented approximately 28% of anticipated new housing construction in Halton Region.



Figure 4-1
Halton Region
Population Growth by Lower-Tier Municipality, 2001 to 2023



Note: Population includes net Census undercount. Figures have been rounded and may not add up precisely.

Source: Statistics Canada Table: 17-10-0139-01 and Table: 17-10-0140-01; summarized by Watson & Associates Economists Ltd.

4.2.1 Components of Population Growth

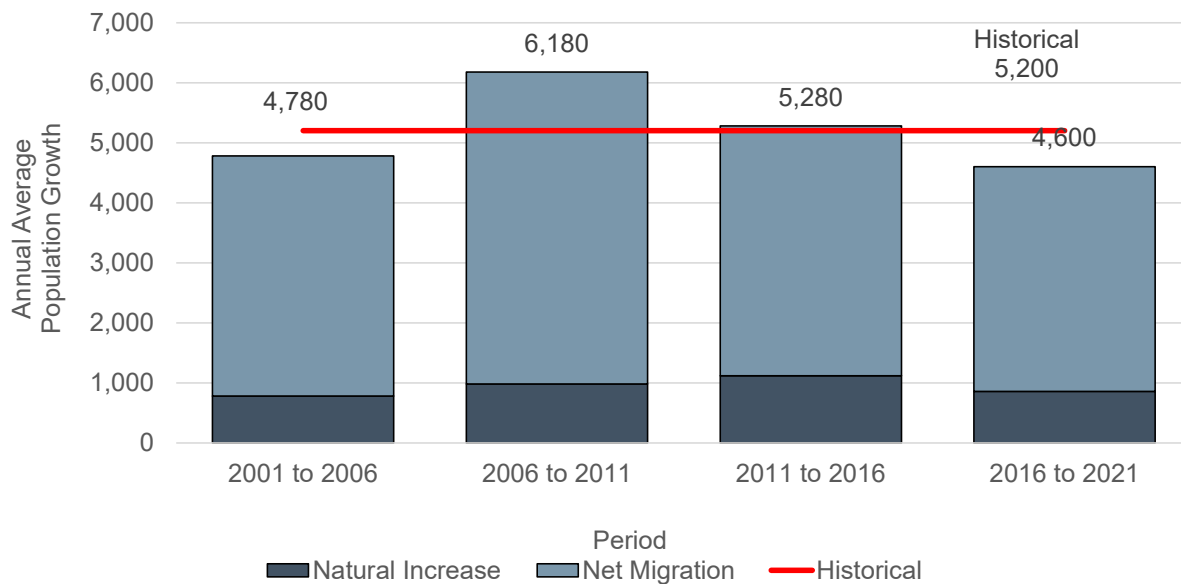
Figure 4-2 summarizes the components of population growth for the Town of Milton from 2001 to 2021, as estimated by Watson. For additional information about the component of population growth, please see Appendix B. As previously noted, specific details regarding net migration by type are not available for the Town of Milton. Key observations include the following:

- Over the past 20 years, the Town of Milton experienced the strongest level of population growth during the 2011 to 2016 period, largely driven by intra-provincial net-migration (migration from other areas of Ontario, namely Peel Region).



- Net migration accounted for approximately 79% to 81% of population growth during the 2001 to 2021 period in the Town of Milton, representing most of the population growth.
- Natural increase (births less deaths) accounted for approximately 19% to 21% of population growth in the Town between 2001 and 2021. Comparatively, the share of population growth from natural increase for the Province as a whole was much lower. Milton's relatively higher share of population growth from natural increase is driven by its higher proportion of young adults and children relative to the provincial average.

Figure 4-2
Town of Milton
Components of Population Growth, 2006 to 2021



Note: Population figures include net Census undercount. At the time of this study, the 2021 undercount was not finalized and therefore the 2016 undercount was utilized. Figures have been rounded and may not add precisely.

Source: Historical 2001 to 2021 data derived from Statistics Canada Annual Demographic Statistics summarized by Watson & Associates Economists Ltd.



4.2.2 Population by Major Age Group

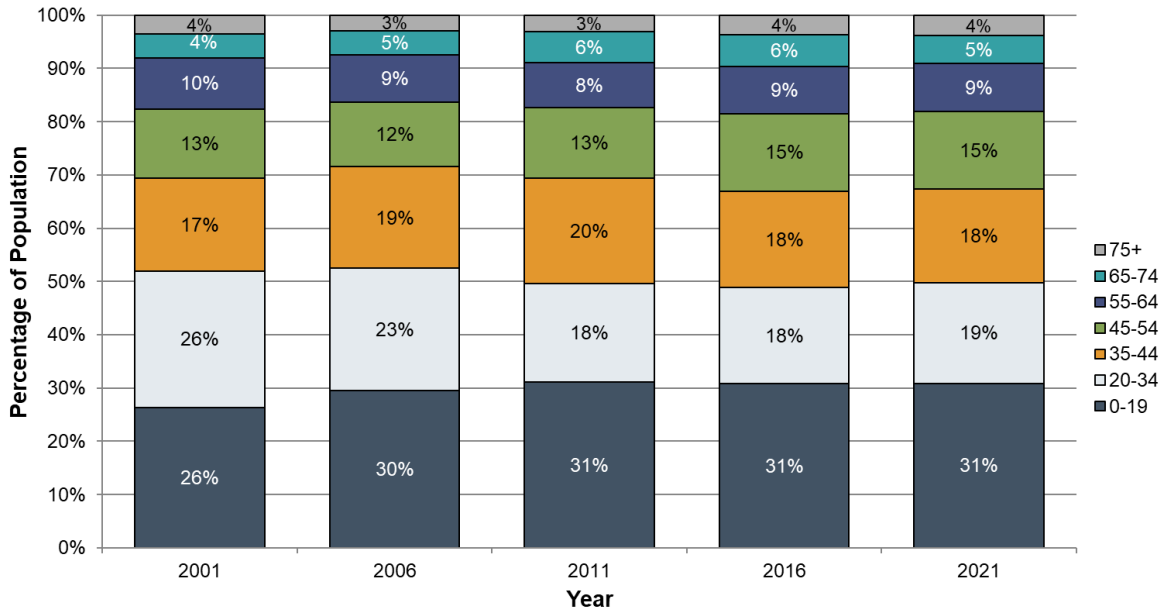
Figure 4-3 summarizes population change by major age group for the Town of Milton from 2001 to 2021. Key observations include the following:

- Comparably, the average age of the population in Milton (35 years old) is much lower than the Region of Halton, which has an average population age of 40.
- The two age groups that experienced the most change between 2001 and 2021 are the 0 to 19 and 20 to 34 age groups.
- The 0 to 19 age group experienced a 4% increase in its share of the total population between 2001 and 2006 before moderating between 2006 to 2021.
- The 20 to 34 age group experienced a decreased in its share of the total population between 2001 to 2011 before moderating from 2011 to 2021.
- Population age groups 35 and older experienced moderate increases and decreases over the 2001 to 2021 period.
- Unlike the Region of Halton and the Province as a whole, the Town of Milton has not experienced a significant increase in the percentage share of seniors' (aged 65+) over the past 20 years. Notwithstanding these historical trends, the Town's share of population in the 65+ age group is forecast to increase over the next 30 years, primarily driven by the aging of the Town's existing Baby Boomer^[46] population (refer to subsection 6.3.1). This is important to recognize as it has implications regarding housing demand by structure type and tenure, as well as municipal service needs.

^[46] Baby Boomers are defined as those born between 1946 and 1964.



Figure 4-3
Town of Milton
Population by Major Age Group, 2001 to 2021



Note: Population includes net Census undercount. At the time of this study, the 2021 undercount was not finalized and therefore the 2016 undercount was utilized.
Source: Historical derived from Statistics Canada Census and Demography Division data, 2001 to 2021; presented by Watson & Associates Economists Ltd.

4.3 Housing Growth Trends

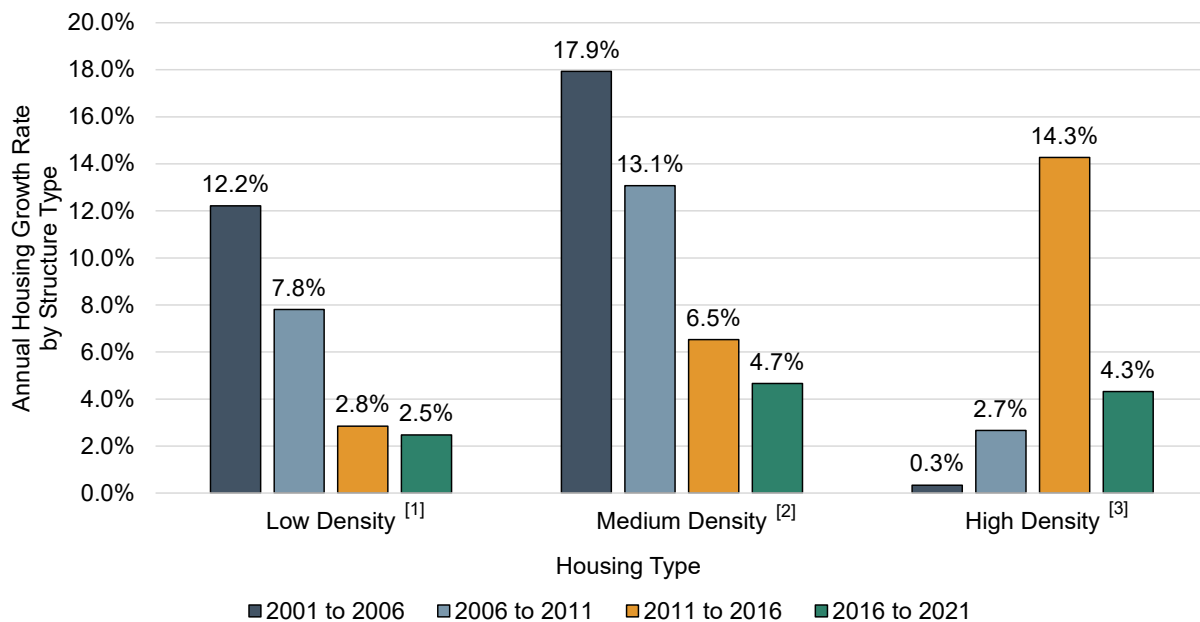
Figure 4-4 summarizes the annual growth rate by housing structure type (i.e., density type) for the historical period between 2001 and 2021. Key observations include the following:

- Between 2001 and 2006, low- and medium-density housing achieved the highest annual growth rates, growing at an annual rate of 12.2% and 17.9%, respectively;
- Since 2006, the annual rate of growth in low- and medium-density housing decreased over each five-year period between 2006 and 2021, with significant decreases over the 2001 to 2016 period, followed by a moderate decrease during the 2016 to 2021 period.



- In contrast, the annual growth rate of high-density housing increased significantly over the 2001 to 2016 period, increasing from 0.3% between 2001 and 2006 to 14.3% from 2011 to 2016. Between 2016 and 2021, the annual growth of high-density housing was 4.3%, which represents a much slower growth rate compared to previous Census periods.

Figure 4-4
Town of Milton
Housing Growth by Structure Type, 2001 to 2021



[1] Includes single and semi-detached units.

[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

[3] Includes stacked townhouses, bachelor, 1-bedroom, 2-bedroom+ apartment units, and secondary suites.

Note: Figures have been rounded and may not add up precisely.

Source: Historical data derived from Statistics Canada Census Profiles for the Town of Milton and presented by Watson & Associates Economists Ltd.

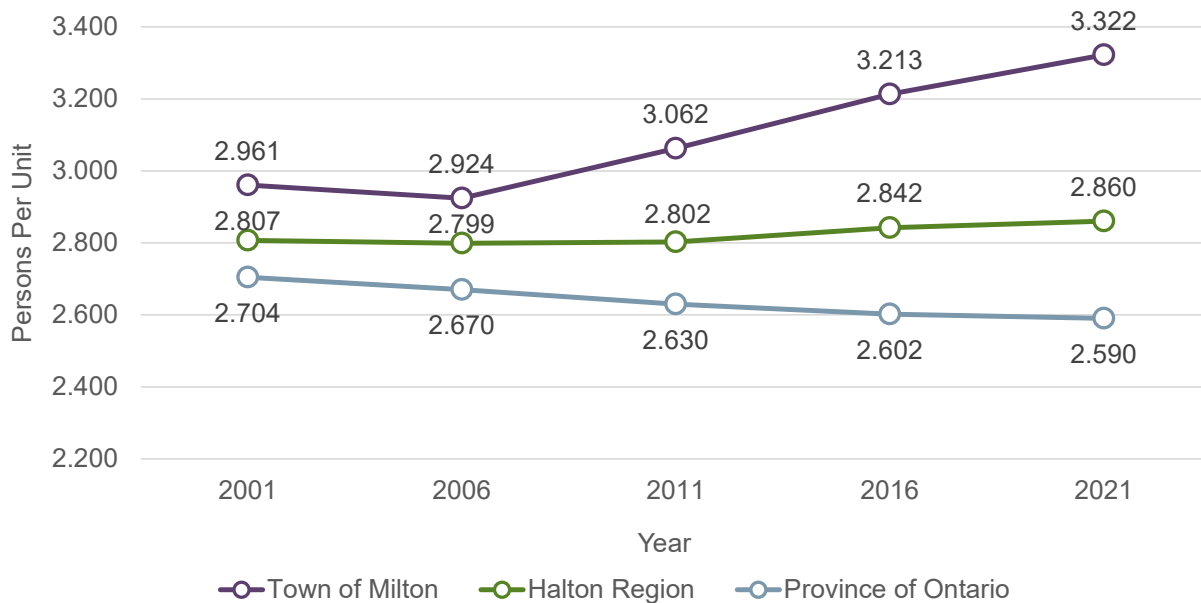
4.3.1 Housing Occupancy Trends

Figure 4-5 summarizes the average number of persons per unit (P.P.U.) in the Province of Ontario, Halton Region, and the Town of Milton from the 2001 to 2021 historical period. For additional information about P.P.U.s please refer to Appendix C. Key observations include the following:



- The average P.P.U. for the Province of Ontario has moderately declined over the past 20 years.
- Average P.P.U. levels in Halton Region were relatively consistent between 2001 and 2011, before moderately increasing between 2011 and 2021.
- The Town of Milton experienced a modest decrease in housing occupancy trends between 2001 and 2006, before showing significant increases in average P.P.U. levels between the 2006 and 2021 Census periods.

Figure 4-5
Ontario, Halton Region, and the Town of Milton
Persons Per Unit (P.P.U.) Trends, 2001 to 2021



Note: Population excludes net Census undercount.

Source: Historical data derived from Statistics Canada Census Profiles for the Town of Milton and presented by Watson & Associates Economists Ltd.

4.3.2 Headship Rates

A household headship rate is defined as the ratio of primary household maintainers, or heads of households, by major population age group (i.e., cohort). Between 2006 and 2021, the Town of Milton's total headship rate decreased from 33% to 29% (refer to Appendix D for additional details). An understanding of historical headship rate trends is important because this information provides insights into household formation trends associated with population growth by age, family type, and family structure. While major fluctuations in headship rates by age group are not common over time, the ratio



of household maintainers per capita varies by population age group. For example, a municipality with a higher percentage of seniors will typically have a higher household maintainer ratio per capita (i.e., headship rate) compared to a municipality with a younger population (such as the Town of Milton). This is because households occupied by seniors typically have fewer children than households occupied by adults under 65 years of age. Accordingly, forecast trends in population age structure provide important insights into future headship rates and average P.P.U. trends for Milton, which was previously discussed in subsection 4.3.1. It is important to note that headship rates by major age group are anticipated to remain relatively stable over the long-term forecast period.

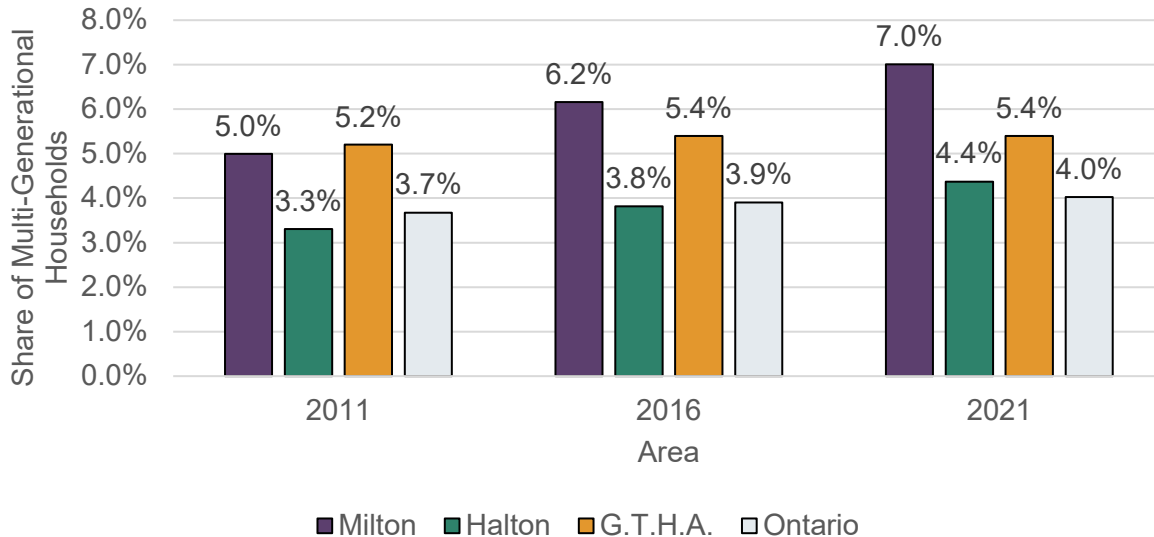
4.3.3 Multi-Generational Households

Figure 4-6 summarizes multi-generational households as a share of total households in the Town of Milton, Halton Region, the G.T.H.A., and the Province of Ontario. Trends in multi-generational households are important to understand as these households typically generate a higher average P.P.U. compared to single family households. Key observations include the following:

- The share of multi-generational households was much higher in Milton relative to Halton Region, the G.T.H.A., and the Province in all historical Census periods.
- The increase in multi-generational households was also larger in Milton, with the share of multi-generational households increasing 2% between 2011 and 2021, a larger increase than in the other geographic areas.
- The share of multi-generational households in the G.T.H.A. and Ontario have been relatively consistent, increasing at a slower rate than in Milton and Halton Region.



Figure 4-6
Ontario, G.T.H.A., Halton Region, and the Town of Milton
Multi-Generational Households Trends, 2011 to 2021



Source: Statistics Canada Census Profiles summarized by Watson & Associates Economists Ltd.

4.3.4 Census vs. Non-Census Households

Figure 4-7 to Figure 4-9 summarize household trends by family structure type for the geographic areas of the Town of Milton, the Region of Halton, and the Province of Ontario, respectively. Key observations include the following:

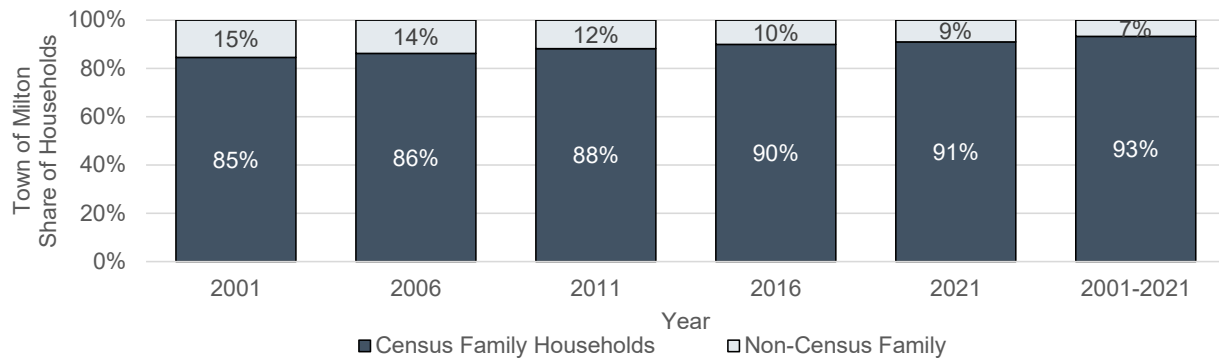
- The share of non-Census family households^[47] in the Region of Halton stayed generally consistent from 2001 to 2021, representing 18% of new Census households during the period.
- The share of non-Census family households in the Province of Ontario increased between 2001 and 2021, with the total share increasing from 24% to 28%, representing 39% of new Census households.
- The Town of Milton experienced a decrease in non-Census family households between 2001 and 2021, falling from 15% to 9%. Non-Census family households

^[47] As defined by Statistics Canada, non-Census-family households are either one person living alone or a group of two or more persons who live together but do not constitute a Census family.



only represented 7% of new households added to the Town of Milton between 2001 and 2021.

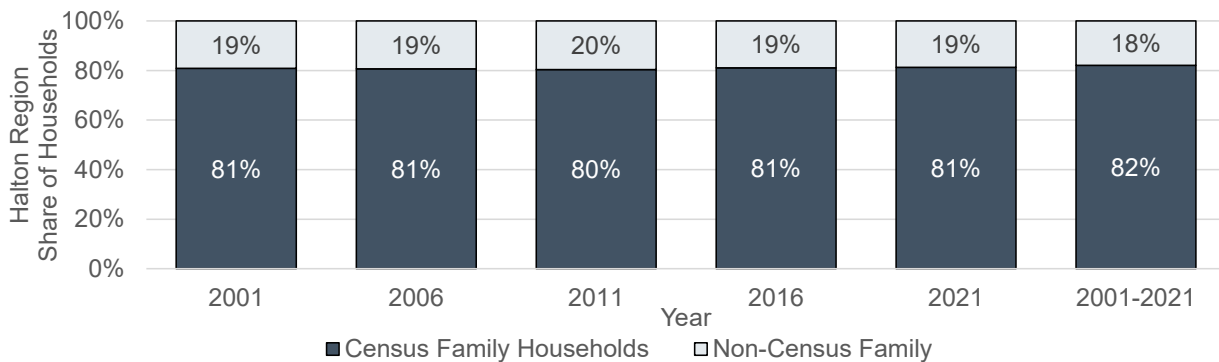
Figure 4-7
Town of Milton
Households Trends by Family Structure, 2001 to 2021



Note: Population excludes net Census undercount. Figures have been rounded and may not add up precisely.

Source: Derived from Statistics Canada Census Profiles by Watson & Associates Economists Ltd.

Figure 4-8
Halton Region
Households Trends by Family Structure, 2001 to 2021

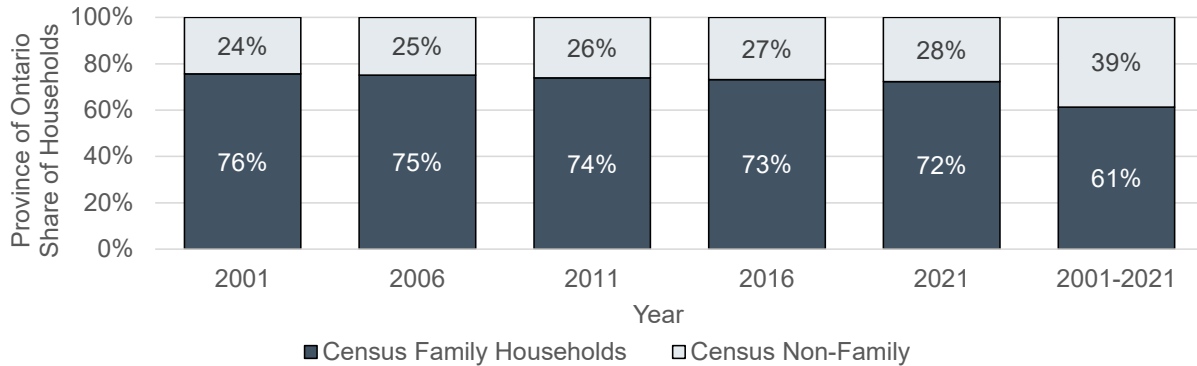


Note: Population excludes net Census undercount. Figures have been rounded and may not add up precisely.

Source: Derived from Statistics Canada Census Profiles by Watson & Associates Economists Ltd.



Figure 4-9
Province of Ontario
Households Trends by Family Structure, 2001 to 2021



Note: Population excludes net Census undercount. Figures have been rounded and may not add up precisely.

Source: Derived from Statistics Canada Census Profiles by Watson & Associates Economists Ltd.

4.4 Socio-Economic Trends and Housing Affordability

4.4.1 Halton Region and Town of Milton Housing Price Trends

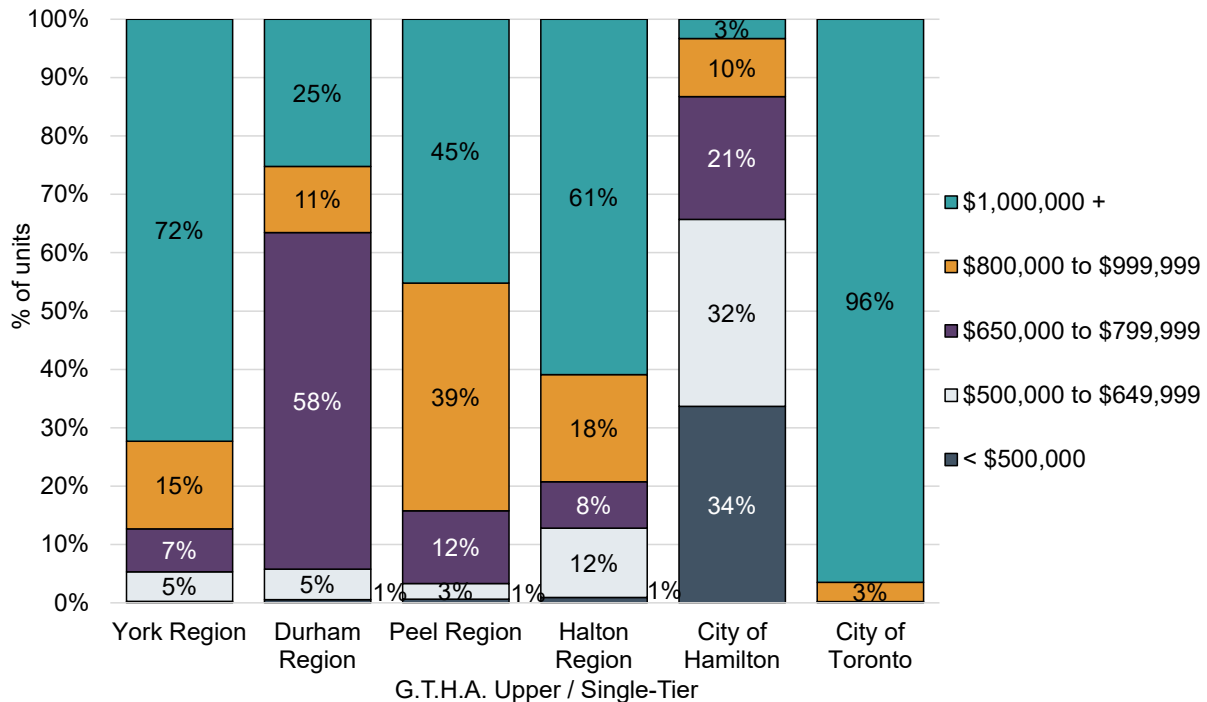
Average new detached home sales for Halton Region between 2020 and 2023 by price point are presented in Figure 4-7 in comparison to other upper-tier/single-tier municipalities in the G.T.H.A. Key findings are as follows:

- Just over 60% of absorbed new single detached homes in Halton Region over the past 3+ years have been over the \$1 million price point, which represents a lower percentage than the City of Toronto and York Region, but comparably higher than all other upper-tier/single-tier G.T.H.A. municipalities.
- The absence of single detached housing prices under the \$1 million price point is placing constraints on low-density housing growth across Halton Region and the G.T.H.A.
- Declining housing affordability emphasizes greater need for a broader range of housing options. For Milton, demands are greatest for missing middle housing



forms.^[48] Demand for high-density ownership and rental housing forms is also on the rise.

Figure 4-10
Greater Toronto Hamilton Area
Absorbed Single Detached Units by Price Range, 2020 to Year-to-Date 2023



Source: Derived from Canada Mortgage and Housing Corporation, Absorbed Unit Price Q1 2023, by Watson & Associates Economists Ltd.

^[48] The “missing middle” describes a range of medium-density housing types between single detached houses and apartment buildings that have gone “missing” from many of our cities in the last 60 to 70 years. This includes a range of multi-unit or clustered housing types compatible in scale with single-family homes that help meet the growing demand for walkable urban living, such as duplexes, triplexes, fourplexes, rowhouses, and townhouses.



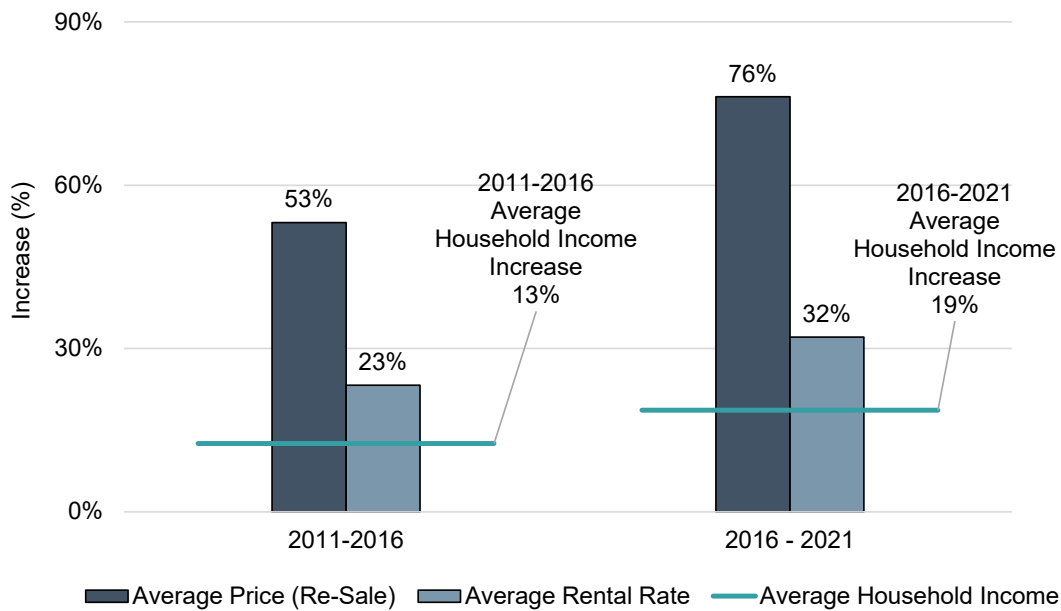
4.4.2 Town of Milton Household Income

Figure 4-11 summarizes the average household income, average housing re-sales, and average monthly rental rate in the Town of Milton from 2011 to 2021. Key observations include the following:

- Average household income, average re-sale prices, and average monthly rental rates all increased between the 2011 to 2016 period and the 2016 to 2021 period.
- Average re-sale housing prices in the Town of Milton increased by 53% and 76% over the 2011 to 2016 period and the 2016 to 2021 period, respectively.
- Average monthly rent also steadily increased, albeit at a lower rate than housing re-sale prices, increasing by 23% and 32% over each period.
- Average household income grew at a much slower rate than housing prices, increasing by 13% and 19% over the two periods.
- In accordance with the above, household income levels within the Town of Milton have not kept pace with housing prices or rents, which has further eroded housing affordability over the past decade. These trends illustrate the need for the Town to continue to explore a range of housing options by structure type and tenure to meet a broad range of housing needs across all age groups and income levels. Phase 2 of this study will provide a more detailed analysis with respect to housing affordability in the Town of Milton.



Figure 4-11
Town of Milton
Housing Prices and Household Income



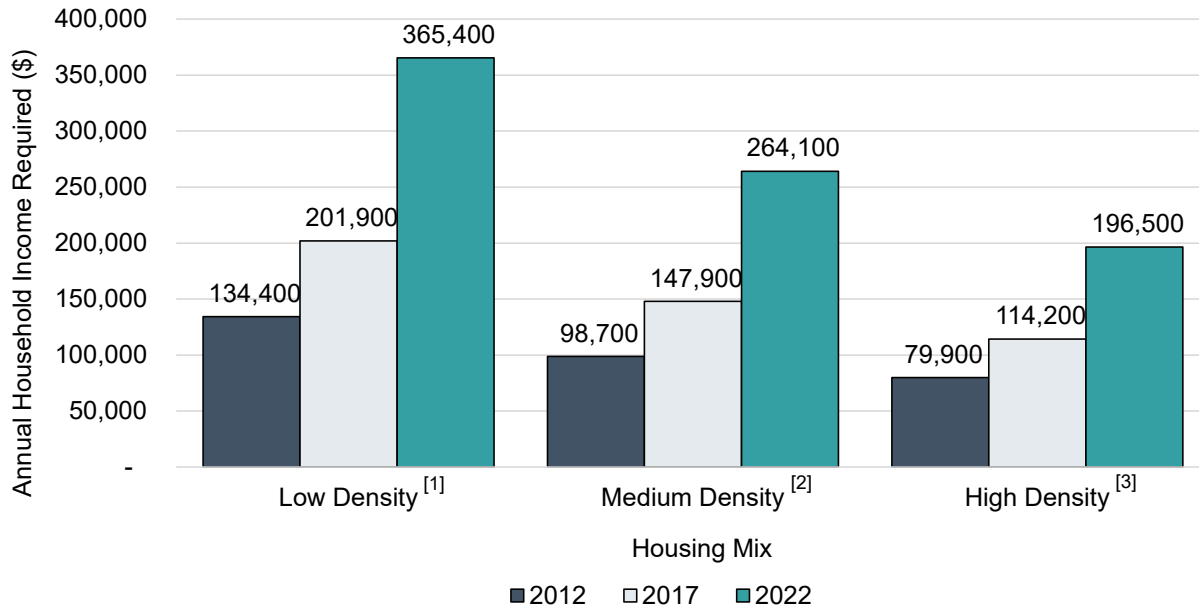
Note: Price (re-sale) increase includes the sale prices of single detached, townhouse/row, and apartment property types.

Source: Derived from Canada Mortgage and Housing Corporation Rental Market Survey, Statistics Canada Census Data, 2011 to 2021, and listing.ca, by Watson & Associates Economists Ltd.

Figure 4-12 on the following page summarizes annual household income required to purchase different housing structure types in the Town of Milton between 2012 and 2021. Across all housing density types, household incomes required to afford an average-priced home have increased between 2.5 and 2.7 times over the past 10 years.



Figure 4-12
Town of Milton
Housing Prices and Household Income



^[1] Includes singles and semi-detached houses.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes stacked townhouses, bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Price (re-sale) increase includes the sale prices of single detached, townhouse/row, and apartment property types and assumes a 25-year mortgage and 10% downpayment.

Source: Derived from listing.ca by Watson & Associates Economists Ltd.

4.5 Recent Residential Development Trends

4.5.1 Town of Milton Residential Building Permit Activity by Structure Type

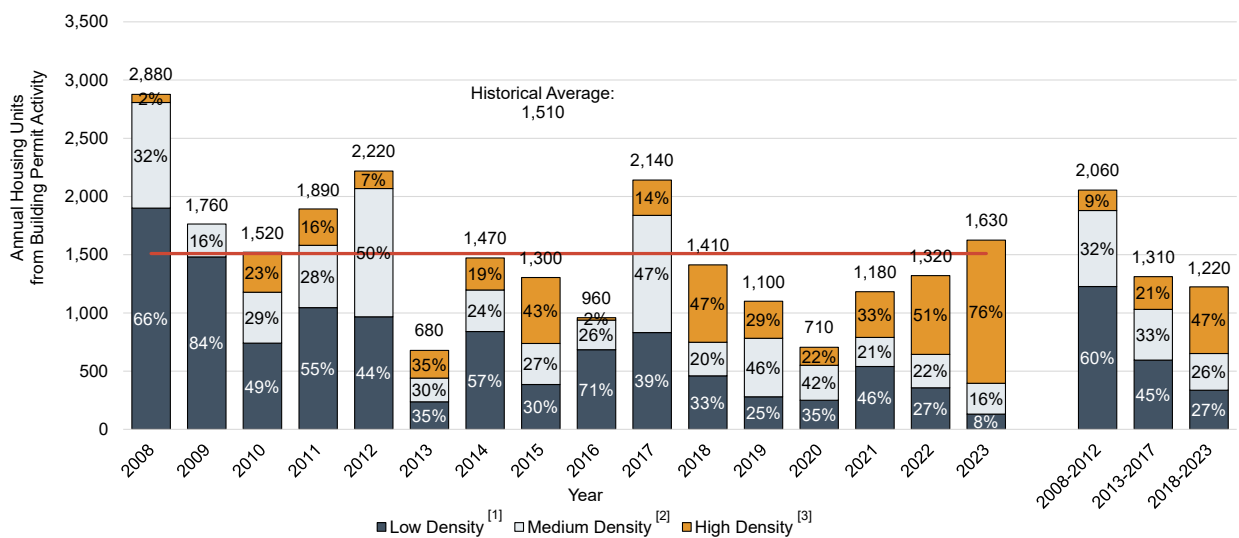
Figure 4-13 summarizes historical trends in residential building permit activity (i.e., new units) for the Town of Milton over the 2008 to 2023 period. Over the past 16-year period:

- The Town issued an average of approximately 1,500 residential building permits per year related to new residential dwellings;



- The share of residential building permits issued for low-density housing progressively decreased from 60% during the 2008 to 2012 period, to 45% during the 2013 to 2017 period, and to 27% during the 2018 to 2023 period; and
- The average rate of residential building permit activity steadily decreased over the 2008 to 2023 period, partly driven by a decline in building permits for low-density housing.

Figure 4-13
Town of Milton
Housing Growth by Structure Type, 2008 to 2023



[1] Includes single and semi-detached houses.

[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

[3] Includes stacked townhouses, and bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Source: Town of Milton building permit data summarized by Watson & Associates Economists Ltd.

4.5.2 Town of Milton Residential Building Permit Activity by Planning Area

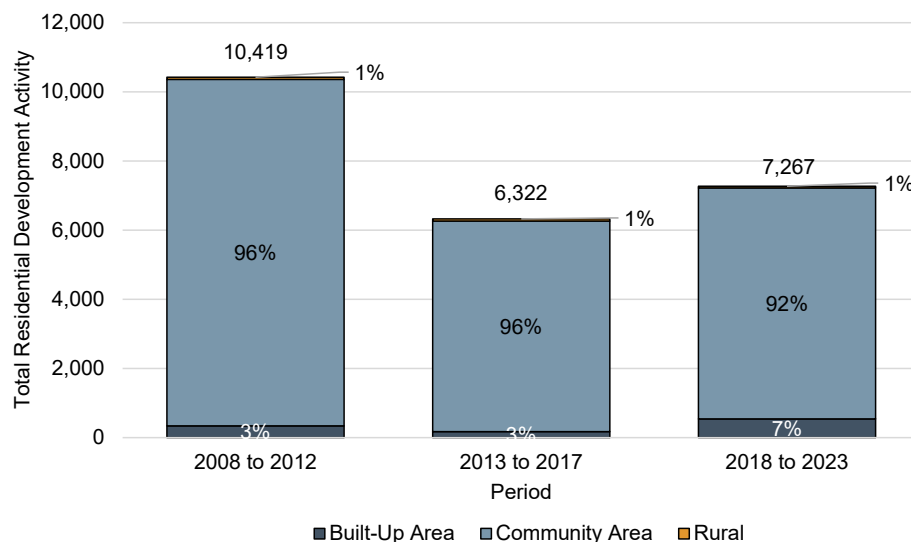
Figure 4-14 summarizes the amount of residential activity by planning policy area. Key observations include the following:

- The share of development activity within the B.U.A. moderately increased to 9% between 2018 and 2022, from 3% during the 2008 to 2012 and 2013 to 2017 periods.



- Over the past decade, the largest share of residential development activity occurred within designated greenfield areas (D.G.A.).^[49] During the 2008 to 2012 and 2013 to 2017 periods, 96% of residential building permits were issued in the D.G.A. This number fell to 92% during the 2018 to 2022 period.
- Looking forward, the Town is anticipated to accommodate a large share of development within its planned and future D.G.A. lands. This is largely due to the strong demand for grade-related housing in the Town of Milton, which is anticipated within the Town’s planned and future greenfield areas. The Town is also directing and encouraging significant medium- and high-density residential development, and retail and office employment growth to the Town’s S.G.A.s. It is important to note that these areas will provide not only provide additional development opportunities but also support the Town’s vision of developing transit-oriented neighbourhoods.

Figure 4-14
Town of Milton
Residential Development Activity (Units) by Policy Area, 2013 to 2022



Source: Adapted from the Town of Milton’s building permit data by Watson & Associates Economists Ltd., 2024.

^[49] It is noted that designated greenfield areas are now referred to as designated growth areas in the P.P.S., 2024.



4.6 Recent Non-Residential Development and Economic Trends

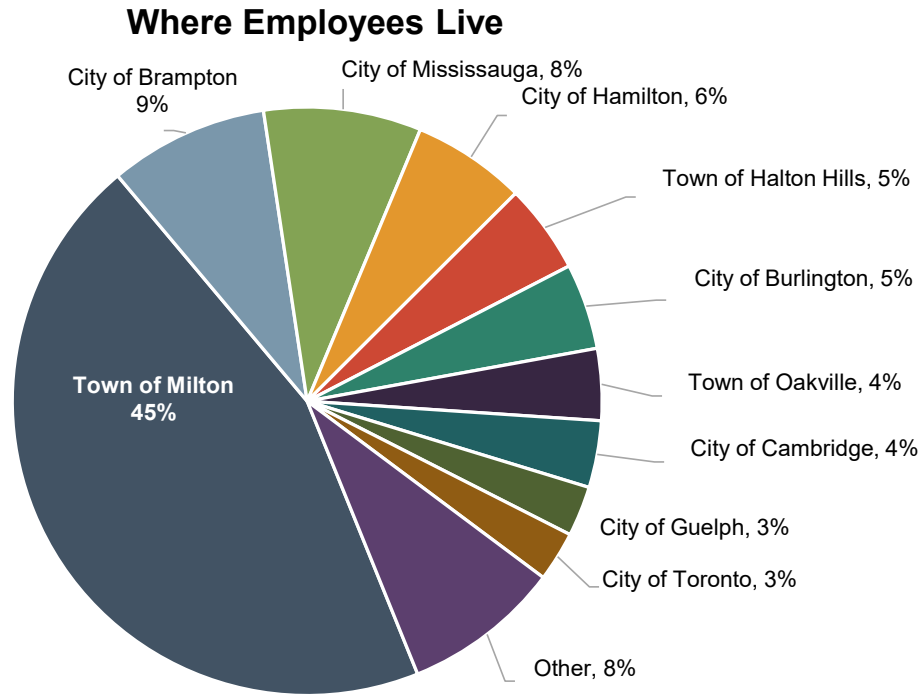
4.6.1 *Commuting Trends*

Due to its geographic location within the G.T.H.A., the Town of Milton is forecast to experience significant outward growth pressure over the next several decades largely from other G.T.H.A. municipalities to the east, which have been amongst the fastest growing municipalities in Ontario in recent decades. The strength of the broader regional G.G.H. economy, in particular the G.T.H.A, also presents an opportunity for Milton's economy and its residents within commuting distance to this growing and diversifying regional employment market.

As displayed in Figure 4-15 and Figure 4-16, in 2021, 45% of Milton residents worked within Milton, while the rest commuted outside Milton for work. Peel Region represented the largest employment hub outside Milton, as it employed 17% of Milton's residents.



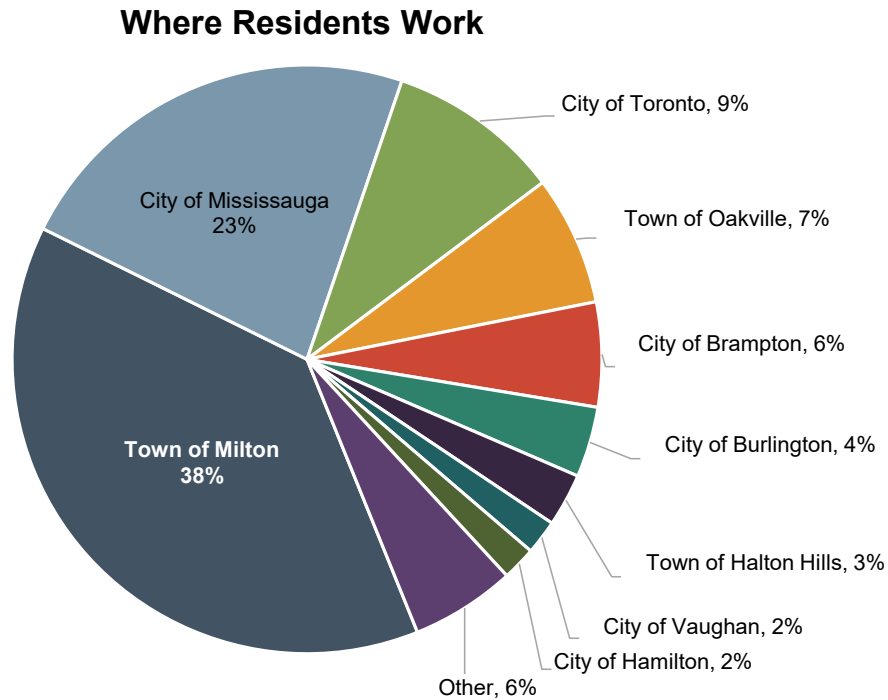
Figure 4-15
Town of Milton
2021 Commuting Patterns



Source: Statistics Canada 2021 Census of Population from Table: 98-10-0459-01, summarized by Watson & Associates Economists Ltd.



Figure 4-16
Town of Milton
2021 Commuting Patterns



Source: Statistics Canada 2021 Census of Population from Table: 98-10-0459-01, summarized by Watson & Associates Economists Ltd.

4.6.2 Local Employment Trends by Sector

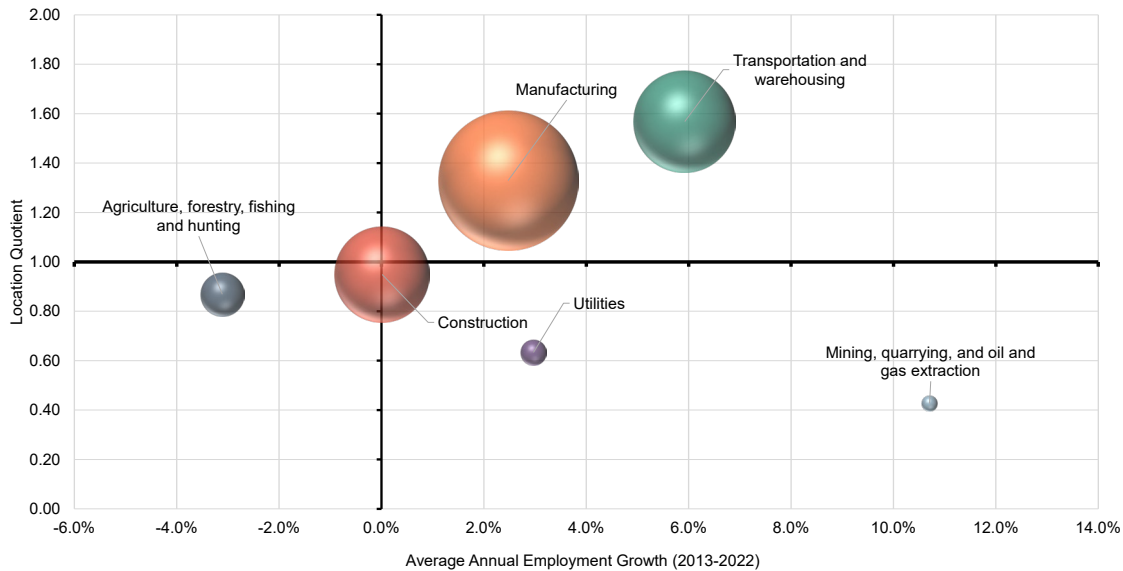
Figure 4-17 and Figure 4-18 illustrate the strength of goods-producing and services-producing employment sectors in the Town of Milton, relative to the Province, using location quotients (L.Q.) by size (based on number of employees) and recent growth trends.^[50] The relative amount of employment by sector (estimated as of 2021) is also indicated by the relative size of the spheres illustrated in Figure 4-17 and Figure 4-18. Historical growth rates by employment cluster are also measured across the x-axis.

^[50] An L.Q. of 1.0 identifies that the concentration of employment by sector is consistent with the broader employment base average. An L.Q. of greater than 1.0 identifies that the concentration of employment in a given employment sector is higher than the broader base average, which suggests a relatively high concentration of a particular employment sector or “cluster.”



As shown, the Town has a concentration in the transportation and warehousing, wholesale trade, and manufacturing sectors. These employment sectors have also experienced various levels of labour force growth over the past five years and generally represent the established economic clusters within the local and regional economy. In contrast, other knowledge-based employment sectors, including finance and insurance, professional, scientific and technical services, and health care and social assistance are less concentrated but have recently been experiencing moderate to strong labour force growth. These employment sectors generally represent emerging economic clusters within the Town.

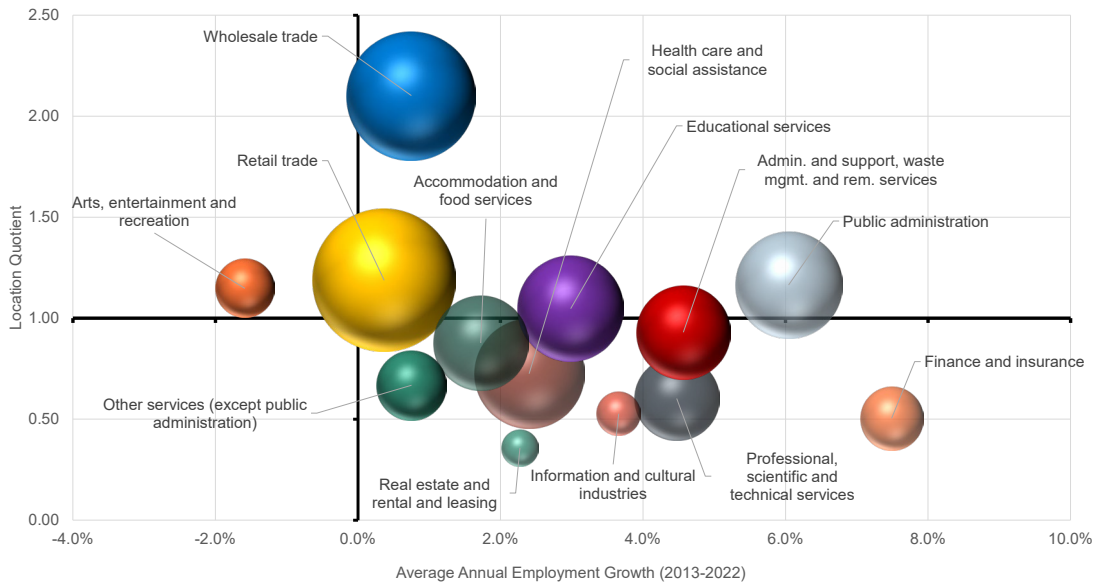
Figure 4-17
Town of Milton
Employment Growth by Goods-Producing Sectors, 2013 to 2022



Source: Derived from Lightcast Analyst by Watson & Associates Economists Ltd.



Figure 4-18
Town of Milton
Employment Growth by Service-Producing Sectors, 2013 to 2022



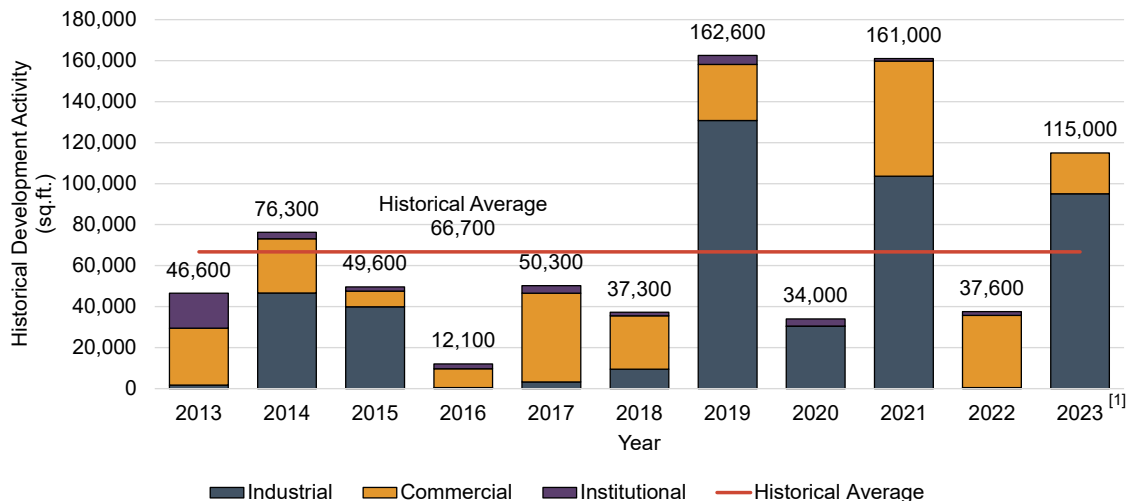
Source: Derived from Lightcast Analyst by Watson & Associates Economists Ltd.

4.6.3 Town of Milton Non-Residential Building Permit Activity by Sector

Over the 2013 to 2023 period, the Town of Milton averaged 66,700 sq.ft. of non-residential development activity annually, as summarized in Figure 4-19. Over the period, industrial development accounted for approximately 59% of total development activity, compared to 36% and 5% in the commercial and institutional sectors, respectively, as shown in Figure 4-19. Since 2019, development activity has picked up in the Town, most notably in the industrial sector.



Figure 4-19
Town of Milton
Annual Non-Residential Development Activity, 2013 to 2023



^[1] Reflects non-residential building permits until the end of June 2023.

Note: The non-residential development activity (sq.ft.) metric contains new construction and additions/expansions. Figures have been rounded.

Source: Derived from the Town of Milton non-residential building permit data from 2013 to June 2023, summarized by Watson & Associates Economists Ltd.

4.7 Conclusions

The Town of Milton has been one of the fastest growing municipalities in Canada over the past two decades. In the near term, tighter monetary policy imposed by the Bank of Canada in response to persistently high inflation rates is likely to continue to somewhat cool the regional housing market in 2024 and into 2025. Notwithstanding these anticipated short-term trends in the regional housing market, the medium- to longer-term housing demand outlook for the Town and the surrounding area (i.e., next 3+ years) is strong and comparably much higher when compared to the past 20 years. This robust outlook is largely driven by relatively stronger anticipated intra-provincial migration and international immigration trends to the G.T.H.A., Halton Region, and the Town of Milton.

As previously discussed, the Town of Milton is anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. It is also important to recognize that the population base of the



Town is getting older on average. The aging of the population and the decline in population growth associated with natural increase (i.e., births less deaths) are anticipated to place downward pressure on the rate of population and labour force growth within the regional economy and, subsequently, the regional labour force participation rate.^[51] These demographic trends are anticipated to place limits on the upper rate of potential economic and demographic growth expected across the Town over the longer term.

The existing housing stock within the Town of Milton is weighted towards low-density housing forms (i.e., singles and semi-detached). In recent decades, however, the Town has experienced a steady shift towards a higher share of high-density housing types. This shift has been largely driven by declining housing affordability associated with low-density housing options, the increased demand for a range of housing forms driven by demographic and socio-economics factors associated with the aging population base, and lifestyle choices of existing and new residents. Looking forward, a broad mix of future housing options across a range of density types will be required throughout the Town to accommodate both younger and older adults across varying income levels, including affordable housing options.

In summary, the demographic and socio-economic trends explored in this chapter will continue to have broad implications on the amount, type, and density of future housing needs, municipal service needs and public infrastructure requirements for the Town over the long term.

^[51] The labour force participation rate is defined as the ratio of employed and unemployed people to the total working-age population (age 15 years and older).



5. Town of Milton Urban Land Supply

5.1 Residential Housing Supply Opportunities

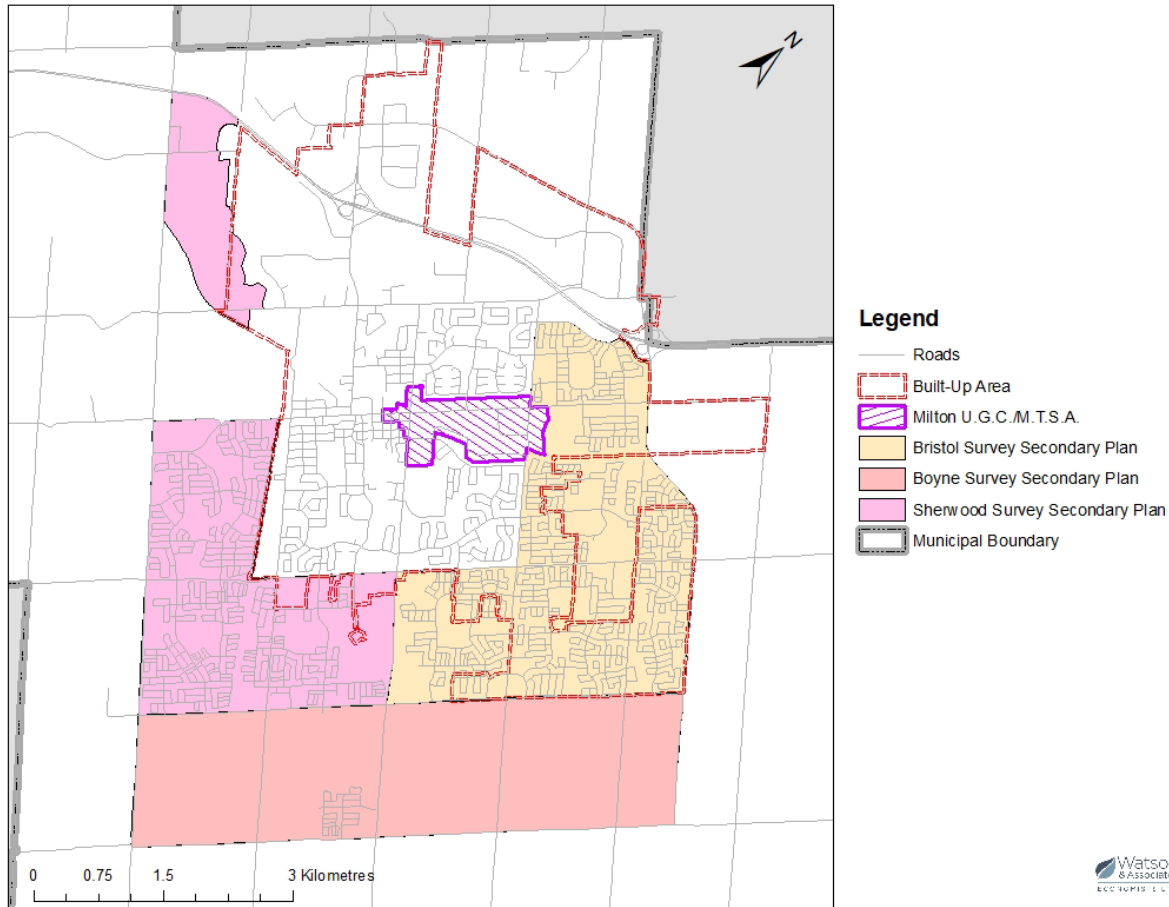
This chapter provides a summary of the Town's housing inventory by planning policy area, including active development applications by planning status (i.e., registered housing units within development plans remaining to be built, draft approved plans, and applications that are currently undergoing review). This analysis has been summarized in accordance with the Town's developed/developing residential areas, designated growth areas, and identified urban residential expansion areas.

As identified below in Figure 5-1, and previously identified herein under subsection 2.3.1.1, Figure 2-4, for municipalities in the G.G.H., a B.U.A. was delineated for all urban settlements as of 2006 as part of the Growth Plan under the *Places to Growth Act, 2005*.^[52] The B.U.A. was based on the portion of the urban settlement that was primarily developed at that time. The Growth Plan, 2019 defines any residential development within the delineated B.U.A. as intensification. Accordingly, all new residential development occurring within the B.U.A. counts towards the Town's intensification target within the framework of the Growth Plan, 2019. For the purpose of this study, the established urban area, which includes the Milton U.G.C./M.T.S.A., in addition to the Bristol Survey Secondary Plan (Milton Phase 1 lands), the Sherwood Survey Secondary Plan (Milton Phase 2 lands), and the Boyne Survey Secondary Plan (Milton Phase 3 lands), will be defined as the Developed/Developing Community Areas, as shown in the map below (Figure 5-1). Over the near- to medium-term planning horizon, additional housing development will be accommodated within the Town's developing residential areas identified in Figure 5-1. Over the longer-term planning horizon, significant residential development is also anticipated to be accommodated on the Town's developed lands through intensification.

^[52] Places to Grow. Better Choices. Brighter Future. Built Boundary for the Growth Plan for the Greater Golden Horseshoe, 2006. Ministry of Public Infrastructure Renewal. Ontario. 2008.



Figure 5-1
Town of Milton
Developed/Developing Community Areas



As summarized in Figure 5-2 on the following page, the potential housing yield on vacant designated residential lands currently not active in development plans (i.e., greenfield lands within the vacant Community Areas^[53] and the Developed/Developing Community Areas) that can accommodate future housing growth has been identified. Also included as part of the Town's long-term housing supply inventory is an estimate of accessory apartments (i.e., second and third units) anticipated to be constructed over the 2021 to 2051 planning horizon.

^[53] Includes the Agerton Secondary Plan, the Britannia Secondary Plan, the Milton Education Village Secondary Plan, and the Trafalgar Secondary Plan.



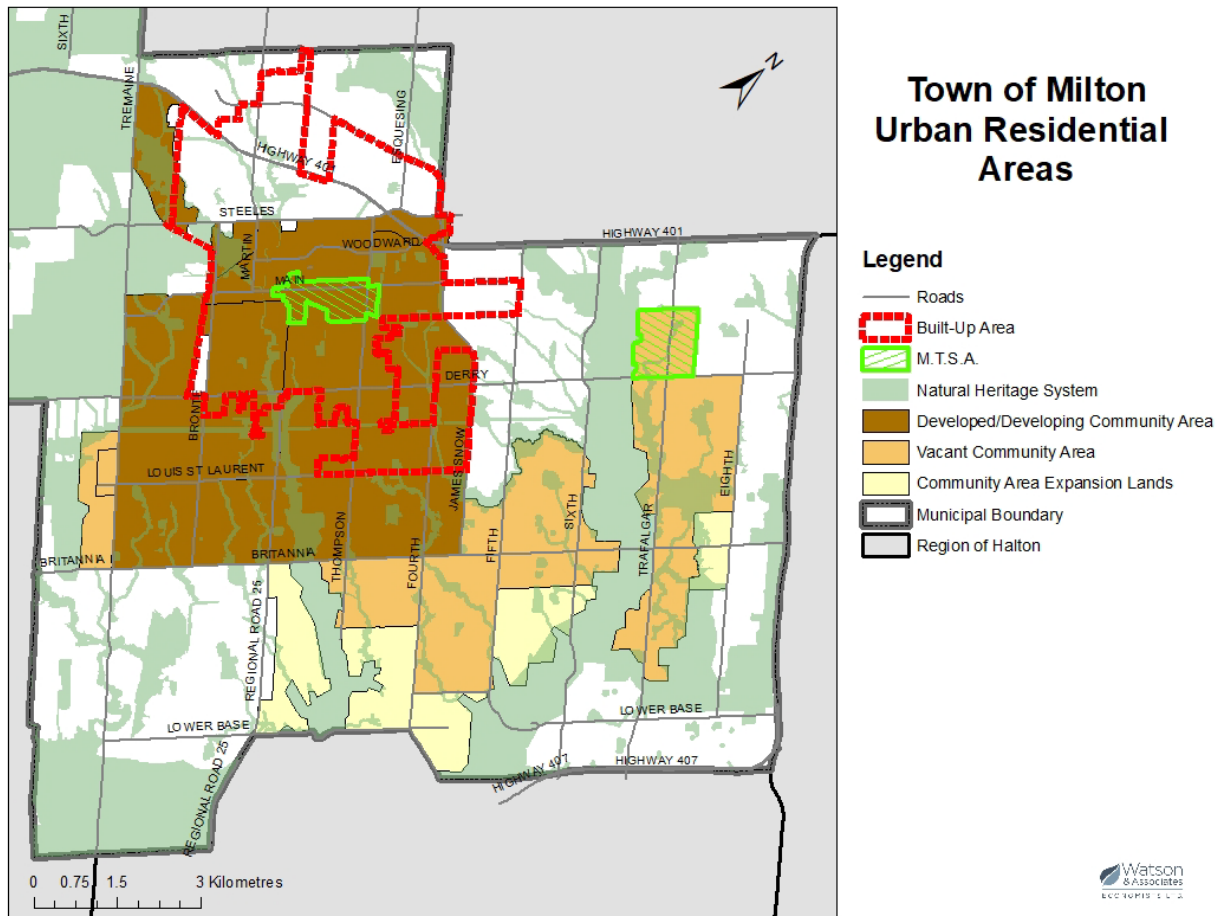
The Town is currently reviewing its urban structure and S.G.A.s through its Official Plan review. In consultation with Town Staff, this report includes some assumptions about potential future S.G.A.s within the Town:

- The Milton U.G.C./GO M.T.S.A. and the Trafalgar GO M.T.S.A. will be designated S.G.A.s;
- The area surrounding the Steeles Avenue and Bronte Street North intersection is being considered for designation as an S.G.A.;
- The Innovation District portion of the Milton Education Village is being considered for designation as an S.G.A.; and
- The planned mixed-use node at the intersection of Britannia Road and James Snow Parkway is being considered for designation as an S.G.A.

Potential long-term housing supply within the Town by S.G.A. has also been assessed in accordance with long-term density targets assumed for these areas. Residential supply opportunities have been reviewed against forecast housing demand by structure type to the year 2051. Long-term residential and/or mixed-use development opportunities represent a key source of long-term housing supply for the Town's Developed/Developing Community Areas, particularly within the Town's S.G.A.s. For additional details regarding Milton's residential housing supply, please refer to Appendix D.



Figure 5-2
Town of Milton
Urban Residential Area, Including Designated Community Areas and
Urban Residential Expansion Areas



5.1.1 Active Development Applications and Secondary Plans

Figure 5-3 through Figure 5-5 summarize the Town’s potential long-term future residential housing supply by area and by development status (i.e., registered housing units within development plans remaining to be built, draft approved plans, and applications that are currently undergoing review, and lands undergoing secondary/tertiary planning process). Residential housing supply opportunities in active plans also provide insights regarding near-term market demand by development type and location, which is further examined in this chapter. For additional information about specific policy areas, please refer to Appendix E. Key observations include the following:

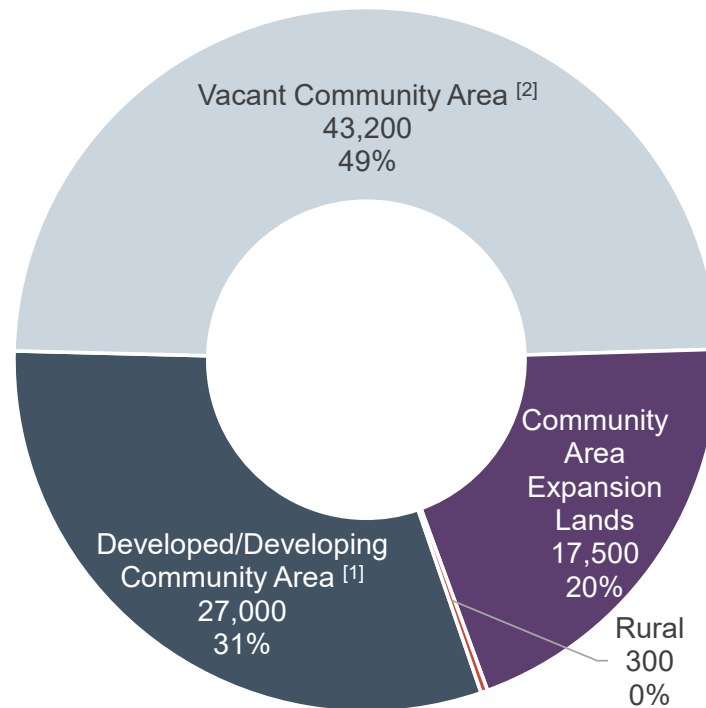


- Approximately 61% of the Town's housing supply potential is in vacant Community Areas, accounting for approximately 43,200 housing units. These areas are represented by the Agerton Secondary Plan, the Britannia Secondary Plan, the Milton Education Village (M.E.V.) Secondary Plan, and the Trafalgar Secondary Plan. The remaining 31% of the Town's housing supply potential is located within the Developed/Developing Community Areas, accounting for approximately 27,000 housing units. Most of the housing supply potential within the Town's Developed/Developing Community Areas is located within the Boyne Survey Secondary Plan.
- Excluding housing supply opportunities associated with potential redevelopment sites, approximately 38% (33,600 housing units) are categorized as medium-density units, followed by high-density units which account for 33% (29,300 units) of the Town's overall housing supply. Low-density housing units comprise the remaining 28% (25,000 units) of the Town's overall housing supply.
- Most of the Town's high-density units in development approvals are in the Developed/Developing Community Areas, accounting for 58% of 28,800 high-density units identified in the Town, whereas the majority of low- and medium-density units are located in vacant Community Areas.
- The Milton U.G.C./M.T.S.A. (8,400 housing units) accounts for 31% of the total identified housing supply potential in the Developed/Developing Community Areas. All units are anticipated to be within high-density forms within this M.T.S.A.^[54]
- Less than 1% of the Town's future long-term housing supply has been identified in the Rural Areas.

^[54] It should be noted that the supply potential identified within the B.U.A. does not include longer-term redevelopment potential opportunities.



Figure 5-3
Town of Milton
Housing Supply in Active Development Applications and Secondary Plans by
Development Area



^[1] Developed/Developing Community Areas include the established urban area in addition to the Bristol Survey Secondary Plan, the Sherwood Survey Secondary Plan, and the Boyne Survey Secondary Area.

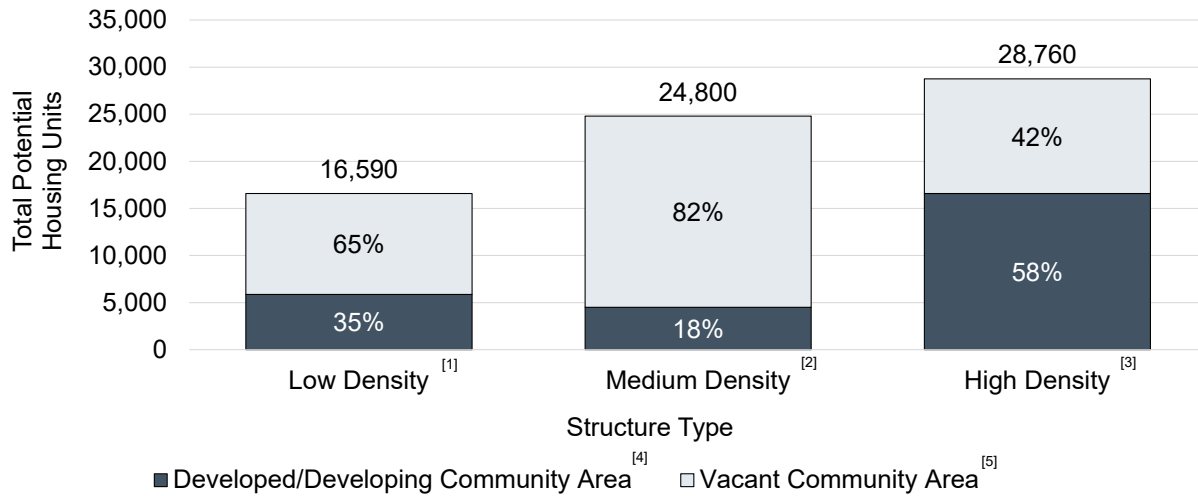
^[2] Vacant Community Areas include the Agerton Secondary Plan, the Britannia Secondary Plan, the Milton Education Village Secondary Plan, and the Trafalgar Secondary Plan.

Note: Figures have been rounded and may not add precisely.

Source: Development application data from the Town of Milton summarized by Watson & Associates Economists Ltd.



Figure 5-4
Town of Milton
Housing Supply in the Development/Planning Approvals Process by Planning Policy Area by Structure Type



[1] Includes single and semi-detached dwellings.

[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

[3] Includes stacked townhouses, bachelor, 1-bedroom, and 2-bedroom+ apartment units.

[4] Developed/Developing Community Areas include the established urban area in addition to the Bristol Survey Secondary Plan, the Sherwood Survey Secondary Plan, and the Boyne Survey Secondary Plan.

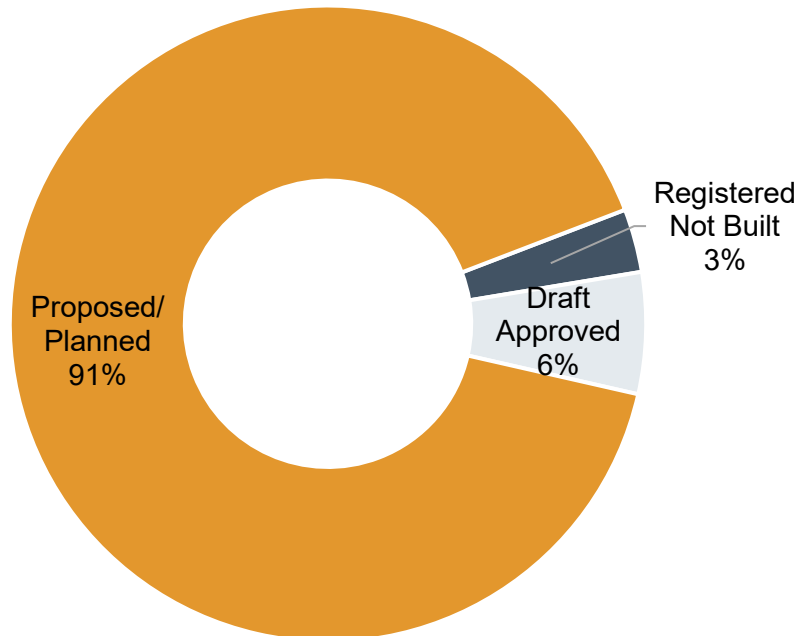
[5] Vacant Community Areas include the Agerton Secondary Plan, the Britannia Secondary Plan, the Milton Education Village Secondary Plan, and the Trafalgar Secondary Plan.

Note: Figures have been rounded and may not add up precisely.

Source: Development application data from the Town of Milton, summarized by Watson & Associates Economists Ltd.



Figure 5-5
Town of Milton
Potential Community Area Housing Supply by Stage of Development/Planning Approval



Source: Development application data from Town of Milton, summarized by Watson & Associates Economists Ltd.

5.1.2 Vacant Residential Land Supply

Most of the Town's potential residential land supply is located in designated, largely vacant Community Areas and Community Area Urban Expansion lands (please refer to Figure 5-2). Designated, vacant Community Area lands are represented by the Agerton Secondary Plan, the Britannia Secondary Plan, the M.E.V. Secondary Plan,^[55] and the Trafalgar Secondary Plan. The location of the Town's Community Area Urban Expansion lands is also illustrated in Figure 5-2. As previously mentioned in subsection 5.1.1, designated, vacant Community Area lands are currently being planned but are largely unbuilt. It is noted that the areas like the Britannia Secondary Plan and the Trafalgar Secondary Plan are planning for mixed-used nodes that can accommodate population-related employment growth. When fully built, these areas will support the

[55] Does include the Minister Zoning Order 476/21 for the Milton Education Village.



Town’s vision of developing transit-oriented neighbourhoods. Figure 5-6 (below) summarizes the amount of vacant land available for development within these areas. Key observations include the following:

- Approximately 69% (1,590 ha) of the Town’s vacant residential lands are within vacant, designated Community Areas; of those lands, the Britannia Secondary Plan accounts for 55% with 870 ha, followed by the Trafalgar Secondary Plan which comprises 30% of the vacant Community Area lands.
- Community Area Urban Expansion Lands account for 30% of the Town’s vacant residential lands, majority of which is located in the Britannia Expansion (W) with 300 ha.

Figure 5-6
Town of Milton
Community Area Land Supply by Status, 2024

	Developed Land Area (ha) ^[1]	Vacant Land Area (ha)	Total Land Area (ha)
Trafalgar GO M.T.S.A. (Agerton Secondary Plan)		120	120
Britannia Secondary Plan	10	870	880
Milton Education Village Secondary Plan	<5	130	140
Trafalgar Secondary Plan	10	470	480
Vacant Community Area	20	1,590	1,610
Rattlesnake Expansion		190	190
Britannia Expansion (W)		300	300
Britannia Expansion (E)		160	160
Trafalgar Expansion		60	60
Community Area Expansion Lands	0	700	700
Town of Milton	20	2,290	2,310

^[1] Based on a desktop review of satellite imagery of lands that are not vacant, and have an existing building and/ structure as of 2023.

Note: Does not include employment conversion requests. Excludes natural heritage features. Figures have been rounded and may not add precisely.

Source: Data provided by the Town of Milton, summarized by Watson & Associates Economists Ltd.

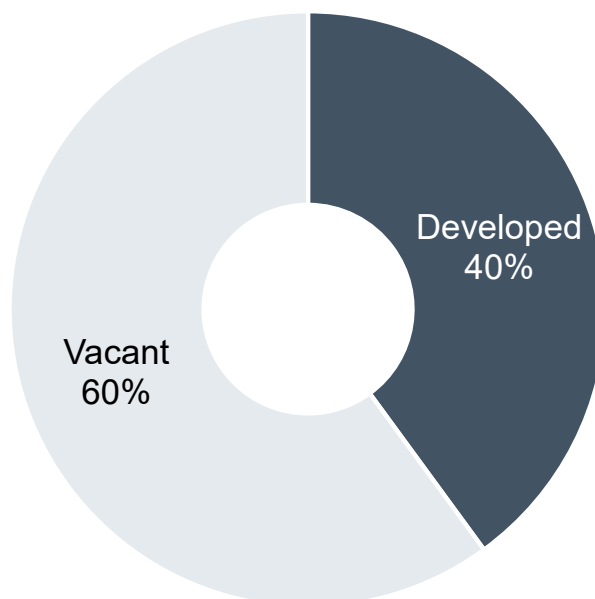


5.2 Vacant Employment Area Land Supply

This subsection examines the Town’s Employment Area land supply; please refer to subsection 2.3.1.3 for details regarding Milton’s Employment Areas. Figure 5-7 summarizes the Town-wide land supply by status and Figure 5-8 further breaks down the land supply by Employment Area. As identified in Figure 5-8, the Town of Milton has approximately 2,260 ha of designated Employment Area lands, of which approximately 60% of the land inventory is occupied/developed, while the remaining 40% is vacant.

Through R.O.P.A. 49, the Town of Milton has lands that are considered Employment Area Expansion Lands, including these lands, the Town of Milton has a total inventory of 3,070 ha of employment lands, of which 56% are currently vacant, as summarized in Figure 5-7 below. For additional mapping of the Town’s employment land supply, please refer to Appendix F.

Figure 5-7
Town of Milton
Total Employment Areas
Land Supply by Supply Status (ha), 2024



Note: Numbers may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.



Figure 5-8
Town of Milton
Employment Areas
Land Supply by Supply Status (ha), 2023

Employment Area	Total Size (ha)	Developed (ha) ^[1]	Vacant (ha)	% Vacant
Milton 401 Industrial/Business Park	940	900	40	4%
Derry Green Business Park	600	260	340	56%
401 Industrial/Business Park Expansion (North Porta)	140	<5	140	99%
Southwest Milton	320	20	310	95%
Agerton Employment Area	240	30	210	89%
Bronte Triangle Employment	20	20	<5	5%
Town of Milton Total Designated Employment Lands	2,260	1,230	1,040	46%
Milton 407 Expansion Employment	740	0	740	100%
Sixth Line Expansion Employment	30	0	30	100%
Rattlesnake Expansion Employment	40	0	40	100%
Town of Milton Total Employment Area Expansion Lands	800	0	800	100%
Town of Milton Total Employment Land Inventory	3,070	1,230	1,840	60%

^[1] Based on a desktop review of satellite imagery of lands that are not vacant, and have an existing building and/ structure as of 2023.

Note: Figures are rounded and may not add precisely.

Source: Derived from Town of Milton data, summarized by Watson & Associates Economists Ltd.

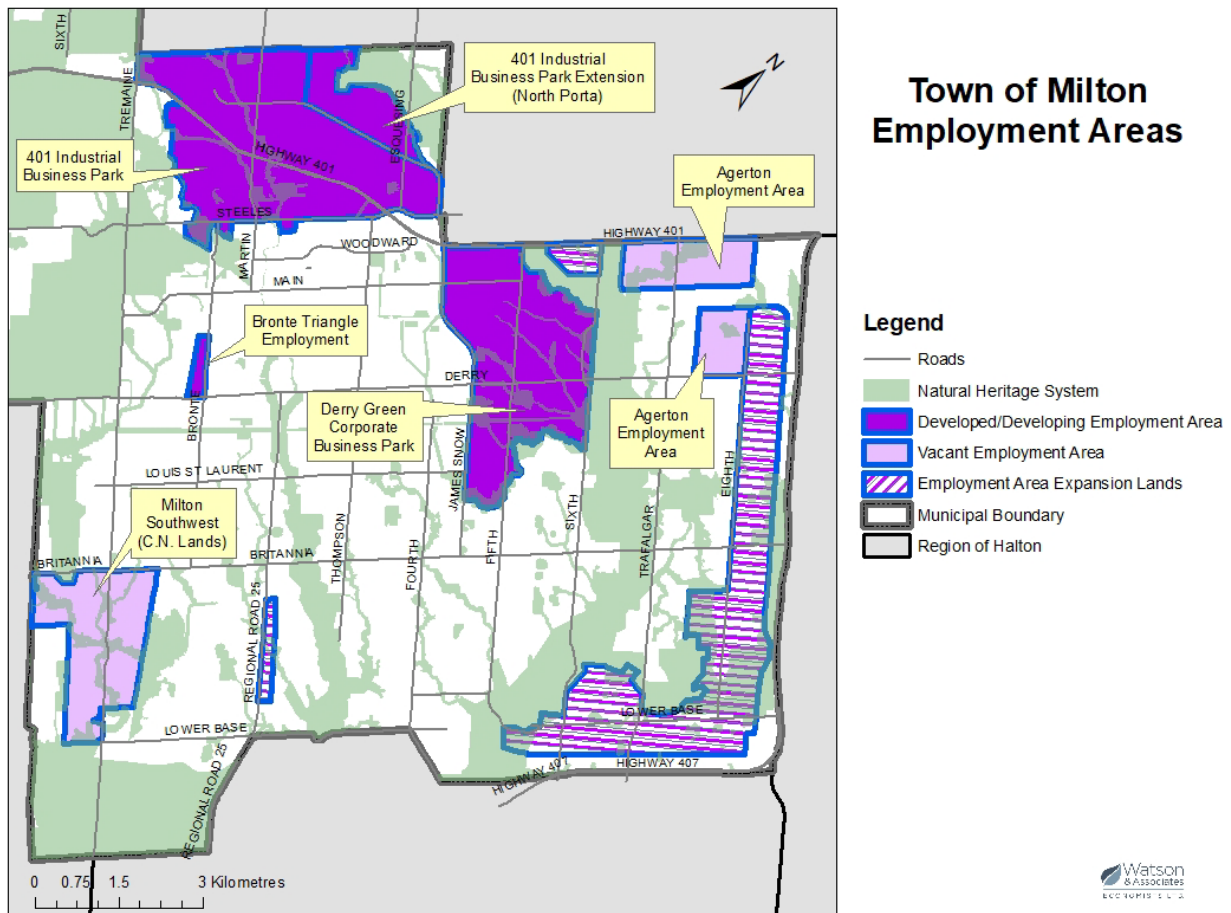
5.3 Existing and Planned Employment Areas

There are several existing industrial/business parks throughout the Town of Milton, each area having unique characteristics and offering opportunities to accommodate a range of business types and employment sectors. Figure 5-9 geographically illustrates all the existing Employment Areas within the Town, in addition to the urban expansion



Employment Areas. The subsections below provide a description of the designated and planned Employment Areas in the Town of Milton.

Figure 5-9
Town of Milton
Designated and Urban Expansion Employment Areas



5.3.1 Milton 401 Industrial and Business Park

The Milton 401 Industrial and Business Park comprises lands located directly north and south of Highway 401, directly east and west of Regional Road 25, and east of James Snow Parkway. Most of these lands have been developed as distribution/logistics, manufacturing and transportation, and office uses. This is the Town's largest employment area accounting for 940 ha of employment land. The Milton 401 Industrial and Business Park is nearing buildout, as less than 5% of the developable lands in the serviced business park are currently vacant.



5.3.2 Derry Green Corporate Business Park

The Derry Green Corporate Business Park includes lands located south of Highway 401 between James Snow Parkway and Sixth Line and extending southward towards Britannia Road. Within the park, 600 ha (1,480 acres) are designated primarily as Business Park with a smaller portion designated as Industrial. As of 2024, approximately half the lands are built out and comprise large warehousing and distribution facilities. The remaining vacant lands of this Business Park are designated for industrial and prestige office uses.

5.3.3 Milton 401 Industrial and Business Park Extension (North Porta)

The Milton 401 Industrial and Business Park Extension (North Porta) lands are located northeast of the Milton 401 Industrial and Business Park area. These lands are bounded by James Snow Parkway, 5 Sideroad, the Canadian National (CN) rail corridor, and natural features near Esquesing Line. These lands are considered most marketable for distribution/logistics, transportation and warehousing, advanced manufacturing and multi-tenant industrial condos. These lands form an extension of a larger contiguous Employment Area – Milton 401 Industrial and Business Park – which has a critical mass, has been highly successful, and provides an opportunity to build on the development activity and success of the existing park. The lands have excellent access to Highway 401 via James Snow Parkway. As of 2024, this Employment Area is mostly vacant with 140 ha of vacant employment land remaining.

5.3.4 Bronte-Triangle Employment Area

The Bronte-Triangle Employment Area is located along Bronte Street South, bordered by Heslop Road to the north and Derry Road West to the south. This employment area is approximately 20 ha in size and is comprised of multi-tenant plazas with smaller office and commercial businesses and retail frontage along Bronte Street. As of 2024, this area is largely built out and it is expected that over the forecast period any employment growth would be through intensification.



5.3.5 Agerton Employment Area

Portions of the Agerton Secondary Plan area include planned Employment Areas ^[56] The Agerton Employment Area offer excellent access to Highways 401 and 407 and is in close proximity the municipal boundary of Mississauga. The Agerton Employment Area offer excellent access to Highways 401 and 407 and is in close proximity to the municipal boundary of Mississauga. There is approximately 240 ha of employment lands in this area to the north and east of the Trafalgar M.T.S.A. (at Derry and Trafalgar Road). These lands are geared towards higher order uses such as major office and prestige industrial uses such as research and development facilities, and advanced manufacturing.

5.3.6 Milton Southwest

Lands located immediately to the south of the M.E.V. Secondary Plan provide the Town with additional longer-term development opportunities. Given its locational attributes, the area is well suited for prestige employment uses, including office development, to accommodate research and development, professional and technical services, and advanced manufacturing. This area is also planned to serve and support the M.E.V. Secondary Plan Area. Maximizing employment opportunities on these lands will be important given the commitment to infrastructure and servicing planned for the area.

C.N., which owns most of the lands within the area, is proposing the development of a large intermodal facility on approximately 180 ha site, largely comprising future employment land, bounded by Britannia Road to the north, First Line to the east, Tremaine Road to the west, and 2nd Side Road to the south. The C.N. intermodal proposal is still the subject of a federal environmental assessment process. The future status of the intermodal proposal is unknown at this time, and presents significant uncertainty with respect to the nature and intensity of uses that are planned within this area.

5.3.7 Employment Area Expansion Lands

The Town's Employment Area Expansion Lands are identified on Figure 5-9, herein. These lands are generally located along the Highway 407 corridor and throughout the

^[56] The latest draft of the Agerton Secondary Plan was presented on July 18, 2022.



southern part of the Town. In total, approximately 800 ha have been identified for future employment use and brought into the Urban Boundary through R.O.P.A. 49.



6. Town of Milton Long-Term Population, Housing and Employment Growth Scenarios

A summary of three long-term employment and population growth forecasts for the Town of Milton has been provided herein, including a Low, Medium and High Growth Scenario. Each of these long-range growth scenarios is premised on varying economic and demographic assumptions for the Province, the broader G.T.H.A., and the Town of Milton, which are briefly discussed below. As previously noted, local and regional economic growth potential represents a key driver of net-migration and population growth associated with working-age adults and their families.

6.1 Key Growth Assumptions

The following subsections summarize the key assumptions that helped inform the three long-term forecast scenarios for the Town of Milton.

6.1.1 *Macro-economic Conditions*

As previously discussed, the COVID-19 pandemic had a significant economic impact on the national and provincial economy in 2020 and 2021, as measured in terms of G.D.P. The economic impacts of this exogenous shock are anticipated to continue to influence global and national economic conditions related to inflation, monetary policy, interest rates, fiscal policy, global trade, and the nature of work over the next decade and beyond. Ongoing macro-economic conditions influenced by COVID-19 will have a direct impact on the strength and near- to medium-term outlook for the Ontario economy. In turn, provincial economic trends and macro-economic conditions influence the Town's local economy and its real estate market.

Under the Low Growth Scenario, it is assumed that the provincial economy will underperform, on average, relative to near-term and ongoing G.D.P. forecasts, while the Medium and High Growth Scenarios, respectively, assume that the provincial G.D.P. growth will meet or exceed near-term provincial forecasts on an ongoing basis.

Under the Low Population and Employment Growth Scenarios, it is assumed that national immigration will underperform relative to federal targets over the 2021 to 2051 planning horizon. The Medium Scenario assumes national immigration targets will be met, while the High Scenario assumes that immigration targets will be exceeded. Under



each of the long-term growth scenarios, it is assumed that the share of total provincial net migration allocated in the Town of Milton will increase relative to historical trends over the past 20 years.

6.1.2 Town of Milton's Forecast Assumptions Regarding Population and Economic Trends

The following key employment trends have been assumed for the Town of Milton under the three long-term population and employment growth scenarios:

- Employment growth comprises two major categories: export-based and community-related employment, as follows:
 - Community-related job growth is tied to population growth. These jobs provide services such as retail, community services, and entertainment throughout the Town. Under the Low Scenario, lower population growth relative to the other scenarios requires less community-based employment to service the needs of the population. As the population forecast increases under the Medium and High Scenarios, more community-based jobs are required to provide services to the increased population.
 - Export-based jobs are largely industrial-based consisting of industries such as manufacturing, construction, and utilities. Export-based job growth also generates population-related employment to service the needs of the growing employment and population base (e.g., retail, accommodation and food, personal services and institutional services).
- As previously noted, the Town of Milton is located within the broader G.T.H.A. regional economy. Within this regional economy, labour force trends are regularly monitored within the Toronto C.M.A, which covers a large extent of the G.T.H.A. As previously discussed, the Toronto C.M.A. labour force has steadily recovered since the 2008/2009 recession, particularly between 2015 and 2019. More recently, the regional economy has sharply rebounded from the impacts of COVID-19, since labour force levels bottomed out in June 2020.
- As previously noted, the unemployment rate for the Toronto C.M.A. has increased to 8.6% as of August 2024. The employed labour force for this economic region continues to show signs of relative strength and is currently recorded at a level well above pre-COVID-19 highs recorded in late 2019/early 2020.



- While it is important to recognize potentially slowing global economic trends and a weaker near-term macro economic outlook (i.e., within the next 12 to 18 months), the provincial and G.T.H.A. regional economy is anticipated to steadily expand over the medium to long term, driving relatively stronger population growth through net migration.

6.1.3 Demographic and Employment Trends

The following key demographic trends have been assumed under the three long-term employment and population growth scenarios for the Town of Milton:

- While the Town of Milton is considered a young municipality compared to Halton Region and the Province of Ontario, over the forecast period it is expected that the Town's population will steadily age (i.e., higher average age of population), primarily driven by the aging of the Baby Boomer generation (population born between 1946 and 1964). Within the Town, the share of population aged 65+ is forecast to increase from 10% in 2021 to 15% by 2051.
- Between 2001 and 2021, the Baby Boomer generation accounted for 14% of the total net migration in the Town of Milton. Since 2006, the share of net migration in this generation has been steadily decreasing. Between 2006 and 2011, this cohort accounted for 19% of the total net migration in the Town, and in the most recent 2016 to 2021 period, Baby Boomers accounted for 6% of the overall net migration. For additional details about net migration, please see Appendix B.
- From 2006 to 2021, the Town of Milton experienced average net migration levels of 4,400 people annually. Under all growth scenarios, annual net migration is forecast to be higher relative to 2006 to 2021 levels. Progressively higher net migration levels are assumed for the Medium and High Scenarios, relative to the Low Scenario.
- The local economy within the Town of Milton is highly integrated with the broader economy across the surrounding region. This steadily growing broader regional economy is diverse, evolving, and represents the economic powerhouse of Canada. As such, continued efforts to raise the economic profile of the Town of Milton by leveraging the economic opportunities and strengths of the broader regional economy should represent a key long-term economic development strategy for the Town.



6.2 Approach to Long-Term Growth Scenarios

As previously noted, three long-term population and employment growth scenarios have been prepared for the Town of Milton and are described below.

The Low Growth Scenario is based upon R.O.P.A. 49 as approved by the Ministry of Municipal Affairs and Housing in November 2022 (please refer to section 2.2.1 for additional information). In developing our alternative long-term growth scenarios for the Town, the Consultant Team has undertaken a comprehensive assessment of the long-term population growth outlook for the Province of Ontario, the G.T.H.A., and Halton Region considering existing population forecasts which have been developed at these broader levels of geography.

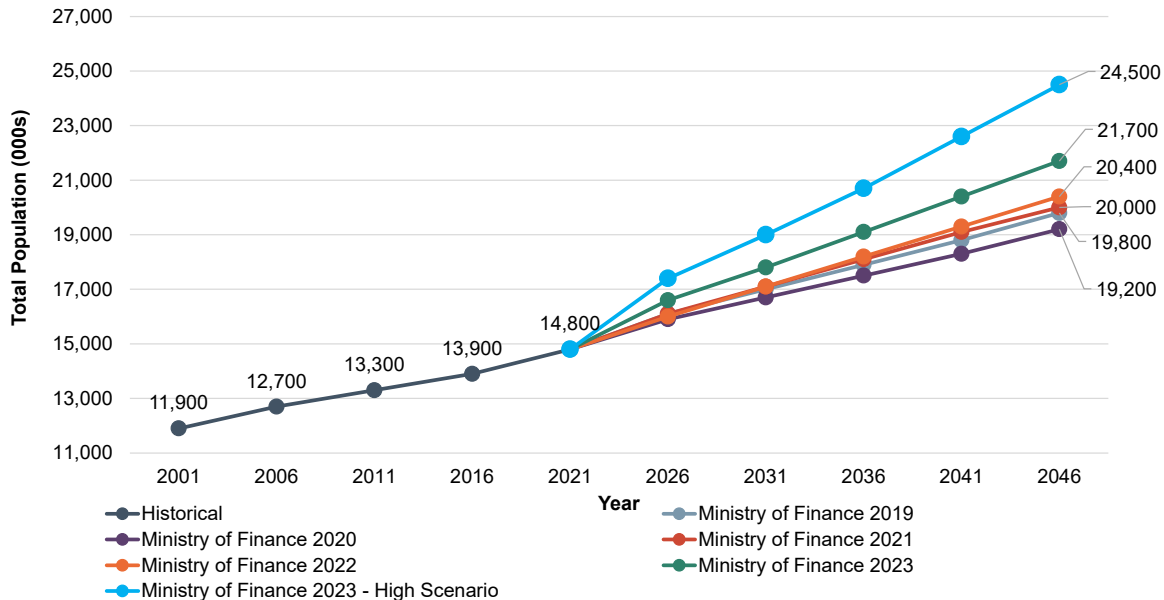
Figure 6-1 illustrates how the population for the Province of Ontario has changed over the past 20 years and how it is forecast to grow over the long-term to the year 2046 in accordance with recent M.O.F. population projections since 2019.^[57] Key observations include the following:

- Historically, the Province of Ontario grew at a rate of 1.1% between 2001 and 2021, averaging approximately 147,300 persons per year.
- With the exception of the M.O.F. 2020 projections, the population projections for Ontario have been steadily increasing with each year since 2019.
- M.O.F. 2023 projections for Ontario are expected to grow at an annual rate of 1.6% per year between 2021 and 2046, which is approximately 274,300 per year, more than doubling historical trends. By 2046, the Province of Ontario is forecast to reach a population of 21.7 million.
- By 2046, Ontario is expected to reach 24.5 million people under the M.O.F. 2023 High Scenario, which is 2.8 million people higher than the M.O.F. 2023 Reference Scenario. Under this High Scenario, the Province is expected to grow at an annual rate of 2.0% or 388,000 people per year.

^[57] At the time of this study, the latest M.O.F. was Summer 2023, on October 1, 2024, M.O.F. released their annual projections for Ontario. Under the M.O.F. 2024 reference scenario, Ontario's population at 2046 is 20.9 million, or 836,000 people less than the M.O.F. 2023 stated.



Figure 6-1
Province of Ontario
Ministry of Finance Projections, 2019 to 2023



Note: Population includes net Census undercount. Figures have been rounded.

Source: Historical data from Statistics Canada Census, 2001 to 2021 and Ministry of Finance projections from Summer 2019, Spring 2020, Spring 2021, and Summer 2022 and 2023 releases derived by Watson & Associates Economists Ltd.

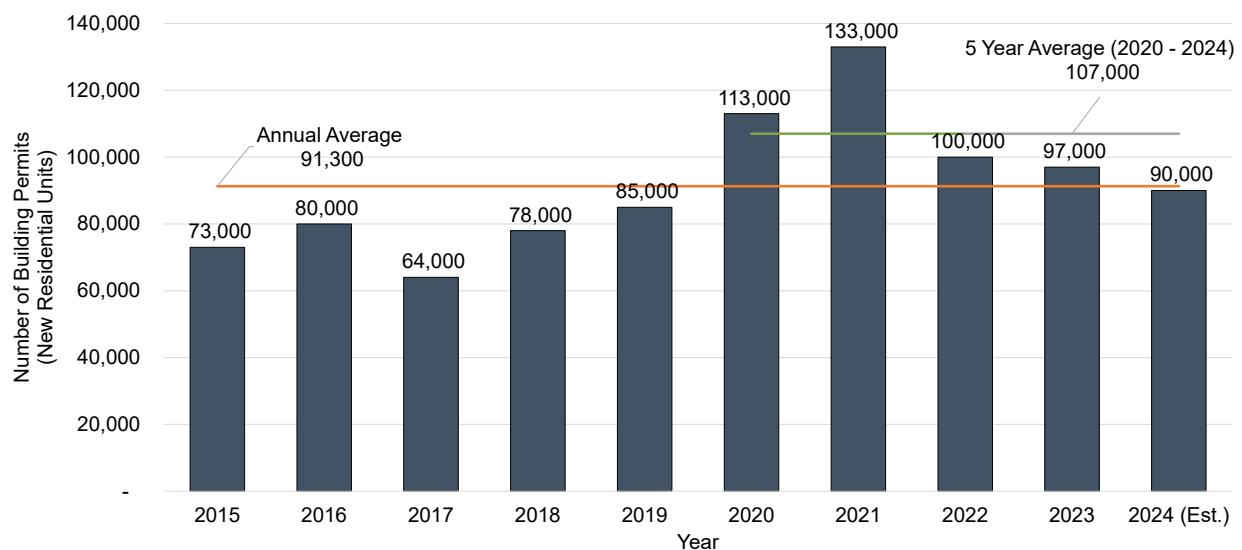
Over the past several decades, the G.T.H.A. and the Greater Ottawa Region have experienced the highest annual rate of population growth within the Province of Ontario. Since 2011, however, and more notably during the latest Statistics Canada Census period (2016 to 2021), the share of Ontario's population growth has been increasingly concentrated outside the G.T.H.A., in the G.G.H. Outer Ring, Eastern Ontario, and Southwestern Ontario. These growth patterns experienced between 2016 and 2021 are anticipated to continue over the forecast period and are reflected in the M.O.F. 2023 Reference Scenario. While the M.O.F. only provides an allocation of the provincial population for the Reference Scenario, it is presumed that growth patterns observed in the Reference Scenario would be similar in the M.O.F. 2023 High Scenario.

Figure 6-2 summarizes historical residential development activity for the Province of Ontario. Over the past decade, the Province has averaged 89,100 new units annually; however, in the most recent five-year period the Province has averaged 105,600 new units annually. As shown in Figure 6-2, below, residential development reached a peak



of 133,400 new units in 2021, but since then has fallen to longer-term historical levels. It is important to note that the 2023 M.O.F. forecast for Ontario represents a housing forecast of almost 1.7 million homes between 2021 and 2031, which exceeds the Province's 10-year housing target of 1.5 million homes, introduced in October 2022.

Figure 6-2
Province of Ontario
Historical Residential Development, 2014 to 2024



Notes: Figures have been rounded.

Source: Statistics Canada building permit data summarized by Watson & Associates Economists Ltd.

Figure 6-3 presents the reference forecast from M.O.F. for the G.T.H.A. Key highlights include the following:

- Historically, the G.T.H.A. has grown at an annual average rate of 1.3%, which is higher than the Province as a whole.
- Similar to the Province of Ontario, with the exception of the M.O.F. 2020 projections, the M.O.F. projections for the G.T.H.A. have been steadily increasing.
- In accordance with the M.O.F. 2023 projections, between 2021 and 2046, the G.T.H.A. is projected to grow at an annual rate of 1.6%, reaching a population of 11.4 million by 2046.
- Comparatively, the Growth Plan forecast for the G.G.H. projects that the G.T.H.A. is expected to grow at an annual rate of 1.4%, reaching 10.7 million



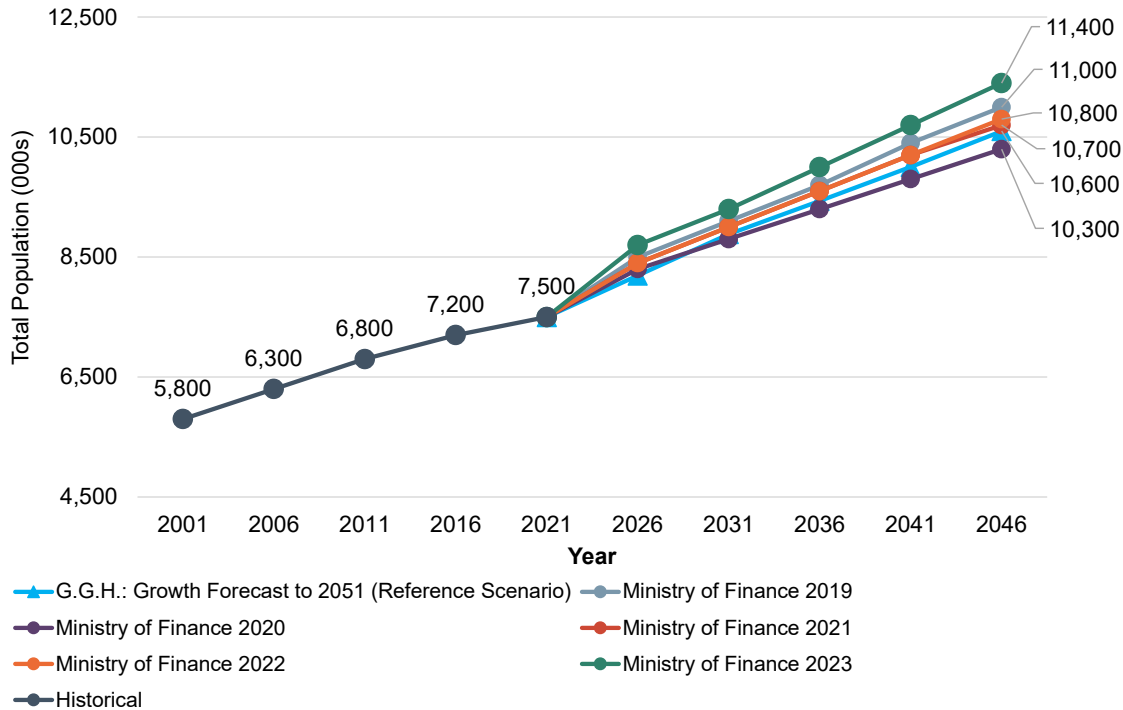
people by 2046, which is approximately 700,000 less than the 2023 M.O.F. forecast.

- While it is recognized that the 2023 M.O.F.^[58] for the G.T.H.A. is ambitious, recent population and economic growth trends, combined with higher near-term provincial immigration levels, suggest that the long-term population forecast for the G.T.H.A. is likely to exceed the Growth Plan forecast.
- Based on our review, the three G.T.H.A. municipalities that are most likely to accommodate higher population growth are the Region of Halton, the Region of Durham, and the Region of Hamilton, given that these municipalities offer greater opportunities to accommodate a broader residential development by price point and tenure within developed areas and planned greenfield areas or expansion areas.

^[58] At the time of this study, the latest M.O.F. was Summer 2023, on October 1, 2024, M.O.F. released their annual projections for Ontario and Census Divisions. Under the M.O.F. 2024 reference scenario, G.T.H.A.'s population at 2046 is 10.6 million, or 776,000 people less than the M.O.F. 2023 stated.



Figure 6-3
Greater Toronto Hamilton Area
Ministry of Finance Projections, 2019 to 2023



Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical data from Statistics Canada Census, 2001 to 2021, and Ministry of Finance projections from Summer 2019, Spring 2020, Spring 2021, Summer 2022, and Summer 2023 releases and from Greater Golden Horseshoe: Growth Forecast to 2051 Technical Report (August 26, 2020) derived by Watson & Associates Economists Ltd.

Figure 6-4 compares the M.O.F. 2023 Reference Scenario^[59] to the Growth Plan forecast for Halton Region. Key observations include the following:

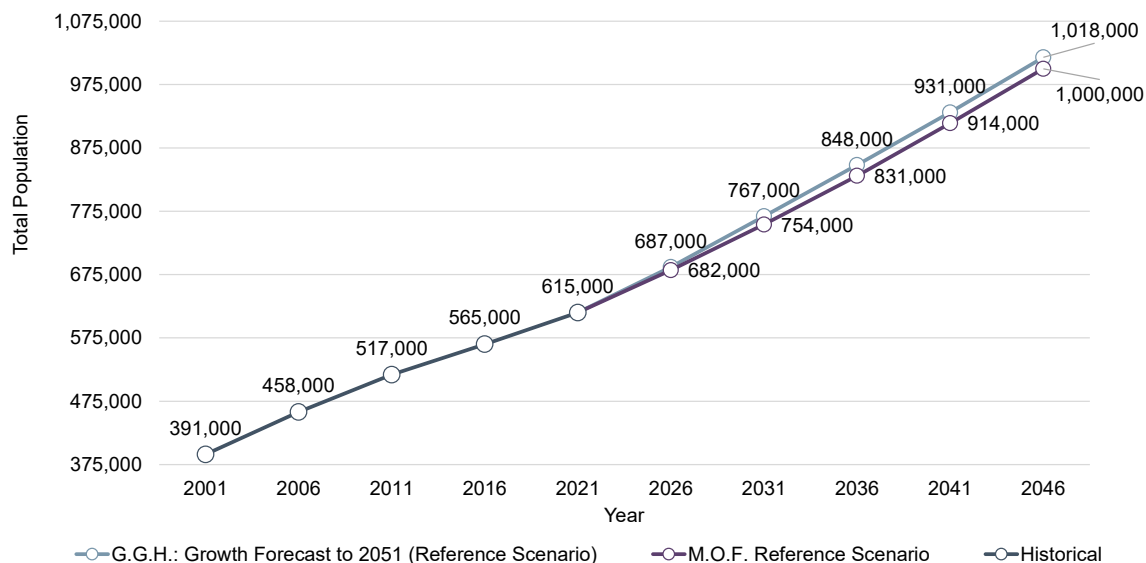
- Between 2001 and 2021, Halton Region grew at an average annual rate of 2.3%, which is approximately 11,200 people per year during this time period.

^[59] At the time of this study, the latest M.O.F. was Summer 2023, on October 1, 2024, M.O.F. released their annual projections for Ontario. Under the M.O.F. 2024 reference scenario, Halton Region’s population at 2046 is 915,700, or 84,700 people less than the M.O.F. 2023 stated.



- Both the M.O.F. 2023 Reference Scenario and the Growth Plan forecast for the G.G.H. project that Halton Region will grow at an average annual growth rate of 2.0%.
- By 2046, Halton Region is expected to reach 1 million people under the M.O.F. 2023 Reference Scenario, which is approximately 18,000 people lower than the Growth Plan forecast for the G.G.H.
- In accordance with our review of regional growth trends and the long-term growth potential for Halton Region, it is our opinion that the 2023 M.O.F. forecast for Halton Region is conservative.

Figure 6-4
Halton Region
Projection Comparison, 2001 to 2046



Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical derived from Statistics Canada Census, 2001 to 2021, and Ministry of Finance Projections from Summer 2023 releases and Greater Golden Horseshoe: Growth Forecast to 2051 Technical Report (August 26, 2020), by Watson & Associates Economists Ltd.



6.3 Long-Term Population and Housing Growth Scenarios, 2021 to 2051

As previously noted, three long-term population growth forecasts have been prepared for the Town of Milton to the year 2051, including a Low, Medium, and High Growth Scenario.^[60] Each of the long-term population growth scenarios represent a varying growth outlook for Milton considering the broader economic and demographic trends across the Province, the G.T.H.A. economic region, Halton Region, and the Town. Each of these scenarios builds on our detailed assessment of long-term demographic and economic growth drivers for the Town, as previously discussed in Chapter 4.

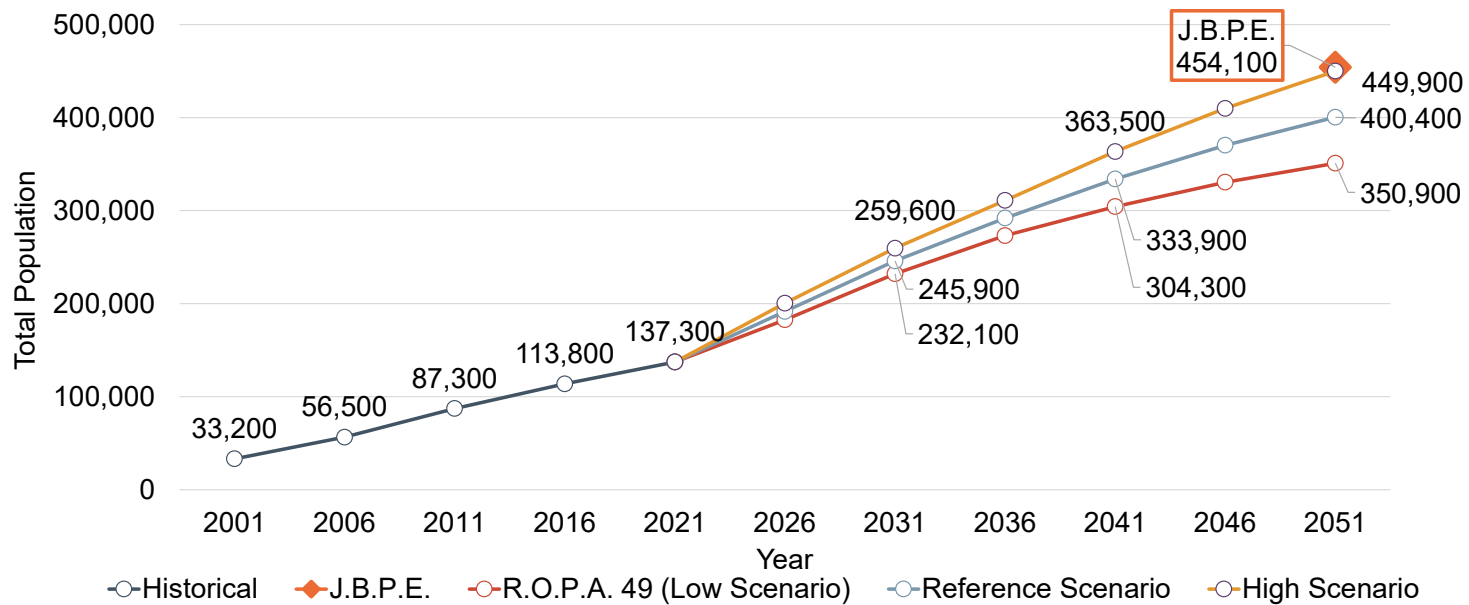
Figure 6-5 graphically compares the High, Medium, and Low Population Growth Scenarios. For reference purposes, the Halton Region Joint Best Planning Estimates (J.B.P.E.) for the Town of Milton are also provided.^[61] The J.B.P.E.'s are based on projected land capacity for infrastructure planning purposes. For additional information about each scenario, please refer to Appendix G. As highlighted on the following page, the Town's forecast population outlook at 2051 ranges from 350,900 to 449,900 residents under the three growth scenarios prepared by Watson. By 2051, under the J.B.P.E. population forecast, the Town of Milton is expected to reach 454,100 residents, which is slightly higher than the High Scenario prepared by Watson, representing an annual average growth rate of 4.1%. Under the J.B.P.E., the Town of Milton is forecast to add an additional 316,800 residents over the 2021 to 2051 forecast.

^[60] At the time of this study, the 2021 net Census undercount had not yet been finalized, so the 2016 undercount (3.3%) was used. Since the study's release, the 2021 net Census undercount has been finalized at 3.9%.

^[61] Halton Region Joint Best Planning Estimates data provided by the Town of Milton.



Figure 6-5
Town of Milton
Total Population, 2001 to 2051



	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
Historical	33,200	56,500	87,300	113,800	137,300						
R.O.P.A. 49 (Low Scenario)					137,300	182,700	232,100	273,100	304,300	330,500	350,900
Reference Scenario					137,300	191,600	245,900	292,000	333,900	370,200	400,400
High Scenario					137,300	200,500	259,600	310,900	363,500	409,900	449,900
J.B.P.E.					138,400	188,530	249,800	308,100	379,300	413,000	454,100

Note: Population figures include net Census undercount. Figures have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0140-01 and Table: 17-10-0139-01, forecast prepared by Watson & Associates Economists Ltd.



Low Scenario (R.O.P.A. 49)

Under the Low Scenario, it is assumed that the population base in Milton will grow at an average annual rate of 3.2% per year between 2021 and 2051. This results in an incremental population increase of 213,600 persons between 2021 and 2051. Under this scenario, the rate of forecast population growth is anticipated to be higher in the first half of the forecast period, gradually slowing during the latter half of the planning horizon. This forecast is modelled largely after the population projections that have been identified by the Region of Halton for the Town of Milton through R.O.P.A. 49 (refer to subsection 2.2.1).

Medium Scenario

Under the Medium Scenario, the population within the Town of Milton is forecast to grow at an annual rate of approximately 3.6% over the forecast period. While this growth rate is lower than what was historically achieved (7.4% annual growth rate between 2001 and 2021), in absolute terms, forecast annual growth under this scenario is 1.7 times greater than the historical levels achieved between 2001 and 2021. Under this scenario, the Town's population is forecast to increase by approximately 263,100 residents between 2021 and 2051. The rate of population growth in this scenario is also anticipated to gradually slow during the latter half of the forecast period.

High Scenario

Under the High Scenario, an average annual growth rate of 4.0% is assumed for the Town of Milton over the 2021 to 2051 forecast period. Under this scenario, Milton's total population would increase to 449,900 people by 2051. The High Scenario would result in an average of 10,400 additional people annually in Milton over the next 30 years, which is approximately double (historically averaging 5,200 people annually) the average amount of population growth the Town experienced between 2001 and 2021.

Preferred Forecast Scenario

As previously discussed, each growth scenario described above is based on a range of assumptions related to population and housing growth for the Province, the economic region, Halton Region, and the Town of Milton. The population growth scenarios described in this section represent the potential range of future growth which can be anticipated for Milton over the next 30 years. Based on our review, the Reference



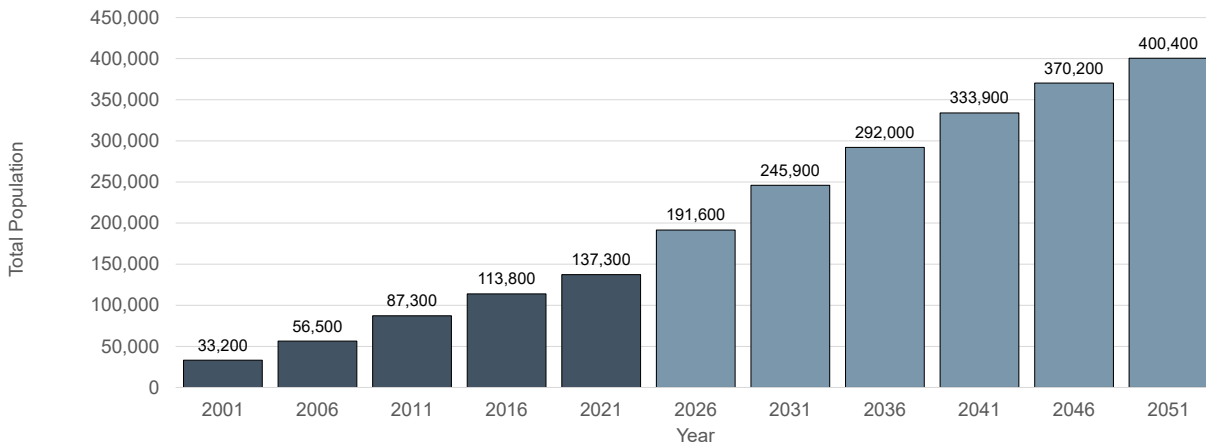
(Medium) Scenario is the recommended growth forecast scenario for the Town of Milton for the following reasons:

1. It represents a reasonable future rate of population growth relative to historical trends, considering recent and forecast immigration levels expected for Canada and Ontario over the next several years and longer-term population growth forecasts for the Province. Furthermore, the share of net migration and population growth in the 15-64 age group is reasonable within the context of historical migration patterns and broader demographic trends anticipated across the Province and the G.T.H.A.
2. As mentioned in subsection 4.2.2, Milton is a relatively young municipality compared to other surrounding municipalities. As a result, population growth in the Town will continue to be driven by both natural increase (births less deaths) and net migration, unlike some municipalities in the Province where the population is not growing from natural increase and, in some cases, municipalities are experiencing negative trends regarding natural population growth. Under each of the growth scenarios, annual net migration is forecast to be higher relative to 2001 to 2021 levels, but closer to recent trends experienced during the latest Census. Forecast trends in net migration and natural increase under the Reference Scenario are ambitious but reasonable for the purposes of long-range planning and growth management.
3. The forecast level of housing growth required to accommodate the Reference Scenario represents a considerable increase in housing activity (explored later in this chapter). The near-term growth forecast (next five to 10 years) is supported by recent residential building permit activity and active development applications currently under review by the Town. Sustaining this level of residential building activity over the longer-term will require a considerable increase in the necessary hard infrastructure and soft services to support this amount of growth. It is noted that the Reference Scenario forecasts considerably more housing for the Town of Milton over the next decade than is currently identified under the Halton Region servicing allocation program.

For additional details about the components of population growth (i.e., net migration and natural increase), please refer to Appendix B.



Figure 6-6
Town of Milton
Total Population, 2001 to 2051



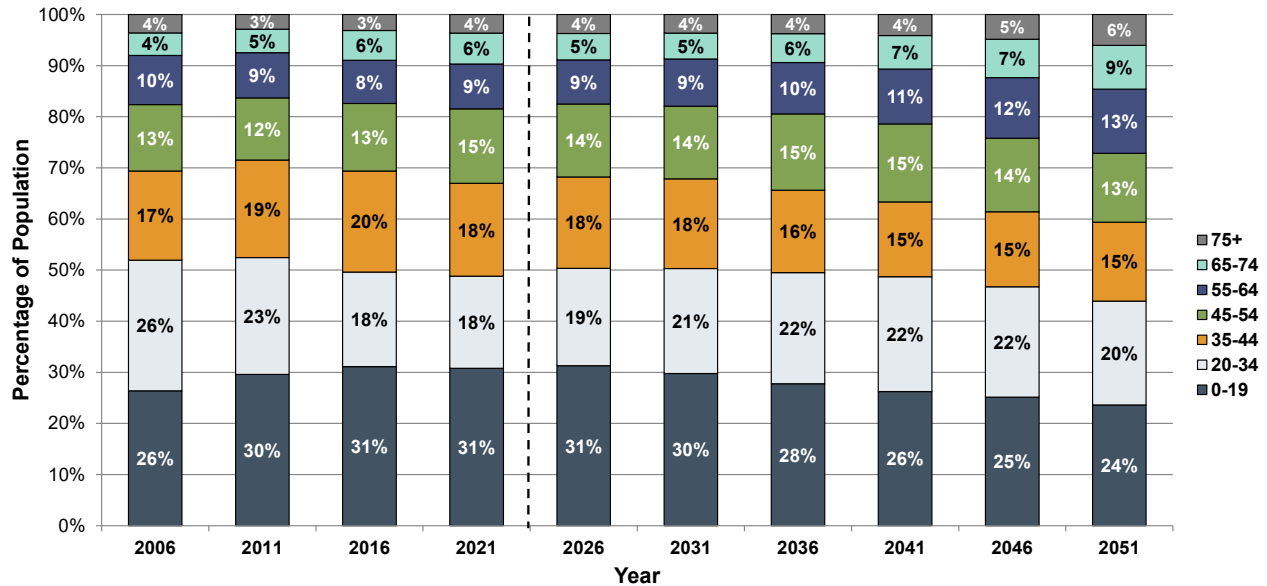
Note: Population figures include net Census undercount. Figures have been rounded.
Source: Historical data derived from Statistics Canada Table: 17-10-0140-01 and Table: 17-10-0139-01, forecast prepared by Watson & Associates Economists Ltd

6.3.1 Forecast Population by Age Group

Figure 6-7 summarizes the Reference Scenario by major age group over the 2021 to 2051 forecast period for the Town of Milton. Over the forecast period, the Town's population base is expected to steadily age. Most notably, the percentage of population in the 65+ age group (seniors) is forecast to increase the most over the forecast period, from 10% in 2021 to 15% in 2051. The aging of the population is anticipated to place modest downward pressure on the rate of population and labour force growth within the Town over the long term. Similar to the Province as a whole, the Town will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions. For additional information about population by age group, please see Appendix B.



Figure 6-7
Town of Milton
Population by Age Group, 2001 to 2051



Note: Figures may not add precisely due to rounding. Population figures include net Census undercount.

Source: Historical 2006 to 2021 data derived from Statistics Canada Annual Demographic Statistics. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd.

6.3.2 Housing Forecast by Structure Type

Figure 6-8 summarizes Milton’s housing forecast for the Reference Scenario by structure type (i.e., low density, medium density, high density, and secondary suites) over the 2021 to 2051 forecast period in five-year growth increments. Key observations include the following:

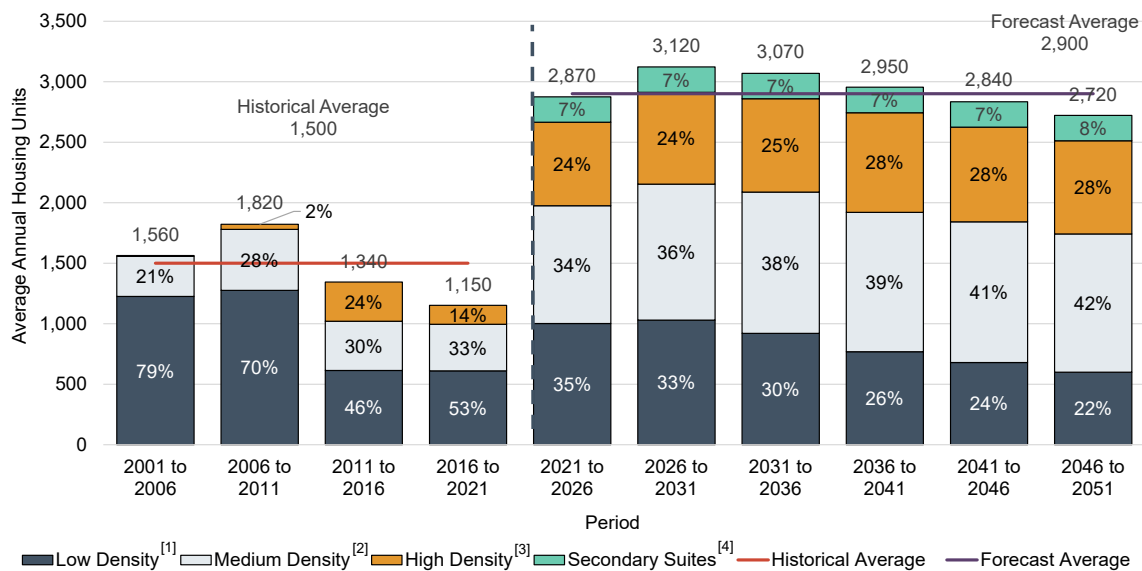
- The forecast represents an increase of approximately 87,900 households or an annual housing growth rate of 3.9% per year (2,900 units per year).
- Comparatively, this annual level of forecast absolute housing growth is considerably higher than the previous historical 20-year period (2001 to 2021) where the Town averaged 1,470 new housing units per year.
- Between 2006 and 2021, the share of medium- and high-density housing steadily increased. When considering recent building permit activity and active



development applications, this increasing trend toward medium- and high-density residential development is expected to continue over the longer term.

- Over the 30-year forecast period, most of the new residential development is anticipated to be in the form of medium- and high-density housing. The shift in dwelling type preferences towards medium- and high-density housing is anticipated to be driven largely by the aging of the population and continued upward pressure on local housing prices.
- Steady demand for low-density housing forms is also anticipated, driven by demand from new families and move-up buyers.
- Over the 2021 to 2051 forecast period, new housing is expected to comprise 28% low-density units (singles and semi-detached), 38% medium-density units (multiples), 26% high-density units (apartments), and 7% secondary suites.

Figure 6-8
Town of Milton
Housing Forecast by Structure Type, 2001 to 2051



[1] Low Density includes singles and semi-detached houses.

[2] Medium Density includes row and back-to-back townhouses and apartments in duplexes.

[3] High Density includes stacked townhouses, bachelor, 1-bedroom, and 2-bedroom+ apartment units.

[4] Secondary suites includes self-contained living accommodations such as apartments and small residential units that are located on a property and have a separate main residential unit.

Note: Figures have been rounded and may not add up precisely.

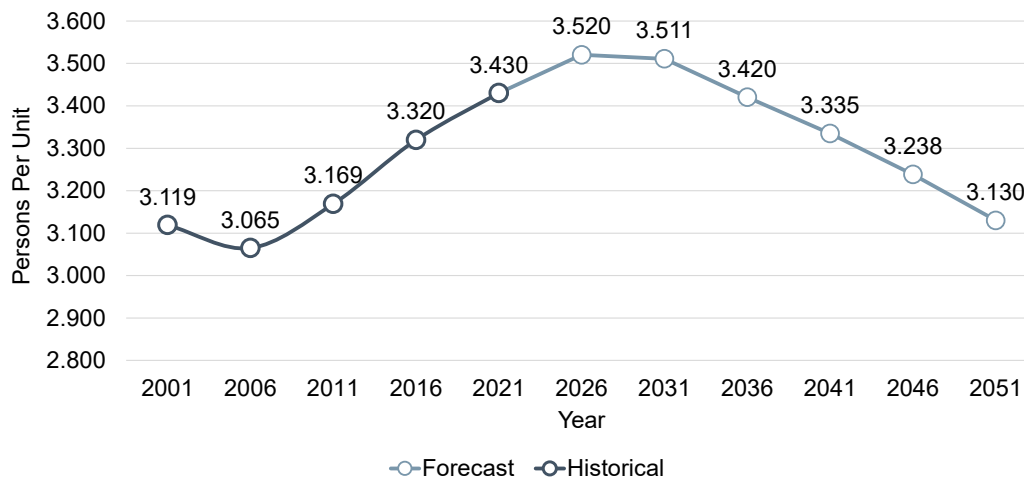
Source: Historical data derived from Statistics Canada Census profiles. Forecast prepared by Watson & Associates Economists Ltd.



Figure 6-9 summarizes anticipated trends in long-term housing occupancy, or average P.P.U., for Milton from 2001 to 2051. Key observations are as follows:

- Between 2006 and 2021, the average P.P.U. for the Town of Milton steadily increased from 3.065 in 2006 to 3.430 in 2021.
- Over the forecast period, the average P.P.U. for Milton is anticipated to continue this increase to 3.520 in 2026 but will decline over the forecast to 3.130 in 2051.
- Overall, P.P.U.s are expected to decline as a result of a number of factors. Shifting housing preferences towards high-density dwelling types from younger and older adult residents are anticipated to result in lower average housing occupancy levels causing an overall decline in the aggregate P.P.U. for total dwellings over the long term. This trend is largely a result of the aging of the Town's population and other demographic trends such as changes in household structure (e.g., changes in share of family vs. non-family households). On the other hand, relatively stronger forecast net-migration levels, which also help add new families to the Town, are anticipated to help off-set this trend.

Figure 6-9
Town of Milton
Persons Per Unit
2001 to 2051

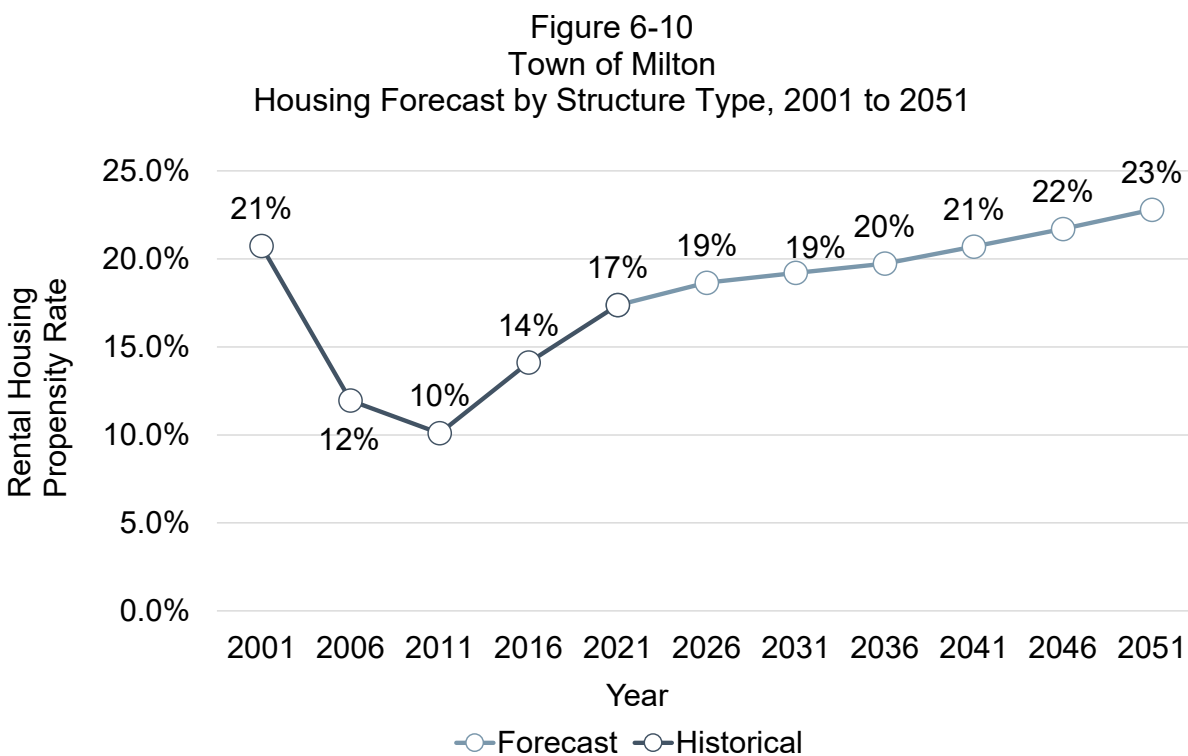


Note: Figures include net Census undercount.
Source: Watson & Associates Economists Ltd.



6.3.3 Housing Forecast by Tenure

As previously identified, achieving the Reference Scenario will require approximately 87,900 new households between 2021 and 2051. Accommodating this level of population across a broad range of demographic and socio-economic groups requires a range of housing options by structure type and tenure. The following explores the Town's housing needs in greater detail by tenure (rental vs. ownership housing). For additional information about the housing forecast by tenure, please refer to Appendix H. Between 2001 and 2021, the share of total dwellings identified as rental dropped from 21% in 2001 to 10% in 2011, but since then has been steadily increasing. Derived from a rental housing propensity (i.e., demand) analysis by age and income level, the percentage of renter households in the Town is forecast to steadily increase from 17% in 2021 to 23% in 2051, as shown in Figure 6-10.



Note: Figures have been rounded.

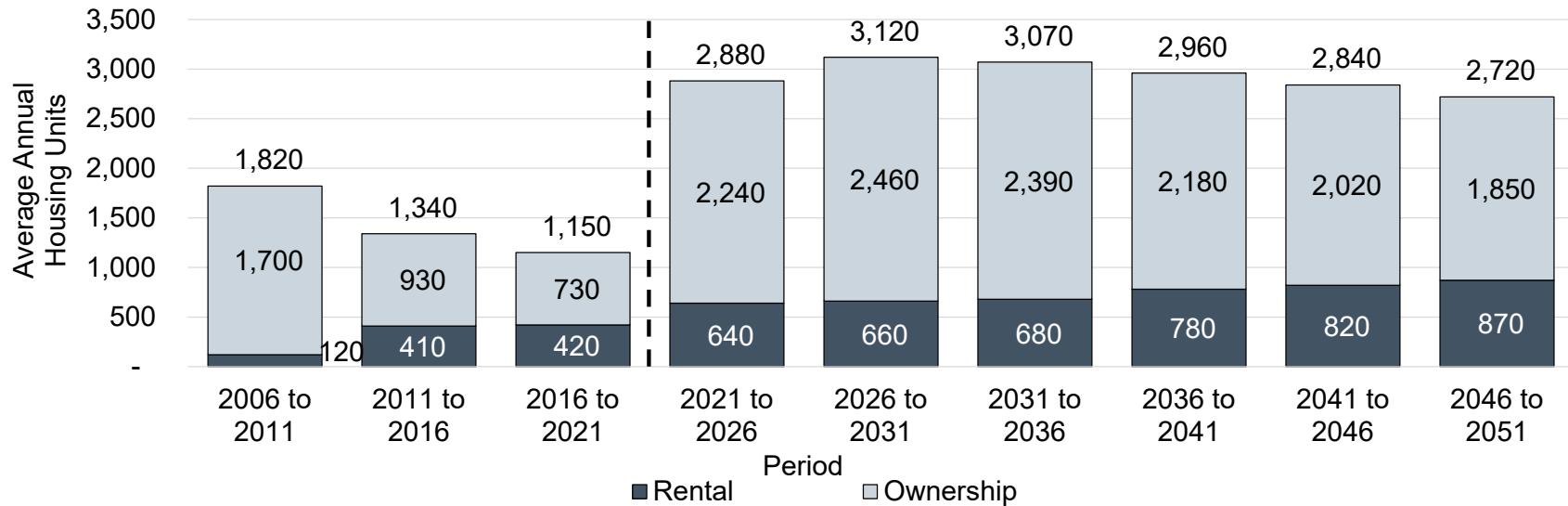
Source: 2001 to 2021 derived from Statistics Canada Census data. 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd.



Historically, between 2001 to 2021, the Town added 4,740 rental units, or 240 units per year. Based on the rental housing propensity analysis presented in Figure 6-10 above, the Town of Milton is expected to add an additional 22,170 rental units over the 30-year period, or approximately 740 rental units per year, as shown in Figure 6-11. Forecast rental housing growth is expected to increase at an annual rate of 4.9% over the 2021 to 2051 forecast period, which is relatively stronger than the forecast annual growth rate of ownership housing measured over the same time period.



Figure 6-11
Town of Milton
Incremental Housing Forecast by Tenure
2006 to 2051



	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	2021-2051
Rental Housing	-	120	410	420	640	660	680	780	820	870	740
Owner-Occupied Housing	1,550	1,700	930	730	2,240	2,460	2,390	2,180	2,020	1,850	2,190
Total	1,550	1,820	1,340	1,150	2,880	3,120	3,070	2,960	2,840	2,720	2,930

Note: Figures have been rounded and may not add up precisely.

Source: Historical data derived from Statistics Canada Census profiles. Forecast prepared by Watson & Associates Economists Ltd.



6.3.4 Post-Secondary Enrolment and Population Forecast

The subsections below outline the approach and forecast for the post-secondary student population in the Town of Milton.

6.3.4.1 Approach to Post-Secondary Student Population Growth

Post-secondary students are an important part of the Town of Milton as they contribute to the vibrancy, diversity, and future economic strength of this area. As of 2024, it is recognized there will be approximately 2,800 full-time students attending local post-secondary institutions within the Town of Milton. This includes students who are permanent residents within the Town, permanent residents outside the Town, and international students who are captured as N.P.R.s in Milton. A portion of this population is not recognized in the Census population base as reported by the Statistics Canada Census.^[62] As part of this analysis, population growth associated with post-secondary students not captured in the Census population has been “layered” onto the base total population and total population forecast to the year 2051. The approach and methodology utilized to complete this analysis are discussed below.

As of mid-2024, there are two Conestoga College campuses that are open in the Town of Milton: the Parkhill Drive Campus, and the Steeles Avenue location. By fall 2024, it is expected that Wilfrid Laurier University will open a campus. While these three campuses are not currently located in the M.E.V., it is expected that by 2031 these interim campuses will relocate to the M.E.V. area.

The post-secondary student population forecast was developed based on the following:

- Discussions with Town staff were held to inform the broader level assumptions utilized to inform a long-term enrolment growth forecast.
- Potential growth in international students was “layered on,” based on recent and anticipated enrolment growth trends at each of the schools, similar trends in the surrounding area, and the future growth outlook for international students globally.

^[62] Reflects full-time enrolment at Conestoga College affiliated campuses (Parkhill Drive and Steeles Avenue) located within the Town of Milton.



6.3.4.2 *Post-Secondary Student Enrolment Forecast*

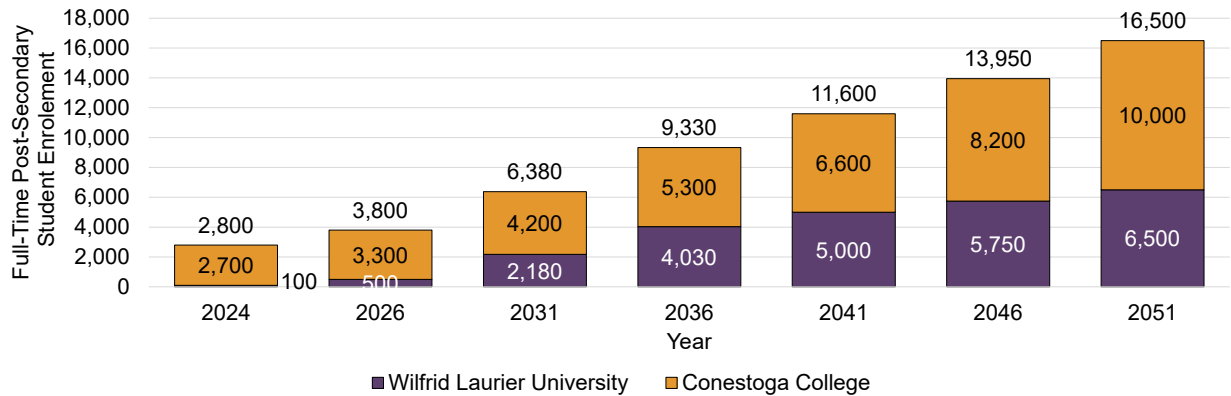
Based on the methodology presented in subsection 6.3.4.1, a long-term (2024 to 2051) aggregate post-secondary student enrolment forecast for Milton was prepared reflecting growth potential within the Town's two post-secondary institutions. As illustrated in Figure 6-12, full-time enrolment is forecast to increase from 2,800 in 2024 to 16,500 by 2051, an increase of 13,700 students over the forecast period (6.8% annual growth rate).

Over the short term (i.e., 2024 to 2031), full-time enrolment growth is expected to be the strongest with an annual growth rate of 12.5%, coinciding with growth in the N.P.R. population, which includes international students. Although the federal government has imposed limitations on the number of international students for the next two years, these restrictions are anticipated to be relatively negligible in the broader, long-term perspective.^[63] Post-2031, full-time enrolment is forecast to moderate to an annual growth rate of approximately 6.2% between 2031 and 2041, and 3.6% between 2041 and 2051. The moderation of the long-term post-secondary student forecast is anticipated to be driven by the slowing of population growth related to domestic students and the increased global competition related to post-secondary international student attraction. Figure 6-13 illustrates the share of domestic and international students over the forecast. Of the 13,700 students, 72% are forecast to be domestic students, and the remaining 28% are anticipated to be international students.

^[63] <https://www.cbc.ca/news/politics/miller-cap-international-students-1.7090779>

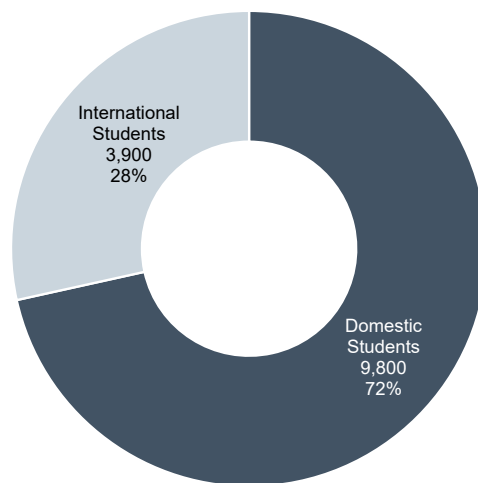


Figure 6-12
Town of Milton
Full-Time Post-Secondary Student Enrolment Forecast
2024 to 2051



Note: Figures have been rounded and may not add up precisely.
Source: Data derived from discussions with Town staff and Conestoga College prepared by Watson & Associates Economists Ltd.

Figure 6-13
Town of Milton
Share of International and Domestic Students
2024 to 2051



Note: Figures have been rounded and may not add up precisely.
Source: Data derived from Wilfrid Laurier University's Milton campus, Conestoga College campus locations, and discussions with Town staff prepared by Watson & Associates Economists Ltd.



Based on anticipated growth trends in enrolment by geographic location and local residency patterns, Figure 6-14 illustrates post-secondary enrolment growth and associated housing needs not captured in the Census for the Town of Milton. Key findings are as follows:

- Full-time post-secondary student enrolment in the Town of Milton is forecast to increase from 2,800 in 2024 to 16,500 by 2051, an increase of 13,700 students over the forecast period (6.8% annual growth rate).^[64]
- By 2051, an estimated 10,100 domestic students are expected, with approximately 70% (7,100 students) requiring housing in the Town of Milton. Of these, around 17% (1,200 students) will reside on campus, while the remaining 83% (5,900 students) will seek off-campus housing.
- Among the 5,900 off-campus students, approximately 57% (3,300 students) are not captured in the Census.^[65] These 3,300 students, are anticipated to be accommodated in off-campus housing. These 3,300 students will require off-campus housing, creating a demand for approximately 1,300 off-campus dwelling units between 2024 and 2051, based on an average household size of 2.5 students per unit.^[66]

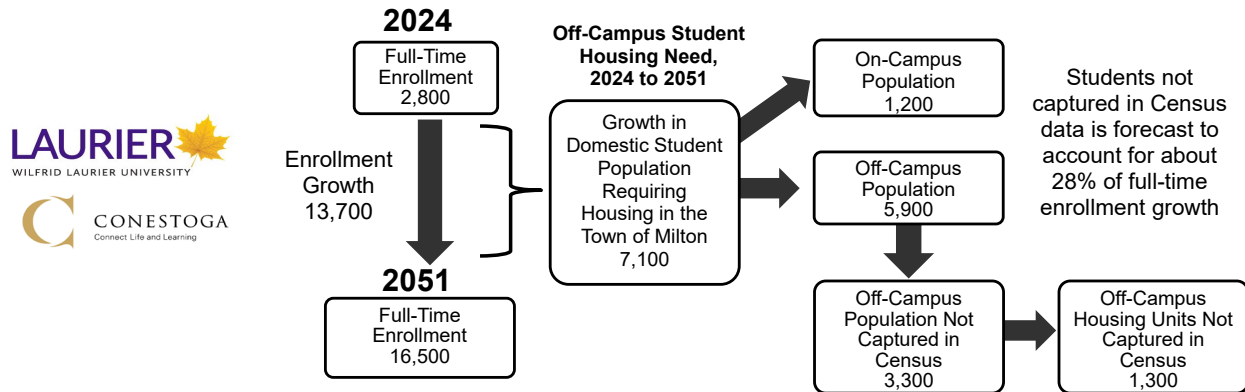
^[64] Post-secondary institutions include Wilfrid Laurier University and Conestoga College affiliated campuses.

^[65] It is important to note, post-secondary international student growth from 2024 to 2051 is captured as part of the N.P.R. population and is included in the permanent population and housing data. The existing and future N.P.R. population is distinctly layered on top of the Town's permanent population by Watson.

^[66] These housing needs reflect domestic student living off-campus who are counted elsewhere in Canada during Census enumeration but require local housing while they are studying at one of the post-secondary institutions in the Town of Milton.



Figure 6-14
Town of Milton
Post-Secondary Student Forecast, 2024 to 2051



Note: Figures have been rounded and may not add up precisely.

Source: Watson & Associates Economists Ltd.

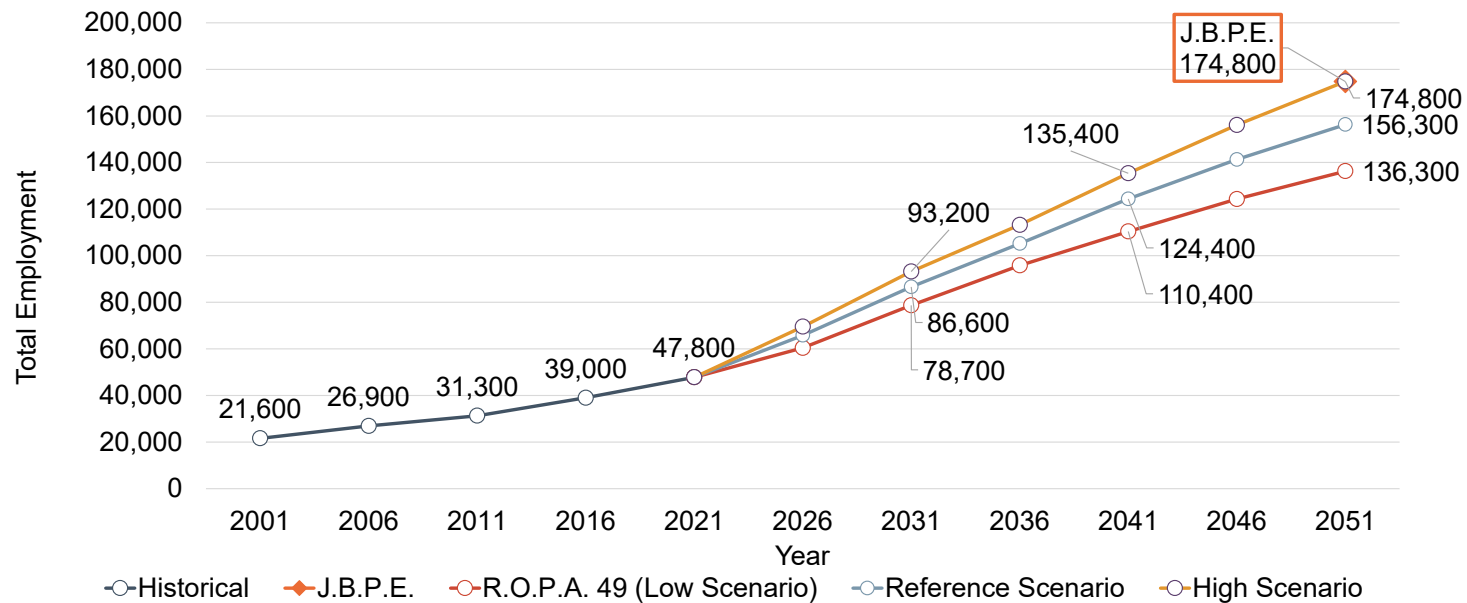
6.4 Long-Term Employment Growth Scenarios, 2021 to 2051

Building on the population and housing growth scenarios, and key macro and regional growth assumptions discussed throughout Chapters 3 and 4, three long-term employment scenarios have been prepared for the Town of Milton in comparison with recent historical trends. As summarized in Figure 6-15, by 2051 the employment base for Milton is forecast to increase by between 88,500 and 127,000 employees, reaching between 136,300 and 174,800 total jobs by 2051. For comparative purposes, the J.P.B.E. employment forecast for the Town of Milton is also provided in Figure 6-15.

Of the three long-term employment growth scenarios prepared, the Reference Employment Scenario is identified as the “most plausible” long-term employment forecast for the Town, considering macro-economic trends and the regional economic outlook and growth drivers within the surrounding commuter-shed, as previously discussed in this report. Accordingly, the Reference Employment Scenario is recommended for long-range planning purposes. Under the Reference Employment Scenario, Milton’s employment base is forecast to reach 156,300 by 2051, generating an employment increase of 108,500 from 2021. This represents an annual employment growth rate of 4.0% between 2021 and 2051, which is the same rate of growth experienced in Milton between 2001 and 2021.



Figure 6-15
Town of Milton
Long-Term Employment Scenarios, 2021 to 2051



	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
Historical	21,600	26,900	31,300	39,000							
R.O.P.A. 49 (Low Scenario)					47,800	60,400	78,700	95,800	110,400	124,300	136,300
Reference Scenario					47,800	65,800	86,600	105,200	124,200	141,000	156,300
High Scenario					47,800	69,500	91,200	113,200	135,400	156,100	174,800
J.P.B.E.					44,800	65,300	90,400	112,000	138,600	154,800	174,800

Notes: Figures have been rounded. Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021, to June 14, 2021.

Source: 2001 to 2016 derived from Statistics Canada Census data; scenarios developed by Watson & Associates Economists Ltd.



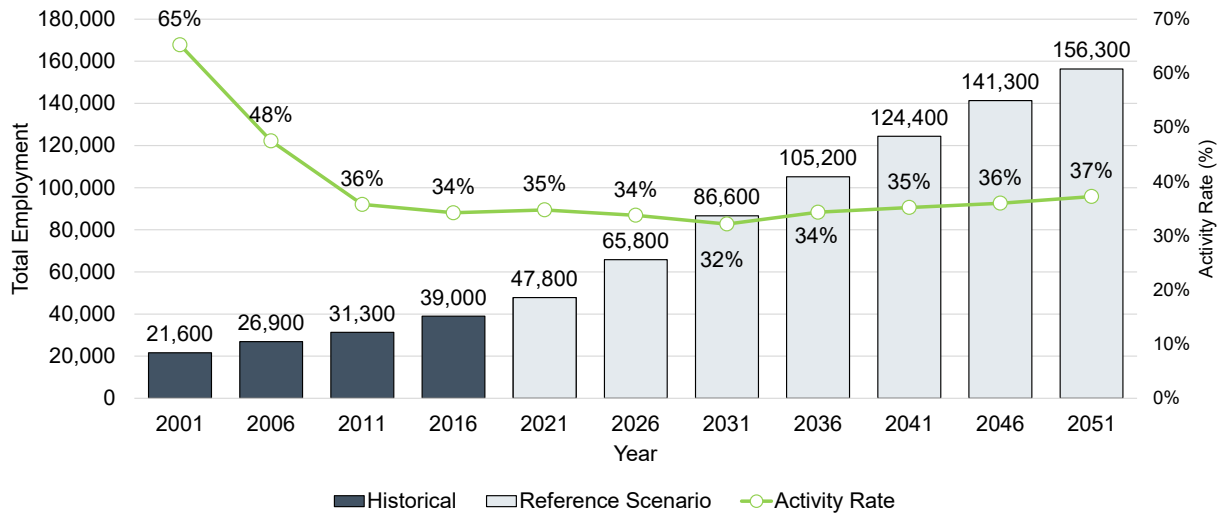
Employment growth across Milton's Community Areas is anticipated to be largely driven by opportunities associated with population-related employment sectors (i.e., commercial retail and institutional), accounting for approximately 41% of employment growth over the 2021 to 2051 forecast period. While the Town has traditionally not attracted a significant amount of office employment, demand for office development is anticipated to materialize over the medium to long term and is directed to the Town's S.G.A.s. The Town is also anticipated to accommodate significant additional employment within a broad range of industrial sectors within its established and planned Employment Areas.

Looking forward, continued advances in technology and telecommunications are anticipated to further enable remote work patterns and ultimately increase the relative share of at-home and/or off-site employment over the long term. Demographics and socio-economics also play a role in the future demand for off-site and work at home employment within an increasingly knowledge- and technology-driven economy. It is anticipated that many working residents within Milton will utilize technology to provide or supplement their income in more flexible ways in contrast to traditional work patterns. It is also likely that an increased number of working and semi-retired residents will be seeking lifestyles that will allow them to work from home on a full-time or part-time basis across the Town, as they transition from the workforce to retirement. Accordingly, approximately 25% of the total job growth is related to home occupations, home-based businesses, and off-site employment.

Figure 6-16 summarizes historical and forecast trends in the employment activity rate (ratio of jobs to population) for Milton. Between 2001 and 2021, the employment activity rate for Milton steadily decreased from 65% to 35%. This decline was largely driven by a higher sustained level of population growth compared to employment growth. Population grew at an annual rate of 7.4%, compared to the 4.0% annual employment growth rate. Under the Reference Employment Scenario, the Town's employment activity rate is anticipated to increase slightly to 37% by 2051 but it is expected to remain well below levels recorded in the early 2000s.



Figure 6-16
Town of Milton
Recommended Long-Term Employment Forecast, 2021 to 2051



Notes:

- Figures have been rounded.
- Activity rate uses population, adjusted to account for net Census undercount estimated at approximately 3.3%.
- Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021, to June 14, 2021.

Source: 2001 to 2016 derived from Statistics Canada Census data; forecast prepared by Watson & Associates Economists Ltd.

6.4.1 Employment Forecast by Employment Category

Figure 6-17 summarizes the Town’s employment growth forecast in five-year increments over the 2021 to 2051 period by major employment land use category, including population-related employment (P.R.E.), employment land employment (E.L.E.) and major office employment (M.O.E.). As shown, the largest incremental increase in employment is anticipated over the 2026 to 2031 period, with growth moderating slightly thereafter. P.R.E. is forecast to account for most of the Town’s employment growth (52%) from 2021 to 2051, followed by E.L.E. at 40%, and M.O.E. at 27%, while Rural Employment growth is expected to be limited (<1%). Please refer to Appendix I for additional information about the employment forecast.



The following provides a summary of employment growth by land use category.

Population-Related Employment

P.R.E. generally serves the local population base by providing convenient locations to local residents. Typically, as the population grows, the demand for this employment also increases to serve the needs of the area. P.R.E. also captures work from home employment. As previously noted in Figure 6-5, Milton's population is anticipated to increase by approximately 263,100 people between 2021 and 2051. Forecast population growth in Milton is anticipated to drive demand for future P.R.E. growth in the Town. This includes employment growth in retail, personal services, accommodation and food, health and social services, and educational service sectors. P.R.E. growth over the 2021 to 2051 period is expected to total approximately 56,000 jobs, representing 52% of overall employment growth in Milton.

Major Office Employment

M.O.E. in Milton is forecast to increase by approximately 8,800 jobs over the 2021 to 2051 period, representing 8% of the Town's total employment growth over the forecast period. M.O.E. growth in Milton will be driven largely by growth in key knowledge-based industry clusters, including professional, scientific and technical services, real estate, and finance and insurance. By 2051, the Town's M.O.E. share of Town-wide employment is forecast to increase to 7% from 6% in 2021.

Employment Lands Employment

Over the forecast period, E.L.E. is expected to account for 40% of total employment growth (44,900 jobs) over the 2021 to 2051 period and reflects growth largely in industrial-based sectors. Employment growth in E.L.E. is expected to be driven largely by a range of industry clusters including construction, transportation and warehousing, wholesale trade, and manufacturing. The E.L.E. share of Town-wide employment is forecast to decrease marginally from 57% in 2021 to 51% in 2051.

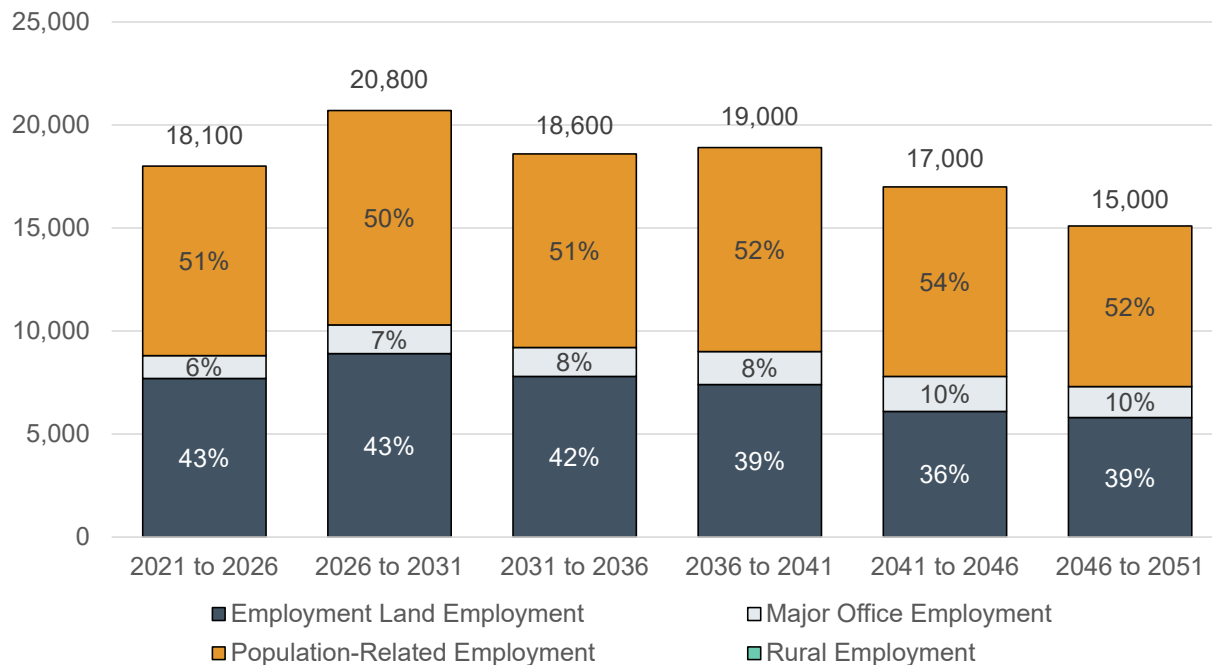
Rural Employment

Rural-based employment, employment primarily consisting of primary sectors, is anticipated to represent <1% (100 jobs) of Milton's employment growth over the 2021 to 2051 period. The Town's share of rural employment is forecast to remain relatively



stable over the next 30 years, increasing modestly from approximately 3,750 jobs in 2021 to 3,900 jobs in 2051.

Figure 6-17
Town of Milton
Total Employment Growth Forecast by Employment Category, 2021 to 2051



Note: Figures include work at home and N.F.P.O.W. employment. Numbers may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure 6-18 provides further details regarding the Reference Employment Scenario by major employment sector. Of the total additional jobs identified for Milton over the long term, approximately 75% of jobs are anticipated to have a usual place of work, while the remaining 25% of new jobs are associated with work at home employment or off-site employees, as previously noted. Additional details regarding the long-term employment forecast for Milton are provided in Appendix I. Regarding the Town's employment forecast by usual place of work by major employment sector, key observations are as follows:

- The industrial employment base is forecast to increase by 31,300 jobs, accounting for approximately 29% of total employment growth. Significant

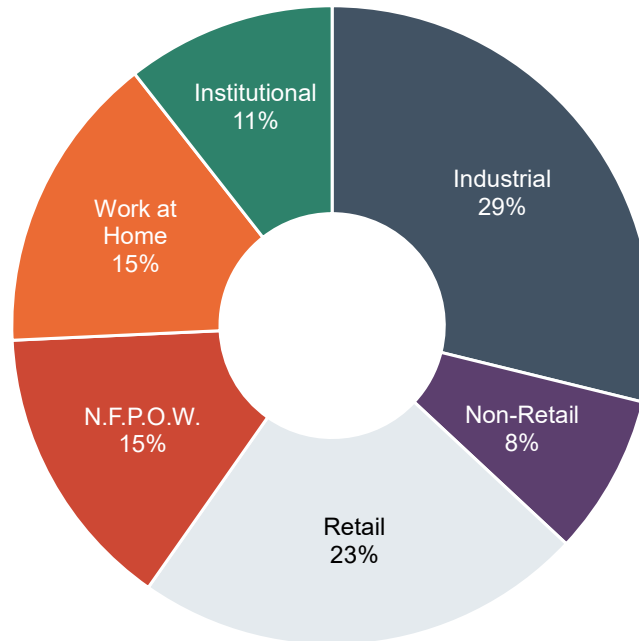


employment opportunities are identified in sectors related to wholesale trade/distribution, manufacturing, construction, and transportation. It is anticipated that almost all industrial employment growth will be accommodated within Milton's Employment Areas.

- Demand for commercial employment growth in Milton is anticipated to steadily increase (33,500 jobs), accounting for 31% of employment growth. Milton is expected to experience a significant increase in knowledge-based employment driven by substantial growth in business services, professional, scientific and technical services, and information and cultural industries, which will be largely accommodated within stand-alone and multi-tenant office buildings. A large share of this growth is expected to be in retail, personal services, and accommodation and food services.
- Milton is anticipated to experience strong employment growth in the institutional sector, representing 11,500 jobs (i.e., 11% of total employment growth), largely driven by the need for increased health services, higher education, government facilities, and other institutional facilities (i.e., cultural, religious, schools) associated with population growth.
- Primary industries (i.e., agriculture, fisheries, and other resource-based employment) are anticipated to experience nominal employment growth over the forecast period, adding approximately 100 jobs over the forecast period.



Figure 6-18
Town of Milton
Total Employment Growth Forecast by Place of Work, 2021 to 2051



Note: Figures have been rounded and may not add up precisely.
Source: Watson & Associates Economists Ltd.

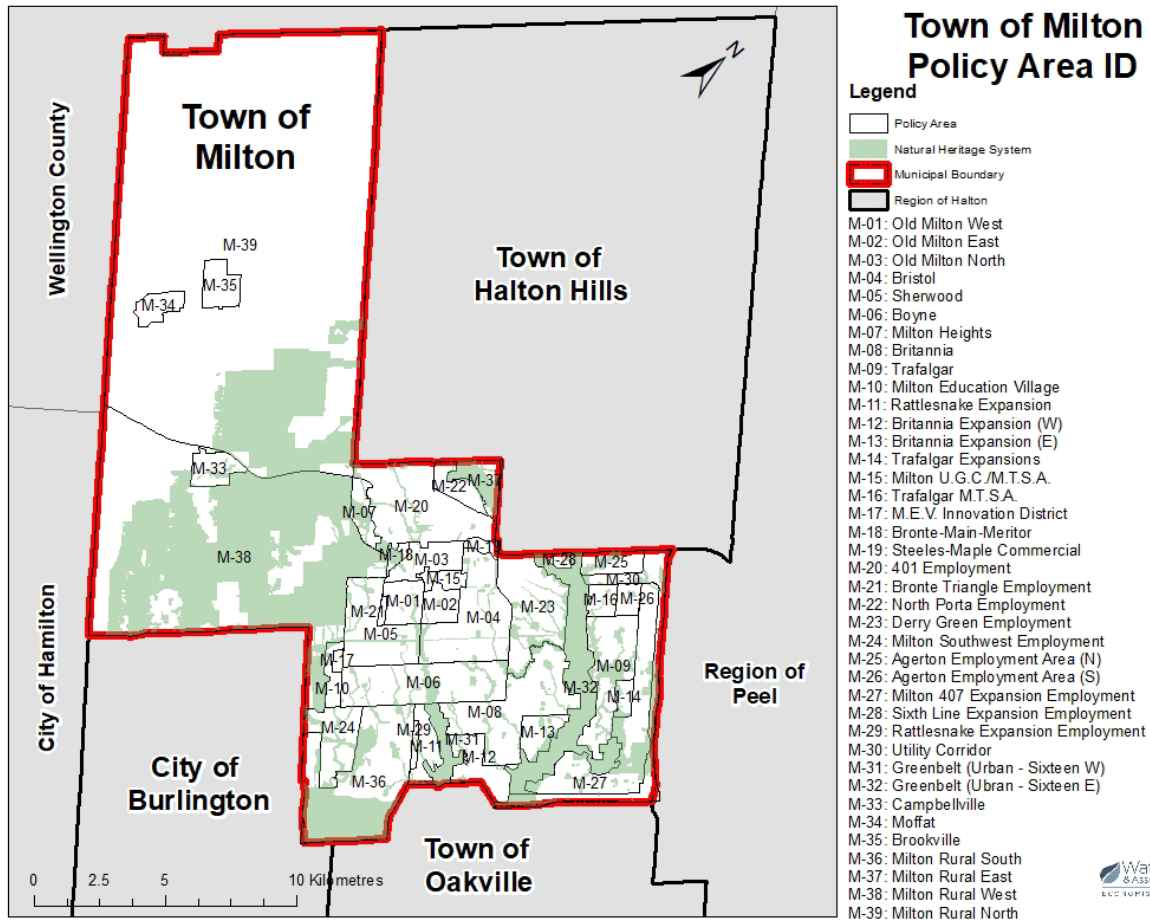


7. Town of Milton Population, Housing, and Employment Growth Allocations by Neighbourhood

Building on the results of the Recommended Growth Scenario, this chapter provides a summary of the population, housing, and employment growth allocations by smallest geographic unit, which are called Policy Areas within the Town of Milton. For additional details, please refer to Appendix J. Figure 7-1, below, provides a key map of all the Policy Areas within the Town of Milton.



Figure 7-1
Town of Milton
Policy Area Map

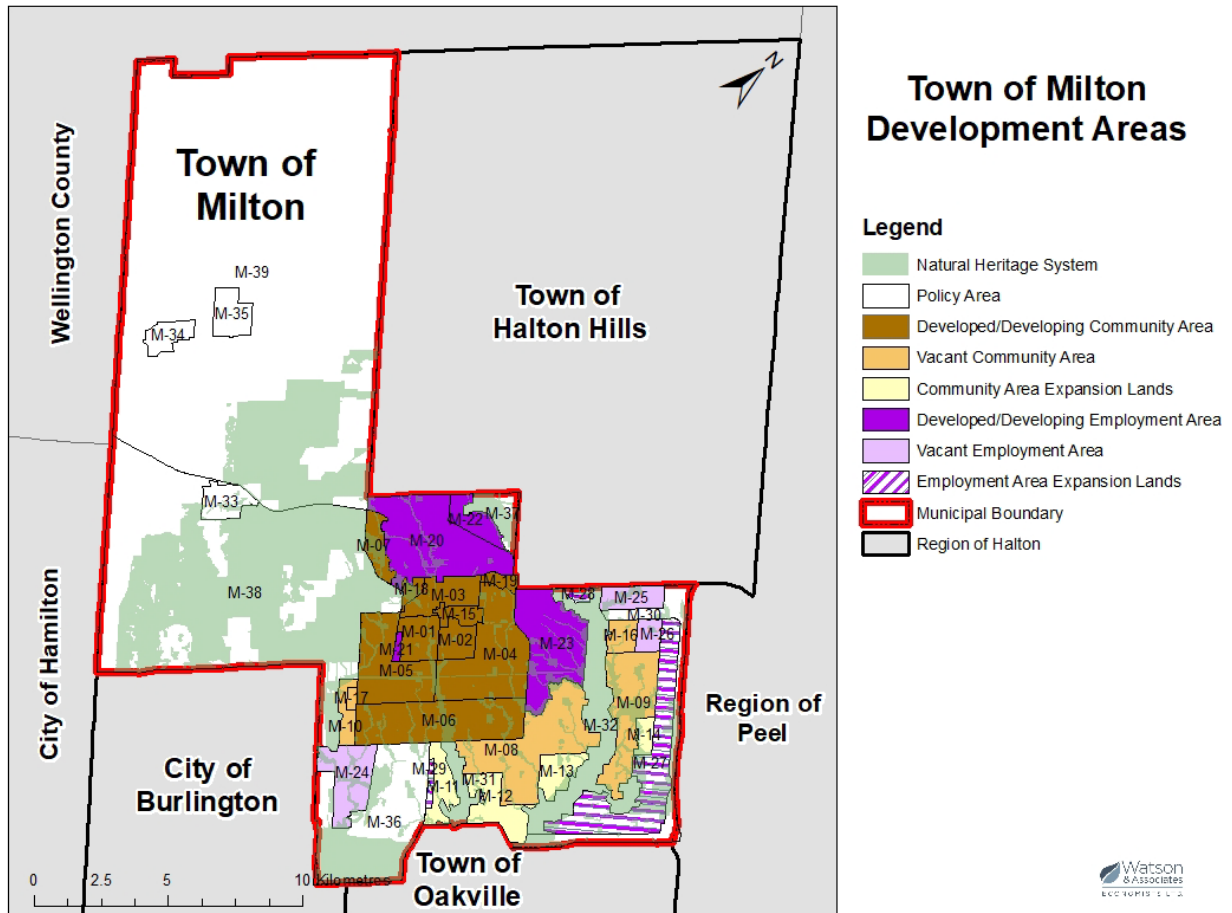


Source: Policy Area ID file provided by the Town of Milton and presented by Watson & Associates Economists Ltd.

These Policy Area IDs were grouped together into larger Development Areas as presented in Figure 7-2 below.



Figure 7-2
Town of Milton
Development Area Map



Source: Policy Area ID file provided by the Town of Milton and presented by Watson & Associates Economists Ltd.



7.1 Residential Development Phasing by Neighbourhood

The Community Area population, housing, and employment allocations by Development Area were developed based on a detailed review of the following local supply and demand factors:

Local Supply Factors

- Supply of potential future housing stock in the development process by housing structure type and approval status.
- Housing intensification opportunities.
- Current inventory of net vacant designated urban “greenfield” lands not currently in the development approvals process.
- Planned residential and non-residential development in the Town’s Secondary Plans.
- Provincial and local policy direction regarding forecast residential growth by broader planning policy area (i.e., B.U.A., D.G.A., S.G.A. and M.T.S.A.).

Demand Factors

- Historical residential building permit activity (new units only) by structure type from 2011 to 2023 by Policy Area and Development Area.
- Anticipated timing of active development applications in the development process by housing structure type and approval status.
- Market demand for housing intensification.
- Forecast trends in housing and employment by structure type and employment sector.

7.1.1 Population Growth Allocations

Figure 7-3 summarizes the allocation of population growth by Development Area between 2021 and 2051 (please refer to Figure 7-1 and Figure 7-2 for delineation of the Town’s Policy Areas and Development Areas). Key assumptions are as follows:

- Over the 2021 to 2051 planning horizon, the Town’s vacant Community Area lands are expected to account for almost half the Town-wide population growth, with 128,200 people planned to be accommodated in these areas.



- Developed/Developing Community Areas are expected to accommodate 28% of the Town-wide population growth, representing an additional 72,500 people.
- Community Area Expansion lands are expected to account for 23% of Milton's population growth.
- Rural Areas are expected to account for less than 1% of the Town-wide population growth.



Figure 7-3
Town of Milton
Population Growth by Development Area, 2021 to 2051

Development Area	Policy Area ID	Population Growth ^[1]	% Share of Town of Milton
Developed/Developing Community Areas ^[2]	Bronte-Main-Meritor Bristol Boyne Milton Heights Milton U.G.C./M.T.S.A. Old Milton West Old Milton East Old Milton North Sherwood Steeles-Maple Commercial	72,500	28%
Vacant Community Areas ^[3]	Britannia Milton Education Village M.E.V. Innovation District Trafalgar Trafalgar M.T.S.A.	128,200	49%
Community Area Expansion Lands	Britannia Expansion (W) Britannia Expansion (E) Rattlesnake Expansion Trafalgar Expansion	60,900	23%
Rural	Campbellville Moffat Brookville Milton Rural South Milton Rural East Milton Rural North Milton Rural West	1,400	1%
Town of Milton		263,100	100%

^[1] Population figures include net Census undercount.

^[2] Developed/Developing Community Areas includes the established urban area in addition to the Bristol Survey Secondary Plan, the Sherwood Survey Secondary Plan, and the Boyne Survey Secondary Plan.

^[3] Vacant Community Areas include the Agerton Secondary Plan, the Britannia Secondary Plan, the Milton Education Village Secondary Plan, and the Trafalgar Secondary Plan.

Note: Figures have been rounded and may not add up precisely.

Source: Forecast summarized by Watson & Associates Economists Ltd.



7.1.2 Housing Growth by Structure Type by Neighbourhood

Figure 7-4 summarizes the housing growth potential by Development Areas (please refer to Figure 7-2 for a map of these areas). Key assumptions are as follows:

- Almost half the future growth in the Town is expected to be accommodated in vacant Community Areas, accounting for 49% of the Town-wide housing growth or 43,200 housing units between 2021 and 2051.
- Developed/Developing Community Areas are expected to accommodate 31% of the Town-wide housing growth with approximately 27,000 new housing units to be constructed over the next 30 years in these areas.
- Approximately 20% of Milton's housing growth is planned to be accommodated in Community Area Urban Expansion lands totalling 17,500 housing units.
- Less than 1% of forecast housing growth has been allocated to the Town's rural areas.



Figure 7-4
Town of Milton
Housing Growth by Development Area, 2021 to 2051

Development Area	Policy Area ID	Total Unit Supply Potential ^[1]	2021 to 2051 Housing Growth				
			Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Total Units	Share of Town-wide Total
Developed/ Developing Community Area ^[5]	Bronte-Main-Meritor Bristol Boyne Milton Heights Milton U.G.C./M.T.S.A. Old Milton West Old Milton East Old Milton North Sherwood Steeles-Maple Commercial	27,000	5,900	4,500	16,600	27,000	31%
Vacant Community Area ^[6]	Britannia Milton Education Village M.E.V. Innovation District Trafalgar Trafalgar M.T.S.A.	43,200	10,800	20,300	12,200	43,200	49%
Community Area Expansion Lands	Britannia Expansion (W) Britannia Expansion (E) Rattlesnake Expansion Trafalgar Expansion	17,500	8,100	8,800	500	17,500	20%



Figure 7-4 (continued)
Town of Milton
Housing Growth by Development Area, 2021 to 2051

Development Area	Policy Area ID	Units in Development Approvals ^[1]	2021 to 2051 Housing Growth				
			Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Total Units	Share of Town-wide Total
Rural	Campbellville Moffat Brookville Milton Rural South Milton Rural East Milton Rural North Milton Rural West	300	300	0	0	300	0%
Town of Milton		87,900	25,000	33,600	29,300	87,900	100%

^[1] Includes residential development applications that are registered but no building permits issued, draft plan approved, currently in the site plan approval stage, proposed, and/or in the secondary or tertiary planning process.

^[2] Includes single and semi-detached dwellings.

^[3] Includes row and back-to-back townhouses and apartments in duplexes.

^[4] Includes stacked townhouses and bachelor, 1-bedroom, and 2-bedroom+ apartment units, and secondary suites (i.e., self-contained living accommodations such as apartments and small residential units that are located on a property that have a separate main residential unit).

^[5] Developed/Developing Community Areas includes the established urban area, in addition to the Bristol Survey Secondary Plan, the Sherwood Survey Secondary Plan, and the Boyne Survey Secondary Plan.

^[6] Vacant Community Areas include the Agerton Secondary Plan, the Britannia Secondary Plan, the Milton Education Village Secondary Plan, and the Trafalgar Secondary Plan.

Note: Figures have been rounded.

Source: Units in development approvals provided by the Town of Milton; 2021 to 2051 housing growth forecast prepared and summarized by Watson & Associates Economists Ltd.



7.1.3 Residential Intensification in the Town of Milton

It is recognized that the developed urban area within Milton is evolving and as a result the Town of Milton has established a broader built-up urban area (i.e., Developed/Developing Community Area,^[67] see Figure 7-2) that will accommodate majority of the Town's intensification opportunities in addition to some remaining greenfield development. Figure 7-5 summarizes the historical development activity for this area since 2006. Over this time period, almost all of the Town's development activity has occurred within this area.

Figure 7-5
Town of Milton
Intensification Comparison

Period	Housing Units in the Developed/Developing Area	% Share of Total
2006 to 2010	9,390	99%
2011 to 2015	7,550	99%
2016 to 2020	6,100	99%
2021 to 2051	27,000	31%

Note: Figures have been rounded.

Source: Historical housing units derived from the Town of Milton building permit data; 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd.

As noted in Figure 7-4, the Developed/Developing Community Area will accommodate 27,000 new units between 2021 to 2051, which is approximately 31% of the Town-wide housing growth or 900 units annually. It is recommended that the Town use this defined geographic area (i.e. Developed/Developing Community Area) to measure its intensification target for monitoring and targeting purposes.

As previously noted, the Growth Plan, 2019 considers any residential development within the delineated B.U.A. as intensification. As identified previously in Chapter 2, the

^[67] Developed/Developing Community Areas includes the established urban area, in addition to the Bristol Survey Secondary Plan, the Sherwood Survey Secondary Plan, and the Boyne Survey Secondary Plan.



current provincial policy framework is being updated and it is anticipated that the Growth Plan, 2019 is to be replaced by the P.P.S., 2024. Notwithstanding these changes in provincial policy, it is recommended that the Town continue to monitor its intensification rate in accordance with the provincially delineated B.U.A. for the purposes of comparative analysis and benchmarking against other surrounding G.T.H.A. municipalities.

Figure 7-6 summarizes the Town's historical intensification rate since 2006 and the intensification rate over the forecast period as defined by the Growth Plan. Over the forecast, it is expected that the Town will accommodate approximately 12,200 units in the B.U.A., which is just over 400 new units in the B.U.A. annually. This generates an overall intensification rate of 14% between 2021 and 2051.

Figure 7-6
Town of Milton
Intensification Comparison

Period	Housing Units in the B.U.A.	% Share of Total
2006 to 2010	30	< 1%
2011 to 2015	370	5%
2016 to 2020	600	10%
2021 to 2051	12,230	14%

Note: Figures have been rounded.

Source: Historical housing units derived from the Town of Milton building permit data; 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd.

Outside the Developed/Developing Community Area, there are other S.G.A.s (i.e., Trafalgar M.T.S.A. and M.E.V. Innovation District) to which Milton is directing and encouraging significant medium- and high-density residential development and retail and office employment growth. These areas are planned to be transit-oriented neighbourhoods supporting some of the highest employment and population densities



within the Town. These S.G.A.s are located in the vacant Community Areas^[68] and would not be included in the Town's overall intensification rate.

7.2 Community Area and Employment Area Employment Growth Allocations by Development Area

Figure 7-7 summarizes the Town's total Community Area and Employment Area employment growth forecast by Development Area (please refer to Figure 7-2 for a map of these areas; for additional details regarding the employment forecast, please refer to Appendix J). Key findings are as follows:

- Employment within designated Employment Areas is forecast to accommodate approximately 37% of the Town's overall employment growth and most of the Town's industrial-based jobs. Of this total, 60% of the E.L.E. jobs are forecast in the Developed/Developing Employment Areas, 28% are forecast on Vacant Employment Areas while the remaining 12% are forecast on Employment Area Expansion lands.
- Over the 2021 to 2051 forecast period, vacant designated Community Areas are forecast to account for 28% of Town-wide employment growth. Employment in vacant designated Community Areas primarily comprises P.R.E. (i.e., jobs associated with population growth such as grocery stores, schools, other personal services, etc.).
- Developed/Developing Community Areas are forecast to accommodate 21% of the Town-wide employment growth. Similar to vacant Community Areas, the Developed/Developing Community Areas are expected to accommodate the Town's P.R.E.
- Community Area and Employment Area Expansion lands account for 9% and 5%, respectively, of the Town-wide employment growth.
- Rural employment growth is expected to account for 1% of the Town-wide employment growth, adding an additional 550 jobs over the forecast period.

^[68] Vacant Community Areas include the Agerton Secondary Plan, the Britannia Secondary Plan, the Milton Education Village Secondary Plan, and the Trafalgar Secondary Plan.



Figure 7-7
Town of Milton
Employment Area Growth by Development Area, 2021 to 2051

Development Area	Policy Area ID	Employment Growth ^[1]	% Share of Town of Milton
Developed/ Developing Community Areas ^[2]	Bronte-Main-Meritor Bristol Boyne Milton Heights Milton U.G.C./M.T.S.A. Old Milton West Old Milton East Old Milton North Sherwood Steeles-Maple Commercial	22,940	21%
Vacant Community Areas ^[3]	Britannia Milton Education Village M.E.V. Innovation District Trafalgar Trafalgar M.T.S.A. ^[4]	30,060	28%
Community Area Urban Expansion Lands	Britannia Expansion (W) Britannia Expansion (E) Rattlesnake Expansion Trafalgar Expansion	9,910	9%
Developed/ Developing Employment Area	401 Employment Bronte Triangle Employment Derry Green Employment North Porta Employment	25,990	24%
Vacant Employment Area	Agerton Employment Area (N) ^[4] Agerton Employment Area (S) ^[4] Milton Southwest Employment	13,720	13%
Employment Area Expansion Lands	Milton 407 Expansion Employment Sixth Line Expansion Employment Rattlesnake Expansion Employment	5,390	5%



Development Area	Policy Area ID	Employment Growth ^[1]	% Share of Town of Milton
Rural	Campbellville Moffat Brookville Milton Rural South Milton Rural East Milton Rural North Milton Rural West	550	1%
Town of Milton		108,550	100%

^[1] Employment figures include work at home and N.F.P.O.W.

^[2] Developed/Developing Community Areas include the provincially defined B.U.A. in addition to the Bristol Survey Secondary Plan, the Sherwood Survey Secondary Plan, and the Boyne Survey Secondary Plan.

^[3] Vacant Community Areas include the Agerton Secondary Plan, the Britannia Secondary Plan, the Milton Education Village Secondary Plan, and the Trafalgar Secondary Plan.

^[4] Approximately 3,250 jobs planned for the long-term office employment and associated office building space in the Agerton Secondary Plan have been identified to potentially occur outside of the 2051 planning horizon.

Note: Figures have been rounded and may not add up precisely.

Source: Forecast summarized by Watson & Associates Economists Ltd.



7.3 Forecast Community Area and Employment Area Density Trends

This section provides a summary of forecast density for both Community Area and Employment Area by 2051. It should be noted that density is measure by the number of people living and/or working in an area measured per hectare. The land area calculated in Section 5 excludes environmental features identified as the Natural Heritage System in the Town’s O.P., utility corridors, and cemeteries. However, the land area includes lands that would support the local function of the area such as local roads, parks/trails, and local infrastructure (i.e. stormwater ponds).

7.3.1 Community Area Density

In accordance with our review of existing and planned Community Area density trends, the Town of Milton is planned to achieve a combined average density of 85 people and jobs per ha in Community Areas (this includes the Developing Community Areas and the vacant Community Areas that are outside the Provincially defined B.U.A.) by 2051 as shown in Figure 7-8.

Figure 7-8
Town of Milton
Average Community Area Density Target at 2051

	Calculations	Developing Community Area F	Vacant Community Area G	Existing Community Area H = F + G
People	A	153,200	128,500	281,700
Jobs	B	24,100	30,400	54,500
People and Jobs	C = A + B	177,300	158,900	336,200
Land Area (ha)	D	2,330	1,610	3,940
Density (people and jobs per ha)	E = C / D	76	99	85

Note: Figures have been rounded.

Source: Summarized by Watson & Associates Economists Ltd.

Figure 7-9 summarizes the overall Community Area density at 2051, including both designated Vacant Community Areas and Community Area Expansion lands. As shown in Figure 7-9, Community Area Expansion lands are anticipated to reach a higher



density of 102 people and jobs per ha. In comparison, the J.B.P.E. densities are also higher in the Community Area Expansion lands, averaging 96 people and jobs per ha by 2051. By 2051, the Town’s total combined density for the Vacant Community Area and Community Area Expansion Lands is 99 people and jobs per ha.

Figure 7-9
Town of Milton
Density at 2051

	Calculations	Vacant Community Area F	Community Area Expansion Lands G	Total Community Area Density H = F + G
People	A	128,500	60,900	189,400
Jobs	B	30,400	10,100	40,500
People and Jobs	C = A + B	158,900	71,000	229,900
Land Area (ha)	D	1,610	700	2,310
Density (people and jobs per ha)	E = C / D	99	102	99

Note: Figures may not add precisely due to rounding.
Source: Presented by Watson & Associates Economists Ltd.

7.3.2 Employment Area Density

There are several macro-economic trends that are influencing average density levels on employment lands. Generally, average density levels on employment lands are declining in the manufacturing sector, as domestic manufacturers focus efforts on increased efficiency and competitiveness through automation. This trend is coupled with increasing demand for large, land-extensive warehousing and logistics facilities to support distribution and transportation of goods throughout the expanding urban population base.

The evolving form of industrial and non-industrial development on employment lands is also influencing average density levels of employment lands. As previously noted, major employers accommodated in the existing Employment Areas are increasingly integrating industrial, office, and training facilities on site. These sites also require significant land area to accommodate surface parking and, in some cases, future expansion potential. On average, employment density levels for integrated office/



distribution and training facilities are much lower than stand-alone major office developments. On the other hand, growing demand within the multi-tenant and stand-alone office sector is anticipated to have an upward influence on average employment densities of employment lands. On-site and off-site employment amenities also tend to have an upward influence on average employment density on employment lands.

Figure 7-10 summarizes forecast density targets in the Town’s designated Employment Area. As of 2021, the Town of Milton has an average density of 17 jobs per ha (7 jobs per acre). Reflective of anticipated trends in employment growth and employment density by sub-sector, it is anticipated that forecast employment growth within Employment Areas over the 2021 to 2051 period will average 38 jobs per ha (15 jobs per acre). By 2051, the average density in designated Employment Areas is forecast to increase to 27 jobs per ha (11 jobs per acre).

Figure 7-10
Town of Milton
Employment Area Density at 2021 and 2051

	Calculations	2021	2051
Total Jobs	A	21,200	60,900
Total Land Area (ha)	B	1,230	2,260
Density (jobs per ha)	$C = A / B$	17	27

Note: Figures may not add precisely due to rounding. 2021 land area is based on developed land as shown in Figure 5-8.

Source: Watson & Associates Economists Ltd.

Figure 7-11 summarizes forecast density trends for Milton’s Employment Areas, include designated Employment Areas and Employment Area Expansion lands in 2051 based on forecast employment land demand and available land supply. In accordance with forecast employment land employment demand and assumed average employment densities within the Town’s designated Employment Areas, the Town’s Employment Area Expansion lands are not anticipated to be fully buildout by 2051. Accordingly, the 2051, the average employment density estimated for the Town’s Employment Area Expansion lands is only 7 job per ha. Figure 7-12 identifies that the Town’s Employment Area Expansion lands have the potential to accommodate an additional 16,200 jobs at full buildout. It is important to recognize that if the forecast density



targets do not materialize within the Town’s designated Employment Areas this is likely to accelerate the buildout of the Town’s Employment Area Expansion lands by 2051.

Figure 7-11
Town of Milton
Employment Area Density at 2051

	Calculations	Existing Employment Areas	Employment Area Expansion Lands	Total Employment Area
Total Jobs	A	60,900	5,500	66,500
Total Land Area (ha)	B	2,260	800	3,070
Density (jobs per ha)	C = A / B	27	7	22

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.

Figure 7-12
Town of Milton
Employment Area Expansion Lands Density

	Calculations	2051	Buildout	Difference
Total Jobs	A	5,500	21,700	16,200
Total Land Area (ha)	B	800	800	-
Density (jobs per ha)	C = A / B	7	27	-

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.



8. Conclusions and Recommendations

This study has highlighted key themes related to growth and change agents that have implications for the future of land use planning as well as the phasing of hard and soft infrastructure for the Town of Milton over the next three decades. A number of broader strategic recommendations are provided below which relate to the long-term management of growth, and urban and rural development within the Town of Milton. These recommendations are intended to inform the Town's new O.P. review and on-going efforts with respect to growth monitoring and growth management. These strategic recommendations are provided within the context of an evolving provincial, regional, and local planning policy framework.

8.1 Strategic Policy Recommendations – Community Areas

8.1.1 Long-term Population, Housing, and Employment Forecasts

Policy Context: The Town is projected to experience strong population and housing growth over the long-term planning horizon. The in-effect O.P. establishes specific policy direction regarding housing projections by structure type over the long-term planning horizon. The current in-force P.P.S., 2020 and the P.P.S., 2024 require planning authorities to provide for an appropriate range and mix of housing options and densities to meet projected housing needs, including affordable housing needs.

Recommended Actions: Update Long-term Population, Housing, and Employment Growth Projections and Density Targets

- Update growth management policies in section 2.1.4 of the Town of Milton O.P., which establishes the Town's goals with respect to population, employment, and housing growth and residential density to the year 2051 to be consistent with the recommended growth projections as established through the study. More specifically, it is recommended that the Town plan for a permanent population of 400,400 and a total employment base of 156,300 by 2051. It is recommended that the Town plan to accommodate 127,900 permanent households by 2051. Furthermore, it is recommended that the Town plan for a minimum density target of 99 people and jobs per ha within its Vacant Community Area and Community Area Expansion lands and a minimum employment density of 22 jobs per ha on



designated Employment Areas. Within M.T.S.A.s and S.G.A.s, plan for a minimum density over the long-term as follows:

- Milton U.G.C./M.T.S.A. –250 people and jobs per ha
- Trafalgar M.T.S.A. – 180 people and jobs per ha^[69]
- M.E.V. Innovation District – 265 people and jobs per ha
- Bronte-Main-Meritor - 225 people and jobs per ha
- Develop a refined policy framework, through the review of the in-effect Town of Milton O.P., to provide continued direction that encourages a range of housing types and densities by tenure (i.e., ownership and rental) in consideration of the updated housing projections to the year 2051.

8.1.2 Revised Residential Phasing and Supply of Urban Land

Policy Context: A significant amount of growth is expected in the Town of Milton and not all of it can or will happen at the same time from a practical perspective, primarily because of the time it will take to extend infrastructure in a logical and efficient manner. As a result, a key deliverable of this study is the phasing of designated growth areas over the next three decades. In doing so, the Town of Milton can achieve numerous policy objectives that best support the development of complete communities.

Milton's S.G.A.s and other developed lands provide a supply opportunity for intensification within the Town; however, capacity and market demand for intensification within these areas is not homogenous. Certain areas have the capacity to play a more significant role in accommodating growth and intensification. In accordance with anticipated market demand, key investment decisions should prioritize the achievement of intensification and higher densities within the areas identified under the intensification hierarchy. On the other hand, the Town should consider planning policies and tools to stimulate development within identified areas that are considered slower growth areas. Furthermore, the Region and the Town should identify infrastructure projects and investments that can unlock or remove barriers to achieve forecast growth potential in S.G.A.s and other priority growth areas.

[69] It should be noted that the density of 180 people and jobs per ha includes employment post 2051.



Recommended Actions: Update the Town of Milton Residential Development Phasing Plan

- Update growth management policies in section 2.1.5 of the Town of Milton O.P., which establish the Town's goals with the phasing and supply of urban land from 2021 to 2051 by policy area in accordance with the results of the Recommended Growth Scenario.
- Ensure consistency with the proposed P.P.S., 2024 regarding the minimum supply of land available for residential development. Consider establishing further principles and criteria to inform recommendations on where development should be prioritized in designated growth areas.
- Update policies that support investment to enable growth, specifically recognizing that the important roles of M.T.S.A.s and S.G.A.s, which will be key to accommodating growth, achieving intensification targets in the Town and encouraging compact built form. This will require refinements to policies that inform and phase investment decisions to enable growth and development in these areas.

8.1.3 Residential Intensification Target

Policy Context: Residential intensification contributes to building complete communities, often makes more efficient use of existing infrastructure and public services and minimizes adverse impacts to the natural environment and agricultural land. The P.P.S., 2024 establishes clear policy direction to encourage that sufficient land within settlement areas is made available through intensification and redevelopment. Based on an assessment of the intensification opportunities, the Town has significant opportunities for utilizing intensification sites to meet a broad range of future housing needs within developed areas.

Recommended Action: Revise the Town's Minimum Intensification Target and Monitor Regularly

- Section 2.1.6.1 of the Town of Milton O.P. states that the Town shall promote intensification in order to support the development of compact, efficient, vibrant, complete, and healthy communities. Based on the analysis of intensification drivers and present infill opportunities, a minimum intensification target of 30%



for the Town's Developed/Developing Community Area, and continue to track development within the provincially defined B.U.A.

- It should be recognized that additional intensification opportunities exist within the Town's S.G.A.s, which currently fall outside the Developed/Developing Community Areas.
- Monitor residential intensification activity on an annual basis against the O.P. target.

8.1.4 Urban Expansion Lands

Policy Context: The Town of Milton continues to be one of the fastest growing municipalities in Canada. Based on an assessment of urban residential land needs to the year 2051 undertaken as a part of the study, it is observed that the Town will require all the Community Area Expansion lands identified through Bill 162 (refer to Figure 2-3, section 2.2.1.).

Recommended Action: Proactively Plan for Community Area Expansion

- Plan for the full phased development of the Community Area Expansion lands referenced in Figure 7-12 by 2051 in accordance with the proposed phasing of these lands as broadly identified in Appendix J of this report.

8.1.5 Plan Monitoring

Policy Context: Throughout the Town's O.P., direction is provided with respect to systematic monitoring, review, and amendment of the O.P. In this regard, the study provides critical input to long-range planning by identifying any future growth, land supply, and land demand which ultimately informs a comprehensive policy framework to manage change over the planning horizon. Policies providing direction on plan monitoring and evaluation are required to regularly evaluate the forecasts presented in this study (inclusive of housing and land supply) as implemented through the Town's O.P. Relevant policies should establish direction to undertake a regular review and update of the growth forecasts to ensure the Town is providing direction for growth and change in a manner that is consistent with the P.P.S., 2024, including land use planning and growth management practices that are sustainable over the long-term planning horizon. Policies establishing direction for regular plan monitoring and evaluation may include a robust framework that enables the Town to modify growth objectives based on actual supply and demand data, while contemplating a range of planning policy,



demographic, and economic factors that influence growth and change over the long-term planning horizon.

Recommended Action: Regularly Monitor and Benchmark the Development of the Town's Community Areas

- Incorporate a framework to monitor housing supply and intensification targets at regular intervals in coordination with Halton Region for the provision of hard services and servicing allocation.
- Consider various tools for monitoring housing growth, including comprehensive and interactive web-based growth tracking models to monitor population, housing, and employment growth, as well as performance measures and benchmarking at the planning policy area and neighbourhood level on an annual basis.

8.1.6 Planning for Office and Mixed-Use Development in Strategic Growth Areas and Major Transit Station Areas

Policy Context: Workers in knowledge-intensive industries are increasingly demanding accessible and dynamic work environments that promote interaction and innovation. This underscores placemaking as an increasingly recognized and important concept in creating diverse and vibrant workplaces which, in turn, can help attract local population and job growth provided that other necessary infrastructure requirements are met. This is particularly relevant in mixed-used environments which integrate retail, office commercial, residential, and other community uses with public open spaces.

Given the strong employment growth identified for the Town of Milton and the Region of Halton that is increasingly oriented towards knowledge-based sectors, S.G.A.s/M.T.S.A.s offer strong market attributes to accommodate these growing employment sectors. Considering the near and longer-term market outlook for office and mixed-use development opportunities identified within the Town's S.G.A.s/M.T.S.A.s, the Town of Milton should continue to prioritize its efforts to encourage and promote office and mixed-use development where market demand potential is highest. The Town should also work to identify potential gaps between planning policy objectives and market demand across each of the Town's S.G.A.s/M.T.S.A.s. This will help identify where the utilization of financial tools and planning incentives to facilitate development, where



fiscally sustainable, may be required to support planning policies regarding intensification within these areas.

When planning for employment in S.G.A.s/M.T.S.A.s, it is important to consider the following:

- **Not all forms of office development can be accommodated in S.G.A.s/M.T.S.A.s** – The provincial, regional, and local planning policy framework directs larger office developments to M.T.S.A.s, or other S.G.A.s where multi-modal transportation and existing or planned frequent transit service will be available to support live/work opportunities. Certain commercial and industrial facilities (e.g., manufacturing, assembly, and warehousing) with office uses, training facilities and showcase rooms/ancillary retail are often integrated on-site. Operations such as these can be land intensive and have unique siting requirements that are typically not appropriate in mixed-use S.G.A.s or M.T.S.A.s and should be directed to Employment Areas. Furthermore, Employment Areas provide opportunities to accommodate multi-use facilities, such as larger industrial operations adopting a campus-style setting which requires surface parking and future expansion potential.
- **Office development potential outweighs demand** – In planning for office development in S.G.A.s/M.T.S.A.s, the Town of Milton and the Region of Halton should be realistic about the amount of office growth that might be attracted to these areas over the planning horizon. While O.P.s have provisions in place to encourage office development, the reality is that potential supply outweighs demand. In planning for new office developments within S.G.A.s/M.T.S.A.s there needs to be corresponding consideration to prioritize development to also create transit-oriented vibrant urban centres and minimize potential competition between these locations.
- **Provide the right long-term environment** – The future success of employment uses within Milton's S.G.A.s/M.T.S.A.s is highly dependent on their ability to provide places that offer access to both skilled and unskilled labour, vibrant spaces and places for employees, and synergies between businesses. This requires a more strategic approach to planning, one that integrates planning with the Town's Economic Development Strategy. A place-based approach should allow for flexible planning frameworks, repurposing measures for older buildings and areas, and investment for mixed-use, co-working, incubators/accelerator



facilities for start-up businesses, and opportunities for shared spaces. With this in mind, the primary objective of planning policies should be to create high-quality, mixed-use urban environments that offer access to high-order transit services, a walkable and cyclable public realm, services and amenities, including restaurants, cafes, shops, daycare facilities, arts and cultural activities, and indoor/outdoor recreational facilities. It should be recognized that such physical qualities are typically what drives successful office real estate markets over the long term.

- **Encourage proactive planning** – It is recognized that given the comprehensive nature of the O.P. review process and the considerable changes that have been made to the provincial policy framework over the past decade, G.G.H. municipalities have traditionally been somewhat slow to adopt flexible land use frameworks to address the structural changes in the economy identified in this report. Recent economic trends and industry disruption, however, mandates that the Town of Milton O.P., Secondary Plans, and zoning allow for opportunities, where appropriate, to encourage transformative change over the long term within S.G.A.s/M.T.S.A.s. This will ensure that businesses are able to effectively respond to the changing environment, new ways of working, and innovation capabilities. Recent trends show that employment spaces and facilities are increasingly demanding the ability to integrate different functions. For example, innovation parks and mixed-use spaces integrate research, institutions, start-ups and labs, office, co-working, and production space with recreational amenities and services.

Recommendation: Proactively Plan for Office and Mixed-Use Development in S.G.A.s/M.T.S.A.s

- Direct major office development to S.G.A.s/M.T.S.A.s that are served with existing or planned high-order transit.
- Target an appropriate level of major office development to complement residential development and other population-related functions to create complete communities. Furthermore, in cases where major office development is integrated with industrial uses, such uses should be permitted within Employment Areas where such development cannot be easily accommodated within M.T.S.A.s and other S.G.A.s due to parcel size constraints or specific circumstances related to land use compatibility, and/or site configuration.



- Accelerate infrastructure investment and capacity to facilitate development/ redevelopment efforts across S.G.A.s/M.T.S.A.s with the strongest identified real estate market opportunities.
- Prepare planning and market studies, including proformas, to assess development feasibility opportunities and challenges for office development across S.G.A.s/M.T.S.A.s and the potential use of municipal financial incentives and other planning tools to help facilitate development.
- Monitor development activity and corresponding population and employment growth within S.G.A.s/M.T.S.A.s on a regular basis.

8.1.7 Develop and Strengthen Policies for Climate Change Adaptation

Policy Context: This study involves establishing a long-term vision for the Town building on the Secondary Plans established for each of the Town’s neighbourhoods and broad O.P. policies related to its urban lands, rural lands, and protected countryside. Planning policies aimed at influencing how and where growth or change occurs are key to the implementation of a successful growth management strategy. Such planning policies are required to ensure that, as Milton continues to mature and evolve, this process occurs in a financially, environmentally, and socio-economically sustainable manner.

As the Town of Milton continues to rapidly grow and develop, it is important to take measures to limit local climate change impacts resulting from human activities. Foremost among these activities is the emission of greenhouse gases when energy is generated from fossil fuels, which is predicted to have significant negative impacts on human health, the natural environment, and the economy. Addressing climate change requires two complementary sets of strategies: mitigation and adaptation. Mitigation involves actions to reduce greenhouse gas emissions and actions to reduce or delay climate change. Adaptation involves actions to minimize vulnerabilities to the impacts of a changing climate and includes planning and strategic decisions important to infrastructure planning and long-range growth management.



Recommended Actions: Continue to Advance the Town's Climate Change Policies Related to Mitigation and Adaptation

Being leaders in sustainability and climate change impact is a key priority for the Town. Accordingly, key recommendations include the following:

- Prepare for the impacts of climate change to increase community resiliency to climate change.
- Work with partners in the community and other levels of government to prepare a comprehensive climate change adaptation and mitigation strategy.
- Continue to manage urban growth by promoting intensification and development that optimizes infrastructure and public service facilities, increases efficiency in transit, and implements practices that support sustainability and climate change mitigation and adaptation.
- Encourage sustainable design principles and development standards and maximize energy efficiency in development.

8.2 Strategic Policy Recommendations – Employment Areas

8.2.1 Plan for Future Employment Area Lands Development and Strategically Plan New Employment Areas

Policy Context: Employment Areas form a vital component of Milton's land use structure and are an integral part of the local economic development potential of the Town. Through development of its Employment Area land base, Milton is better positioned to build more balanced, complete, and competitive communities. Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the Town.

It is critical that Milton's Employment Areas and other urban non-residential lands are planned in a manner that aims to promote economic competitiveness, attract employment growth, and maximize employment density and land utilization, where appropriate. Phasing policies should also be explored that require the servicing of greenfield employment lands to be completed prior to, or in parallel with, the servicing and development of the Town's identified Employment Area Expansion lands.



Recommended Actions: Continue to Plan for the Phased Development of the Town's Designated Employment Area and Future Employment Area Expansion Lands

- Continue to plan for the phased development of the Town's designated Employment Areas;
- Designate and plan for the development of the Employment Area Expansion lands referenced in Figure 7-2 by 2051, in accordance with the proposed phasing of these lands as identified in Appendix J of this report.
- Continue to plan for the full development of the Town's Employment Area Expansion lands beyond 2051, as referenced in Figure 7-12.

8.2.2 Ensure that Employment Lands are Well Adapted to Structural Changes Occurring in the Evolving Macro-Economy

Policy Context: Structural changes occurring in the macro-economy pose potential opportunities and challenges for future employment growth within the Town. As the economy continues to shift towards knowledge-based sectors, it is important to continue to develop planning policies for accommodating a range of employment uses within the Town. Having said that, it is important to recognize the recent provincial policy changes, including the new definition of “area of employment” in the *Planning Act* (this change received Royal Assent in June 2023, but has not yet received proclamation), limit the range of employment uses in Employment Areas to primarily industrial uses (as discussed in Chapter 1). As such, it is important that the Town plan for an urban structure that provides a range of employment opportunities. It is also noted that P.P.S., 2024 (section 2.8.1.3) supports this direction with respect to the accommodation of employment outside of Employment Areas to support the development of complete communities.

Recommended Actions: Explore the Creation of New Employment Land Use Categories to Accommodate “Employment Outside of Employment Areas”

- Explore the creation of a new employment category that would permit service-related uses that are primarily destination-oriented and not particularly related to, or supportive of, immediately adjacent land uses in Employment Areas in view of the evolving nature of Employment Areas within the context of the new *Planning Act* definition. The Town should consider such uses where this development



already exists in established Employment Areas and where there is a logical expansion of these uses. These areas would include certain non-retail, non-industrial uses which are not typically well-suited in mix-used commercial areas, for example: places of worship, day cares, recreational and entertainment facilities, auto service/repair, and self-storage facilities.

- Protect areas of employment outside of Employment Areas that would act as a transitioning use between residential and industrial areas. A similar approach is taken in the City of Calgary Land Use By-Law to provide policies regarding the “Industrial Edge District.” Another example can be the City of London O.P. which includes a Commercial Industrial designation to accommodate commercial uses that do not fit well within the context of the City’s commercial designations. These commercial uses generally include commercial recreation, places of assembly, and uses referred to as “quasi-industrial,” whereby they have some elements of industrial uses (e.g., outdoor storage for equipment sales).
- To align with the provincial planning context, include more defined policy direction in the Town’s O.P. to outline the goals and objectives related to employment-supportive uses in Employment Areas vs. employment outside of Employment Areas (e.g., non-industrial uses in Employment Areas should be of limited scale, or focused on serving businesses and employees in the Employment Areas). The Town may wish to also consider developing more defined criteria or descriptions regarding the appropriate type, size, and location of complementary non-industrial uses in Employment Areas (e.g., eating establishments, personal and health care services, and smaller-scale, service-oriented businesses) at strategic and accessible locations which are designed to enhance the functionality of existing and future Employment Areas.

8.3 Protect Employment Areas

Policy Context: It is recognized that Milton’s Employment Areas are an integral part of the Town of Milton and the Region of Halton’s economic growth potential. For the Town to achieve its long-term economic development goals, Employment Areas need to continue to offer opportunities for growth and development. This includes accommodating a large share of the Town’s employment growth, across a broad range of industry sectors, to maintain high levels of employment in the Town and the Region relative to population growth.



Recommendations: Development Proactive Approaches to Support Economic Development and the Protection of Employment Areas

- Protect the Town’s Employment Areas to ensure that the lands in such areas are not eroded and the planned function of these areas is not undermined, in order to remain competitive over the long term. Both occupied and vacant Employment Area land supply, including underutilized lands, play a role in the Town’s competitiveness and should be protected.
- Continue to explore opportunities to expedite the servicing of designated Employment Areas through regional infrastructure projects which are currently being advanced within Regional capital projects.
- Ensure that a minimum five-year supply of Regionally serviced Employment Areas is maintained and available at all times to meet market needs.
- Develop a proactive approach to work with landowners to increase the number of sites that are “market ready.” Market-ready sites are lands that are not only vacant and serviced but have landowner intent to progress the lands for entry into the market. There are a number of reasons why lands may not be market ready; for example, the landowner may not be willing or ready to sell the land or may be holding on to the land for future development/expansion. The Region of Halton and the Town of Milton are encouraged to consult with landowners to understand the opportunities and limitations of market-ready lands and identify strategies to address potential barriers to investment.
- Identify and prioritize opportunities for “quality of life enhancements” to strengthen the competitiveness and attractiveness of Employment Areas. In addition to promoting a range of employment-supportive uses in Employment Areas, the Town of Milton is encouraged to develop priorities for making physical improvements to existing Employment Areas, where the need for such enhancements are identified. This could include opportunities to add or enhance existing elements such as open space/public realm improvements, lighting, wayfinding/branding, trails, active transportation connections, transit access, and other types of hard infrastructure which help to make Employment Areas attractive places to work. Opportunities identified through this process could be incorporated into updated urban design policies for the Town’s Employment Areas.
- Continue to leverage the Town’s economic development potential within the broader regional profile of the G.T.H.A. and capitalize on local competitive



advantages. The Town has synergies that are important to be maintained for sustainable economic development. Building on the results of the Town of Milton Five-Year Economic Development Strategy, economic development initiatives should leverage Milton's distinct economic and competitive strengths within the context of the broader G.G.H. economy (e.g., cost competitive development environment, established manufacturing and logistics sectors, and other growing knowledge-based sectors).^[70]

8.3.1 Explore Opportunities for Intensification of Employment Lands

Policy Context: Future redevelopment, expansion, and infill opportunities will continue to exist as the Town's Employment Areas mature and evolve. Intensification potential on occupied and underutilized employment lands is not well understood given uncertainties regarding the future intentions of existing landowners. Section 2.8.1 (d) of the Proposed P.P.S., 2024 encourages intensification of employment uses and compatible, compact, mixed-use development to support the achievement of complete communities.

Recommended Actions: Encourage the Development and Intensification of Underutilized Employment Areas

- Promote and facilitate intensification/infill opportunities in existing Employment Areas.
- Explore opportunities for infill and redevelopment in mature industrial areas.
- Work with landowners of large infill or redevelopment sites to assess interest in developing the lands and assess the feasibility of development.
- Explore redevelopment opportunities on brownfield industrial sites.

8.3.2 Encourage Eco-Industrial Development Approaches to Employment Lands Development and Strengthen Policies for Climate Change Adaptation

Policy Context: As the Town of Milton continues to grow and develop, it is important to take measures to limit local climate change impacts. Sustainability and climate change impact have been identified as key priorities for the Town. Across North America there are numerous examples where municipalities have developed eco-industrial

^[70] Town of Milton Five-Year Economic Development Strategy, 2022-2026.



development approaches or sustainable economic development initiatives in Employment Areas. Industrial development that follows eco-industrial principles generally is based on reducing the environmental impact footprint through urban design and sustainable design principles and/or embraces a triple bottom line profit business model for the development. For example, the Hanlon Creek Business Park in Guelph aims to strike a balance between meeting Guelph's economic needs and its need to protect the City's natural heritage. There are certain similar characteristics that can be considered for the Town of Milton due to the presence of natural features within areas adjacent to Employment Areas.

Recommended Actions: Encourage Innovative Solutions Which Support Eco-Industrial Development in Employment Areas

- Continue to support innovative and sustainable buildings that incorporate green building design standards such as LEED and include sustainable building features such as green roofs and solar panels.
- Consider including policies for eco-business zones in the Town's O.P. update. Eco-business zones are areas of employment and/or industrial activity that promote environmental quality, economic vitality, and social benefits through the continuum of planning, design, construction, long-term operations, and deconstruction. There is an opportunity to explore this concept with eco-business principles.
- Explore opportunities to attract investment in renewable energy systems (e.g., geothermal, district energy) in Employment Areas.



Appendix A

Growth Projections Methodology



Appendix A: Growth Projections Methodology

Approach and Methodology

The population, household, and employment forecast methodology adopted for this study utilizes a combined forecasting approach that incorporates both the traditional “top-down” cohort-survival forecast methodology (i.e., population by age-cohort) and a “bottom-up” household formation methodology. This combined approach is adopted to ensure that both regional economic/demographic trends and local housing market conditions are adequately assessed in developing the long-term growth potential for the Town of Milton.

A.1 Economic Base Model

Local/regional economic activities can be divided into two categories: those that are “export-based,” and those that are “community-based.” The export-based sector comprises industries (i.e., economic clusters) that produce goods that reach markets outside the community (e.g., agriculture and primary resources, manufacturing, research and development). Export-based industries also provide services to temporary and second-home residents of the Town of Milton (hotels, restaurants, tourism-related sectors, colleges, and universities) or to businesses outside the region (specialized financial and professional, scientific and technical services). Community-based industries produce services that primarily meet the needs of the residents in the Town (retail, medical, primary and secondary education, and personal and government services). Ultimately, future permanent population and housing growth within the Town of Milton has been determined in large measure by the competitiveness of the export-based economy within the Town of Milton and the surrounding market area.

On the other hand, population growth in the 65+ cohort will continue to be largely driven by the aging of the Town’s existing population and, to a lesser extent, the attractiveness of the Town to older adults and seniors through net migration, including the conversion of seasonal dwellings to permanent households.

A.2 Cohort-Survival Population and Household Forecast Methodology

The cohort-survival population forecast methodology uses, as its base, population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate

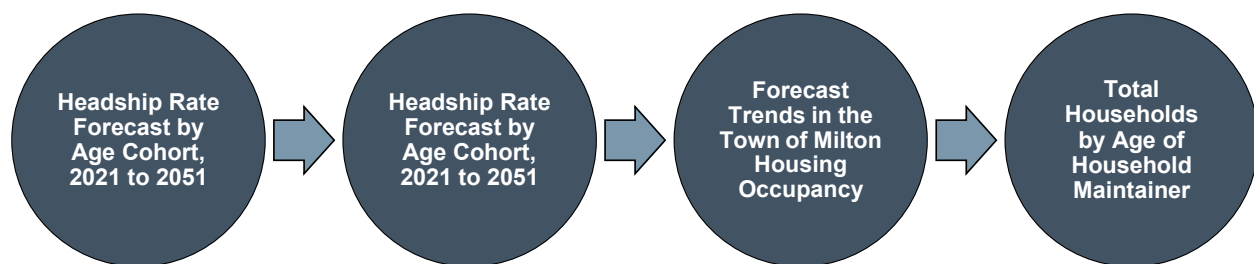


years (to generate new births). To this total, an estimated rate of net migration is added (in-migration to the municipality, less out-migration, by age group).

Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy. Total housing growth is generated from the population forecast by major age group using a headship rate forecast.

A headship rate is defined as the number of primary household maintainers or heads of households by major population age group (i.e., cohort). Average headship rates do not tend to vary significantly over time by major age group; however, the number of maintainers per household varies by population age group. For example, the ratio of household maintainers per total housing occupants is higher on average for households occupied by older cohorts (i.e., 55+ years of age) as opposed to households occupied by adults 29 to 54 years of age. This is important because, as the Town of Milton's population ages, the ratio of household maintainers is anticipated to increase. The average headship rate represents the inverse of the average number of persons per unit (P.P.U.). As such, as the Town's population ages over time, the average P.P.U. is forecast to steadily decline as the ratio of household maintainers per total housing occupants increases. Figure A-1 summarizes the cohort-survival forecast methodology, which is a provincially accepted approach to projecting population and the corresponding total household formation.^[71]

Figure A-1
Cohort-Survival Population and Household Forecast Methodology



[71] Projection Methodology Guideline. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements, 1995.



This forecasting approach has been developed in accordance with the Ontario Provincial Projection Methodology Guidelines and industry best practices.^[72] This approach focuses on the rate of historical housing construction in the Town of Milton and the surrounding area, adjusted to incorporate supply and demand factors by geographic area, such as servicing constraints, housing units in the development process, and historical housing demand. Population is then forecast by developing assumptions on average household size by unit type, taking into consideration the higher average occupancy of new housing units and the decline in P.P.U. over time within existing households.

A.3 Employment Forecast

The long-term employment growth potential for the Town of Milton has been developed from the labour force growth forecast, which considers both the rate and age structure of forecast labour force growth over the 2021 to 2051 planning horizon. A long-term employment growth forecast by major employment sector/category (i.e., primary, industrial, commercial, institutional, work at home) was then established using the employment “activity rate” method.^[73]

When forecasting long-term employment, it is important to understand how employment growth in the Town of Milton by major employment category (i.e., industrial, commercial and institutional) is impacted by forecast labour force and population growth. Population-related employment (i.e., retail, schools, services, and commercial) is generally automatically attracted to locations convenient to residents. Typically, as the population grows, the demand for population-related employment also increases, to service the needs of the local community. Forecast commercial and institutional activity rates have been based on historical activity rates and employment trends, and future commercial and institutional employment prospects within a local and regional context. Similar to population-related employment, home-based employment is also anticipated to generally increase in proportion to population growth.^[74]

[72] Projection Methodology Guideline. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements, 1995.

[73] An employment activity rate is defined as the number of jobs in a municipality divided by the number of residents.

[74] Due to further advancements in telecommunications technology, it is anticipated that home-based employment activity rates may increase over the forecast period for the Town.



Industrial and office commercial employment (export-based employment), on the other hand, is not closely linked to population growth. This type of employment tends to be more influenced by broader market conditions (i.e., economic competitiveness, transportation access, access to labour, and distance to employment markets) and local site characteristics such as servicing capacity, highway access and exposure, site size/ configuration, physical conditions, and site location within existing and future Employment Areas throughout Milton and the surrounding market area. As such, industrial employment (employment lands employment) is not anticipated to increase in direct proportion to population growth and has been based on a review of the following:

- Macro-economic trends influencing industrial and employment lands development (i.e., industrial and office employment) within Milton and the surrounding market area);
- Historical employment trends (i.e., review of established and emerging employment clusters), non-residential construction activity, and recent employment land absorption rates; and
- The availability of serviced industrial and employment land supply (i.e., shovel-ready industrial and employment lands) and future planned greenfield development opportunities on vacant designated industrial and employment lands within Milton and the surrounding market area.



Appendix B

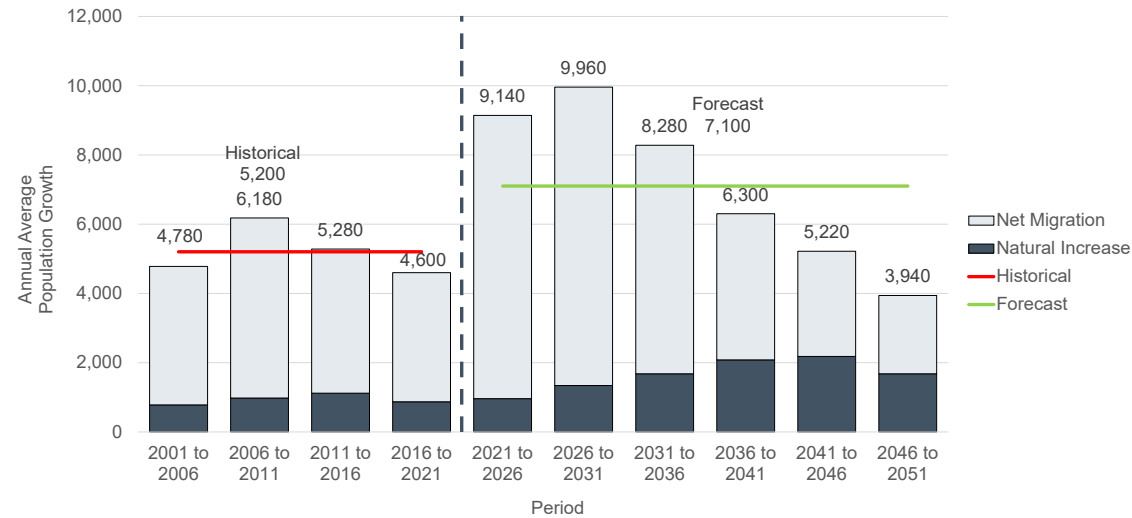
Components of Population Growth



Appendix B: Components of Population Growth

Low Scenario

Figure B-1
Town of Milton
Components of Population Growth, 2001 to 2051



	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
Natural Increase	780	980	1,120	860	960	1,340	1,680	2,080	2,180	1,680
Net Migration	4,000	5,200	4,160	3,740	8,180	8,620	6,600	4,220	3,040	2,260
Population Growth	4,780	6,180	5,280	4,600	9,140	9,960	8,280	6,300	5,220	3,940

Note: Figures have been rounded and may not add up precisely. Population figures include net Census undercount.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure B-2
Town of Milton
Net Migration by Age Cohort, 2006 to 2051

Cohort	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	7,200	6,000	5,400	16,100	17,500	14,000	9,300	6,600	4,200
20-34	8,600	5,900	6,600	11,300	10,900	7,100	4,600	3,100	2,300
35-44	5,300	3,600	4,100	9,000	10,300	8,700	5,700	4,400	3,800
45-54	2,200	2,000	1,000	1,900	1,900	1,300	700	500	400
55-74	2,000	2,200	1,200	2,000	1,900	1,300	700	500	300
75+	600	1,100	1,000	800	600	500	300	200	300
Total	25,900	20,900	19,200	40,900	43,100	32,900	21,100	15,200	11,300

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure B-3
Town of Milton
Share of Net Migration by Age Cohort, 2006 to 2051

Cohort	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	28%	29%	28%	39%	41%	43%	44%	43%	38%
20-34	33%	28%	34%	27%	25%	21%	22%	20%	20%
35-44	20%	17%	21%	22%	24%	26%	27%	29%	34%
45-54	8%	10%	5%	5%	4%	4%	3%	3%	3%
55-74	8%	11%	6%	5%	4%	4%	3%	3%	3%
75+	2%	5%	5%	2%	1%	2%	1%	1%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure B-4
Town of Milton
Population by Age Cohort, 2006 to 2051

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	14,900	25,800	35,400	42,300	56,400	68,100	74,700	77,700	80,400	80,400
20-34	14,400	20,000	21,000	24,800	34,500	47,700	59,500	68,400	71,200	70,400
35-44	9,900	16,600	22,500	24,900	32,100	39,700	43,100	43,400	47,200	52,600
45-54	7,300	10,600	15,000	20,000	26,700	33,400	40,600	46,200	47,200	46,600
55-64	5,400	7,700	9,600	12,000	16,300	22,300	28,400	34,000	40,500	45,400
65-74	2,500	4,000	6,600	8,300	9,700	12,200	16,100	21,200	26,700	32,200
75+	2,000	2,500	3,600	5,000	6,900	8,800	10,700	13,300	17,400	23,200
Total	56,500	87,300	113,800	137,300	182,700	232,100	273,100	304,300	330,500	350,900

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure B-5
Town of Milton
Share of Population by Age Cohort, 2006 to 2051

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	26%	30%	31%	31%	31%	29%	27%	26%	24%	23%
20-34	26%	23%	18%	18%	19%	21%	22%	22%	22%	20%
35-44	17%	19%	20%	18%	18%	17%	16%	14%	14%	15%
45-54	13%	12%	13%	15%	15%	14%	15%	15%	14%	13%
55-64	10%	9%	8%	9%	9%	10%	10%	11%	12%	13%
65-74	4%	5%	6%	6%	5%	5%	6%	7%	8%	9%
75+	4%	3%	3%	4%	4%	4%	4%	4%	5%	7%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

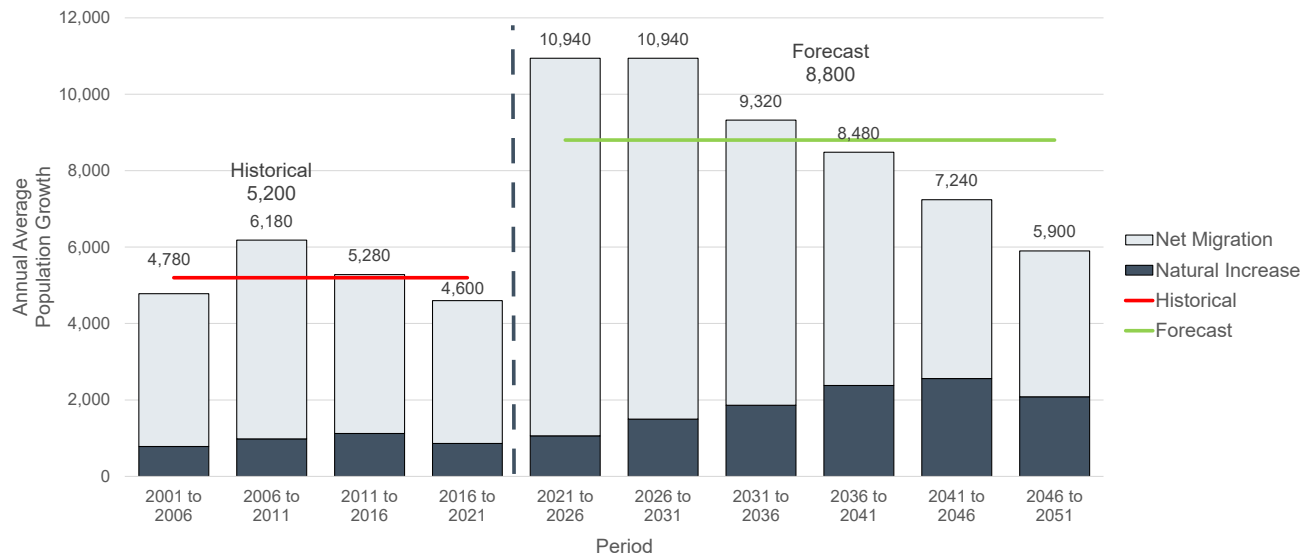
Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Reference Scenario

Figure B-6
Town of Milton
Components of Population Growth, 2001 to 2051



	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
Natural Increase	780	980	1,120	860	1,060	1,500	1,860	2,380	2,560	2,080
Net Migration	4,000	5,200	4,160	3,740	9,880	9,440	7,460	6,100	4,680	3,820
Population Growth	4,780	6,180	5,280	4,600	10,940	10,940	9,320	8,480	7,240	5,900

Note: Figures have been rounded and may not add up precisely. Population figures include net Census undercount.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure B-7
Town of Milton
Net Migration by Age Cohort, 2006 to 2051

Cohort	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	7,200	6,000	5,400	19,400	19,200	15,900	13,300	10,100	7,300
20-34	8,600	5,900	6,600	13,500	11,900	8,000	6,600	4,700	3,900
35-44	5,300	3,600	4,100	10,900	11,200	9,800	8,200	6,700	6,400
45-54	2,200	2,000	1,000	2,300	2,100	1,500	1,000	700	600
55-74	2,000	2,200	1,200	2,400	2,100	1,500	1,000	700	600
75+	600	1,100	1,000	1,000	700	600	400	300	500
Total	25,900	20,900	19,200	49,500	47,200	37,200	30,400	23,300	19,100

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure B-8
Town of Milton
Share of Net Migration by Age Cohort, 2006 to 2051

Cohort	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	28%	29%	28%	39%	41%	43%	44%	43%	38%
20-34	33%	28%	34%	27%	25%	21%	22%	20%	20%
35-44	20%	17%	21%	22%	24%	26%	27%	29%	34%
45-54	8%	10%	5%	5%	4%	4%	3%	3%	3%
55-74	8%	11%	6%	5%	4%	4%	3%	3%	3%
75+	2%	5%	5%	2%	1%	2%	1%	1%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure B-9
Town of Milton
Population by Age Cohort, 2006 to 2051

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	14,900	25,800	35,400	42,300	59,900	73,200	81,100	87,700	93,100	94,500
20-34	14,400	20,000	21,000	24,800	36,500	50,500	63,500	75,000	79,900	81,400
35-44	9,900	16,600	22,500	24,900	34,200	43,200	47,000	48,800	54,300	61,800
45-54	7,300	10,600	15,000	20,000	27,300	34,900	43,600	51,000	53,300	54,000
55-64	5,400	7,700	9,600	12,000	16,600	22,700	29,300	35,800	44,000	50,300
65-74	2,500	4,000	6,600	8,300	9,900	12,400	16,500	21,900	27,600	34,300
75+	2,000	2,500	3,600	5,000	7,100	9,000	11,000	13,800	18,000	24,200
Total	56,500	87,300	113,800	137,300	191,600	245,900	292,000	333,900	370,200	400,400

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure B-10
Town of Milton
Share of Population by Age Cohort, 2006 to 2051

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	26%	30%	31%	31%	31%	30%	28%	26%	25%	24%
20-34	26%	23%	18%	18%	19%	21%	22%	22%	22%	20%
35-44	17%	19%	20%	18%	18%	18%	16%	15%	15%	15%
45-54	13%	12%	13%	15%	14%	14%	15%	15%	14%	13%
55-64	10%	9%	8%	9%	9%	9%	10%	11%	12%	13%
65-74	4%	5%	6%	6%	5%	5%	6%	7%	7%	9%
75+	4%	3%	3%	4%	4%	4%	4%	4%	5%	6%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

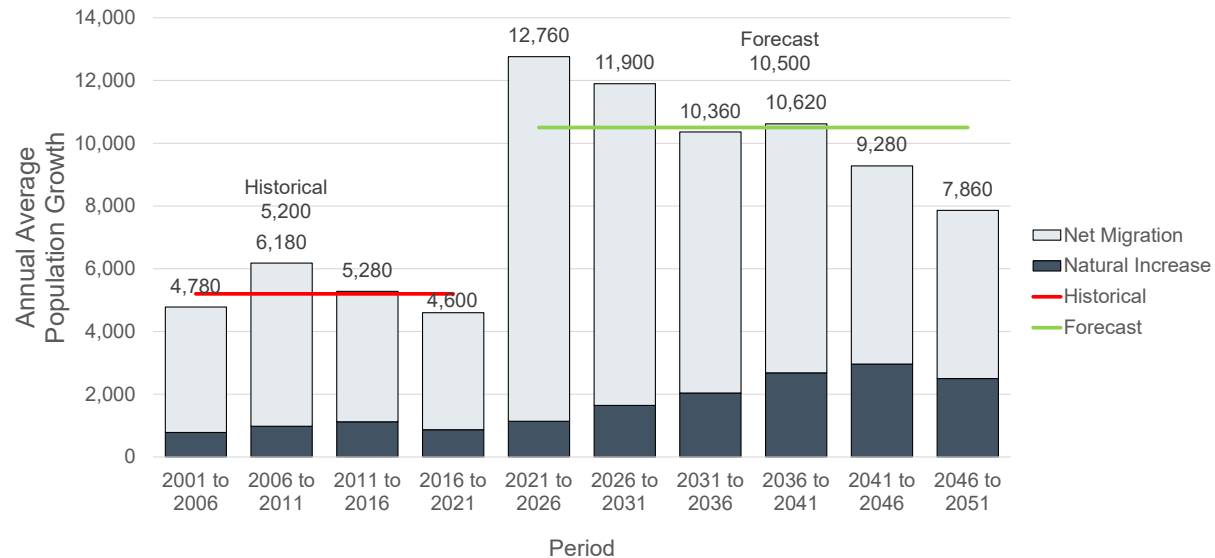
Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



High Scenario

Figure B-11
Town of Milton
Components of Population Growth, 2001 to 2051



	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
Natural Increase	780	980	1,120	860	1,140	1,640	2,040	2,680	2,960	2,500
Net Migration	4,000	5,200	4,160	3,740	11,620	10,260	8,320	7,940	6,320	5,360
Population Growth	4,780	6,180	5,280	4,600	12,760	11,900	10,360	10,620	9,280	7,860

Note: Figures have been rounded and may not add up precisely. Population figures include net Census undercount.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure B-12
Town of Milton
Net Migration by Age Cohort, 2006 to 2051

Cohort	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	7,200	6,000	5,400	22,800	20,800	17,700	17,400	13,700	10,100
20-34	8,600	5,900	6,600	15,900	13,000	8,900	8,700	6,400	5,400
35-44	5,300	3,600	4,100	12,800	12,200	11,000	10,700	9,100	9,000
45-54	2,200	2,000	1,000	2,700	2,200	1,600	1,300	1,000	700
55-74	2,000	2,200	1,200	2,800	2,200	1,600	1,200	1,000	700
75+	600	1,100	1,000	1,200	800	700	500	400	700
Total	25,900	20,900	19,200	58,100	51,300	41,500	39,700	31,600	26,800

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure B-13
Town of Milton
Share of Net Migration by Age Cohort, 2006 to 2051

Cohort	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	28%	29%	28%	39%	41%	43%	44%	43%	38%
20-34	33%	28%	34%	27%	25%	21%	22%	20%	20%
35-44	20%	17%	21%	22%	24%	26%	27%	29%	34%
45-54	8%	10%	5%	5%	4%	4%	3%	3%	3%
55-74	8%	11%	6%	5%	4%	4%	3%	3%	3%
75+	2%	5%	5%	2%	1%	2%	1%	1%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure B-14
Town of Milton
Population by Age Cohort, 2006 to 2051

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	14,900	25,800	35,400	42,300	63,500	78,300	87,400	97,600	105,900	108,600
20-34	14,400	20,000	21,000	24,800	38,600	53,200	67,600	81,700	88,600	92,400
35-44	9,900	16,600	22,500	24,900	36,400	46,600	50,900	54,200	61,500	70,900
45-54	7,300	10,600	15,000	20,000	27,900	36,500	46,700	55,700	59,300	61,400
55-64	5,400	7,700	9,600	12,000	16,800	23,200	30,100	37,700	47,500	55,100
65-74	2,500	4,000	6,600	8,300	10,100	12,600	16,900	22,500	28,600	36,400
75+	2,000	2,500	3,600	5,000	7,300	9,200	11,300	14,200	18,600	25,100
Total	56,500	87,300	113,800	137,300	200,500	259,600	310,900	363,500	409,900	449,900

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure B-15
Town of Milton
Share of Population by Age Cohort, 2006 to 2051

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	26%	30%	31%	31%	31%	30%	28%	26%	25%	24%
20-34	26%	23%	18%	18%	19%	21%	22%	22%	22%	20%
35-44	17%	19%	20%	18%	18%	18%	16%	15%	15%	15%
45-54	13%	12%	13%	15%	14%	14%	15%	15%	14%	13%
55-64	10%	9%	8%	9%	9%	9%	10%	11%	12%	13%
65-74	4%	5%	6%	6%	5%	5%	6%	7%	7%	9%
75+	4%	3%	3%	4%	4%	4%	4%	4%	5%	6%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table: 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Appendix C

Persons Per Unit



Appendix C: Persons Per Unit

Figure C-1
Town of Milton
Persons Per Unit

Age of Dwelling	Singles and Semi-Detached						25 Year Adjusted Average
	< 1 BR	1 BR	2 BR	3/4 BR	5+ BR	Total	
1-5			3.294	3.740	4.936	3.881	
6-10			3.050	3.848	5.276	4.043	
11-15			2.895	3.854	5.023	4.002	
16-20			2.129	3.493	5.219	3.622	3.825
20-25				3.379	4.133	3.367	
25-35				3.378		3.426	
35+		1.667	2.102	2.809	4.050	2.874	
Total	4.250	2.814	2.397	3.480	4.843	3.602	

Age of Dwelling	Medium Density						25 Year Adjusted Average
	< 1 BR	1 BR	2 BR	3/4 BR	5+ BR	Total	
1-5		1.722	2.482	3.241		3.050	
6-10			2.345	3.340		3.102	
11-15			2.317	3.210		3.021	
16-20			2.278	3.090		3.039	3.049
20-25				3.093		3.146	
25-35							
35+		1.250	2.714	2.810		2.720	
Total	1.267	1.744	2.395	3.163	4.806	3.011	

Age of Dwelling	High Density						25 Year Adjusted Average
	< 1 BR	1 BR	2 BR	3/4 BR	5+ BR	Total	
1-5	1.182	1.460	1.981	2.773		1.840	
6-10		1.376	1.877	2.762		1.729	
11-15		1.251	1.691	2.304		1.563	
16-20		1.386	1.683	3.160		1.673	1.744
20-25		1.402	1.736	2.481		1.694	
25-35		1.372	1.861	2.512		1.746	
35+	1.125	1.282	1.806	2.502		1.688	
Total	1.136	1.332	1.818	2.574		1.708	

Note: High Density P.P.U.s are based on Halton Region data. lo

Source: Statistics Canada custom order data, summarized by Watson & Associates Economists Ltd.



Appendix D

Headship Rates



Appendix D: Headship Rates

Low Scenario

Figure D-1
Town of Milton
Headship Rates, 2006 to 2051

Age Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
15-24	0.32662	0.01958	0.01370	0.00813	0.00813	0.00813	0.00813	0.00813	0.00813	0.00813
25-34	0.38385	0.37155	0.32508	0.27172	0.27172	0.27172	0.27172	0.27172	0.27172	0.27172
35-44	0.47182	0.49662	0.47537	0.46442	0.46442	0.46442	0.46442	0.46442	0.46442	0.46442
45-54	0.53761	0.54342	0.55757	0.54102	0.54102	0.54102	0.54102	0.54102	0.54102	0.54102
55-64	0.54588	0.51987	0.52175	0.53630	0.53630	0.53630	0.53630	0.53630	0.53630	0.53630
65-74	0.52652	0.51925	0.48834	0.48363	0.48363	0.48363	0.48363	0.48363	0.48363	0.48363
75+	0.54390	0.54410	0.47265	0.45742	0.45742	0.45742	0.45742	0.45742	0.45742	0.45742
Total	0.32662	0.31568	0.30107	0.29156	0.28658	0.28717	0.29460	0.30352	0.31331	0.32400

Source: 2006 to 2021 derived from Statistics Canada data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Reference Scenario

Figure D-2
Town of Milton
Headship Rates, 2006 to 2051

Age Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
15-24	0.32662	0.01958	0.01370	0.00813	0.00813	0.00813	0.00813	0.00813	0.00813	0.00813
25-34	0.38385	0.37155	0.32508	0.27172	0.27172	0.27172	0.27172	0.27172	0.27172	0.27172
35-44	0.47182	0.49662	0.47537	0.46442	0.46442	0.46442	0.46442	0.46442	0.46442	0.46442
45-54	0.53761	0.54342	0.55757	0.54102	0.54102	0.54102	0.54102	0.54102	0.54102	0.54102
55-64	0.54588	0.51987	0.52175	0.53630	0.53630	0.53630	0.53630	0.53630	0.53630	0.53630
65-74	0.52652	0.51925	0.48834	0.48363	0.48363	0.48363	0.48363	0.48363	0.48363	0.48363
75+	0.54390	0.54410	0.47265	0.45742	0.45742	0.45742	0.45742	0.45742	0.45742	0.45742
Total	0.32662	0.31568	0.30107	0.29156	0.28406	0.28483	0.29237	0.29987	0.30881	0.31948

Source: 2006 to 2021 derived from Statistics Canada data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



High Scenario

Figure D-3
Town of Milton
Headship Rates, 2006 to 2051

Age Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
15-24	0.32662	0.01958	0.01370	0.00813	0.00813	0.00813	0.00813	0.00813	0.00813	0.00813
25-34	0.38385	0.37155	0.32508	0.27172	0.27172	0.27172	0.27172	0.27172	0.27172	0.27172
35-44	0.47182	0.49662	0.47537	0.46442	0.46442	0.46442	0.46442	0.46442	0.46442	0.46442
45-54	0.53761	0.54342	0.55757	0.54102	0.54102	0.54102	0.54102	0.54102	0.54102	0.54102
55-64	0.54588	0.51987	0.52175	0.53630	0.53630	0.53630	0.53630	0.53630	0.53630	0.53630
65-74	0.52652	0.51925	0.48834	0.48363	0.48363	0.48363	0.48363	0.48363	0.48363	0.48363
75+	0.54390	0.54410	0.47265	0.45742	0.45742	0.45742	0.45742	0.45742	0.45742	0.45742
Total	0.32662	0.31568	0.30107	0.29156	0.28178	0.28274	0.29041	0.29686	0.30517	0.31601

Source: 2006 to 2021 derived from Statistics Canada data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Appendix E

Town-Wide Housing Units in Active Development Approvals/Secondary Planning Process



Appendix E: Town-Wide Housing Units in Active Development Approvals/ Secondary Planning Process

Figure E-1
Town of Milton
Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	200	229	1,434	1,863
Draft Approved	2,135	1,225	211	3,571
Proposed	12,336	21,754	18,332	52,422
Vacant Designated Lands	10,309	10,412	9,313	30,034
Total	24,980	33,620	29,290	87,890

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30, 2023, summarized by Watson & Associates Economists Ltd.

Figure E-2
Town of Milton
Developed/Developing Community Area Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	200	229	1,434	1,863
Draft Approved	2,135	1,225	211	3,571
Proposed	1,615	1,464	6,161	9,240
Vacant Designated Lands	1,915	1,590	8,783	12,288
Total	5,865	4,508	16,589	26,962

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30, 2023, summarized by Watson & Associates Economists Ltd.



Figure E-3
Town of Milton
Vacant Community Area Housing Units in Secondary/Tertiary Planning Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	0	0	0	0
Vacant Designated Lands	10,715	20,290	12,171	43,176
Total	10,715	20,290	12,171	43,176

[1] Includes single and semi-detached dwellings.

[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30,2023, summarized by Watson & Associates Economists Ltd.

Figure E-4
Town of Milton
Rural Area Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	270	0	0	270
Total	270	0	0	270

[1] Includes single and semi-detached dwellings.

[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30,2023, summarized by Watson & Associates Economists Ltd.



Figure E-5
Town of Milton
Old Milton West Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	0	0	649	649
Vacant Designated Lands	50	0	171	221
Total	50	0	820	870

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30, 2023, summarized by Watson & Associates Economists Ltd.

Figure E-6
Town of Milton
Old Milton East Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered				0
Draft Approved				0
Proposed			150	150
Vacant Designated Lands				0
Total	0	0	150	150

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30, 2023, summarized by Watson & Associates Economists Ltd.



Figure E-7
Town of Milton
Old Milton North Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered				0
Draft Approved				0
Proposed	20	0	280	300
Vacant Designated Land				0
Total	20	0	280	300

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30,2023, summarized by Watson & Associates Economists Ltd.

Figure E-8
Town of Milton
Bristol Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	10	0	0	10
Draft Approved	14	0	211	225
Proposed	0	14	424	438
Vacant Designated Lands	176	91	875	1,142
Total	200	105	1,510	1,815

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30,2023, summarized by Watson & Associates Economists Ltd.



Figure E-9
Town of Milton
Sherwood Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	0	121	598	719
Vacant Designated Lands	30	102	92	224
Total	30	223	690	943

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30,2023, summarized by Watson & Associates Economists Ltd.

Figure E-10
Town of Milton
Boyne Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	190	229	1,434	1,853
Draft Approved	2,000	984		2,984
Proposed	1,301	1,051		2,352
Vacant Designated Lands	1,494	1,226	748	3,468
Total	4,985	3,490	2,182	10,657

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30,2023, summarized by Watson & Associates Economists Ltd.



Figure E-11
Town of Milton
Milton Heights Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	121	241	0	362
Proposed	294	278	0	572
Vacant Designated Lands	165	171	50	386
Total	580	690	50	1,320

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30, 2023, summarized by Watson & Associates Economists Ltd.

Figure E-12
Town of Milton
Britannia Housing Units in Active Secondary Planning Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	0	0	0	0
Vacant Designated Lands	6,740	8,620	1,425	16,785
Total	6,740	8,620	1,425	16,785

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30, 2023, summarized by Watson & Associates Economists Ltd.



Figure E-13
Town of Milton
Trafalgar Housing Units in Active Secondary Planning Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	0	0	0	0
Vacant Designated Lands	3,830	7,250	1,597	12,677
Total	3,830	7,250	1,597	12,677

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30,2023, summarized by Watson & Associates Economists Ltd.

Figure E-14
Town of Milton
Milton Education Village Housing Units in Active Secondary Planning Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	0	0	0	0
Vacant Designated Lands	145	2,590	1,718	4,453
Total	145	2,590	1,718	4,453

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30,2023, summarized by Watson & Associates Economists Ltd.



Figure E-15
Town of Milton
Milton U.G.C./M.T.S.A. Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	0	0	4,060	4,060
Vacant Designated Lands	0	0	4,307	4,307
Total	0	0	8,367	8,367

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30,2023, summarized by Watson & Associates Economists Ltd.

Figure E-16
Town of Milton
Trafalgar M.T.S.A. Housing Units in Active Secondary Planning Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	0	0	0	0
Vacant Designated Lands		1,650	4,921	6,571
Total		1,650	4,921	6,571

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30,2023, summarized by Watson & Associates Economists Ltd.



Figure E-17
Town of Milton
Bronte-Main-Meritor Housing Units in Active Development Approvals Process

	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Registered	0	0	0	0
Draft Approved	0	0	0	0
Proposed	0	0	0	0
Vacant Designated Lands	0	0	2,540	2,540
Total	0	0	2,540	2,540

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data provided by the Town of Milton Development Finance Department as of April 30, 2023, summarized by Watson & Associates Economists Ltd.



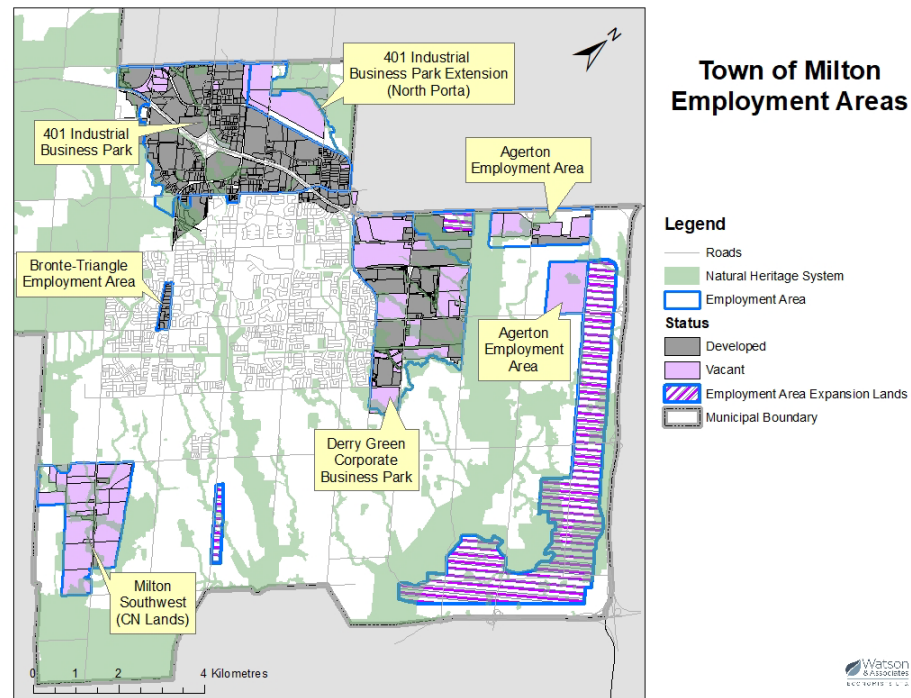
Appendix F

Town-Wide Inventory of Employment Area Land Supply



Appendix F: Town-Wide Inventory of Employment Area Land Supply

Figure F-1
Town of Milton
Employment Area Land Supply



Note: Developed employment lands include lands that have an existing building on site or have a building permit issued on or before June 30, 2023.



Appendix G

Town-Wide Population, Housing and Employment Scenarios



Appendix G: Town-wide Population, Housing, and Employment Scenarios

R.O.P.A. 49 (Low Scenario)

Figure G-1
Town of Milton
Population and Housing Summary – Low Scenario

	Year	Population (including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.) without undercount	
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Accessory Units ^[5]	Other			Total Households
Historical	Mid-2001	33,200	31,500	600	30,900	7,860	1,300	1,470		50	10,680	3.106	2.948
	Mid-2006	56,500	53,900	700	53,200	13,910	3,030	1,470		50	18,450	3.065	2.924
	Mid-2011	87,300	84,400	800	83,600	20,350	5,390	1,790		40	27,560	3.168	3.061
	Mid-2016	113,800	110,100	1,400	108,700	23,410	7,520	2,800		30	34,270	3.320	3.213
	Mid-2021	137,300	133,000	1,500	131,400	26,470	9,440	3,220	890	20	40,030	3.430	3.322
Forecast	Mid-2026	182,700	176,900	2,100	174,800	30,760	13,580	6,200	1,780	20	52,340	3.490	3.379
	Mid-2031	232,100	224,700	2,600	222,100	35,490	18,730	9,740	2,680	20	66,650	3.482	3.372
	Mid-2036	273,100	264,500	3,100	261,400	39,630	23,840	13,400	3,570	20	80,450	3.395	3.287
	Mid-2041	304,300	294,700	3,400	291,200	42,720	28,480	16,670	4,470	20	92,360	3.295	3.190
	Mid-2046	330,500	320,000	3,700	316,300	45,410	33,070	19,690	5,360	20	103,550	3.192	3.091
Mid-2051	350,900	339,800	4,000	335,800	47,640	37,330	22,430	6,270	20	113,680	3.086	2.989	
Incremental	Mid-2001 to Mid-2006	23,300	22,400	100	22,300	6,050	1,730	0	0	0	7,770		
	Mid-2006 to Mid-2011	30,800	30,500	100	30,400	6,440	2,360	320	0	-10	9,110		
	Mid-2011 to Mid-2016	26,500	25,700	600	25,100	3,060	2,130	1,010	0	-10	6,710		
	Mid-2016 to Mid-2021	23,500	22,900	100	22,700	3,060	1,920	420	890	-10	5,760		
	Mid-2021 to Mid-2026	45,400	43,900	600	43,400	4,290	4,140	2,980	890	0	12,310		
	Mid-2021 to Mid-2031	94,800	91,700	1,100	90,700	9,020	9,290	6,520	1,790	0	26,620		
	Mid-2021 to Mid-2036	135,800	131,500	1,600	130,000	13,160	14,400	10,180	2,680	0	40,420		
	Mid-2021 to Mid-2041	167,000	161,700	1,900	159,800	16,250	19,040	13,450	3,580	0	52,330		
	Mid-2021 to Mid-2046	193,200	187,000	2,200	184,900	18,940	23,630	16,470	4,470	0	63,520		
Mid-2021 to Mid-2051	213,600	206,800	2,500	204,400	21,170	27,890	19,210	5,380	0	73,650			

[1] Population includes net Census undercount.

[2] Includes single detached and semi-detached dwellings.

[3] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

[4] Includes stacked townhouses, and bachelor, 1-bedroom, and 2-bedroom+ apartment units.

[5] Secondary suites includes self-contained living accommodations such as apartments and small residential units that are located on a property that have a separate main residential unit.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure G-2
Town of Milton
Employment Summary (Activity Rates) – Low Scenario

Period	Population Including Undercount ^[1]	Activity Rate								Total Including N.F.P.O.W.
		Primary	Work at Home	Industrial	Retail	Non-Retail Commercial	Institutional	Total	N.F.P.O.W. ^[2]	
Mid-2001	33,200	0.023	0.045	0.250	0.141	0.046	0.103	0.608	0.044	0.653
Mid-2006	56,500	0.013	0.043	0.169	0.109	0.031	0.072	0.438	0.037	0.475
Mid-2011	87,300	0.007	0.037	0.102	0.085	0.027	0.067	0.324	0.034	0.358
Mid-2016	113,800	0.006	0.038	0.093	0.078	0.023	0.068	0.306	0.036	0.342
Mid-2021	137,300	0.005	0.047	0.099	0.074	0.022	0.064	0.312	0.036	0.348
Mid-2026	182,700	0.004	0.048	0.101	0.065	0.018	0.054	0.292	0.039	0.330
Mid-2031	232,100	0.003	0.049	0.101	0.069	0.022	0.053	0.298	0.042	0.339
Mid-2036	273,100	0.003	0.049	0.101	0.076	0.026	0.051	0.307	0.044	0.351
Mid-2041	304,300	0.003	0.050	0.101	0.082	0.031	0.050	0.317	0.046	0.363
Mid-2046	330,500	0.002	0.050	0.101	0.087	0.036	0.050	0.328	0.048	0.376
Mid-2051	350,900	0.002	0.051	0.100	0.092	0.042	0.050	0.338	0.050	0.388
Incremental Change										
Mid-2001 to Mid-2006	23,400	-0.010	-0.002	-0.081	-0.032	-0.015	-0.032	-0.171	-0.0069	-0.1774
Mid-2006 to Mid-2011	30,800	-0.007	-0.006	-0.067	-0.025	-0.003	-0.005	-0.113	-0.004	-0.117
Mid-2011 to Mid-2016	26,500	-0.001	0.001	-0.008	-0.006	-0.004	0.000	-0.018	0.003	-0.016
Mid-2016 to Mid-2021	23,500	-0.001	0.009	0.005	-0.004	-0.001	-0.003	0.006	0.000	0.005
Mid-2021 to Mid-2026	45,300	-0.001	0.001	0.002	-0.009	-0.004	-0.010	-0.020	-0.001	0.001
Mid-2021 to Mid-2031	94,800	-0.002	0.002	0.003	-0.005	0.000	-0.011	-0.014	-0.002	0.002
Mid-2021 to Mid-2036	135,800	-0.002	0.002	0.003	0.002	0.004	-0.013	-0.005	-0.002	0.002
Mid-2021 to Mid-2041	167,000	-0.003	0.003	0.002	0.008	0.009	-0.014	0.005	-0.003	0.003
Mid-2021 to Mid-2046	193,200	-0.003	0.003	0.002	0.013	0.014	-0.014	0.016	-0.003	0.003
Mid-2021 to Mid-2051	213,600	-0.003	0.004	0.002	0.018	0.020	-0.014	0.026	-0.003	0.004
Annual Average										
Mid-2001 to Mid-2006	4,680	-0.002	0.000	-0.016	-0.006	-0.003	-0.006	-0.034	-0.001	-0.035
Mid-2006 to Mid-2011	6,160	-0.001	-0.001	-0.013	-0.005	-0.001	-0.001	-0.023	-0.001	-0.023
Mid-2011 to Mid-2016	5,300	0.000	0.000	-0.002	-0.001	-0.001	0.000	-0.004	0.001	-0.003
Mid-2016 to Mid-2021	4,700	0.000	0.002	0.001	-0.001	0.000	-0.001	0.001	0.000	0.001
Mid-2021 to Mid-2026	9,060	0.000	0.000	0.000	-0.002	-0.001	-0.002	-0.004	0.001	-0.003
Mid-2021 to Mid-2031	9,480	0.000	0.000	0.000	0.000	0.000	-0.001	-0.001	0.001	-0.001
Mid-2021 to Mid-2036	9,053	0.000	0.000	0.000	0.000	0.000	-0.001	0.000	0.001	0.000
Mid-2021 to Mid-2041	8,350	0.000	0.000	0.000	0.000	0.000	-0.001	0.000	0.001	0.001
Mid-2021 to Mid-2046	7,728	0.000	0.000	0.000	0.001	0.001	-0.001	0.001	0.000	0.001
Mid-2021 to Mid-2051	7,120	0.000	0.000	0.000	0.001	0.001	0.000	0.001	0.000	0.001



Figure G-2 (Continued)
Town of Milton
Employment Summary – Low Scenario

Period	Population Including Undercount ^[1]	Employment							N.F.P.O.W. ^[2]	Total Including N.F.P.O.W.
		Primary	Work at Home	Industrial	Retail	Non-Retail Commercial	Institutional	Total		
Mid-2001	33,200	770	1,500	8,280	4,690	1,510	3,430	20,170	1,470	21,640
Mid-2006	56,500	760	2,450	9,550	6,190	1,740	4,070	24,750	2,110	26,860
Mid-2011	87,300	590	3,230	8,880	7,390	2,380	5,870	28,330	2,930	31,250
Mid-2016	113,800	650	4,320	10,620	8,890	2,650	7,700	34,820	4,140	38,960
Mid-2021	137,300	710	6,470	13,570	10,170	3,050	8,850	42,820	4,940	47,760
Mid-2026	182,700	730	8,840	18,500	11,930	3,370	9,920	53,290	7,080	60,360
Mid-2031	232,100	740	11,300	23,530	16,080	5,040	12,360	69,060	9,660	78,720
Mid-2036	273,100	760	13,490	27,710	20,720	7,170	14,020	83,860	11,910	95,770
Mid-2041	304,300	770	15,100	30,790	24,930	9,480	15,320	96,390	14,040	110,430
Mid-2046	330,500	790	16,640	33,380	28,840	12,000	16,610	108,260	16,000	124,260
Mid-2051	350,900	800	18,010	35,240	32,250	14,640	17,670	118,610	17,670	136,270
Incremental Change										
Mid-2001 to Mid-2006	23,400	-10	950	1,270	1,510	230	640	4,580	640	5,220
Mid-2006 to Mid-2011	30,800	-180	790	-680	1,200	640	1,810	3,580	820	4,390
Mid-2011 to Mid-2016	26,500	70	1,090	1,750	1,500	270	1,830	6,500	1,210	7,710
Mid-2016 to Mid-2021	23,500	60	2,150	2,950	1,290	400	1,150	8,000	800	8,800
Mid-2021 to Mid-2026	45,300	20	2,370	4,930	1,760	320	1,070	10,470	2,140	12,600
Mid-2021 to Mid-2031	94,800	30	4,830	9,960	5,910	1,990	3,510	26,240	4,720	30,960
Mid-2021 to Mid-2036	135,800	50	7,020	14,140	10,550	4,120	5,170	41,040	6,970	48,010
Mid-2021 to Mid-2041	167,000	60	8,630	17,220	14,760	6,430	6,470	53,570	9,100	62,670
Mid-2021 to Mid-2046	193,200	80	10,170	19,810	18,670	8,950	7,760	65,440	11,060	76,500
Mid-2021 to Mid-2051	213,600	90	11,540	21,670	22,080	11,590	8,820	75,790	12,730	88,510
Annual Average										
Mid-2001 to Mid-2006	4,680	-2	190	254	302	46	128	916	128	1,044
Mid-2006 to Mid-2011	6,160	-36	158	-136	240	128	362	716	164	878
Mid-2011 to Mid-2016	5,300	14	218	350	300	54	366	1,300	242	1,542
Mid-2016 to Mid-2021	4,700	12	430	590	258	80	230	1,600	160	1,760
Mid-2021 to Mid-2026	4,700	4	474	986	352	64	214	2,094	428	2,520
Mid-2021 to Mid-2031	9,060	3	483	996	591	199	351	2,624	472	3,096
Mid-2021 to Mid-2036	9,480	3	468	943	703	275	345	2,736	465	3,201
Mid-2021 to Mid-2041	9,053	3	432	861	738	322	324	2,679	455	3,134
Mid-2021 to Mid-2046	8,350	3	407	792	747	358	310	2,618	442	3,060
Mid-2021 to Mid-2051	7,728	3	385	722	736	386	294	2,526	424	2,950



Notes associated with Figure G-2

^[1] Population adjusted to account for net Census undercount.

^[2] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Source: Historical data derived from Statistics Canada Place of Work data; forecast prepared by Watson & Associates Economists Ltd.



Reference Scenario

Figure G-3
Town of Milton
Population and Housing Summary – Reference Scenario

	Year	Population (including Census undercount) ^[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.) without undercount	
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Accessory Units ^[5]	Other			Total Households
Historical	Mid-2001	33,200	31,500	600	30,900	7,860	1,300	1,470		50	10,680	3.106	2.948
	Mid-2006	56,500	53,900	700	53,200	13,910	3,030	1,470		50	18,450	3.065	2.924
	Mid-2011	87,300	84,400	800	83,600	20,350	5,390	1,790		40	27,560	3.168	3.061
	Mid-2016	113,800	110,100	1,400	108,700	23,410	7,520	2,800		30	34,270	3.320	3.213
	Mid-2021	137,300	133,000	1,500	131,400	26,470	9,440	3,220	890	20	40,030	3.430	3.322
Forecast	Mid-2026	191,600	185,500	2,200	183,300	31,490	14,310	6,670	1,940	20	54,420	3.520	3.409
	Mid-2031	245,900	238,100	2,800	235,300	36,640	19,930	10,460	2,990	20	70,030	3.511	3.400
	Mid-2036	292,000	282,800	3,300	279,500	41,240	25,760	14,320	4,040	20	85,370	3.420	3.312
	Mid-2041	333,900	323,400	3,800	319,600	45,080	31,520	18,430	5,090	20	100,140	3.335	3.229
	Mid-2046	370,200	358,500	4,200	354,300	48,490	37,330	22,350	6,140	20	114,320	3.238	3.136
	Mid-2051	400,400	387,700	4,500	383,200	51,480	43,040	26,190	7,190	20	127,920	3.130	3.031
Incremental	Mid-2001 to Mid-2006	23,300	22,400	100	22,300	6,050	1,730	0	0	0	7,770		
	Mid-2006 to Mid-2011	30,800	30,500	100	30,400	6,440	2,360	320	0	-10	9,110		
	Mid-2011 to Mid-2016	26,500	25,700	600	25,100	3,060	2,130	1,010	0	-10	6,710		
	Mid-2016 to Mid-2021	23,500	22,900	100	22,700	3,060	1,920	420	890	-10	5,760		
	Mid-2021 to Mid-2026	54,300	52,500	700	51,900	5,020	4,870	3,450	1,050	0	14,390		
	Mid-2021 to Mid-2031	108,600	105,100	1,300	103,900	10,170	10,490	7,240	2,100	0	30,000		
	Mid-2021 to Mid-2036	154,700	149,800	1,800	148,100	14,770	16,320	11,100	3,150	0	45,340		
	Mid-2021 to Mid-2041	196,600	190,400	2,300	188,200	18,610	22,080	15,210	4,200	0	60,110		
	Mid-2021 to Mid-2046	232,900	225,500	2,700	222,900	22,020	27,890	19,130	5,250	0	74,290		
	Mid-2021 to Mid-2051	263,100	254,700	3,000	251,800	25,010	33,600	22,970	6,300	0	87,890		

^[1] Population includes net Census undercount.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[4] Includes stacked townhouses, and bachelor, 1-bedroom, and 2-bedroom+ apartment units.

^[5] Secondary suites includes self-contained living accommodations such as apartments and small residential units that are located on a property that have a separate main residential unit.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure G-4
Town of Milton
Employment Summary (Activity Rates) – Reference Scenario

Period	Population Including Undercount ^[1]	Activity Rate								Total Including N.F.P.O.W.
		Primary	Work at Home	Industrial	Retail	Non-Retail Commercial	Institutional	Total	N.F.P.O.W. ^[2]	
Mid-2001	33,200	0.023	0.045	0.250	0.141	0.046	0.103	0.608	0.044	0.653
Mid-2006	56,500	0.013	0.043	0.169	0.109	0.031	0.072	0.438	0.037	0.475
Mid-2011	87,300	0.007	0.037	0.102	0.085	0.027	0.067	0.324	0.034	0.358
Mid-2016	113,800	0.006	0.038	0.093	0.078	0.023	0.068	0.306	0.036	0.342
Mid-2021	137,300	0.005	0.047	0.099	0.074	0.022	0.064	0.312	0.036	0.348
Mid-2026	191,600	0.004	0.052	0.101	0.071	0.018	0.058	0.305	0.039	0.344
Mid-2031	245,900	0.003	0.054	0.106	0.072	0.018	0.057	0.310	0.042	0.352
Mid-2036	292,000	0.003	0.055	0.109	0.076	0.019	0.054	0.315	0.045	0.360
Mid-2041	333,900	0.002	0.057	0.111	0.081	0.022	0.053	0.325	0.047	0.373
Mid-2046	370,200	0.002	0.057	0.111	0.084	0.026	0.052	0.332	0.050	0.382
Mid-2051	400,400	0.002	0.057	0.112	0.087	0.030	0.051	0.339	0.052	0.390
Incremental Change										
Mid-2001 to Mid-2006	23,400	-0.010	-0.002	-0.081	-0.032	-0.015	-0.032	-0.171	-0.0069	-0.1774
Mid-2006 to Mid-2011	30,800	-0.007	-0.006	-0.067	-0.025	-0.003	-0.005	-0.113	-0.004	-0.117
Mid-2011 to Mid-2016	26,500	-0.001	0.001	-0.008	-0.006	-0.004	0.000	-0.018	0.003	-0.016
Mid-2016 to Mid-2021	23,500	-0.001	0.009	0.005	-0.004	-0.001	-0.003	0.006	0.000	0.005
Mid-2021 to Mid-2026	54,300	-0.001	0.005	0.002	-0.003	-0.004	-0.006	-0.007	0.003	-0.004
Mid-2021 to Mid-2031	108,500	-0.002	0.006	0.007	-0.002	-0.004	-0.007	-0.002	0.006	0.004
Mid-2021 to Mid-2036	154,700	-0.003	0.008	0.010	0.002	-0.003	-0.011	0.003	0.009	0.012
Mid-2021 to Mid-2041	196,600	-0.003	0.009	0.012	0.007	0.000	-0.012	0.013	0.011	0.025
Mid-2021 to Mid-2046	232,900	-0.003	0.010	0.012	0.010	0.004	-0.013	0.020	0.014	0.034
Mid-2021 to Mid-2051	263,100	-0.003	0.010	0.013	0.013	0.007	-0.014	0.027	0.016	0.043
Annual Average										
Mid-2001 to Mid-2006	4,680	-0.002	0.000	-0.016	-0.006	-0.003	-0.006	-0.034	-0.001	-0.035
Mid-2006 to Mid-2011	6,160	-0.001	-0.001	-0.013	-0.005	-0.001	-0.001	-0.023	-0.001	-0.023
Mid-2011 to Mid-2016	5,300	0.000	0.000	-0.002	-0.001	-0.001	0.000	-0.004	0.001	-0.003
Mid-2016 to Mid-2021	4,700	0.000	0.002	0.001	-0.001	0.000	-0.001	0.001	0.000	0.001
Mid-2021 to Mid-2026	10,860	0.000	0.001	0.000	-0.001	-0.001	-0.001	-0.001	0.001	-0.001
Mid-2021 to Mid-2031	10,850	0.000	0.001	0.001	0.000	0.000	-0.001	0.000	0.001	0.000
Mid-2021 to Mid-2036	10,313	0.000	0.001	0.001	0.000	0.000	-0.001	0.000	0.001	0.001
Mid-2021 to Mid-2041	9,830	0.000	0.000	0.001	0.000	0.000	-0.001	0.001	0.001	0.001
Mid-2021 to Mid-2046	9,316	0.000	0.000	0.000	0.000	0.000	-0.001	0.001	0.001	0.001
Mid-2021 to Mid-2051	8,770	0.000	0.000	0.000	0.000	0.000	0.000	0.001	0.001	0.001



Figure G-4 (Continued)
Town of Milton
Employment Summary – Reference Scenario

Period	Population Including Undercount ^[1]	Employment							N.F.P.O.W. ^[2]	Total Including N.F.P.O.W.
		Primary	Work at Home	Industrial	Retail	Non-Retail Commercial	Institutional	Total		
Mid-2001	33,200	770	1,500	8,280	4,690	1,510	3,430	20,170	1,470	21,640
Mid-2006	56,500	760	2,450	9,550	6,190	1,740	4,070	24,750	2,110	26,860
Mid-2011	87,300	590	3,230	8,880	7,390	2,380	5,870	28,330	2,930	31,250
Mid-2016	113,800	650	4,320	10,620	8,890	2,650	7,700	34,820	4,140	38,960
Mid-2021	137,300	710	6,470	13,570	10,170	3,050	8,850	42,820	4,940	47,760
Mid-2026	191,600	730	9,910	19,400	13,620	3,540	11,210	58,390	7,420	65,810
Mid-2031	245,900	740	13,190	26,090	17,760	4,430	14,050	76,260	10,360	86,610
Mid-2036	292,000	760	16,120	31,720	22,150	5,670	15,660	92,070	13,120	105,190
Mid-2041	333,900	770	18,890	36,950	26,940	7,420	17,590	108,560	15,840	124,400
Mid-2046	370,200	790	21,150	40,960	31,080	9,740	19,140	122,850	18,420	141,280
Mid-2051	400,400	800	22,910	44,860	34,880	11,840	20,320	135,600	20,700	156,310
Incremental Change										
Mid-2001 to Mid-2006	23,400	-10	950	1,270	1,510	230	640	4,580	640	5,220
Mid-2006 to Mid-2011	30,800	-180	790	-680	1,200	640	1,810	3,580	820	4,390
Mid-2011 to Mid-2016	26,500	70	1,090	1,750	1,500	270	1,830	6,500	1,210	7,710
Mid-2016 to Mid-2021	23,500	60	2,150	2,950	1,290	400	1,150	8,000	800	8,800
Mid-2021 to Mid-2026	54,300	20	3,430	5,830	3,450	490	2,360	15,570	2,480	18,060
Mid-2021 to Mid-2031	108,500	30	6,720	12,520	7,590	1,380	5,200	33,430	5,420	38,850
Mid-2021 to Mid-2036	154,700	50	9,640	18,150	11,980	2,620	6,820	49,250	8,180	57,430
Mid-2021 to Mid-2041	196,600	60	12,410	23,380	16,770	4,370	8,740	65,740	10,910	76,640
Mid-2021 to Mid-2046	232,900	80	14,680	27,390	20,910	6,690	10,290	80,030	13,490	93,520
Mid-2021 to Mid-2051	263,100	90	16,440	31,290	24,710	8,790	11,470	92,780	15,770	108,550
Annual Average										
Mid-2001 to Mid-2006	4,680	-2	190	254	302	46	128	916	128	1,044
Mid-2006 to Mid-2011	6,160	-36	158	-136	240	128	362	716	164	878
Mid-2011 to Mid-2016	5,300	14	218	350	300	54	366	1,300	242	1,542
Mid-2016 to Mid-2021	4,700	12	430	590	258	80	230	1,600	160	1,760
Mid-2021 to Mid-2026	10,860	4	686	1,166	690	98	472	3,114	496	3,612
Mid-2021 to Mid-2031	10,850	3	672	1,252	759	138	520	3,343	542	3,885
Mid-2021 to Mid-2036	10,313	3	643	1,210	799	175	455	3,283	545	3,829
Mid-2021 to Mid-2041	9,830	3	621	1,169	839	219	437	3,287	546	3,832
Mid-2021 to Mid-2046	9,316	3	587	1,096	836	268	412	3,201	540	3,741
Mid-2021 to Mid-2051	8,770	3	548	1,043	824	293	382	3,093	526	3,618



Notes associated with Figure G-4

^[1] Population adjusted to account for net Census undercount.

^[2] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Source: Historical data derived from Statistics Canada Place of Work data; forecast prepared by Watson & Associates Economists Ltd.



High Scenario

Figure G-5
Town of Milton
Population and Housing Summary – High Scenario

	Year	Population (Including Census undercount) ^[1]	Excluding Census Undercount			Housing Units						Persons Per Unit (P.P.U.) with undercount	Persons Per Unit (P.P.U.) without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Low Density ^[2]	Medium Density ^[3]	High Density ^[4]	Accessory Units ^[5]	Other	Total Households		
Historical	Mid-2001	33,200	31,500	600	30,900	7,860	1,300	1,470		50	10,680	3.106	2.948
	Mid-2006	56,500	53,900	700	53,200	13,910	3,030	1,470		50	18,450	3.065	2.924
	Mid-2011	87,300	84,400	800	83,600	20,350	5,390	1,790		40	27,560	3.168	3.061
	Mid-2016	113,800	110,100	1,400	108,700	23,410	7,520	2,800		30	34,270	3.320	3.213
	Mid-2021	137,300	133,000	1,500	131,400	26,470	9,440	3,220	890	20	40,030	3.430	3.322
Forecast	Mid-2026	200,500	194,200	2,300	191,900	32,140	15,040	7,180	2,130	20	56,500	3.549	3.437
	Mid-2031	259,600	251,400	2,900	248,500	37,710	21,120	11,170	3,380	20	73,400	3.537	3.425
	Mid-2036	310,900	301,100	3,500	297,500	42,780	27,370	15,500	4,620	20	90,290	3.443	3.334
	Mid-2041	363,500	352,000	4,100	347,900	47,360	34,240	20,420	5,870	20	107,900	3.369	3.262
	Mid-2046	409,900	396,900	4,600	392,300	51,480	41,280	25,190	7,110	20	125,080	3.277	3.173
	Mid-2051	449,900	435,600	5,100	430,600	55,240	48,460	30,100	8,360	20	142,170	3.164	3.064
Incremental	Mid-2001 to Mid-2006	23,300	22,400	100	22,300	6,050	1,730	0	0	0	7,770		
	Mid-2006 to Mid-2011	30,800	30,500	100	30,400	6,440	2,360	320	0	-10	9,110		
	Mid-2011 to Mid-2016	26,500	25,700	600	25,100	3,060	2,130	1,010	0	-10	6,710		
	Mid-2016 to Mid-2021	23,500	22,900	100	22,700	3,060	1,920	420	890	-10	5,760		
	Mid-2021 to Mid-2026	63,200	61,200	800	60,500	5,670	5,600	3,960	1,240	0	16,470		
	Mid-2021 to Mid-2031	122,300	118,400	1,400	117,100	11,240	11,680	7,950	2,490	0	33,370		
	Mid-2021 to Mid-2036	173,600	168,100	2,000	166,100	16,310	17,930	12,280	3,730	0	50,260		
	Mid-2021 to Mid-2041	226,200	219,000	2,600	216,500	20,890	24,800	17,200	4,980	0	67,870		
	Mid-2021 to Mid-2046	272,600	263,900	3,100	260,900	25,010	31,840	21,970	6,220	0	85,050		
Mid-2021 to Mid-2051	312,600	302,600	3,600	299,200	28,770	39,020	26,880	7,470	0	102,140			

^[1] Population includes net Census undercount.

^[2] Includes single detached and semi-detached dwellings.

^[3] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[4] Includes stacked townhouses, and bachelor, 1-bedroom, and 2-bedroom+ apartment units.

^[5] Secondary suites includes self-contained living accommodations such as apartments and small residential units that are located on a property that have a separate main residential unit.

Note: Figures may not add precisely due to rounding.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure G-6
Town of Milton
Employment Summary (Activity Rates) – High Scenario

Period	Population Including Undercount ^[1]	Activity Rate								Total Including N.F.P.O.W.
		Primary	Work at Home	Industrial	Retail	Non-Retail Commercial	Institutional	Total	N.F.P.O.W. ^[2]	
Mid-2001	33,200	0.023	0.045	0.250	0.141	0.046	0.103	0.608	0.044	0.653
Mid-2006	56,500	0.013	0.043	0.169	0.109	0.031	0.072	0.438	0.037	0.475
Mid-2011	87,300	0.007	0.037	0.102	0.085	0.027	0.067	0.324	0.034	0.358
Mid-2016	113,800	0.006	0.038	0.093	0.078	0.023	0.068	0.306	0.036	0.342
Mid-2021	137,300	0.005	0.047	0.099	0.074	0.022	0.064	0.312	0.036	0.348
Mid-2026	200,500	0.004	0.052	0.101	0.071	0.021	0.058	0.308	0.039	0.346
Mid-2031	259,600	0.003	0.055	0.102	0.074	0.023	0.058	0.315	0.044	0.359
Mid-2036	310,900	0.002	0.056	0.103	0.077	0.027	0.054	0.318	0.046	0.364
Mid-2041	363,500	0.002	0.056	0.104	0.080	0.031	0.053	0.326	0.047	0.373
Mid-2046	409,900	0.002	0.057	0.104	0.084	0.035	0.052	0.333	0.048	0.381
Mid-2051	449,900	0.002	0.057	0.104	0.087	0.040	0.051	0.340	0.048	0.388
Incremental Change										
Mid-2001 to Mid-2006	23,400	-0.010	-0.002	-0.081	-0.032	-0.015	-0.032	-0.171	-0.0069	-0.1774
Mid-2006 to Mid-2011	30,800	-0.007	-0.006	-0.067	-0.025	-0.003	-0.005	-0.113	-0.004	-0.117
Mid-2011 to Mid-2016	26,500	-0.001	0.001	-0.008	-0.006	-0.004	0.000	-0.018	0.003	-0.016
Mid-2016 to Mid-2021	23,500	-0.001	0.009	0.005	-0.004	-0.001	-0.003	0.006	0.000	0.005
Mid-2021 to Mid-2026	63,200	-0.002	0.005	0.002	-0.003	-0.001	-0.006	-0.004	0.003	-0.001
Mid-2021 to Mid-2031	122,300	-0.002	0.007	0.003	0.000	0.001	-0.007	0.003	0.008	0.011
Mid-2021 to Mid-2036	173,600	-0.003	0.008	0.004	0.003	0.004	-0.011	0.006	0.010	0.016
Mid-2021 to Mid-2041	226,200	-0.003	0.009	0.005	0.006	0.008	-0.012	0.014	0.011	0.025
Mid-2021 to Mid-2046	272,600	-0.003	0.010	0.005	0.010	0.013	-0.013	0.021	0.012	0.033
Mid-2021 to Mid-2051	312,600	-0.003	0.010	0.005	0.013	0.017	-0.014	0.028	0.012	0.041
Annual Average										
Mid-2001 to Mid-2006	4,680	-0.002	0.000	-0.016	-0.006	-0.003	-0.006	-0.034	-0.001	-0.035
Mid-2006 to Mid-2011	6,160	-0.001	-0.001	-0.013	-0.005	-0.001	-0.001	-0.023	-0.001	-0.023
Mid-2011 to Mid-2016	5,300	0.000	0.000	-0.002	-0.001	-0.001	0.000	-0.004	0.001	-0.003
Mid-2016 to Mid-2021	4,700	0.000	0.002	0.001	-0.001	0.000	-0.001	0.001	0.000	0.001
Mid-2021 to Mid-2026	12,640	0.000	0.001	0.000	-0.001	0.000	-0.001	-0.001	0.001	0.000
Mid-2021 to Mid-2031	24,460	0.000	0.001	0.000	0.000	0.000	-0.001	0.000	0.001	0.001
Mid-2021 to Mid-2036	17,360	0.000	0.001	0.000	0.000	0.000	-0.001	0.000	0.001	0.001
Mid-2021 to Mid-2041	15,080	0.000	0.000	0.000	0.000	0.000	-0.001	0.001	0.001	0.001
Mid-2021 to Mid-2046	13,630	0.000	0.000	0.000	0.000	0.001	-0.001	0.001	0.000	0.001
Mid-2021 to Mid-2051	12,504	0.000	0.000	0.000	0.000	0.001	0.000	0.001	0.000	0.001



Figure G-6 (Continued)
Town of Milton
Employment Summary – High Scenario

Period	Population Including Undercount ^[1]	Employment							N.F.P.O.W. ^[2]	Total Including N.F.P.O.W.
		Primary	Work at Home	Industrial	Retail	Non-Retail Commercial	Institutional	Total		
Mid-2001	33,200	770	1,500	8,280	4,690	1,510	3,430	20,170	1,470	21,640
Mid-2006	56,500	760	2,450	9,550	6,190	1,740	4,070	24,750	2,110	26,860
Mid-2011	87,300	590	3,230	8,880	7,390	2,380	5,870	28,330	2,930	31,250
Mid-2016	113,800	650	4,320	10,620	8,890	2,650	7,700	34,820	4,140	38,960
Mid-2021	137,300	710	6,470	13,570	10,170	3,050	8,850	42,820	4,940	47,760
Mid-2026	200,500	730	10,490	20,310	14,250	4,180	11,730	61,690	7,770	69,460
Mid-2031	259,600	740	14,180	26,500	19,330	6,060	14,930	81,740	11,410	93,150
Mid-2036	310,900	760	17,280	32,030	23,930	8,280	16,680	98,960	14,270	113,230
Mid-2041	363,500	770	20,420	37,800	29,170	11,090	19,150	118,400	17,040	135,440
Mid-2046	409,900	790	23,420	42,470	34,420	14,320	21,200	136,610	19,490	156,100
Mid-2051	449,900	800	25,750	46,610	39,190	17,790	22,830	152,970	21,780	174,750
Incremental Change										
Mid-2001 to Mid-2006	23,400	-10	950	1,270	1,510	230	640	4,580	640	5,220
Mid-2006 to Mid-2011	30,800	-180	790	-680	1,200	640	1,810	3,580	820	4,390
Mid-2011 to Mid-2016	26,500	70	1,090	1,750	1,500	270	1,830	6,500	1,210	7,710
Mid-2016 to Mid-2021	23,500	60	2,150	2,950	1,290	400	1,150	8,000	800	8,800
Mid-2021 to Mid-2026	63,200	20	4,020	6,740	4,080	1,130	2,880	18,870	2,830	21,700
Mid-2021 to Mid-2031	122,300	30	7,710	12,930	9,160	3,010	6,080	38,920	6,470	45,390
Mid-2021 to Mid-2036	173,600	50	10,810	18,460	13,760	5,230	7,830	56,140	9,330	65,470
Mid-2021 to Mid-2041	226,200	60	13,950	24,230	19,000	8,040	10,300	75,580	12,100	87,680
Mid-2021 to Mid-2046	272,600	80	16,950	28,900	24,250	11,270	12,350	93,790	14,550	108,340
Mid-2021 to Mid-2051	312,600	90	19,280	33,040	29,020	14,740	13,980	110,150	16,840	126,990
Annual Average										
Mid-2001 to Mid-2006	4,680	-2	190	254	302	46	128	916	128	1,044
Mid-2006 to Mid-2011	6,160	-36	158	-136	240	128	362	716	164	878
Mid-2011 to Mid-2016	5,300	14	218	350	300	54	366	1,300	242	1,542
Mid-2016 to Mid-2021	4,700	12	430	590	258	80	230	1,600	160	1,760
Mid-2021 to Mid-2026	12,640	4	804	1,348	816	226	576	3,774	566	4,340
Mid-2021 to Mid-2031	24,460	6	1,542	2,586	1,832	602	1,216	7,784	1,294	9,078
Mid-2021 to Mid-2036	17,360	5	1,081	1,846	1,376	523	783	5,614	933	6,547
Mid-2021 to Mid-2041	15,080	4	930	1,615	1,267	536	687	5,039	807	5,845
Mid-2021 to Mid-2046	13,630	4	848	1,445	1,213	564	618	4,690	728	5,417
Mid-2021 to Mid-2051	12,504	4	771	1,322	1,161	590	559	4,406	674	5,080



Notes associated with Figure G-6

^[1] Population adjusted to account for net Census undercount.

^[2] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."

Source: Historical data derived from Statistics Canada Place of Work data; forecast prepared by Watson & Associates Economists Ltd.



Appendix H

Rental Housing Forecast



Appendix H: Rental Housing Forecast

Low Scenario

Figure H-1
Town of Milton
Rental Housing Forecast – Low Scenario
2001 to 2051

Housing Tenure	Historical					Forecast					
	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
Total											
Rental Housing	2,200	2,200	2,800	4,800	7,000	10,300	15,300	20,000	24,000	26,900	29,500
Owner-Occupied Housing	8,500	16,200	24,800	29,400	33,100	42,000	52,300	60,600	68,500	76,800	84,300
Total Households	10,700	18,400	27,500	34,200	40,000	52,300	67,600	80,500	92,500	103,700	113,800
Share											
Rental Housing Share	21%	12%	10%	14%	17%	20%	23%	25%	26%	26%	26%
Owner-Occupied Share	79%	88%	90%	86%	83%	80%	77%	75%	74%	74%	74%
Total Share	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures have been rounded.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd.



Reference Scenario

Figure H-2
Town of Milton
Rental Housing Forecast – Reference Scenario
2001 to 2051

Housing Tenure	Historical					Forecast					
	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
Total											
Rental Housing	2,200	2,200	2,800	4,800	7,000	10,200	13,400	16,900	20,700	24,800	29,200
Owner-Occupied Housing	8,500	16,200	24,800	29,400	33,100	44,300	56,600	68,500	79,400	89,500	98,800
Total Households	10,700	18,400	27,500	34,200	40,000	54,400	70,000	85,400	100,100	114,300	127,900
Share											
Rental Housing Share	21%	12%	10%	14%	17%	19%	19%	20%	21%	22%	23%
Owner-Occupied Share	79%	88%	90%	86%	83%	81%	81%	80%	79%	78%	77%
Total Share	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures have been rounded.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd.



High Scenario

Figure H-3
Town of Milton
Rental Housing Forecast – High Scenario
2001 to 2051

Housing Tenure	Historical					Forecast					
	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
Total											
Rental Housing	2,200	2,200	2,800	4,800	7,000	10,700	14,000	18,000	22,600	27,500	32,900
Owner-Occupied Housing	8,500	16,200	24,800	29,400	33,100	45,800	59,400	72,300	85,300	97,600	109,300
Total Households	10,700	18,400	27,500	34,200	40,000	56,500	73,400	90,300	107,900	125,100	142,200
Share											
Rental Housing Share	21%	12%	10%	14%	17%	19%	19%	20%	21%	22%	23%
Owner-Occupied Share	79%	88%	90%	86%	83%	81%	81%	80%	79%	78%	77%
Total Share	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures have been rounded.

Source: 2001 to 2021 derived from Statistics Canada Census data; 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd.



Appendix I

Town-wide Employment Growth by Land Use Category



Appendix I: Town-wide Employment Growth by Land Use Category

Low Scenario

Figure I-1
Town of Milton
Total Employment by Land Use Category – Low Scenario
2001 to 2051

Year	Employment Land Employment	Major Office Employment	Population-Related Employment	Rural Employment	Total Employment
2001	11,100	80	7,400	3,050	21,640
2006	13,790	270	9,350	3,450	26,860
2011	14,060	550	13,130	3,520	31,260
2016	15,880	2,170	17,160	3,750	38,960
2021	19,480	2,670	21,800	3,810	47,760
2026	24,420	3,900	27,700	3,800	59,820
2031	31,330	5,940	36,000	3,840	77,110
2036	37,120	8,350	44,470	3,880	93,820
2041	42,360	10,630	51,810	3,920	108,720
2046	47,260	12,890	59,090	3,960	123,200
2051	51,730	14,980	65,580	3,990	136,270

Notes: Figures have been rounded. Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021, to June 14, 2021. Employment figures include work at home and N.F.P.O.W.

Source: 2001 to 2016 derived from Statistics Canada Census data; scenarios developed by Watson & Associates Economists Ltd.



Reference Scenario

Figure I-2
Town of Milton
Total Employment by Land Use Category – Reference Scenario
2001 to 2051

Year	Employment Land Employment	Major Office Employment	Population-Related Employment	Rural Employment	Total Employment
2001	11,100	80	7,400	3,050	21,640
2006	13,790	270	9,350	3,450	26,860
2011	14,060	550	13,130	3,520	31,260
2016	15,880	2,170	17,160	3,750	38,960
2021	19,480	2,670	21,800	3,810	47,760
2026	27,140	3,800	31,040	3,830	65,810
2031	36,050	5,240	41,490	3,840	86,610
2036	43,810	6,680	50,840	3,860	105,190
2041	51,270	8,370	60,900	3,870	124,400
2046	57,390	10,000	70,000	3,890	141,280
2051	63,180	11,460	77,770	3,900	156,300

Notes: Figures have been rounded. Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021, to June 14, 2021. Employment figures include work at home and N.F.P.O.W.

Source: 2001 to 2016 derived from Statistics Canada Census data; scenarios developed by Watson & Associates Economists Ltd.



High Scenario

Figure I-3
Town of Milton
Total Employment by Land Use Category – High Scenario
2001 to 2051

Year	Employment Land Employment	Major Office Employment	Population-Related Employment	Rural Employment	Total Employment
2001	11,100	80	7,400	3,050	21,640
2006	13,790	270	9,350	3,450	26,860
2011	14,060	550	13,130	3,520	31,260
2016	15,880	2,170	17,160	3,750	38,960
2021	19,480	2,670	21,800	3,810	47,760
2026	28,360	4,990	32,260	3,850	69,460
2031	37,330	7,690	44,240	3,890	93,150
2036	45,160	10,130	54,010	3,920	113,230
2041	53,330	13,080	65,070	3,960	135,440
2046	60,240	16,100	75,770	3,990	156,100
2051	66,510	18,980	85,240	4,020	174,750

Notes: Figures have been rounded. Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021, to June 14, 2021. Employment figures include work at home and N.F.P.O.W.

Source: 2001 to 2016 derived from Statistics Canada Census data; scenarios developed by Watson & Associates Economists Ltd.



Appendix J

Population, Housing, and Employment Allocations by Policy Area



Appendix J: Population, Housing, and Employment Allocations by Policy Area

Reference Scenario

Figure J-1
Town of Milton
Summary of Population, Housing, and Employment – Reference Scenario
2021 to 2051

Policy Area	2021 Population ^[1]	2051 Population ^[1]	2021 Housing Units	2051 Housing Units	2021 Employment ^[2]	2051 Employment ^[2]
Old Milton West	6,400	8,700	2,270	3,140	1,100	1,800
Old Milton East	6,300	7,600	2,150	2,300	800	1,200
Old Milton North	9,000	11,200	3,540	3,840	2,600	3,500
Bristol	54,600	60,700	15,420	17,240	4,700	6,700
Sherwood	35,700	39,200	9,580	10,520	4,700	5,800
Boyne	15,100	48,100	4,050	14,710	1,300	10,100
Milton Heights	500	5,100	110	1,430	0	1,400
Britannia	200	56,500	60	16,840	0	10,300
Trafalgar	100	41,000	40	12,720	300	8,400
Milton Education Village	0	11,800	0	4,460	100	2,200
Rattlesnake Expansion	0	16,000	0	4,670	100	1,800
Britannia Expansion (W)	0	25,900	20	7,400	0	5,200
Britannia Expansion (E)	0	13,600	0	3,840	0	1,600
Trafalgar Expansion	0	5,400	10	1,600	0	1,500
Milton U.G.C./M.T.S.A.	100	15,200	70	8,430	5,100	11,200
Trafalgar M.T.S.A. ^[3]	0	14,100	0	6,570	0	6,600



Policy Area	2021 Population ^[1]	2051 Population ^[1]	2021 Housing Units	2051 Housing Units	2021 Employment ^[2]	2051 Employment ^[2]
M.E.V. Innovation District	0	5,100	0	2,690	0	2,900
Bronte-Main-Meritor	300	4,900	30	2,570	200	1,600
Steeles-Maple Commercial	0	0	0	0	2,100	2,200
401 Employment	300	300	30	30	17,100	25,300
Bronte Triangle Employment	0	0	20	20	2,100	2,100
North Porta Employment	100	100	10	10	0	3,900
Derry Green Employment	100	100	20	20	1,800	15,800
Milton Southwest Employment	100	100	20	20	0	3,000
Agerton Employment Area (N) ^[3]	0	0	0	0	200	5,900
Agerton Employment Area (S) ^[3]	0	0	0	0	0	5,000
Milton 407 Expansion Employment	200	200	70	70	200	4,200
Sixth Line Expansion Employment	0	0	10	10	0	600
Rattlesnake Expansion Employment	0	0	10	10	0	700
Utility Corridor	0	0	10	10	0	0
Greenbelt (Urban - Sixteen W)	0	0	0	0	0	0
Greenbelt (Urban - Sixteen E)	200	200	50	50	200	200
Campbellville	800	1,100	270	360	300	500
Moffat	500	700	140	190	0	100



Policy Area	2021 Population ^[1]	2051 Population ^[1]	2021 Housing Units	2051 Housing Units	2021 Employment ^[2]	2051 Employment ^[2]
Brookville	600	700	200	220	120	140
Milton Rural South	300	400	90	110	210	240
Milton Rural East	600	600	60	70	30	60
Milton Rural West	2,100	2,400	720	760	1,400	1,600
Milton Rural North	3,000	3,400	990	1,030	800	900
Town of Milton	137,300	400,400	40,050	127,930	47,800	156,300

^[1] Population includes Census undercount.

^[2] Employment figures include work at home and N.F.P.O.W.

^[3] Approximately 3,250 jobs planned for the long-term office employment and associated office building space in the Agerton Secondary Plan have been identified to potentially occur outside of the 2051 planning horizon.

Notes: Figures have been rounded.

Source: Watson & Associates Economists Ltd.



Figure J-2
Town of Milton
Total Housing Growth by Area Allocations
2021 to 2051

	2021 to 2026	2026 to 2031	2031 to 2036	2036 to 2041	2041 to 2046	2046 to 2051	2021 to 2051
Developed/Developing Community Area							
Low Density ^[1]	3,800	1,440	260	160	120	80	5,860
Medium Density ^[2]	3,610	310	300	160	80	50	4,510
High Density ^[3]	4,000	3,210	2,160	2,490	2,430	2,300	16,590
Total Housing Units	11,410	4,960	2,720	2,810	2,630	2,430	26,960
Vacant Community Area							
Low Density ^[1]	1,170	3,660	2,100	1,650	1,140	1,140	10,750
Medium Density ^[2]	1,260	5,300	4,320	4,390	3,200	3,200	20,270
High Density ^[3]	510	1,630	2,630	2,540	2,340	2,340	12,160
Units in Vacant Community Areas	2,940	10,590	9,050	8,580	6,680	6,680	43,180
Community Area Expansion Lands							
Low Density ^[1]	0	0	2,190	1,980	2,100	1,860	8,130
Medium Density ^[2]	0	0	1,220	1,210	2,530	3,860	8,820
High Density ^[3]	0	0	110	140	200	80	530
Units in Community Area Expansion Lands	0	0	3,520	3,330	4,830	5,800	17,480
Rural Area							
Low Density ^[1]	50	60	50	50	30	30	270
Medium Density ^[2]	0	0	0	0	0	0	0
High Density ^[3]	0	0	0	0	0	0	0
Units in Rural Areas	50	60	50	50	30	30	270

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Note: Figures have been rounded and may not add precisely.

Source: Watson & Associates Economists Ltd.



Figure J-3
Town of Milton
Total Employment Growth by Area Allocations
2021 to 2051

	2021 to 2026	2026 to 2031	2031 to 2036	2036 to 2041	2041 to 2046	2046 to 2051	2021 to 2051
Developed/Developing Community Area	8,100	4,900	3,000	2,800	2,200	1,900	22,900
Vacant Community Area	2,400	7,800	5,100	5,800	5,000	3,900	30,000
Community Area Urban Expansion Land	0	0	2,900	2,700	2,300	2,100	10,000
Developed/Developing Employment Area	7,200	6,500	4,300	3,500	2,900	1,600	26,000
Vacant Employment Area	200	1,400	3,400	3,700	3,000	2,100	13,800
Employment Area Expansion Lands	0	0	0	600	1,300	3,400	5,300
Rural	200	100	0	100	100	0	500
Town of Milton	18,100	20,700	18,700	19,200	16,800	15,000	108,500

Note: Figures have been rounded and may not add up precisely. Employment figures include work at home and N.F.P.O.W.
Source: Forecast summarized by Watson & Associates Economists Ltd.