



Heritage Heights Economic Impact Analysis

City of Brampton

Draft

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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
E.I.A.	economic impact assessment
G.F.A.	gross floor area
ha	hectare
M.T.S.A.	Major Transit Station Area
P.P.U.	persons per unit
sq.ft.	square foot
sq.m	square metre



1. Introduction

1.1 Terms of Reference

Watson & Associates Economists Ltd. (Watson) was retained by the City of Brampton to undertake a high-level economic impact assessment (E.I.A.) of the Heritage Heights Secondary Plan Area at buildout based on master planning work currently being undertaken by the City. The analysis is based on two City-derived buildout scenarios with differing regional transportation connection and land use visions:

- 2014 Concept Plan with 400-series highway; and
- 2020 Draft Concept Plan with urban arterial and high order transit corridor.

1.2 Study Context

The subject area encompasses approximately 987 gross hectares (2,439 gross acres) of land located within a large future urban growth area in the City of Brampton. The lands are bounded by Mayfield West Road to the north, Winston Churchill Road to the west, the Credit River to the south and Mississauga Road to the east. Heritage Heights represents that largest undeveloped greenfield area in the City of Brampton.

The 2014 Concept Plan and the corresponding development parameters is based on a May 2014 Preliminary Concept Plan developed by the City of Brampton for the Heritage Heights Secondary Plan area. The 2014 Concept Plan includes a major north-south transportation corridor (G.T.A. West Corridor 400 series highway) and a land use plan comprised of a mix of residential, retail commercial, institutional, and business park/industrial land uses. The proposed land use structure and land intensity are similar to recent development trends in Brampton.

The 2020 draft Concept Plan (hereafter referred to as the 2020 Concept Plan) and preliminary development parameters was developed through a Virtual Charette held on June 8, 2020. The 2020 Concept Plan includes three M.T.S.A.s (Major Transit Station Areas) – North M.T.S.A, GO M.T.S.A. and South M.T.S.A. - located along a high order transit corridor in place of the proposed 400-series highway. The M.T.S.A.s are envisioned to comprise of high density mixed-use, residential, office, and local population-related commercial land uses. A Wellness District is also planned for the



GO M.T.S.A. The balance of the subject area (outside of M.T.S.A.s) is comprised of a mix of residential uses (low, medium and high density housing), employment lands and a provision for local population-related commercial and institutional uses (neighbourhood retail and schools).

2. Heritage Heights Concept Plan Development Parameters

The following provides our observations with respect to the development parameters and corresponding population, housing, and employment yields at buildout for the 2020 Concept Plan discussed in section 1. For comparative purposes, the development parameters for the 2014 Concept Plan are also presented. For reference, the two concept plans are presented in Appendix A. The development parameter outputs presented herein serve as inputs to the economic impact analysis in section 3.

2.1 2020 Concept Plan Residential Development Parameters

Building on the land uses and development parameters identified through the June 8, 2020 Virtual Charette, more refined housing and population yields at buildout for the 2020 Concept Plan were generated by Watson and are presented in Figure 1. Housing densities and yields are generally based on the mid-point of the low/high-density ranges and housing yields, and developable land areas presented in the Virtual Charette with further adjustments to reflect non-residential land needs. Key observations are noted below:

- At buildout, the 2020 Concept Plan is anticipated to accommodate a population of approximately 123,700 and 35,855 housing units covering a gross land area of 771 ha;
- The housing yield includes 13,655 low-density units (singles/semi-detached), 11,225 medium-density units (townhouses, stacked townhouses), and 10,975 high-density units (condominiums and apartments);
- The North M.T.S.A., GO M.T.S.A., and South M.T.S.A. are forecast to accommodate 7,415, 7,100 and 6,560 housing units, respectively, at buildout.



Outside of the M.T.S.A.s, Heritage Heights is expected to accommodate 14,780 units by buildout; and

- Of the forecast population by buildout, the area outside the M.T.S.A.s is expected to accommodate a population of 58,800. This is compared to 23,800 in the North M.T.S.A., 20,900 in the GO M.T.S.A., and 20,300 in the South M.T.S.A.

Figure 1
2020 Heritage Heights Concept Plan – Housing and Population Yield at Buildout

	Residential						
	Land Area		Density (per Gross ha)	Density (per net ha)	Housing Unit Yield	P.P.U.	Population Yield
	Gross ha	Net ha					
North M.T.S.A.							
High Density	19	15	161	200	3,000	2.51	7,530
Medium Density	53	43	61	75	3,225	3.52	11,350
Low Density	42	34	28	35	1,190	4.15	4,940
North M.T.S.A. Total	114	92			7,415		23,820
GO M.T.S.A.							
High Density	29	23	161	200	4,600	2.51	11,545
Medium Density	30	24	61	75	1,800	3.52	6,335
Low Density	25	20	28	35	700	4.15	2,905
GO M.T.S.A. Total	83	67			7,100		20,785
South M.T.S.A.							
High Density	20	16	161	200	3,200	2.51	8,030
Medium Density	43	35	61	75	2,625	3.52	9,240
Low Density	26	21	28	35	735	4.15	3,050
South M.T.S.A. Total	89	72			6,560		20,320
Outside M.T.S.A.s							
High Density	1	1	141	175	175	2.51	440
Medium Density	64	48	56	75	3,575	3.52	12,585
Low Density	420	315	26	35	11,030	4.15	45,775
Outside M.T.S.A.s Total	485	364			14,780		58,800
Heritage Heights Total							
High Density	68	55	161	200	10,975	2.51	27,545
Medium Density	190	150	59	75	11,225	3.52	39,510
Low Density	513	390	27	35	13,655	4.15	56,670
Total	771	595			35,855		123,730

Source: Developable land areas adapted from June 8, 2020 Virtual Charette with housing densities comprised of an average of the "Low-High" Range identified through the Virtual Charette. P.P.U. data based on anticipated new unit construction in Brampton based on custom Statistics Canada data prepared by Watson & Associates Economists Ltd.

2.2 2020 Concept Plan Non-Residential Development Parameters

2.2.1 Population-Related Commercial G.F.A. and Land Needs

Figure 2 provides a high-level assessment of the need for local population servicing retail commercial land and corresponding gross floor area (G.F.A.) within Heritage



Heights to support the buildout population based on the 2020 Concept Plan. This assessment is based on a high-level review of anticipated local retail space per capita, floor space per worker, and employment density. As illustrated:

- An estimated 320,000 sq.m (3.45 million sq.ft.) of population-related commercial G.F.A. is anticipated to meet the needs of the buildout population of 123,700;
- This includes an estimated 77,500 sq.m (833,700 sq.ft.) of population-related commercial G.F.A. in the North M.T.S.A., 67,600 sq.m (727,600 sq.ft.) in the GO M.T.S.A., 66,100 sq.m (711,200 sq.ft.) in the South M.T.S.A., and 109,300 sq.m (1,176,000 sq.ft.) in areas outside M.T.S.A.s¹;
- The population-related commercial G.F.A. required in the M.T.S.A.s is expected to be accommodated through mixed-use development with land requirements reflected in the residential component discussed in section 2.1; and
- Outside of the M.T.S.A.s, the demand for population-related commercial G.F.A. results in the need for approximately 31 net ha (77 net acres) of land designated for retail commercial uses.²

Figure 2
Heritage Heights 2020 Concept Plan – Population-Related Commercial G.F.A. and Land Needs at Buildout

Location	Population at Buildout	G.F.A. per Capita		Population-related Commercial G.F.A. Demand		Population-related Commercial Land Need (net ha)
		sq.ft.	sq.m	sq.ft.	sq.m	
North M.T.S.A.	23,820	35	3.3	833,700	77,500	
GO M.T.S.A.	20,790	35	3.3	727,650	67,600	
South M.T.S.A.	20,320	35	3.3	711,200	66,100	
Total Mixed-Use	64,930			2,272,550	211,200	
Outside M.T.S.A.s	58,800	20	1.9	1,176,000	109,300	31
Total	123,730			3,448,550	320,400	

Source: Watson & Associates Economists Ltd.

¹ Assumes 35 sq.ft. of retail space per capita in M.T.S.A.s and 20 sq.ft. per capita outside M.T.S.A.s.

² Based on a floor space index (F.S.I.) of 0.35.



2.2.2 Non-Residential G.F.A. and Employment Yields

Building on non-residential land uses identified in the 2020 Virtual Charette and on the population-related commercial G.F.A. and land needs identified above, a detailed employment and non-residential G.F.A. at buildout by geographic area and land-use has been prepared. These metrics have regard for market considerations and recent and forecast density trends within a broader regional context. Figure 3 summarizes key outputs of this analysis. Highlights include:

- At buildout, the Heritage Heights 2020 Concept Plan is anticipated to accommodate an employment base of approximately 42,900 jobs including 14,500 jobs in the GO M.T.S.A., 10,700 jobs in the North M.T.S.A., 9,100 jobs in the South M.T.S.A., and 8,500 in the areas outside the M.T.S.A.s;
- The employment by land use/sector at buildout includes 8,300 population-related commercial jobs, 7,140 institutional jobs (including those associated with the Wellness District), 23,545 office commercial jobs, and 3,900 jobs on employment lands (employment lands employment);
- The 2020 Concept Plan is anticipated to encompass 1.39 million sq.m (14.95 million sq.ft.) of non-residential building G.F.A. at buildout, including 420,000 sq.m (4.52 million sq.ft.) in the GO M.T.S.A., 274,000 sq.m (2.95 million sq.ft.) in the North M.T.S.A., 232,000 sq.m (2.50 million sq.ft.) in the South M.T.S.A. and 462,000 sq.m (4.98 million sq.ft.) in the area outside of the M.T.S.A.s;
- Heritage Heights is anticipated to accommodate a range of population-related uses to support local population needs comprised of retail/personal services and institutional uses within the M.T.S.A.s and outside the M.T.S.A.s. This includes a total of 321,000 sq.m (3.45 million sq.ft.) of population-related commercial building space and 405,000 sq.m (4.36 million sq.ft.) of institutional building space (including the Wellness District); and
- The M.T.S.A.s are also expected to accommodate significant office development, totalling 437,000 sq.m (4.7 million sq.ft.) of G.F.A. comprised of office space in mixed-use development and standalone major office buildings. The North M.T.S.A. is anticipated to accommodate 146,000 sq.m (1.57 million sq.ft.) of office space, the GO M.T.S.A. 166,000 sq.m (1.79 million sq.ft.), and the South M.T.S.A. 125,000 sq.m (1.35 million sq.ft.).



Figure 3
2020 Heritage Heights Concept Plan – Employment and Non-Residential G.F.A. Yield at Buildout

	Non-Residential								
	Gross ha	Net ha	Jobs per Gross ha	Jobs per net ha	Employment Yield	FSW (sq.ft.)	FSW (sq.m)	Building GFA (sq.ft.)	Building GFA (sq.m)
North M.T.S.A.									
Retail/Personal Services					2,085	400	37	834,000	77,500
Institutional					770	700	65	539,000	50,100
Office					1,500	200	19	300,000	27,900
Total Mixed-Use					4,355			1,673,000	155,400
Standalone Major Office	8	6	800	1,000	6,365	200	19	1,273,035	118,300
Total	8	6			10,720			2,946,035	273,700
GO M.T.S.A.									
Retail/Personal Services					1,740	400	37	696,000	64,700
Institutional					580	700	65	406,000	37,700
Office					2,300	200	19	460,000	42,700
Total Mixed-Use					4,620			1,562,000	145,100
Major Office	9	7	800	1,000	6,650	200	19	1,329,900	123,600
Wellness District	20	16	161	200	3,200	500	46	1,600,000	148,600
Main Street Retail	1	1	65	80	80	400	38	32,000	3,000
GO M.T.S.A. Total	30	25			14,550			4,523,900	420,300
South M.T.S.A.									
Retail/Personal Services					1,780	400	37	712,000	66,100
Institutional					635	700	65	444,175	41,300
Office					1,600	200	19	320,000	29,700
Total Mixed-Use					4,015			1,476,175	137,100
Major Office	6	5	800	1,000	5,130	200	19	1,026,000	95,300
South M.T.S.A. Total	6	5			9,145			2,502,175	232,500
Outside M.T.S.A.s									
Other Retail/Personal Services	29	23	70	88	2,025	450	42	911,250	84,700
Institutional	76	61	26	32	1,955	700	65	1,368,500	127,100
Commercial/Mixed-Use	7	6.0	68	84	505	450	42	227,250	21,100
Main Street Retail	1	1.0	69	84	85	450	42	38,250	3,600
Employment Lands	81	65.0	48	60	3,900	624	58	2,433,600	226,100
Outside M.T.S.A.s Total	194	156			8,470			4,978,850	462,600
Heritage Heights Total									
Population-Related Commercial					8,300			3,450,750	320,700
Institutional/Wellness District					7,140			4,357,675	404,800
Office					23,545			4,708,935	437,500
Employment Lands					3,900			2,433,600	226,100
Heritage Heights Total	230	185			42,885			14,950,960	1,389,000

Source: Watson & Associates Economists Ltd.

2.3 Comparison of Development Parameters and Population and Employment Yields at Buildout – 2020 and 2014 Heritage Heights Concept Plans

2.3.1 Residential Development

Figure 4 summarizes the residential development and population yields at buildout for the 2020 Heritage Heights Concept Plan in comparison to the 2014 Concept Plan. As shown:

- The 2020 Concept Plan has a total housing yield of 35,855 units at buildout, notably higher than the 15,920 units identified in the 2014 Concept Plan;



- High-density dwellings comprise a significantly higher share of total residential units under the 2020 Concept Plan than under the 2014 Concept Plan (30% vs. 14%). Low-density dwellings account for 62% of housing units in the 2014 Concept Plan compared to 38% for the 2020 Concept Plan; and
- The 2020 Concept Plan yields more than double the population at buildout than the 2014 Concept Plan (123,700 vs. 59,900) achieved through a higher density and corresponding yield of housing units as well as a higher share of land uses dedicated to residential/mixed use.

Figure 4
Heritage Heights 2020 and 2014 Concept Plan Residential Development Parameters and Population Yield – Buildout

2014 Concept Plan

Housing Type	Net ha	Housing Density (units per net ha)	Housing Units	Housing Mix (%)	P.P.U.	Population Yield
Low Density	311	30	9,495	60%	4.15	39,400
Compact Urban	77	50	3,825	24%	3.52	13,470
Executive	22	15	325	2%	4.15	1,340
High Density	18	125	2,275	14%	2.51	5,710
Total	428	37	15,920	100%	3.76	59,920

Source: Net developable land areas and housing density assumptions adapted from Preliminary Framework Plan, July 24, 2014. Population yields generated by Watson & Associates Economists Ltd. using custom Statistics Canada PPU data.

2020 Concept Plan

Housing Type	Net ha	Housing Density (units per net ha)	Housing Units	Housing Mix (%)	P.P.U.	Population Yield
Low Density	390	35	13,655	38%	4.15	56,670
Medium Density	150	75	11,225	31%	3.52	39,510
High Density in M.T.S.A. Mixed-Use Areas	54	200	10,800	30%	2.51	27,550
High Density in Non-M.T.S.A. Mixed-Use Areas	1	175	175			
Total	595	60	35,855	100%	3.45	123,730

Source: Developable land areas and housing unit yields adapted from June 8, 2020 Virtual Charette. Population yields generated by Watson & Associates Economists Ltd. using custom Statistics Canada P.P.U. data.

2.3.2 Non-Residential Development

Figure 5 summarizes the non-residential development and employment yields at buildout for the 2020 Heritage Heights Concept Plan compared to the 2014 Concept Plan. As shown:

- At buildout, the 2020 Concept Plan is anticipated to yield a total employment of approximately 42,900 achieving an activity rate of approximately 35%. To achieve an activity rate of 35% requires a broad mix of employment to be



accommodated within Heritage Heights including 23,500 jobs within Major Office and other office-related employment; and

- The 2020 Concept Plan is expected to generate approximately 1.39 million sq.m of non-residential G.F.A. which is nearly twice the non-residential G.F.A. identified for the 2014 Concept Plan (731,000 sq.m).

Figure 5
Heritage Heights 2020 and 2014 Concept Plans Non-Residential Development Parameters and Employment Yield – Buildout

2014 Concept Plan

Employment Sector/Land Use	Net ha	Employment Density (Jobs per net ha)	Employment Yield	Floor Space per Worker (sq.m)	Non-Residential Gross Floor Area (sq.m.)
Commercial Population-Related	79	75	5,955	46	274,000
Employment Lands	42	38	1,600	92	147,000
Business Employment	38	150	5,740	23	132,000
Regional Shopping Centre	32	122	3,900	29	113,000
Schools	44	18	785	83	65,000
Total	235	76	17,980	41	731,000

Source: Net developable land areas and employment density assumptions adapted from Preliminary Framework Plan, July 24, 2014. Non-Residential Gross Floor Area generated by Watson & Associates Economists Ltd.

2020 Concept Plan

Employment Sector/Land Use	Net ha	Employment Density (Jobs per net ha)	Employment Yield	Floor Space per Worker (sq.m)	Non-Residential Gross Floor Area (sq.m.)
Commercial Population-Related (Mixed-Use M.T.S.A.s)			5,685	37	211,000
Institutional - Mixed-Use M.T.S.A.s			1,985	65	129,000
Major Office/Office - Mixed-Use M.T.S.A.s			23,545	19	437,000
Wellness District	16	200	3,200	46	148,600
Commercial Population-Related - Outside M.T.S.A.s	31	84	2,615	42	110,000
Institutional - Outside M.T.S.A.s	61	32	1,952	65	127,000
Employment Lands	65	60	3,900	58	226,000
Total	174		42,880	32	1,389,000

Source: Watson & Associates Economists Ltd.

2.3.3 Summary of 2020 and 2014 Concept Plans

Figure 6 provides a summary of development parameters for the 2020 and 2014 Concept Plans for Heritage Heights at buildout. Key observations include the following:



- The 2020 Concept Plan envisions a much greater density of development/ utilization of land than the 2014 Concept Plan resulting in significantly higher population, housing, and employment yields at buildout than the original plan;
- The 2020 Concept Plan provides a more balanced residential and non-residential development scenario than the 2014 Concept Plan. The activity rate (jobs to population ratio) for the 2020 Concept Plan is 35% compared to 30% for the 2014 Concept Plan; and
- With respect to overall density, the 2020 Concept Plan achieves 169 people and jobs per ha compared to 79 people and jobs per ha for the 2014 Concept Plan.

Figure 6
Heritage Heights 2020 and 2014 Concept Plans Summary

	2020 Concept Plan		2014 Concept Plan	
	Land Area (ha)	% Share	Land Area (ha)	% Share
Residential	541	55%	428	43%
Mixed-Use	73	7%	-	0%
Non-Residential	174	18%	235	24%
Total Developable	787	80%	663	67%
Non-Developable	200	20%	324	33%
Total	987	100%	987	100%
Population				
		123,730		59,920
Housing				
		35,855		15,920
Employment				
		42,880		17,980
Activity Rate (jobs to population ratio)				
		35%		30%
Density (P + J per ha)				
		169		79

Source: Watson & Associates Economists Ltd.

3. Economic and Fiscal Impacts of Land Use Concepts

The following section provides an assessment of economic and fiscal benefits associated with Heritage Heights at buildout under the two land use concepts identified above.



3.1 Construction Value

Figure 7 illustrates the estimated construction value (in 2020 dollars) of the two Concept Plans at buildout based on the land use scenarios identified in Section 2. As illustrated:

- The 2020 Concept Plan has an estimated total construction value of \$14.8 billion, for than double that of the 2014 Concept Plan (\$6.8 billion);
- Residential construction totals an estimated \$12.0 billion (81% of total construction value) while the non-residential component totals an estimated \$2.8 billion (19% of total) under the 2020 Concept Plan; and
- In the 2014 Concept Plan, the residential component represents 85% of the total estimated construction value (\$5.8 billion) while the non-residential component accounts for 15% of the total (\$1.0 billion).

Figure 7 – Estimate of Construction Costs of Heritage Heights Concept Plans - Buildout

2014 Concept Plan

Construction Type	Construction Value (000's)
Residential	
Low Density	\$3,766,200
Compact Urban	\$1,197,200
Executive	\$245,300
High Density ¹	\$598,700
Residential Total	\$5,807,300
Non-Residential	
Commercial Population-Related	\$378,300
Employment Lands	\$135,800
Business Employment	\$251,300
Regional Shopping Centre	\$128,500
Schools	\$135,600
Non-Residential Total	\$1,029,400
2014 Concept Plan Total	\$6,836,800



2020 Concept Plan

Construction Type	Construction Value (000's)
Residential	
Low Density	\$5,416,300
Medium Density	\$3,513,300
High Density ¹	\$3,059,400
Residential Total	\$11,989,000
Non-Residential	
Commercial Population-Related (Mixed-Use M.T.S.A.s)	\$349,300
Institutional - Mixed-Use M.T.S.A.s	\$269,000
Major Office/Office - Mixed-Use M.T.S.A.s	\$1,095,100
Wellness District	\$509,100
Commercial Population-Related - Outside M.T.S.A.s	\$151,900
Institutional - Outside M.T.S.A.s	\$264,900
Employment Lands	\$208,700
Non-Residential Total	\$2,848,000
2020 Concept Plan Total	\$14,837,000

Source: Watson & Associates Economists Ltd.

¹ High-density residential growth is assumed to be 35% purpose-built and 65% condominium units.

3.2 Employment Impacts

Direct Employment

Based on the non-residential land uses identified and appropriate employment density assumptions identified in section 2, the total direct employment to be accommodated within the subject area at buildout, under each land use scenario, is presented in Figure 8. As shown:

- The 2020 Heritage Heights Concept Plan is expected to yield direct employment of approximately 42,900 while under the 2014 Concept Plan, 17,980 jobs are anticipated to be generated;
- The 2020 Concept Plan has a notably higher share of employment lands and office-based employment than the 2014 Concept Plan;
 - 64% of employment in the 2020 Concept Plan is identified under Major Office/office uses and employment lands compared to 41% for Business Employment and Employment lands under the 2014 Concept Plan.



- Commercial populated-related (regional and local serving) employment represents a higher share of employment under the 2014 Concept Plan than under the 2020 Concept Plan (55% vs.19%).¹

Figure 8 – Direct Employment Growth at Buildout– Heritage Heights Concept Plans

2014 Concept Plan

Land Use	Direct Employment	
	Jobs	% of Total
Commercial Population-Related	5,955	33%
Employment Lands	1,600	9%
Business Employment	5,740	32%
Regional Shopping Centre	3,900	22%
Schools	785	4%
Total	17,980	100%

2020 Concept Plan

Land Use	Direct Employment	
	Jobs	% of Total
Commercial Population-Related (Mixed-Use M.T.S.A.s)	5,685	13%
Institutional - Mixed-Use M.T.S.A.s	1,985	5%
Major Office/Office - Mixed-Use M.T.S.A.s	23,545	55%
Wellness District	3,200	7%
Commercial Population-Related - Outside M.T.S.A.s	2,615	6%
Institutional - Outside M.T.S.A.s	1,950	5%
Employment Lands	3,900	9%
Total	42,880	100%

Source: Watson & Associates Economists Ltd.

Employment Multipliers or “Spin-Off” Employment Potential

Employment multipliers provide a summary of the indirect economic effect or “shock” from income and/or employment generated by a particular employment sector. The economic (employment) multipliers by sector and the potential “spin-off” employment under the two land use concepts are discussed below.

¹ Population-related commercial (regional and local) for 2014 Concept Plan captures Commercial-population related as well as Regional Shopping Centre employment.



Indirect Employment Growth Potential

Figure 9 summarizes the potential “spin-off” employment using a weighted average of employment multiplier data based on the sectors anticipated to be accommodated on the corresponding lands. This analysis is based on 2016 Provincial Multipliers available in the Statistics Canada Input/Output model, which provides a comprehensive accounting model of the inter-industrial structure of the Ontario economy.

The results of this analysis identify that Heritage Heights could potentially yield up to an additional 22,400 indirect jobs by buildout distributed on a broad regional basis under the 2020 Concept Plan. In comparison, under the 2014 Concept Plan, the potential number of indirect jobs generated by buildout is estimated to total 7,700. The indirect jobs generated may be local in nature (i.e. within City of Brampton) or located more broadly (i.e. provincial, national, and international).

Collectively, the total number of jobs (direct and indirect) generated under the 2020 Concept Plan totals 65,300. This is compared to 25,700 under the 2014 Concept Plan.

The strongest economic spin-offs are anticipated in industrial uses (e.g. manufacturing) and those in the “knowledge-based” sectors including those associated with office-based uses. This highlights the importance of attracting and retaining local employment growth in these sectors. As previously discussed, the 2020 Concept Plan has a notably higher share of employment in employment uses and office-based sectors than the 2014 Concept Plan, achieving a moderately higher average employment multiplier than the 2014 Concept Plan (1.52 vs. 1.43).

Figure 9 – Direct and Indirect Employment Growth at Buildout– Heritage Heights Concept Plans

2014 Concept Plan

Land Use	Multiplier ¹	Direct Employment	Indirect Employment	Total Employment (Direct and Indirect)
Commercial Population-Related	1.34	5,955	1,995	7,950
Employment Lands	1.68	1,600	1,090	2,690
Business Employment	1.58	5,740	3,325	9,065
Regional Shopping Centre	1.30	3,900	1,155	5,055
Schools	1.19	785	150	935
Total	1.43	17,980	7,715	25,695



2020 Concept Plan

Land Use	Multiplier ¹	Direct Employment	Indirect Employment	Total Employment (Direct and Indirect)
Commercial Population-Related (Mixed-Use M.T.S.A.s)	1.35	5,685	1,960	7,645
Institutional - Mixed-Use M.T.S.A.s	1.23	1,985	450	2,435
Major Office/Office - Mixed-Use M.T.S.A.s	1.67	23,545	15,885	39,430
Wellness District	1.16	3,200	510	3,710
Commercial Population-Related - Outside M.T.S.A.s	1.27	2,615	705	3,320
Institutional - Outside M.T.S.A.s	1.18	1,950	355	2,305
Employment Lands	1.64	3,900	2,505	6,405
Total	1.52	42,880	22,370	65,250

Source: Watson & Associates Economists Ltd.

1. Weighted average of Statistics Canada Provincial Input-Output Multipliers, 2016 based on mix of anticipated employment sectors to be accommodated on lands

Induced Effect of Employment

Employment also generates positive “induced” effects which are derived from the spending of labour income on the consumption of goods and services which drive “non-basic” employment growth. This effect is not captured in the economic multipliers, but it is significant, nonetheless. The strength of the “induced” effect is largely related to average household income. Higher income opportunities permit families and individuals to enjoy a higher standard of living with more disposable income. In turn, this generates growth in household savings, taxation and consumption of goods and services within the local economy. This increase in demand results in further expansion on the local and regional employment market, largely in the retail and business services sector.

The highest paid job sectors tend to be “export-based” knowledge-based sectors and/or non-retail employment. Within the context of the proposed concept plans and the employment mix identified, the 2020 Concept Plan is anticipated to generate a higher induced effect than the 2014 Concept Plan.

Quality of Employment

In addition to providing higher average hourly wage rates, “knowledge-based” and/or non-retail employment typically offers better employee benefits, increased full-time employment opportunities and a greater range of skilled jobs than retail/service employment. This serves to better the quality of life for the households and individuals involved (i.e. family sustaining) and makes for a stronger and more balanced community.



Temporary (Construction) Employment Growth

Anticipated residential and non-residential development will also influence growth within temporary employment sectors such as the construction industry. During the construction phase, expenditures will be made for the construction of buildings and infrastructure. This investment will create employment associated with construction, as well as generate spending on materials and services required. Additional benefits (multipliers) will be derived as employees spend income earned in the local economy.

Figure 10 provides an estimate of direct and indirect temporary employment generated (in person years) for every \$1,000 spent on non-residential construction, as well as the purchase materials, equipment and services by the commercial operations, using employment multiplier data available from the Statistics Canada Input-Output model.¹

As illustrated, the construction of new residential and non-residential development would generate a total of 103,600 person years of (temporary construction) employment under the 2020 Concept Plan while the 2014 Concept Plan would generate 47,700 person years. Based on an average of 20 years of work per employee, this would generate the demand for approximately 5,180 construction employees for Brampton and the surrounding area under the 2020 Concept Plan and approximately 2,380 jobs under the 2014 Concept Plan. Further, additional employment generated from the construction of infrastructure associated with new development has been excluded from this analysis.

¹ For the purposes of this exercise, it was necessary to estimate construction costs in 2016 \$ to apply available Statistics Canada I/O multiplier data to calculate employment generated. The cost of constructing residential and non-residential development is based on industry averages for 2020 using RSMMeans Cost of construction.



Figure 10
Heritage Heights Concept Plans Temporary (Construction) Employment

Sector	Total sq.m	Value of Construction 000's 2020\$	Value of Construction 000's 2016\$	Employment Multipliers ¹			Person Years of Employment Generated		
				Direct	Indirect	Total	Direct	Indirect	Total
2014 Concept Plan									
Residential									
Low Density	2,246,000	\$ 3,766,221	\$ 3,320,316	0.00470	0.00314	0.00784	15,595	10,430	26,025
Compact Urban	587,000	\$ 1,197,191	\$ 1,055,449	0.00470	0.00314	0.00784	4,955	3,315	8,270
Executive	112,000	\$ 245,274	\$ 216,235	0.00470	0.00314	0.00784	1,015	680	1,695
High Density ²	218,000	\$ 598,652	\$ 527,774	0.00470	0.00314	0.00784	2,480	1,660	4,140
Non-Residential									
Commercial Population-Related	274,000	\$ 378,258	\$ 333,474	0.00547	0.00283	0.00830	1,825	945	2,770
Employment Lands	147,000	\$ 135,765	\$ 119,691	0.00547	0.00283	0.00830	655	340	995
Business Employment	132,000	\$ 251,335	\$ 221,578	0.00547	0.00283	0.00830	1,210	630	1,840
Regional Shopping Centre	113,000	\$ 128,497	\$ 113,283	0.00547	0.00283	0.00830	620	320	940
Schools	65,000	\$ 135,566	\$ 119,516	0.00547	0.00283	0.00830	655	340	995
Total	3,894,000	\$ 6,836,760	\$ 6,027,317				29,010	18,660	47,670
2020 Concept Plan									
Residential									
Low Density	3,230,000	\$ 5,416,297	\$ 4,775,031	0.00470	0.00314	0.00784	22,430	15,005	37,435
Medium Density	1,723,000	\$ 3,513,326	\$ 3,097,363	0.00470	0.00314	0.00784	14,550	9,730	24,280
High Density ²	1,051,000	\$ 3,059,421	\$ 2,697,199	0.00470	0.00314	0.00784	12,670	8,475	21,145
Non-Residential									
Commercial Population-Related (Mixed-Use M.T.S.A.s)	211,000	\$ 349,262	\$ 307,911	0.00547	0.00283	0.00830	1,685	870	2,555
Institutional - Mixed-Use M.T.S.A.s	129,000	\$ 269,047	\$ 237,193	0.00547	0.00283	0.00830	1,295	670	1,965
Major Office/Office - Mixed-Use M.T.S.A.s	437,000	\$ 1,095,117	\$ 965,460	0.00547	0.00283	0.00830	5,275	2,735	8,010
Wellness District	149,000	\$ 509,114	\$ 448,837	0.00547	0.00283	0.00830	2,455	1,270	3,725
Commercial Population-Related - Outside M.T.S.A.s	110,000	\$ 151,855	\$ 133,876	0.00547	0.00283	0.00830	730	380	1,110
Institutional - Outside M.T.S.A.s	127,000	\$ 264,876	\$ 233,516	0.00547	0.00283	0.00830	1,275	660	1,935
Employment Lands	226,000	\$ 208,728	\$ 184,015	0.00547	0.00283	0.00830	1,005	520	1,525
Total	7,392,000	\$14,837,044	\$ 13,080,402				63,370	40,315	103,685

Source: Watson & Associates Economists Ltd.

¹ Additional Employment calculated from Statistics Canada Provincial Input-Output Multipliers, 2016.

² High-density residential growth is assumed to be 35% purpose-built and 65% condominium units.

3.3 Fiscal Impacts

Development Charge Policies

As development proceeds, the City and Region will receive D.C. (development charge) revenue for the residential and non-residential development constructed. Although this will happen over a long-term period of time, Figure 11 provides for the estimated D.C. revenues if all development were constructed based on 2020 D.C. rates under the two scenarios: Key observations include:

- Total Development Charge (D.C.) revenue in the 2020 Concept Plan is estimated to total \$3.16 billion, of which 85% (\$2.69 billion) is from residential development and 15% (\$470 million) from non-residential development. This is compared to total D.C. revenue of approximately \$1.53 billion under the 2014 Concept Plan, of which 84% (\$1.29 billion) is from residential development and 16% (\$243 million) from non-residential development; and



- The City of Brampton portion of the 2020 Concept Plan D.C. revenue totals approximately \$1,178,000,000, compared to approximately \$583,000,000 in the 2014 Concept Plan.

Figure 11 – Heritage Heights Development Charge Revenues

2014 Concept Plan

Residential						
Housing Type	Housing Units	Development Charge Revenue				
		City	Region	Education	GO Transit	Total
Low Density	9,495	\$364,724,000	\$502,106,000	\$43,411,000	\$5,454,000	\$915,695,000
Compact Urban	3,825	\$108,922,000	\$165,716,000	\$17,488,000	\$2,197,000	\$294,324,000
Executive	325	\$12,484,000	\$17,186,000	\$1,486,000	\$187,000	\$31,343,000
High Density	> 750 sq.ft.	795	\$18,359,000	\$25,732,000	\$3,635,000	\$48,052,000
	<= 750 sq.ft.	1,480	\$19,693,000	\$31,683,000	\$6,767,000	\$58,458,000
Total	15,920	\$504,489,000	\$710,741,000	\$66,020,000	\$8,165,000	\$1,289,415,000

Non-Residential						
Employment Sector/Land Use	G.F.A. (sq.m)	Development Charge Revenue				
		City	Region	Education	GO Transit	Total
Commercial Population-Related	274,000	\$32,620,000	\$63,475,000	\$2,655,000	\$0	\$98,750,000
Employment Lands	147,000	\$8,824,000	\$22,919,000	\$1,424,000	\$0	\$33,168,000
Business Employment	132,000	\$15,715,000	\$30,579,000	\$1,279,000	\$0	\$47,573,000
Regional Shopping Centre	113,000	\$13,453,000	\$26,178,000	\$1,095,000	\$0	\$40,725,000
Schools	65,000	\$7,738,000	\$15,058,000	\$630,000	\$0	\$23,426,000
Total	731,000	\$78,350,000	\$158,208,000	\$7,083,000	\$0	\$243,641,000

Source: Watson & Associates Economists Ltd.

Note: Figures have been rounded. High density unit size shares estimated by Watson & Associates Economists Ltd.

2020 Concept Plan

Residential							
Housing Type	Housing Units	Development Charge Revenue					
		City	Region	Education	GO Transit	Total	
Low Density	13,655	\$524,518,000	\$722,092,000	\$62,431,000	\$7,844,000	\$1,316,885,000	
Medium Density	11,225	\$319,648,000	\$486,318,000	\$51,321,000	\$6,448,000	\$863,735,000	
High Density in M.T.S.A. Mixed-Use Areas	> 750 sq.ft.	3,775	\$87,132,000	\$122,121,000	\$17,250,000	\$1,548,000	\$228,052,000
	<= 750 sq.ft.	7,025	\$93,504,000	\$150,431,000	\$32,127,000	\$1,494,000	\$277,556,000
High Density in Non-M.T.S.A. Mixed-Use Areas	> 750 sq.ft.	60	\$1,409,000	\$1,974,000	\$279,000	\$25,000	\$3,687,000
	<= 750 sq.ft.	115	\$1,517,000	\$2,440,000	\$521,000	\$24,000	\$4,503,000
Total	35,855	\$1,026,211,000	\$1,482,936,000	\$163,408,000	\$17,360,000	\$2,689,915,000	

Non-Residential						
Employment Sector/Land Use	G.F.A. (sq.m)	Development Charge Revenue				
		City	Region	Education	GO Transit	Total
Commercial Population-Related (Mixed-Use M.T.S.A.s)	211,000	\$25,120,000	\$48,880,000	\$2,045,000	\$0	\$76,044,000
Institutional - Mixed-Use M.T.S.A.s	129,000	\$15,357,000	\$29,884,000	\$1,250,000	\$0	\$46,492,000
Major Office/Office - Mixed-Use M.T.S.A.s	437,000	\$52,025,000	\$101,235,000	\$4,235,000	\$0	\$157,495,000
Wellness District	148,600	\$17,691,000	\$34,425,000	\$1,440,000	\$0	\$53,555,000
Commercial Population-Related - Outside M.T.S.A.s	110,000	\$13,096,000	\$25,483,000	\$1,066,000	\$0	\$39,644,000
Institutional - Outside M.T.S.A.s	127,000	\$15,119,000	\$29,421,000	\$1,231,000	\$0	\$45,771,000
Employment Lands	226,000	\$13,567,000	\$35,236,000	\$2,190,000	\$0	\$50,992,000
Total	1,389,000	\$151,975,000	\$304,564,000	\$13,457,000	\$0	\$469,993,000

Source: Watson & Associates Economists Ltd.

Note: Figures have been rounded. High density unit size shares estimated by Watson & Associates Economists Ltd.



Potential Assessment Growth

As the new development is constructed, the City will receive additional residential and non-residential assessment growth. Samples of assessment data were utilized in this analysis to produce an estimate of assessment growth that Brampton is expected to realize. The survey utilizes current value assessment data from M.P.A.C.'s database and data from the City's tax rolls for newer residential and non-residential development considered representative of the development expected in Heritage Heights. Figure 12 summarizes the total estimated new assessment (in 2020 dollars) to be generated under each concept plan at buildout:

- The estimated assessment value of the development anticipated under the 2020 Concept Plan is \$23.0 billion, of which 86% (\$19.8 billion) is from residential sources and 14% (\$3.1 billion) from non-residential sources; and
- Assessment growth under the 2014 Concept Plan is anticipated to total \$12.1 billion, of which 85% (\$10.3 billion) is from residential development and 15% (\$1.8 billion) from non-residential development.

Figure 12 – City of Brampton Heritage Heights Basis of Assessment Estimates

2014 Concept Plan

Residential	Number of Units	Assessed Value (2020\$)
Low Density	9,495	\$7,174,220,000
Compact Urban	3,825	\$1,996,907,000
Executive	325	\$358,058,000
High Density - Purpose-Built Apartments	800	\$232,883,000
High Density - Condominiums	1,475	\$536,076,000
Residential Total	15,920	\$10,298,144,000
Non-Residential	G.F.A. (sq.m)	
Commercial Population-Related	274,000	\$920,178,000
Employment Lands	147,000	\$174,627,000
Business Employment	132,000	\$344,592,000
Regional Shopping Centre	113,000	\$306,871,000
Schools	65,000	\$98,522,000
Non-Residential Total	731,000	\$1,844,790,000
2014 Concept Plan Total		\$12,142,934,000

Source: Watson & Associates Economists Ltd.

Note: Figures have been rounded. High-density residential growth is assumed to be 35% purpose-built and 65% condominium units.



2020 Concept Plan

Residential	Number of Units	Assessed Value (2020\$)
Low Density	13,655	\$10,317,428,000
Medium Density	11,225	\$5,860,204,000
High Density - Purpose-Built Apartments	3,800	\$1,105,394,000
High- Density - Condominiums	7,000	\$2,545,088,000
Residential Total	35,680	\$19,828,114,000
Non-Residential	G.F.A. (sq.m)	
Commercial Population-Related (Mixed-Use M.T.S.A.s)	211,000	\$708,605,000
Institutional - Mixed-Use M.T.S.A.s	129,000	\$195,529,000
Major Office/Office - Mixed-Use M.T.S.A.s	437,000	\$1,140,807,000
Wellness District	148,600	\$262,283,000
<i>Hospital Component</i>	<i>133,700</i>	<i>\$212,379,000</i>
<i>Commercial Component</i>	<i>14,900</i>	<i>\$49,905,000</i>
Commercial Population-Related - Outside M.T.S.A.s	110,000	\$369,415,000
Institutional - Outside M.T.S.A.s	127,000	\$192,498,000
Employment Lands	226,000	\$268,474,000
Non-Residential Total	1,388,600	\$3,137,610,000
2020 Concept Plan Total		\$22,965,724,000

Source: Watson & Associates Economists Ltd.

Note: Figures have been rounded. High-density residential growth is assumed to be 35% purpose-built and 65% condominium units. Wellness District hospital and commercial components estimated by Watson & Associates Economists Ltd.

Potential Property Tax Revenue Generation

An estimate of annual property tax revenue generated from the anticipated assessment growth identified in Figure 12 based on 2020 property tax rates is presented in Figure 13. Key observations:

- The estimated annual property tax revenue in the 2020 Concept Plan at buildout is \$244.6 million, of which 77% is from residential sources and 23% from non-residential sources; and
- This is compared to \$133.1 million in the 2014 Concept Plan, of which 74% is from residential development and 26% from non-residential development.



Figure 13 - Property Tax Revenue Projections at Buildout (2020 dollars)

2014 Concept Plan

Residential	Growth	Assessment Increase (\$)	Tax Class	Total Tax Rate	Property Tax Revenue (\$)
	Units				
Low Density	9,495	\$7,174,220,000	RT	0.95%	\$68,392,000
Compact Urban	3,825	\$1,996,907,000	RT	0.95%	\$19,037,000
Executive	325	\$358,058,000	RT	0.95%	\$3,413,000
High Density - Purpose-Built Apartments	800	\$232,883,000	NT	0.95%	\$2,220,000
High Density - Condominiums	1,475	\$536,076,000	RT	0.95%	\$5,110,000
Residential Total	15,920	\$10,298,144,000			\$98,173,000
Non-Residential		sq.m			
Commercial Population-Related	274,000	\$920,178,000	XT	1.98%	\$18,245,000
Employment Lands	147,000	\$174,627,000	JT	2.16%	\$3,766,000
Business Employment	132,000	\$344,592,000	YT	1.98%	\$6,833,000
Regional Shopping Centre	113,000	\$306,871,000	ZT	1.98%	\$6,085,000
Schools	65,000	\$98,522,000	E	0.00%	\$0
Non-Residential Total	731,000	\$1,844,790,000			\$34,928,000
2014 Concept Plan Total		\$12,142,934,000			\$133,101,000

Source: Watson & Associates Economists Ltd.

Note: Figures have been rounded. High-density residential growth is assumed to be 35% purpose-built and 65% condominium units.

2020 Concept Plan

Residential	Growth	Assessment Increase (\$)	Tax Class	Total Tax Rate	Property Tax Revenue (\$)
	Units				
Low Density	13,655	\$10,317,428,000	RT	0.95%	\$98,357,000
Medium Density	11,225	\$5,860,204,000	RT	0.95%	\$55,866,000
High Density - Purpose-Built Apartments	3,800	\$1,105,394,000	NT	0.95%	\$10,538,000
High-Density - Condominiums	7,000	\$2,545,088,000	RT	0.95%	\$24,262,000
Residential Total	35,680	\$19,828,114,000			\$189,023,000
Non-Residential		sq.m			
Commercial Population-Related (Mixed-Use M.T.S.A.s)	211,000	\$708,605,000	XT	1.98%	\$14,050,000
Institutional - Mixed-Use M.T.S.A.s	129,000	\$195,529,000	E	0.00%	\$0
Major Office/Office - Mixed-Use M.T.S.A.s	437,000	\$1,140,807,000	YT	1.98%	\$22,620,000
Wellness District	148,600	\$262,283,000			\$5,790,000
<i>Hospital Component</i>	133,700	\$212,379,000	E	0.00%	\$0
<i>Commercial Component</i>	14,900	\$49,905,000	XT	1.98%	\$5,790,000
Commercial Population-Related - Outside M.T.S.A.s	110,000	\$369,415,000	XT	1.98%	\$7,325,000
Institutional - Outside M.T.S.A.s	127,000	\$192,498,000	E	0.00%	\$0
Employment Lands	226,000	\$268,474,000	JT	2.16%	\$5,790,000
Non-Residential Total	1,388,600	\$3,137,610,000			\$55,574,000
2020 Concept Plan Total		\$22,965,724,000			\$244,597,000

Source: Watson & Associates Economists Ltd.

Note: Figures have been rounded. High-density residential growth is assumed to be 35% purpose-built and 65% condominium units. Wellness District hospital and commercial components estimated by Watson & Associates Economists Ltd.

Building Permit Fees

As the new development is constructed, the City will collect building permit fees. The fees are charged on a \$ per square meter basis for new residential and non-residential



development. Estimate of building permit fee revenue generated from new development G.F.A. and permit fees based on the 2020 Fee Schedule is presented in Figure 14. Key observations include:

- The estimated building permit fee revenue in the 2020 Concept Plan is \$ \$99.8 million, of which 76% is from residential sources and 24% from non-residential sources; and
- This is compared to \$50.4 million in the 2014 Concept Plan, of which 77% is from residential development and 23% from non-residential development.

Figure 14 - Building Permit Fees Revenue

	Housing Units	Total Size sq.m	Permit Fee \$ per sq.m	Permit Fee Revenue
Residential				
Low Density	9,495	2,246,000	\$11.83	\$26,572,000
Compact Urban	3,825	587,000	\$11.83	\$6,944,000
Executive	325	112,000	\$15.00	\$1,681,000
High Density	2,275	218,000	\$16.88	\$3,676,000
Residential Total	15,920	3,163,000		\$38,874,000
Non-Residential				
Commercial Population-Related		274,000	\$16.32	\$4,472,000
Employment Lands		147,000	\$10.99	\$1,615,000
Business Employment		132,000	\$16.32	\$2,154,000
Regional Shopping Centre		113,000	\$16.32	\$1,844,000
Schools		65,000	\$21.40	\$1,391,000
Non-Residential Total		731,000		\$11,476,000
2014 Concept Plan Total		3,894,023		\$50,350,000

Source: Watson & Associates Economists Ltd.

Note: Figures have been rounded.



2020 Concept Plan

	Housing Units	Total Size sq.m	Permit Fee \$ per sq.m	Permit Fee Revenue
Residential				
Low Density	13,655	3,230,000	\$11.83	\$38,213,826
Medium Density	11,225	1,723,000	\$11.83	\$20,378,640
High Density	10,975	1,051,000	\$16.88	\$17,734,247
Residential Total	35,855	6,003,000		\$76,326,713
Non-Residential				
Commercial Population-Related (Mixed-Use M.T.S.A.s)		211,000	\$16.32	\$3,444,000
Institutional - Mixed-Use M.T.S.A.s		129,000	\$21.40	\$2,761,000
Major Office/Office - Mixed-Use M.T.S.A.s		437,000	\$16.32	\$7,132,000
Wellness District		149,000	\$21.40	\$3,180,000
Commercial Population-Related - Outside M.T.S.A.s		110,000	\$16.32	\$1,795,000
Institutional - Outside M.T.S.A.s		127,000	\$21.40	\$2,718,000
Employment Lands		226,000	\$10.99	\$2,483,000
Non-Residential Total		1,389,000		\$23,512,000
2020 Concept Plan Total		7,392,000		\$99,838,000

Source: Watson & Associates Economists Ltd.

Note: Figures have been rounded.

The anticipated growth from the two Concept Plans will have an impact on both the operating costs and capital expenditures in the City. These have not been reflected in the analysis presented herein. These costs (and costs of other services provided by the City) should be considered in addition to the tax revenue gained from a new development to provide a comprehensive estimate of the amount of tax revenue that would offset the cost of development. Further, D.C.s, can only be collected for the growth-related portion of the capital expenditures and does not include operating costs or replacement costs, both of which are real costs to the municipality.

4. Conclusions

Based on the economic impact analysis completed, the following can be concluded:

- The two land use concepts for Heritage Heights have differing visions with respect to the range and mix of future residential and non-residential land uses. The 2020 Concept Plan:
 - offers significantly higher housing, population and employment yields than the 2014 Concept Plan;



- offers a higher potential to accommodate direct employment than the 2014 Concept Plan, both in absolute terms and mix of employment sectors, and also has the greatest potential for indirect employment growth and induced employment impacts; and
- has a total construction value of more than double that of the 2014 Concept Plan, yielding significantly higher potential construction employment, development charge and building permit fee revenues, assessment growth and property tax generation than the 2014 Plan.



Appendix A

Heritage Heights 2020 and
2014 Concept Plans



2020 Concept Plan

(land use map and development parameters tables to be added)



2014 Concept Plan

(land use map and development parameters tables to be added)