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Comparison of Assumptions: Final Phase 1 ELS; Draft Phase 2 ELS; and, Final Phase 2 ELS

Assumption	Phase 1 Study MKI & MMM	Draft Phase 2 Study Dillon and Watson & Associates	Final Phase 2 Study Dillon and Watson & Associates	Comment
Employment by 2031	106,000 (Policy Scenario) 111,000 (Market Scenario)	106,000 (Policy Scenario)	106,000 (Policy Scenario)	Policy scenario must be the basis.
Forecast Period	2006-2031	2011-2031	2011-2031	Shift in time
ICI Employment Growth over Forecast Period (excluding No Fixed Place of work and Work at Home)	14,762 (Policy Scenario) 18,962 (Market Scenario)	11,339	11,339	While the shift in time is a major factor the forecast shift in ICI noted below also played a role.
Average Annual Employment Growth	Policy (590 per annum) Market (758 per annum)	566 per annum	566 per annum	Based on the total number of jobs divided by the number of years in the forecast period the average annual employment growth can be determined. Density, ICI Split and forecast period accounts for the difference between 590 & 566
ICI Employment Growth Forecast Split	29% Industrial 55% Commercial 15% Institutional	27% Industrial 53% Commercial 20% Institutional	27% Industrial 53% Commercial 20% Institutional	Comparable
Share of ICI Employment on Employment Lands	Overall 70% 97% Industrial 73% Commercial 13% Institutional	Overall 59% 100% Industrial 53% Commercial 21% Institutional	Overall 59% 100% Industrial 53% Commercial 21% Institutional	Phase 2 was more conservative as to overall how much employment was expected to occur on employment lands. This has the effect of lowering.
Employment Growth on Employment Lands	Total 10,295 (Policy) Total 13,222 (Market)	Total 6,707	Total 6,707	The primary shift is the forecast period shift and the percent of total employment growth that is assumed to take place on employment lands (70% for Phase

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Employment Density on Employment Lands	Average: 59 jobs/net ha	Average: 45 jobs/net ha	Average: 45 jobs/net ha	1 and 59% for Phase 2). Phase 2 adopted a more conservative employment density on employment lands. The Phase 1 report did also test the implications of 45 jobs/hectare. The result is that more land is required to accommodate the same amount of jobs.
Absorption	7 ha per year (Policy) 9 ha per year (Market) Phase 1 also tested a discounted long term historic absorption rate of 16.5 ha	7.45 ha per year	7.45 ha per year (ROPA #38) 12.5 ha per year (based on 5 year historic average)	The 7.45 ha per year absorption rate is consistent with Sustainable Halton. The five year historic average is used to test the supply and demand analysis to give a range of years of supply (see pg 87 of Phase 2)
Forecast Employment Land Demand	175 net ha (Policy) 225 net ha (Market)	149 net ha	149 net ha	Both Phase 1 and Phase 2 used best available information. Phase 2 assumed: fewer jobs on employment lands, lower share of employment on employment land, lower density as well as the shift in time frame.
Vacant Land Supply	314 net ha 298 net ha (with 5% vacancy factor)	308 net ha (no vacancy factor applied)	308 net hac 248.3 net ha, effective supply includes 5% vacancy factor and a discount of 30% for all parcels larger than 10	Same general inventory of properties, except for the accounting for uptake over the period between the completion of the Phase 1 analysis and the Phase 2 analysis. Both used 5%

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			ha.)	vacancy factors. The Phase 2 supply is also reduced by the infrastructure discount for large parcels.
Forecast Vacant Land Supply at 2031	120 net ha (Policy) 70 net ha (Market)	163 ha 149 net ha	99.3 ha	Phase 1 also provides a sensitivity test for long term land needs. Both Phase 1 and Phase 2 agree that there is a need to protect the land for the long term (beyond 2031), however, Phase 1 actually quantified this on page 25.