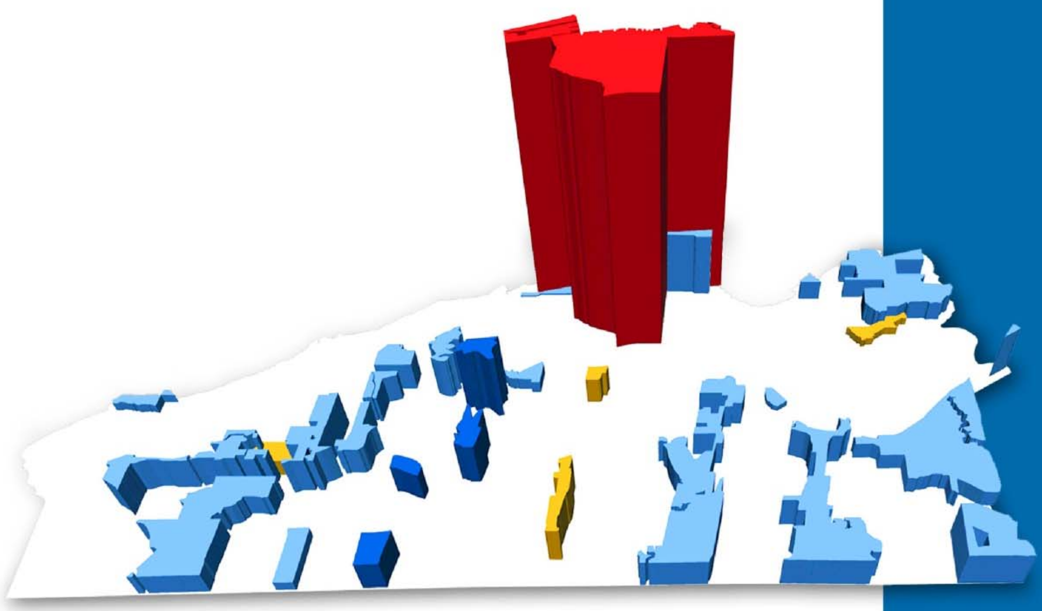
Presentation to City of Toronto Planning and Growth Management Committee
September 13th, 2011

# Sustainable Competitive Advantage and Prosperity – Planning for Employment Uses in the City of Toronto



# CONCLUSIONS

Sustaining Toronto's competitive advantage and prosperity will require:

- Continued preservation of the industrial employment land base for its wealth generating capacity; and
- A new focus on targeting new office space construction to realize future growth potential.

# OUTLINE

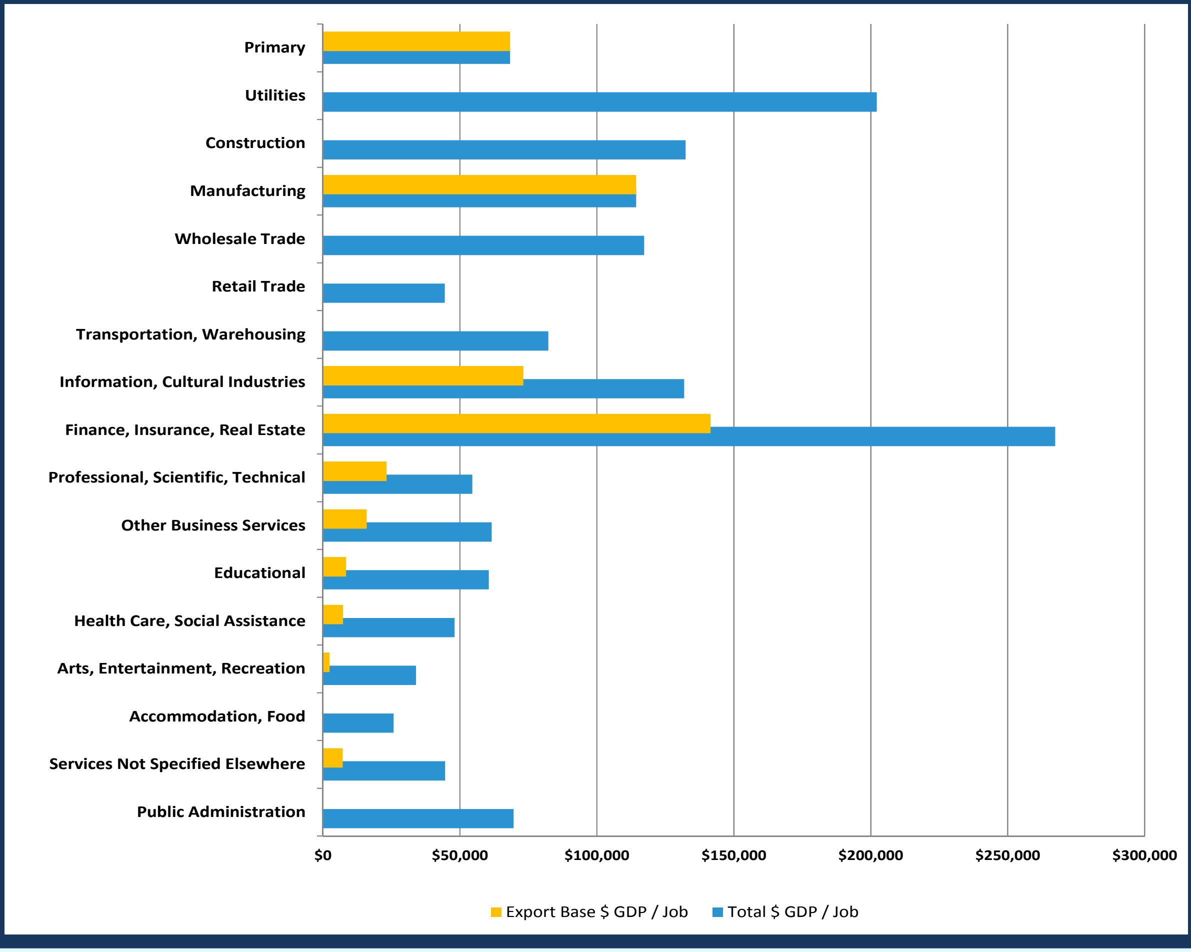
- Foundations
- Projections & Implications
- Recommended Directions

# FOUNDATIONS

- Wealth Generation
- Employment Lands Vitality
- Office Space Challenge
- Residential Growth

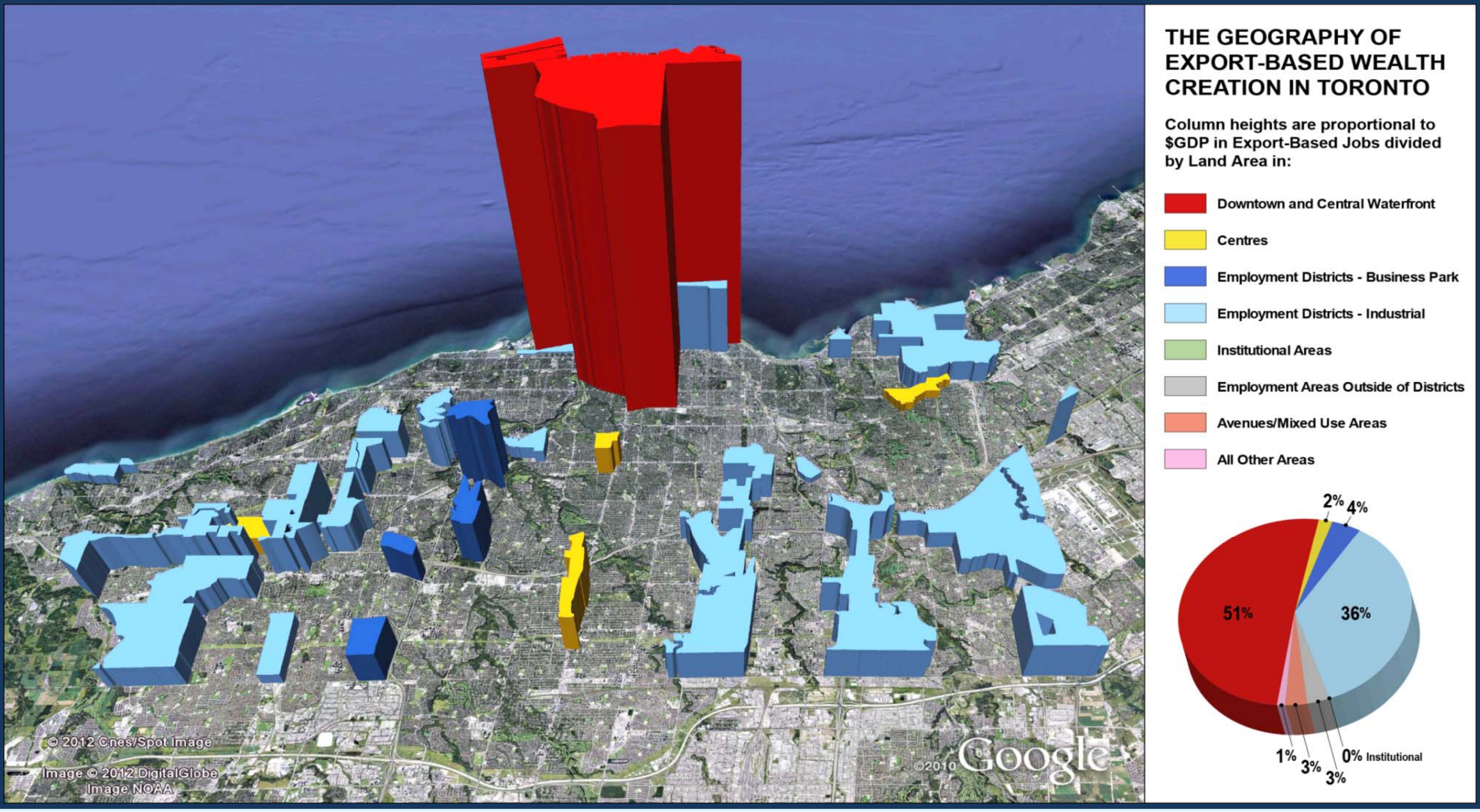
# FOUNDATIONS

*Total and Export-Based Wealth Generation ($GDP) by NAICS Sector*



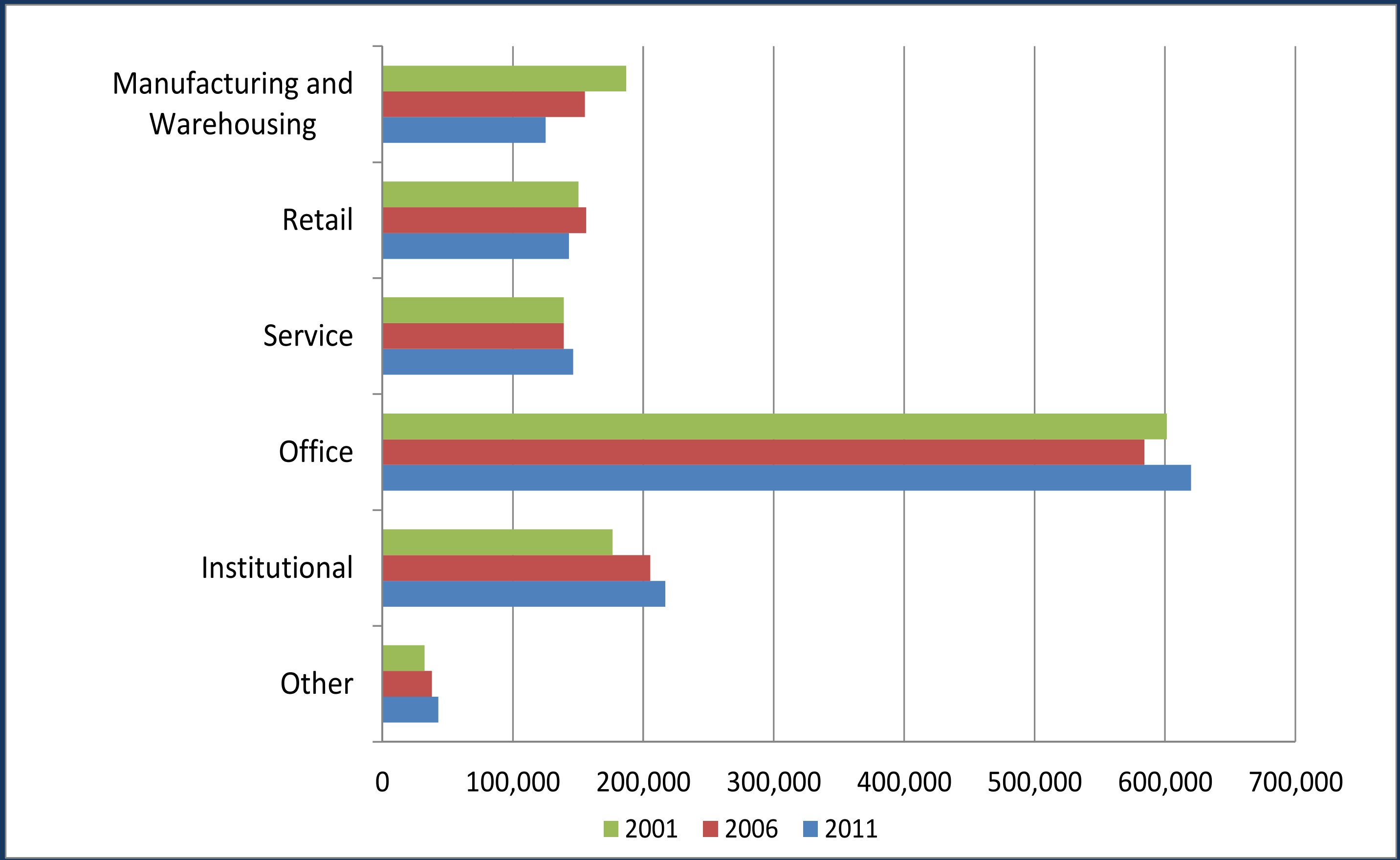
# FOUNDATIONS

*The Geography of Export-Based Wealth Creation in Toronto*



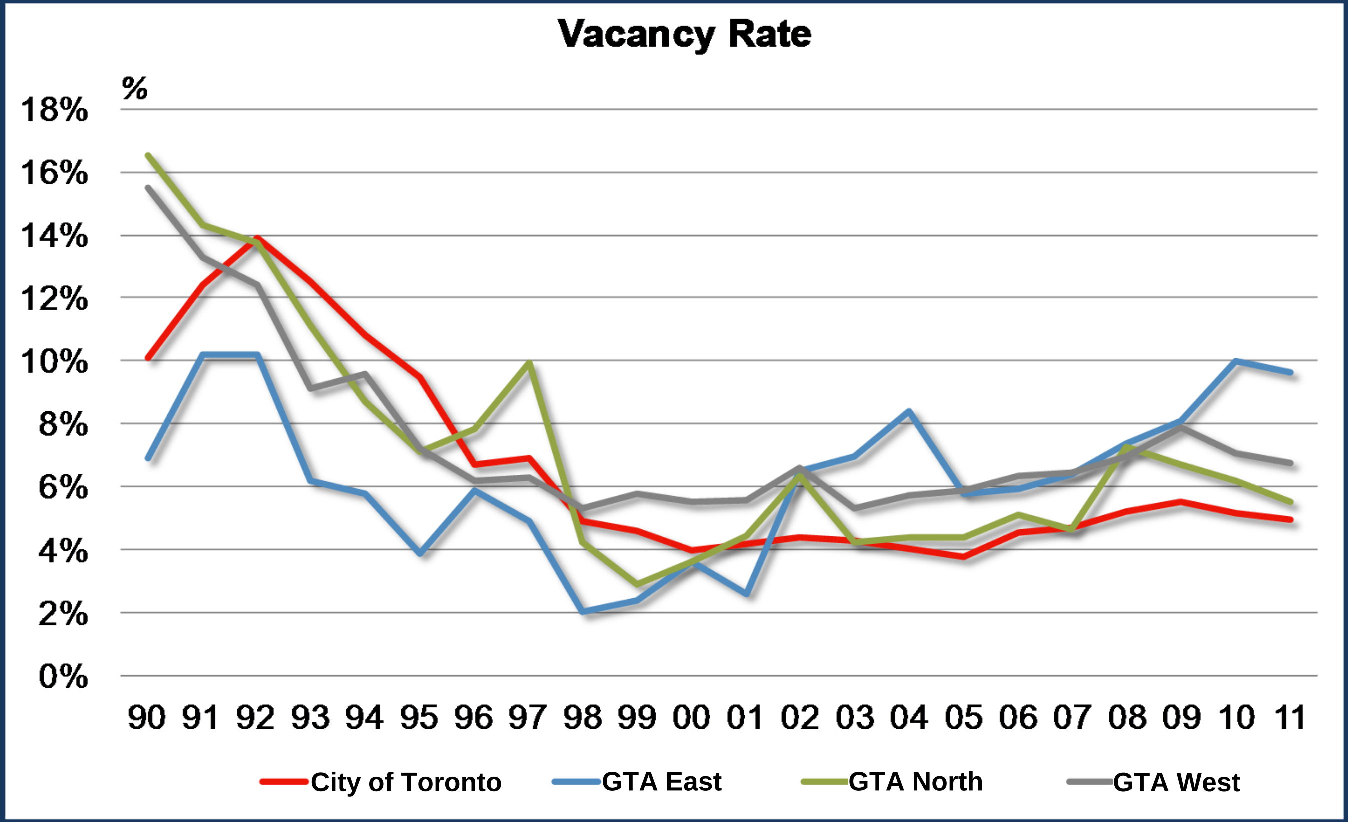
# FOUNDATIONS

***Employment by Sector – 2001, 2006, 2011***



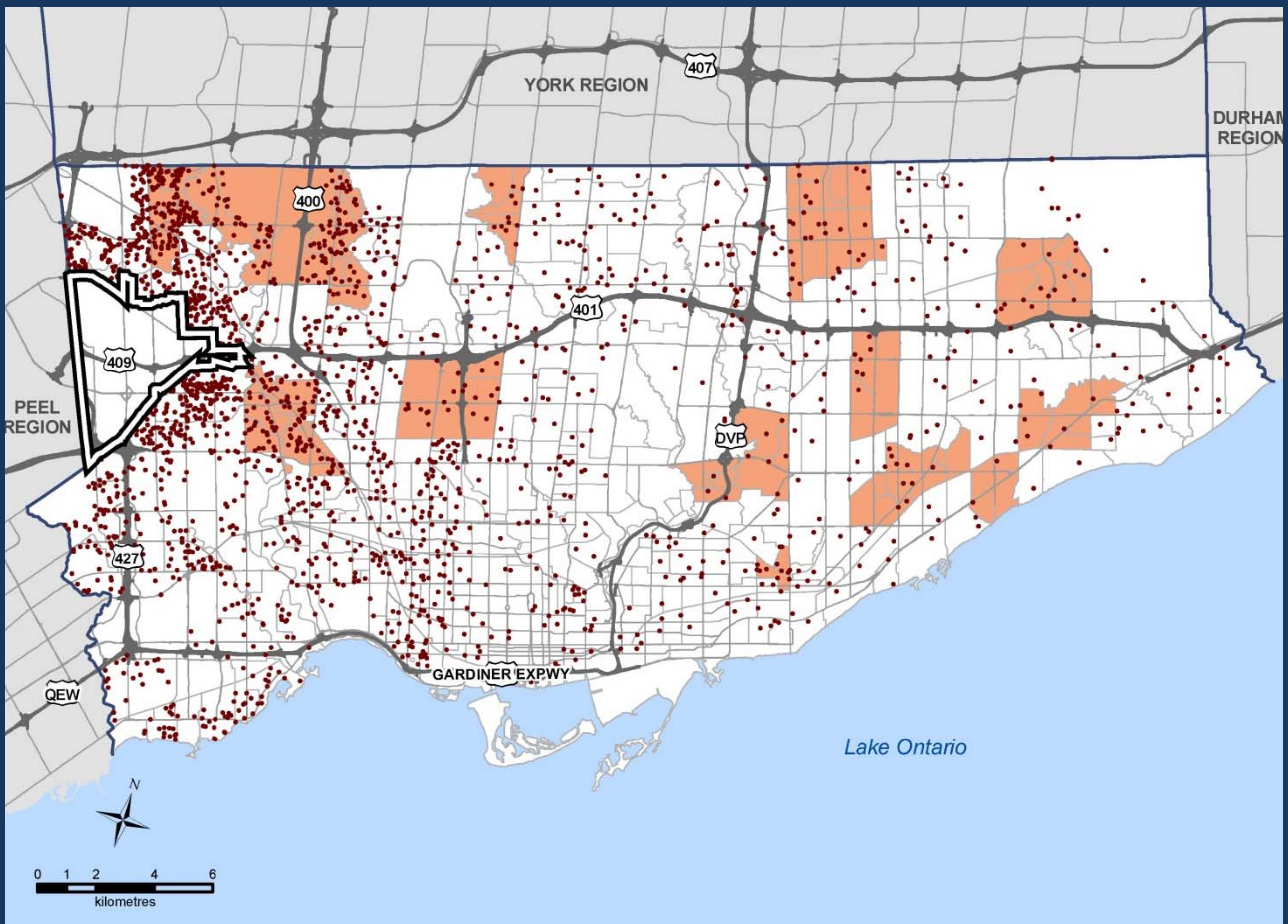
# FOUNDATIONS

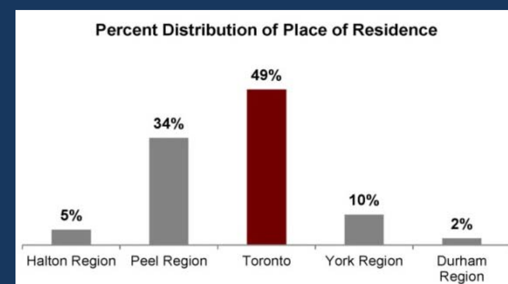
*Industrial Vacancy Rates – GTA*



# FOUNDATIONS

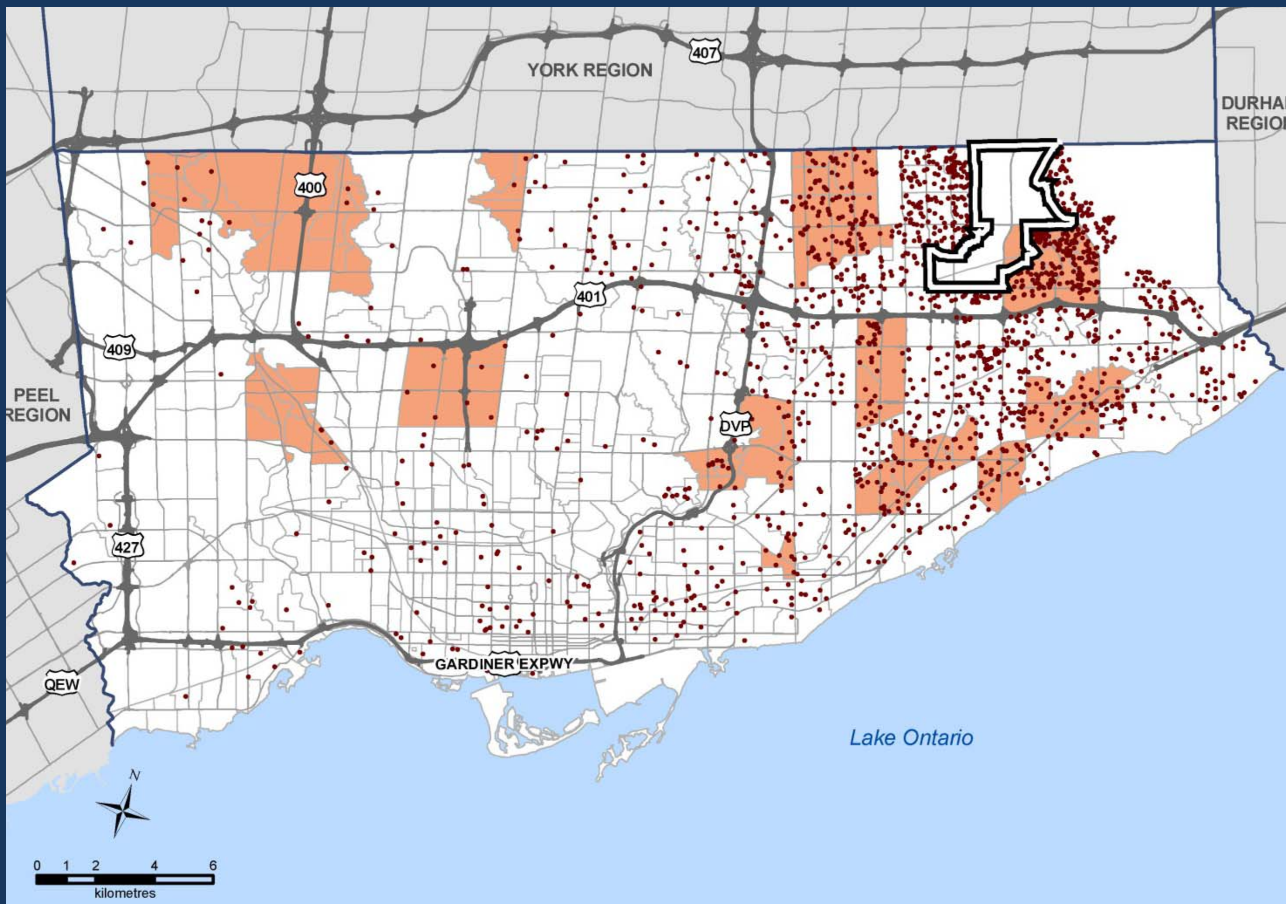
***Distribution of Place of Residence for Employment in the Rexdale Employment District, 2006***



# FOUNDATIONS

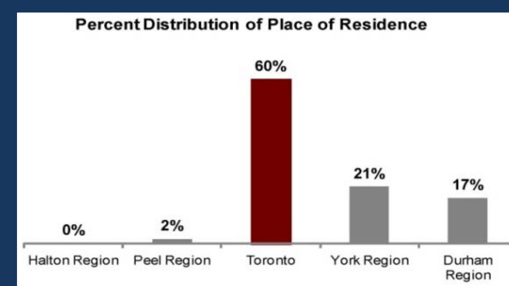
***Distribution of Place of Residence for Employment in the Tapscott Employment District, 2006***




1 Dot = 10 Places of Residence of Employees of the Tapscott / Marshalling Yard Employment District

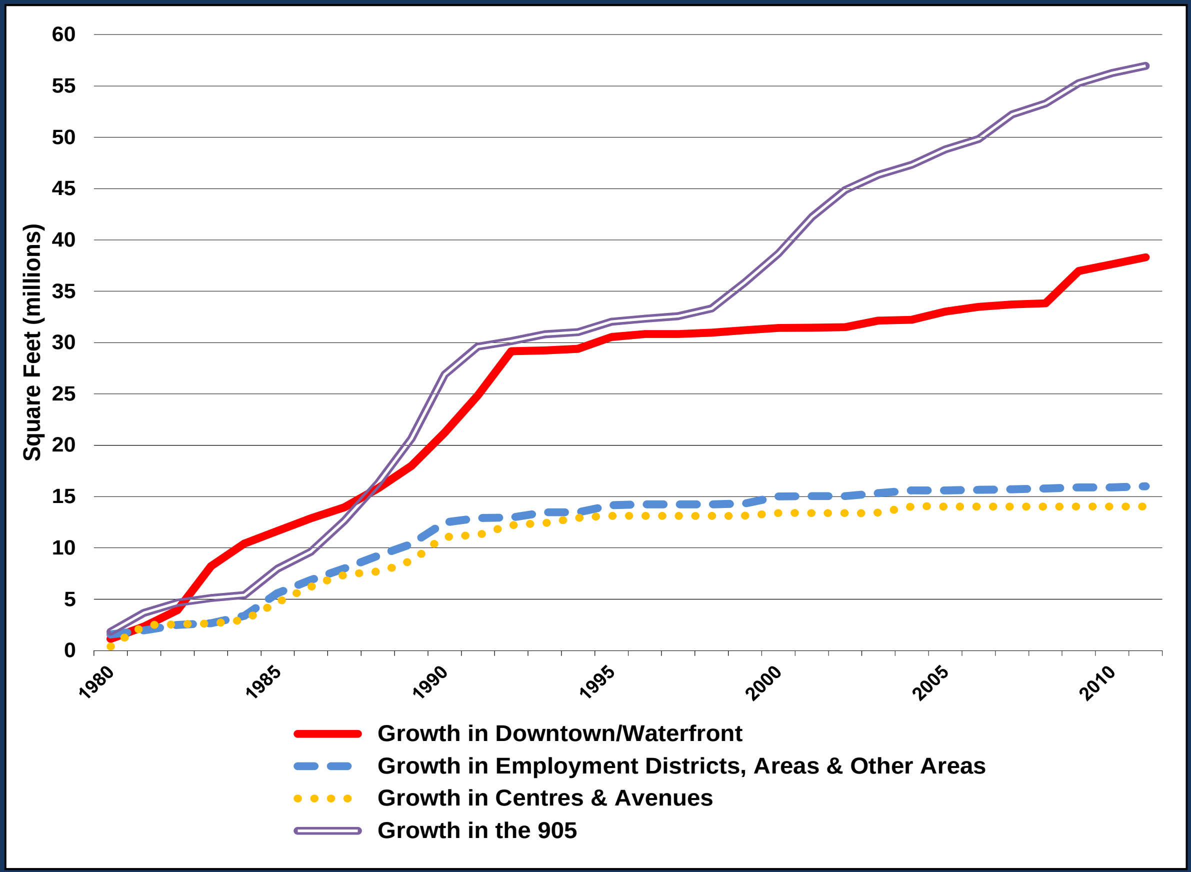
Tapscott / Marshalling Yard Employment District

Priority Neighbourhood Area



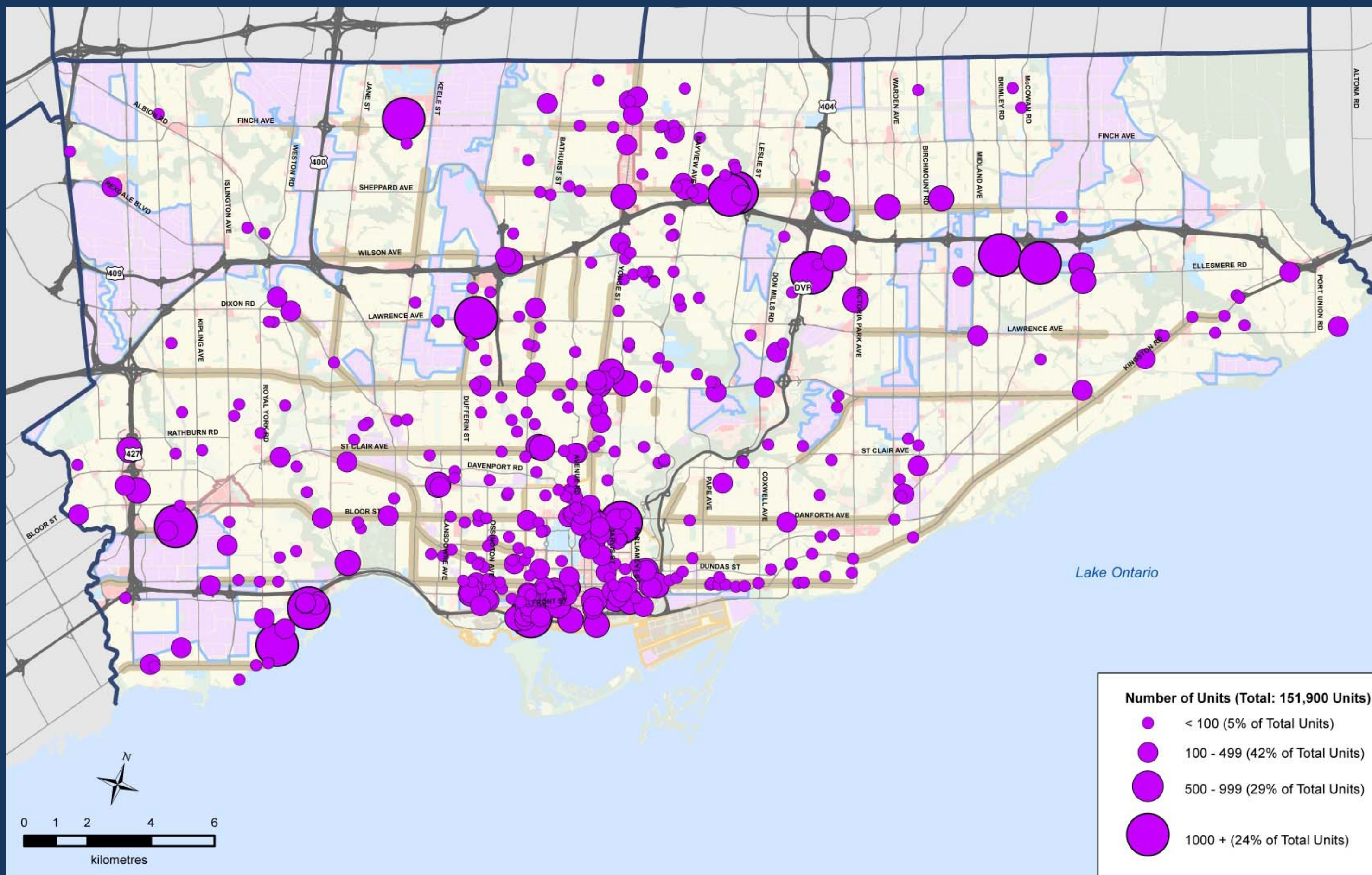
# FOUNDATIONS

***Growth of Office Space – Toronto vs. the 905***



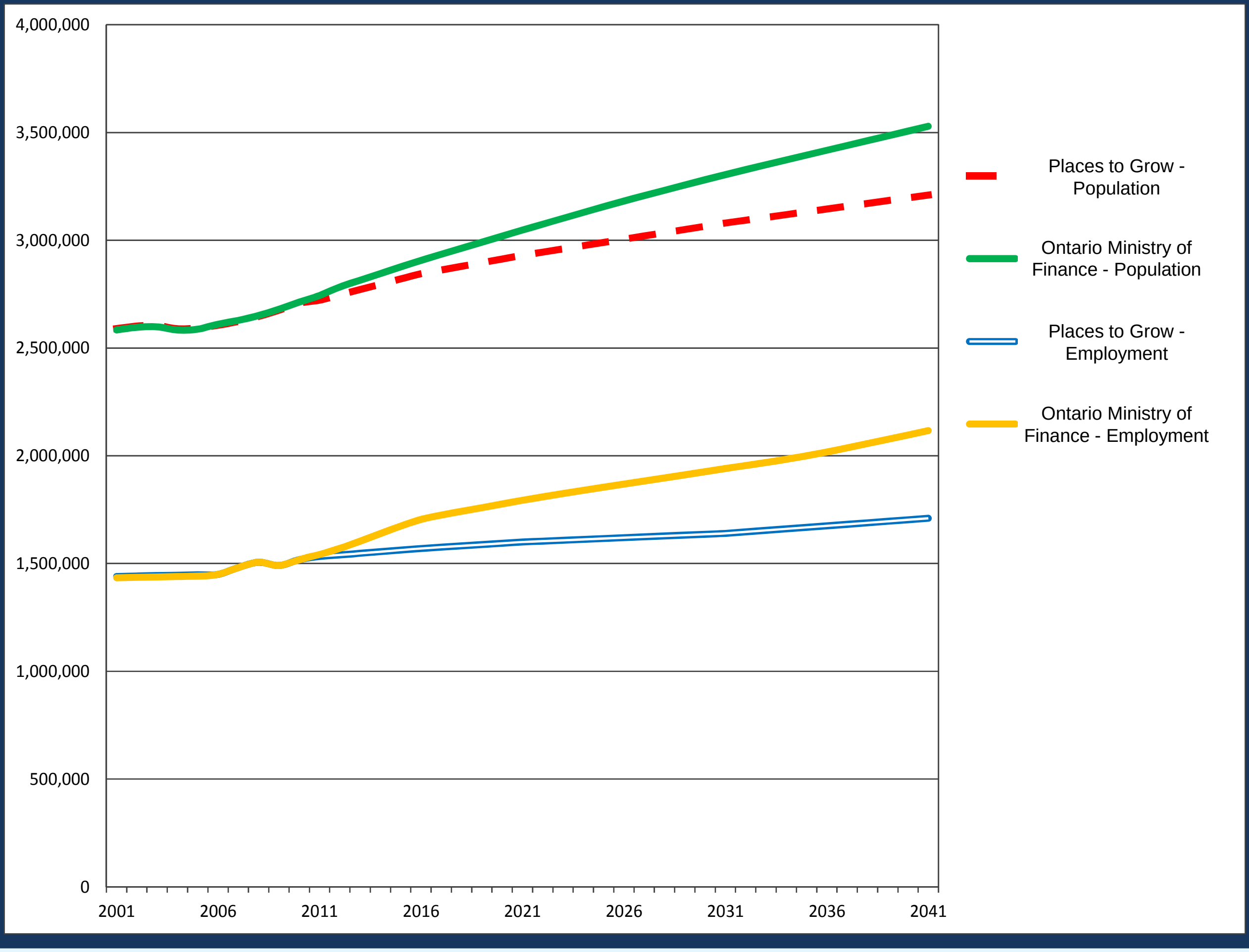
# FOUNDATIONS

***Residential Development Applications in the City of Toronto***



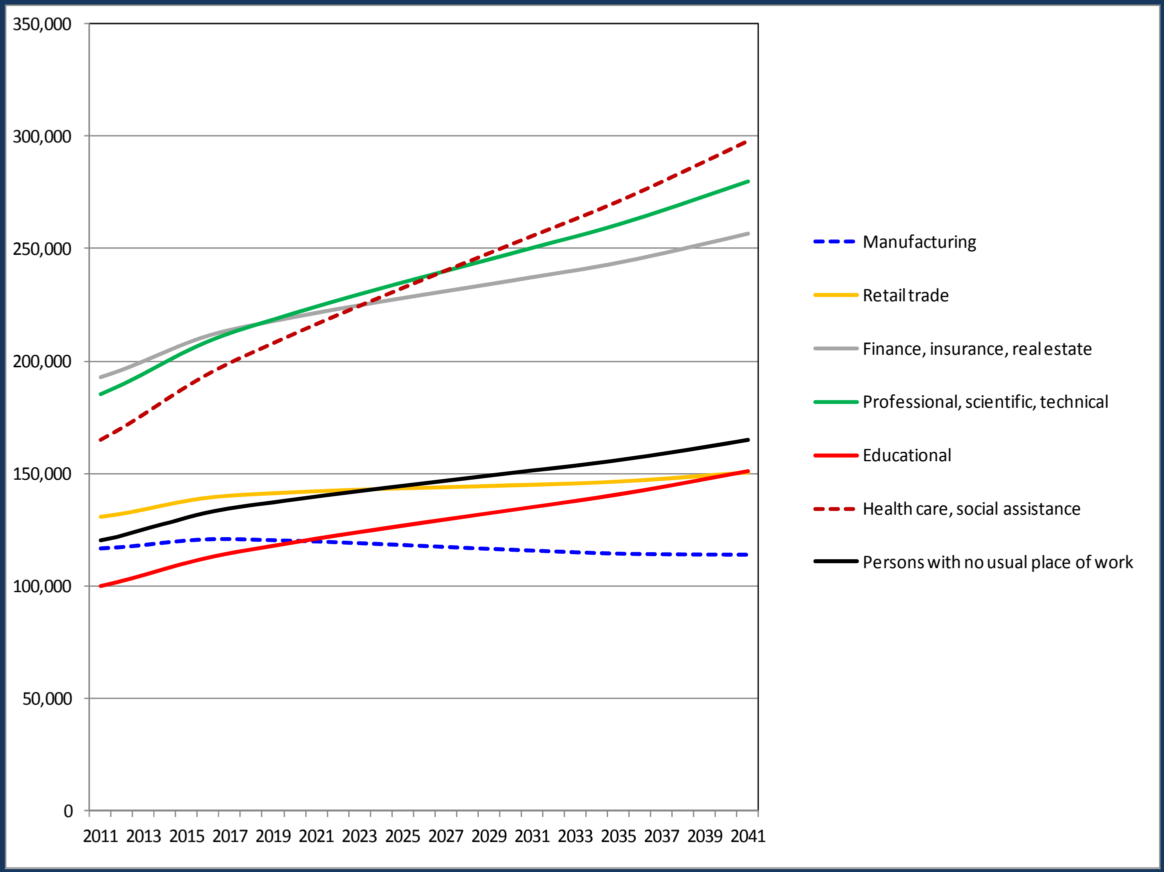
# PROJECTIONS

***Projected City of Toronto Population and Employment 2001 to 2041***



# PROJECTIONS

*City of Toronto Employment by Industry 2011 to 2041: High Alternative for Industries Employing 100,000 or more in 2011*



# PROJECTIONS

***Summary of Population, Employment and Job Space Growth Forecasts***

| | 2011 (Estimate) | 2031 Low | 2031 High | 2041 Low | 2041 High |
|---|---|---|---|---|---|
| **Population** | 2,722,100 | 3,080,000 | 3,305,500 | 3,210,000 | 3,528,900 |
| Growth after 2011 | | 357,900 | 583,400 | 487,900 | 806,800 |
| **Employment** | 1,532,700 | 1,640,000 | 1,941,000 | 1,710,000 | 2,116,800 |
| Growth after 2011 | | 107,300 | 408,300 | 177,300 | 584,100 |
| **Growth in Employment Space Requirements from 2011 (millions of sq. ft.)** | | | | | |
| **Office Space* - C4SE Projection** | | **7** | **29** | **11** | **42** |
| *Office Jobs Growth* | | *37,900* | *146,200* | *56,900* | *216,900* |
| **Office Space* - RESC Projection** | | **21** | **44** | **31** | **71** |
| *Office Jobs Growth* | | *105,100* | *225,600* | *158,500* | *364,600* |
| **Industrial Space*** | | **11** | **31** | **18** | **44** |
| **Retail & Service Space*** | | **11** | **29** | **15** | **40** |

* Job space is described as Net Rentable Area for office space (convertible to Gross Floor Area by dividing by 0.85), Gross Floor Area (GFA) for industrial space, and Gross Leasable Area (GLA) for retail and service space. Retail and service GLA/GFA ratios vary with form.

*Source: Centre for Spatial Economics-Strategic Projections Inc., Real Estate Search Corporation, Cushman & Wakefield, Malone Given Parsons Ltd.*

# IMPLICATIONS

- Industrial land needs will continue to grow
- Competition for a finite land resource
- Higher intensity/density
- Balancing residential growth with employment will be a challenge
- Need to integrate Planning, Economic Development and Transit to connect employment to homes

# RECOMMENDED DIRECTIONS

Recommended Policy Directions – Industrial Employment Areas:

- Preserve core areas
- Restrict retail & other non-industrial uses to edges only
- Redevelopers should bear mitigation costs

# RECOMMENDED DIRECTIONS

Recommended Policy Directions – Office Space:

- Identify new office clusters
- No net loss of job space
- Office space minimums on threshold + parcels
- Enable 3 year development cycle
- Amenitize edges of Business Parks at rapid transit stations with mixed use redevelopment

# RECOMMENDED DIRECTIONS

Recommended Policy Directions – Retail, Service & Institutional Uses:

- Encourage retail integration in redevelopment
- Facilitate intensification in Avenues & at nodes
- Preserve major institutional capacity for intensification
- Encourage institutional care uses wherever they can be accommodated