

City of Ottawa Employment Land Review *Stakeholder Workshop*



April 30, 2015
1:30 pm – 4:00 pm



Workshop Agenda

1. Introductions and opening remarks
 - John Smit, City of Ottawa
2. Ottawa's Employment Land Review
 - What we've heard from stakeholders
 - Where are we now
 - Russell Mathew, Hemson Consulting Ltd.
3. Policy Context & Geography of Employment
 - Tim Smith, Urban Strategies
 - Questions and Answers
4. Economic Outlook & Supply and Demand Analysis
 - Russell Mathew, Hemson Consulting Ltd.
 - Questions and Answers

Workshop Agenda

5. Summary of Emerging Issues and Topics for Discussion
 - Tim Smith, Urban Strategies
6. Table Discussions
 - Points for Discussion
 - What priority issues need to be addressed by this study?
 - What strategies should be examined?
7. Wrap up and Next Steps
 - Tim Smith, Urban Strategies

Now we will discuss:

- Employment Land Review
 - Where are we now
 - What we've heard from stakeholders

Where are we now?

Employment Land Review Study Process						
Steps	1 Taking Stock	2 <i>Meeting Future Needs</i>	3 <i>Defining the Challenge</i>	4 <i>Understanding Options</i>	5 <i>Proposing a Plan of Action</i>	6 <i>Putting it all together</i>
Timing	Nov 2014 – Mar 2015	Mar – Apr 2015	Apr – Jun 2015	Jun – Aug 2015	Aug – Oct 2015	Oct – Dec 2015
Key Questions	<ul style="list-style-type: none"> • Where do people work? • What are the City's goals ? 	<ul style="list-style-type: none"> • What is the future economic outlook? • How much land do we need? 	<ul style="list-style-type: none"> • Where should future jobs go? • Are there barriers to development? 	<ul style="list-style-type: none"> • How can we address the challenges and achieve our objectives? 	<ul style="list-style-type: none"> • What strategies would be most effective for the City to meet it's goals? • How are they implemented? 	<ul style="list-style-type: none"> • How should we plan for employment and employment land?
Who's involved	<p>Core Group of Consulting Team & City Staff, Sponsors Group of Councillors & Working Group of Industry & Other Key Stakeholders</p>					

Purpose of the study

1. Examination of City's objectives for location of jobs and Official Plan policies for employment and employment land
2. Estimate future employment land demand in rural and urban area designations
3. Identify key issues, opportunities and strategies for achieving City's employment and economic development goals
4. Recommend priority actions and implementation plan

Examination of planning for Ottawa's employment lands

- Review of policy framework for Employment and Enterprise Areas
- Assessment of Ottawa's existing and planned employment geography
- Review intensification opportunities
- Consider rural issues & opportunities – servicing, permissions, future potential
- Respond to area-specific issues and proposals
- Link between employment lands and economic development strategies

What we heard: Themes from the stakeholder meetings

Development Challenges and Opportunities

- Industrial lands along Highway 417 are the most attractive, but supply of available properties is low
- Distance from the core and lack of highway access may make Orleans and Riverside South less attractive for employment
- LRT may not be expected to fundamentally change the office market
- Mainstreets may be becoming more attractive for offices
- Some employers would like proximity to the airport, but access and leasing can be challenges
- Industrial lands develop slowly, so patience is needed
- Generally, Ottawa's business parks are not marketed aggressively

What we heard: Themes from the stakeholder meetings

The Economy

- Future growth in Ottawa's manufacturing sector should be considered
- The next wave of high tech jobs are expected to cover more of the city
- Government jobs may be key to significantly growing employment in Orleans and south communities

Policy

- The study should examine the 1.3 jobs/household target
- There may be too much land being planned for employment and not all in the best locations

Where are we now

Today

- For Discussion
 - Supply and Demand Analysis – preliminary results
 - Emerging Issues

Next Steps

- Identification of Challenges and Opportunities

Ottawa Employment Land Review

Policy Context and Ottawa's Geography of Employment

What informs our review

- Relevant background documents
- Big-picture look at Ottawa's "urban structure"
- High-level analysis of development constraints and opportunities in Ottawa's employment areas
- Policy and development trends observed in other cities
- Local perspectives

Provincial Policy Statement

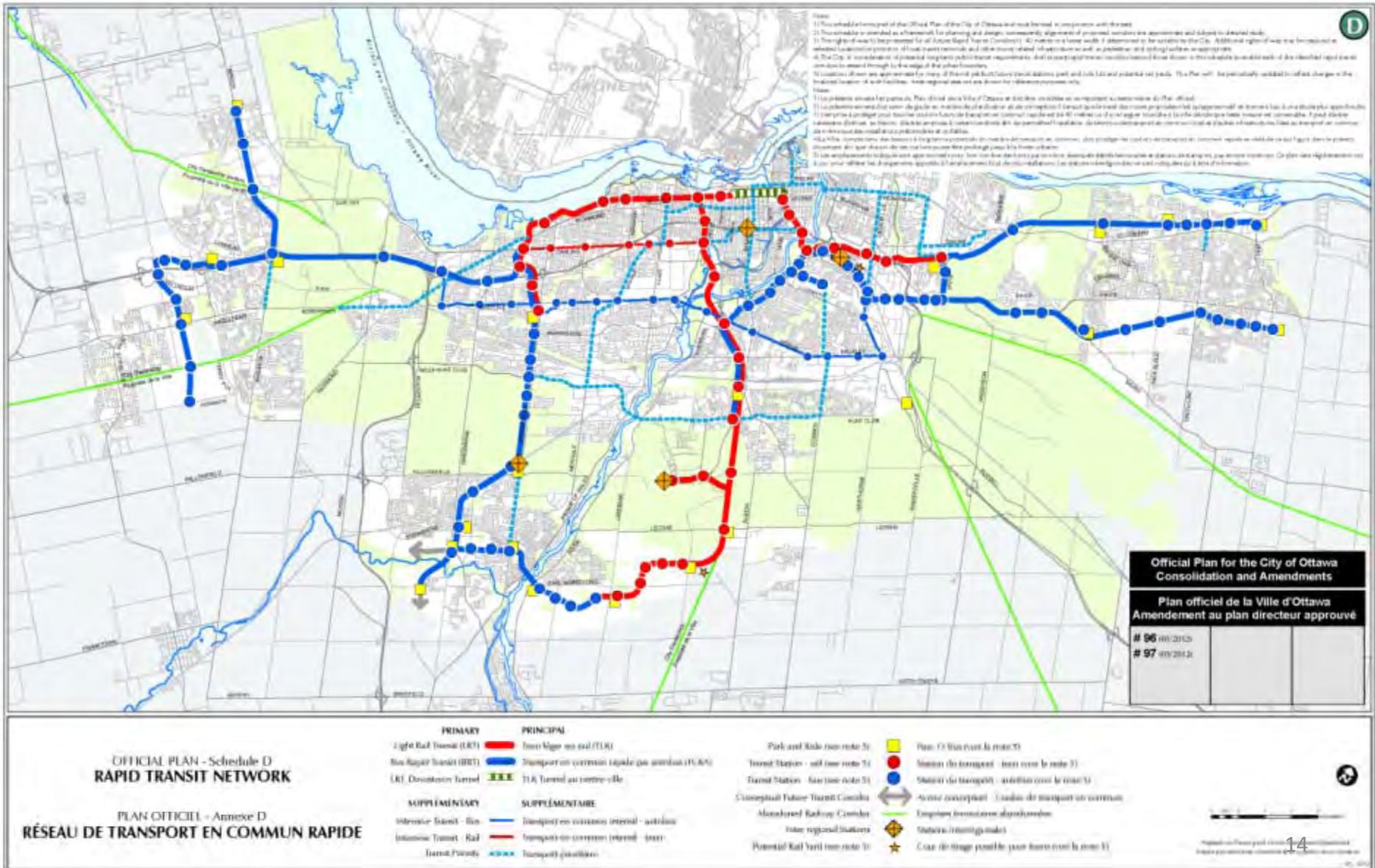
- Promote **intensification**
- Plan for a mix and range of employment to **meet long-term needs**
- Provide opportunities for a **diversified economic base**
- Incorporate employment uses in **mixed-use development**
- Provide the **necessary infrastructure**
- **Protect and preserve** employment areas
- **Conversions require a comprehensive review**

Ottawa Official Plan

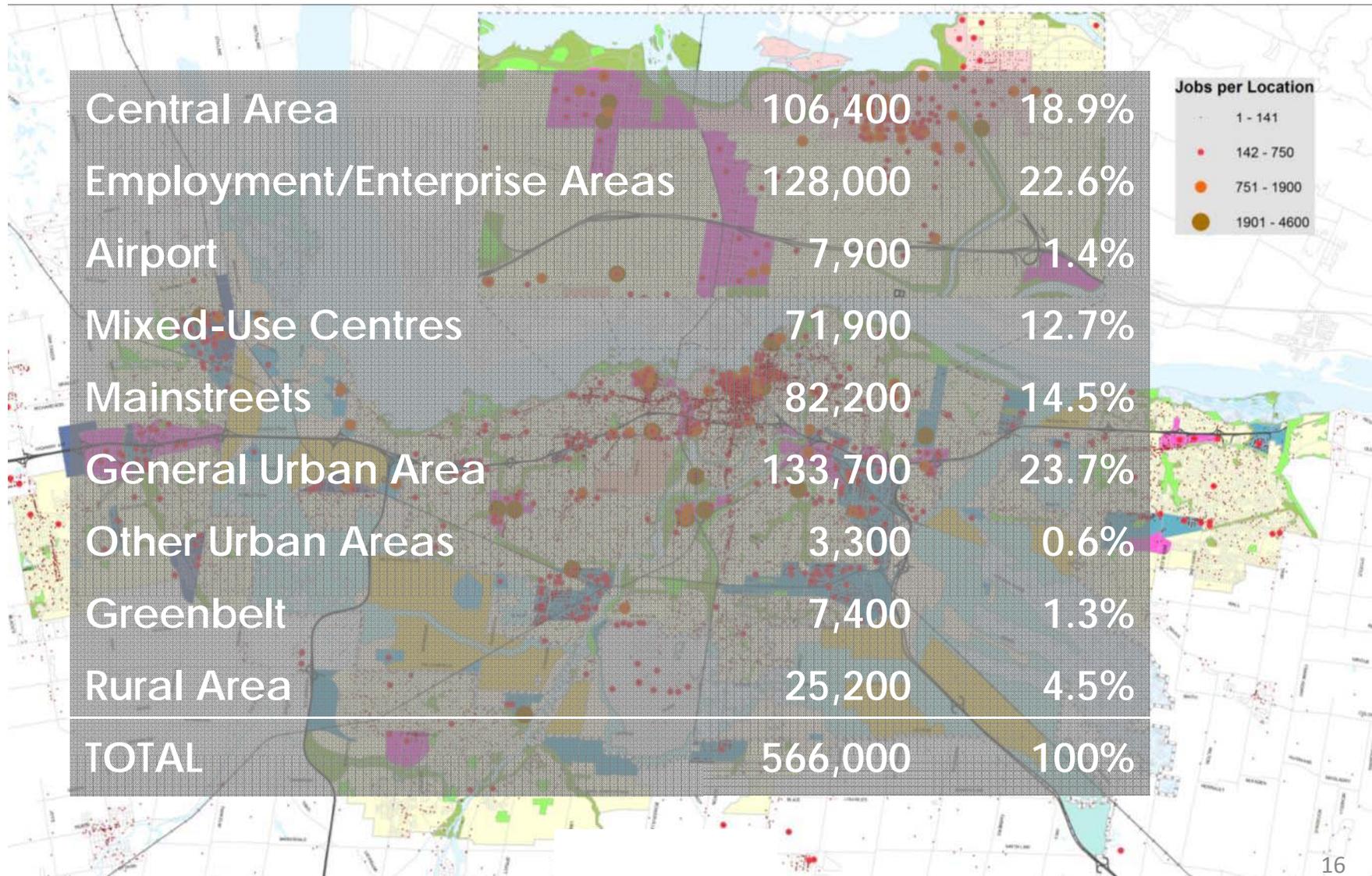
Growth Management

- Within OPA 150, move to more **compact, mixed-use, transit-oriented development** and intensification requirements
- Plan for more than 1.1 million people by 2031 (265,000 more than in 2006) and **703,000 jobs** (173,000 more)
- Target of **1.3 jobs per household** in each urban community
- **Major Office Development** (over 10,000 m²) **directed to areas with higher order transit** and sites in employment areas close to rapid transit
- **Removal of employment lands discouraged**—extensive criteria applied to proposed conversions

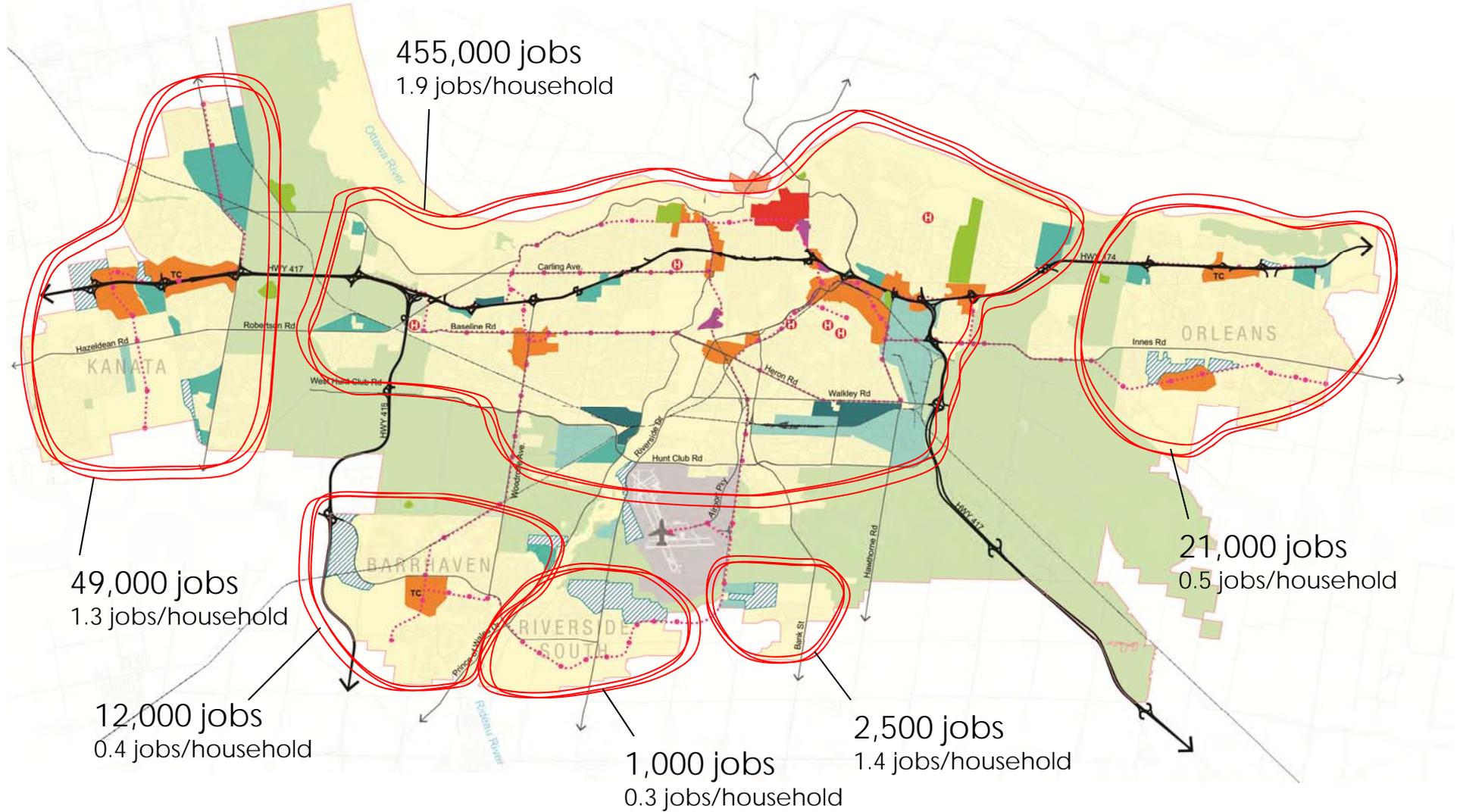
Rapid Transit Network Plan



Where the jobs are



The Official Plan seeks “complete communities” inside and outside the Greenbelt.



Is it time to take a “one community” approach?



Ottawa's Urban Employment Nodes



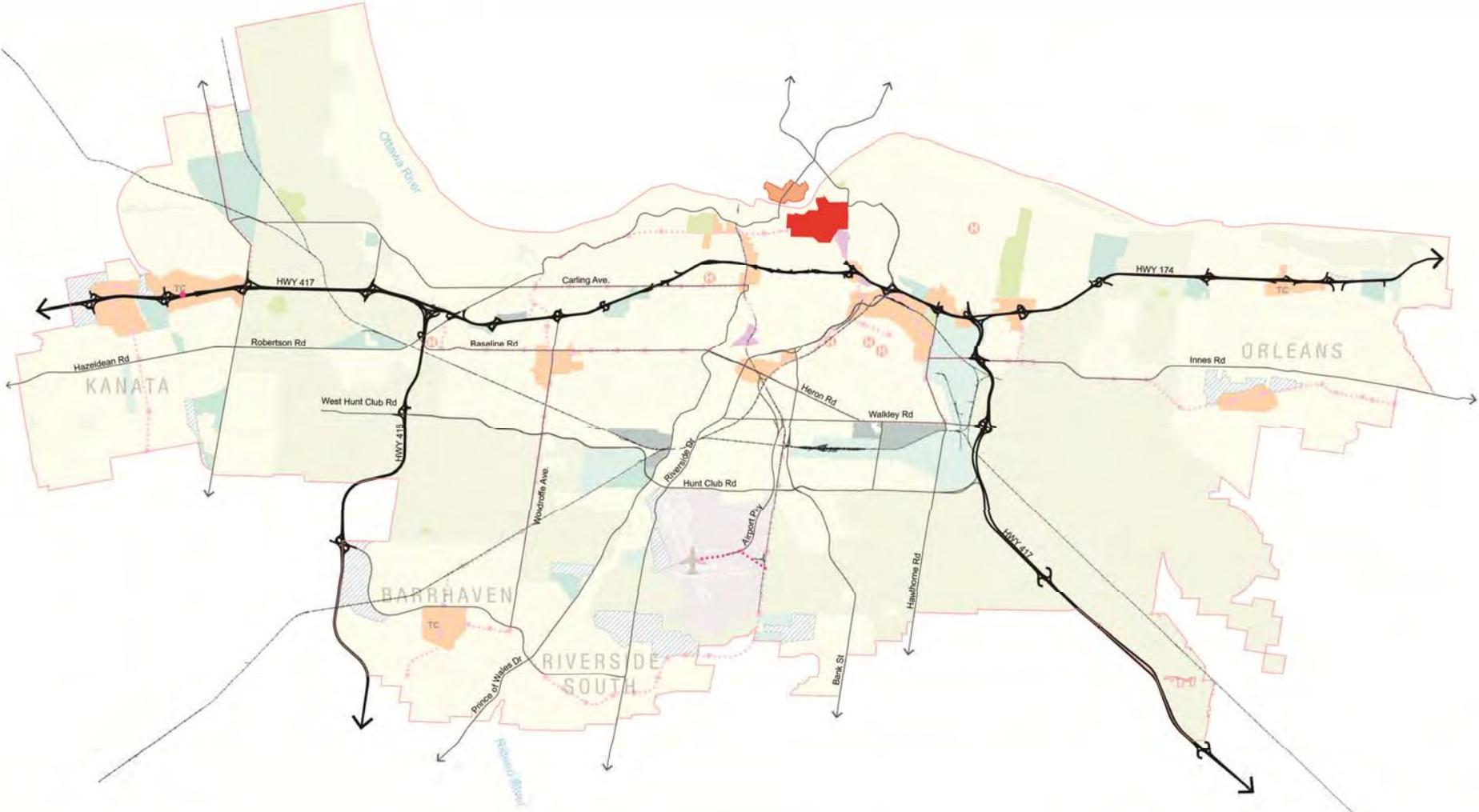
Industrial/Business Parks:

- Primarily Office
- Mixed Office/Industrial/Retail
- Primarily Industrial
- ▨ Vacant Employment Area

Other Employment Areas:

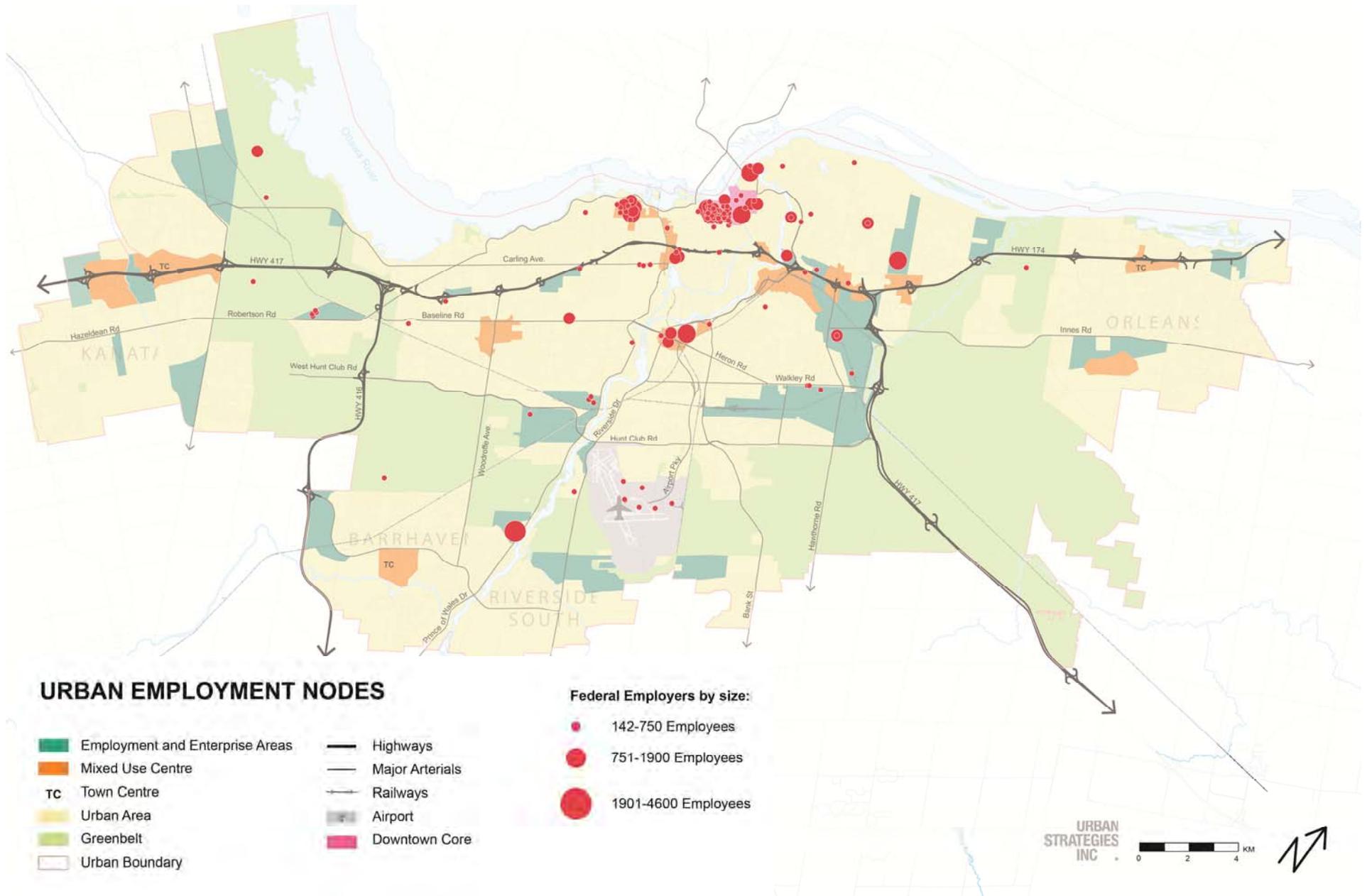
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- Downtown Gatineau
- Federal Government
- University/College
- Ⓜ Major Hospital
- Ⓜ Airport
- Mixed Use Centre
- TC Town Centre
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Downtown Core

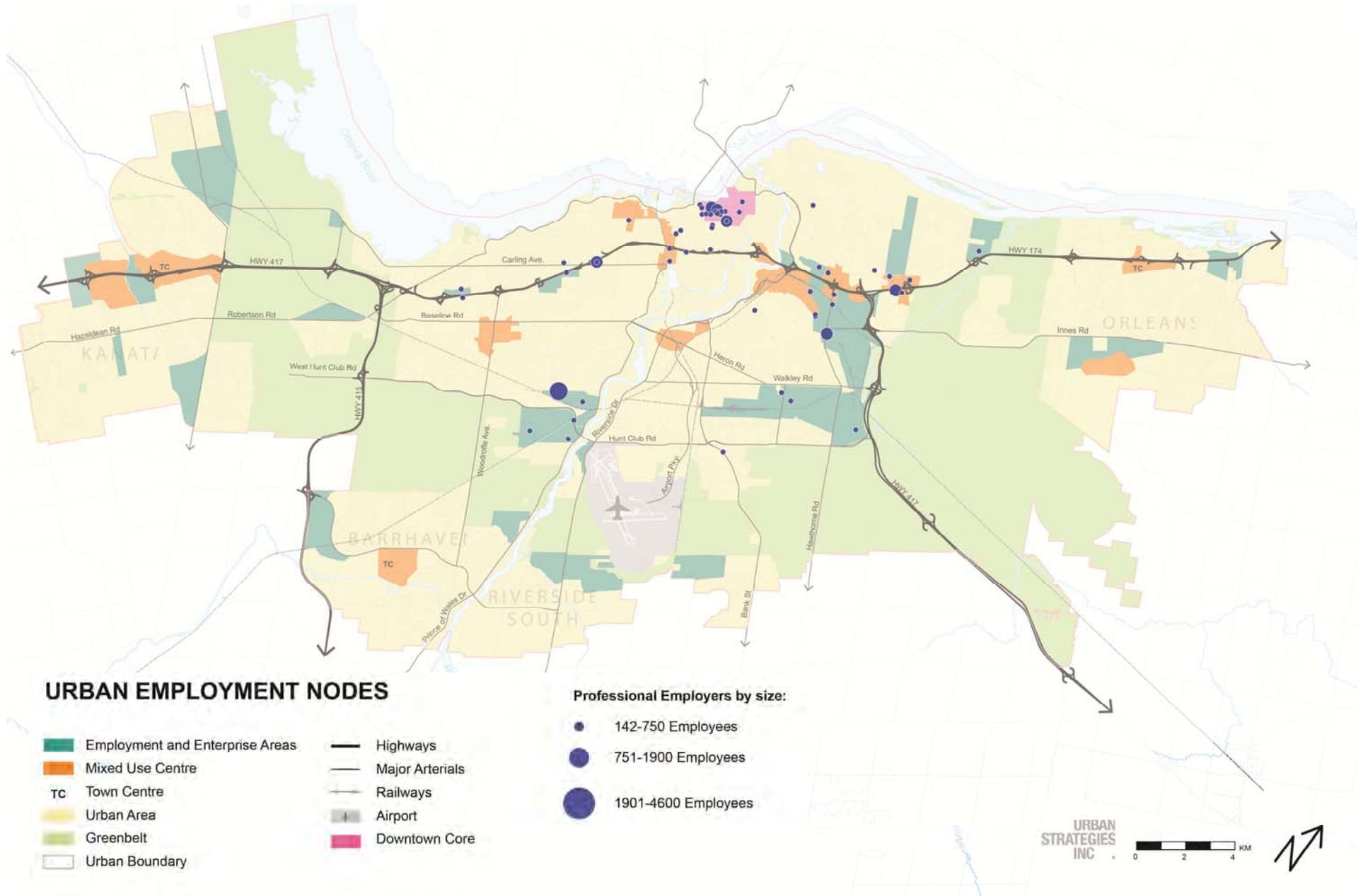


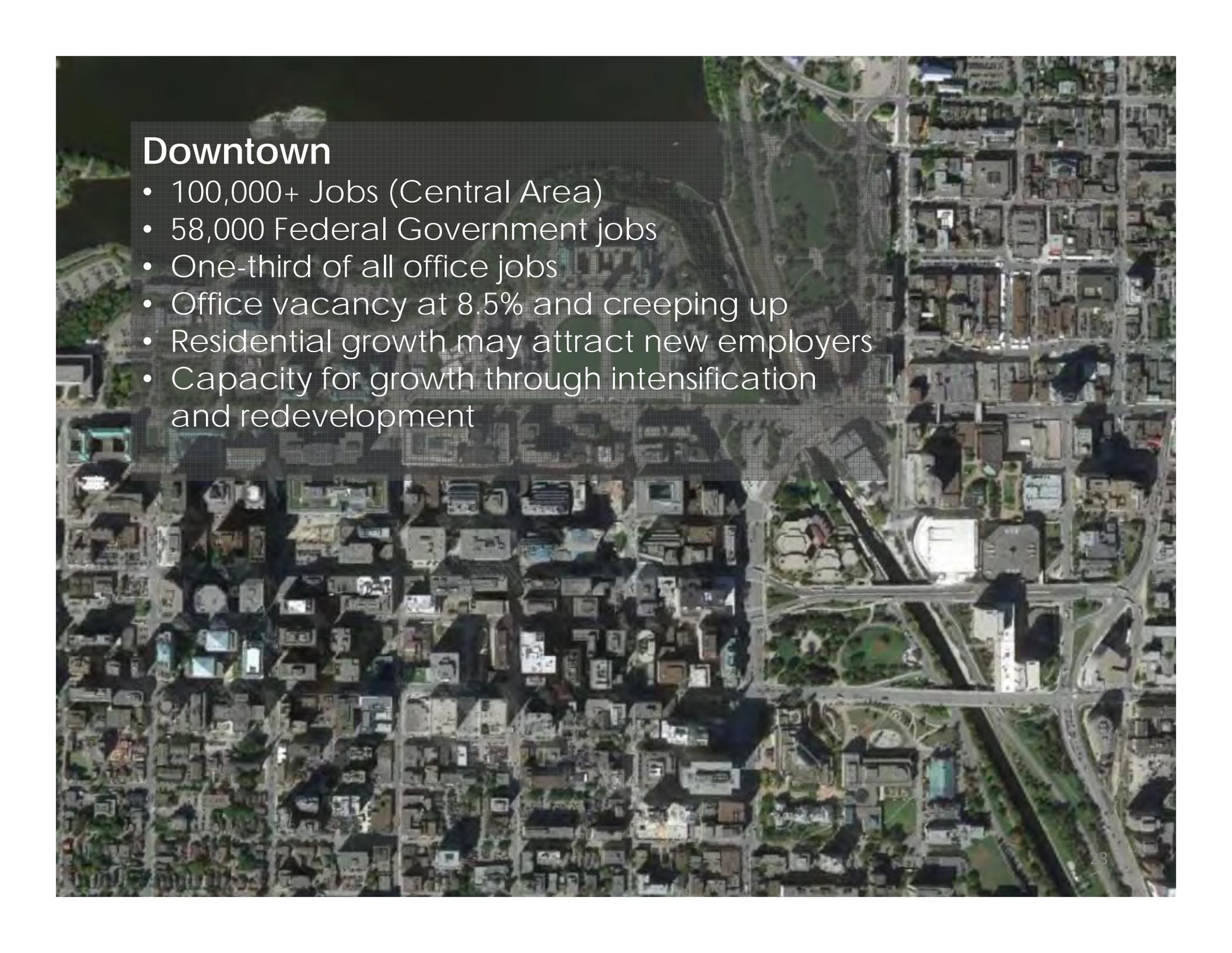
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Vacant Employment Area	University/College	Greenbelt	Railways
	Major Hospital	Urban Boundary	
	Airport		

Where the federal jobs are



Where the professional jobs are



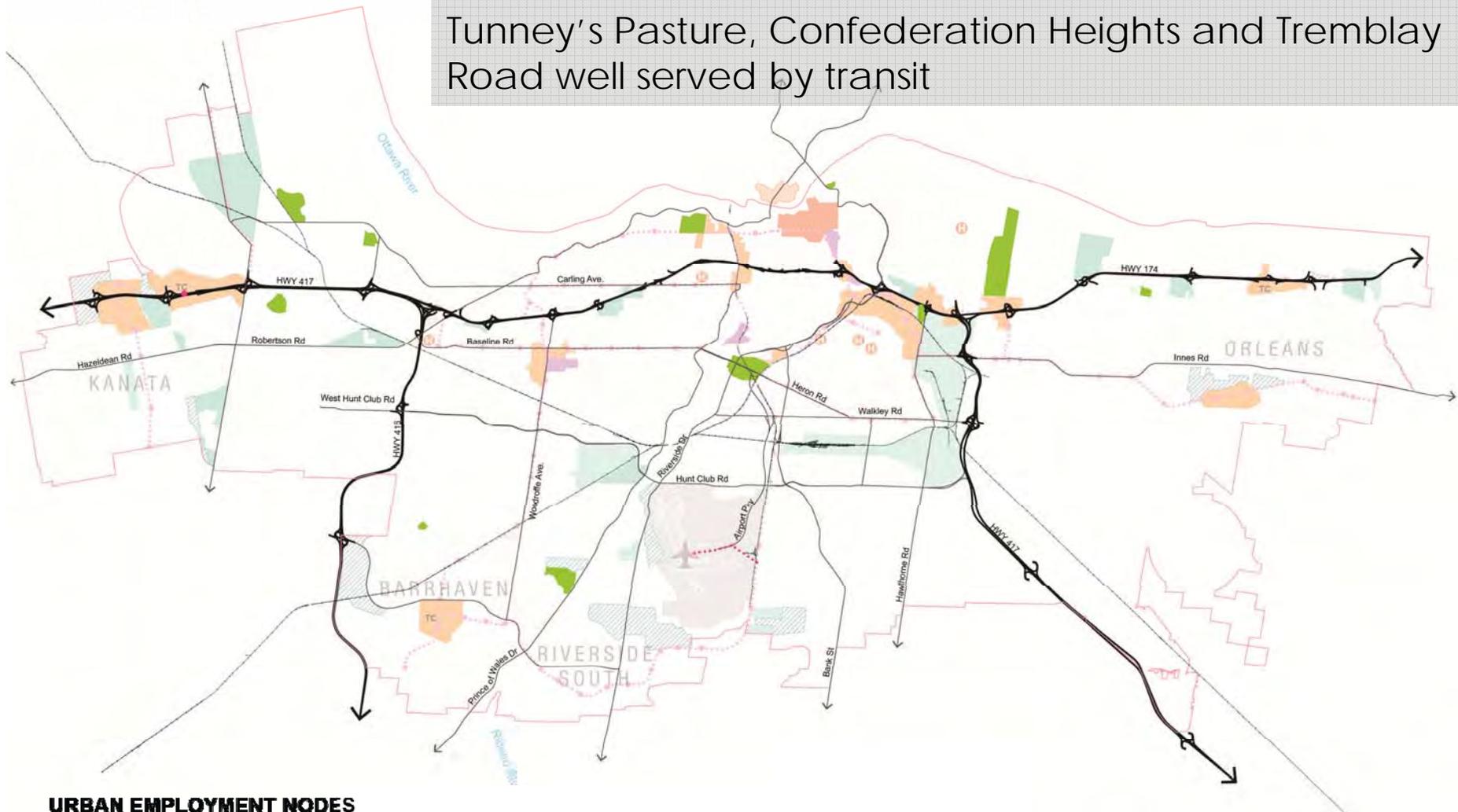


Downtown

- 100,000+ Jobs (Central Area)
- 58,000 Federal Government jobs
- One-third of all office jobs
- Office vacancy at 8.5% and creeping up
- Residential growth may attract new employers
- Capacity for growth through intensification and redevelopment

Federal Office/Research Nodes

Tunney's Pasture, Confederation Heights and Tremblay Road well served by transit



URBAN EMPLOYMENT NODES

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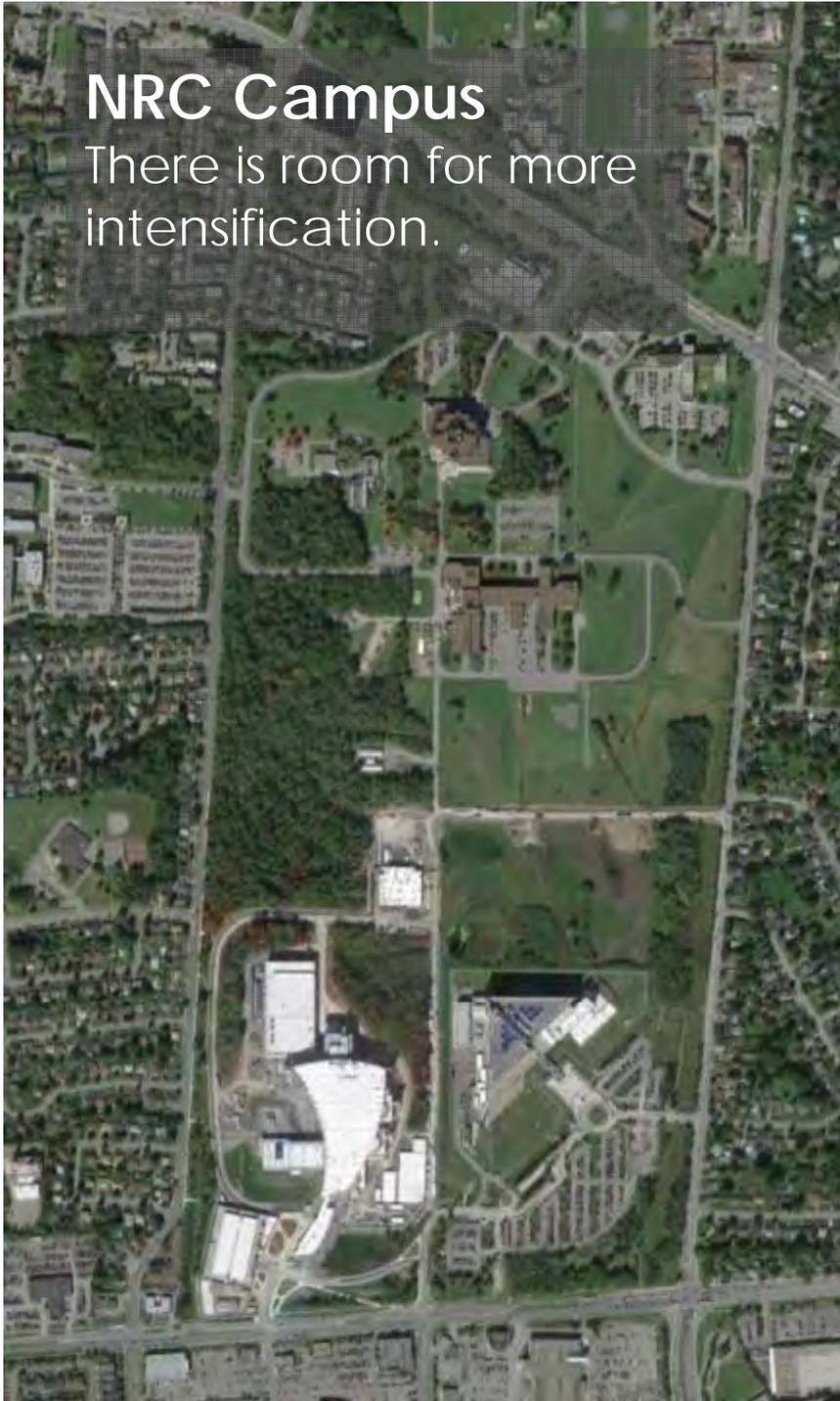
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- - - Rapid Transit (existing and planned LRT and BRT)
- Railways

NRC Campus

There is room for more intensification.



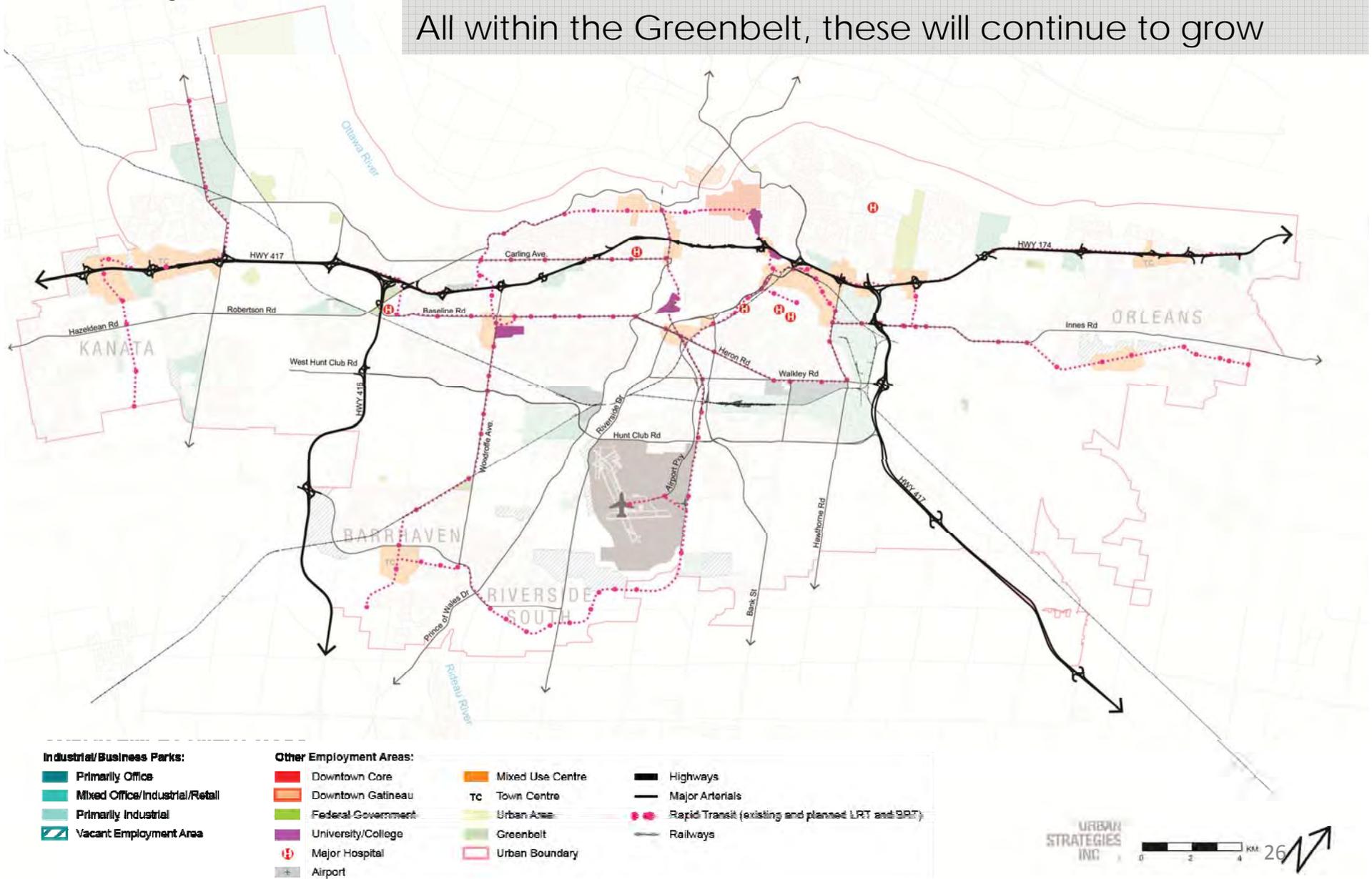
Tunney's Pasture

Plans for 10,000 more jobs



Major Institutions

All within the Greenbelt, these will continue to grow



Ottawa Health Sciences Centre



uOttawa's "River Campus"



Employment Lands



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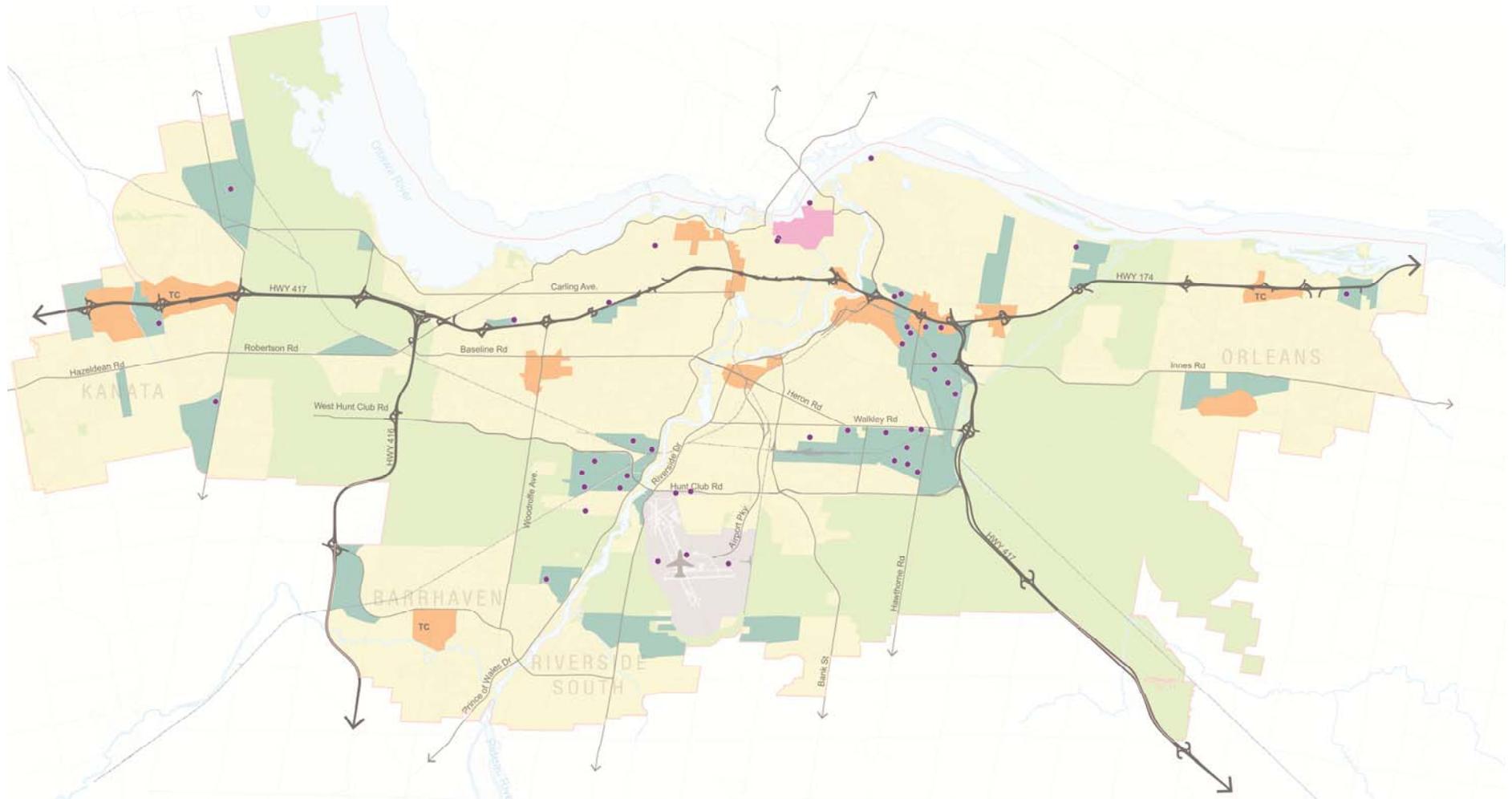
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- ⋯ Rapid Transit (existing and planned LRT and BRT)
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Employment Area Policies

- Lands reserved to:
 - Balance jobs and housing in all urban communities
 - Ensure supply of large parcels
 - Ensure affordability
 - Allow clustering of similar uses
 - Separate noxious uses from sensitive areas
 - Allow privacy
- Minimum 2,000 jobs in each but averaged around 4,000 in 2012
- Planned adjacent to highways and arterials
- Located throughout the urban fabric

Where the industrial jobs are



URBAN EMPLOYMENT NODES

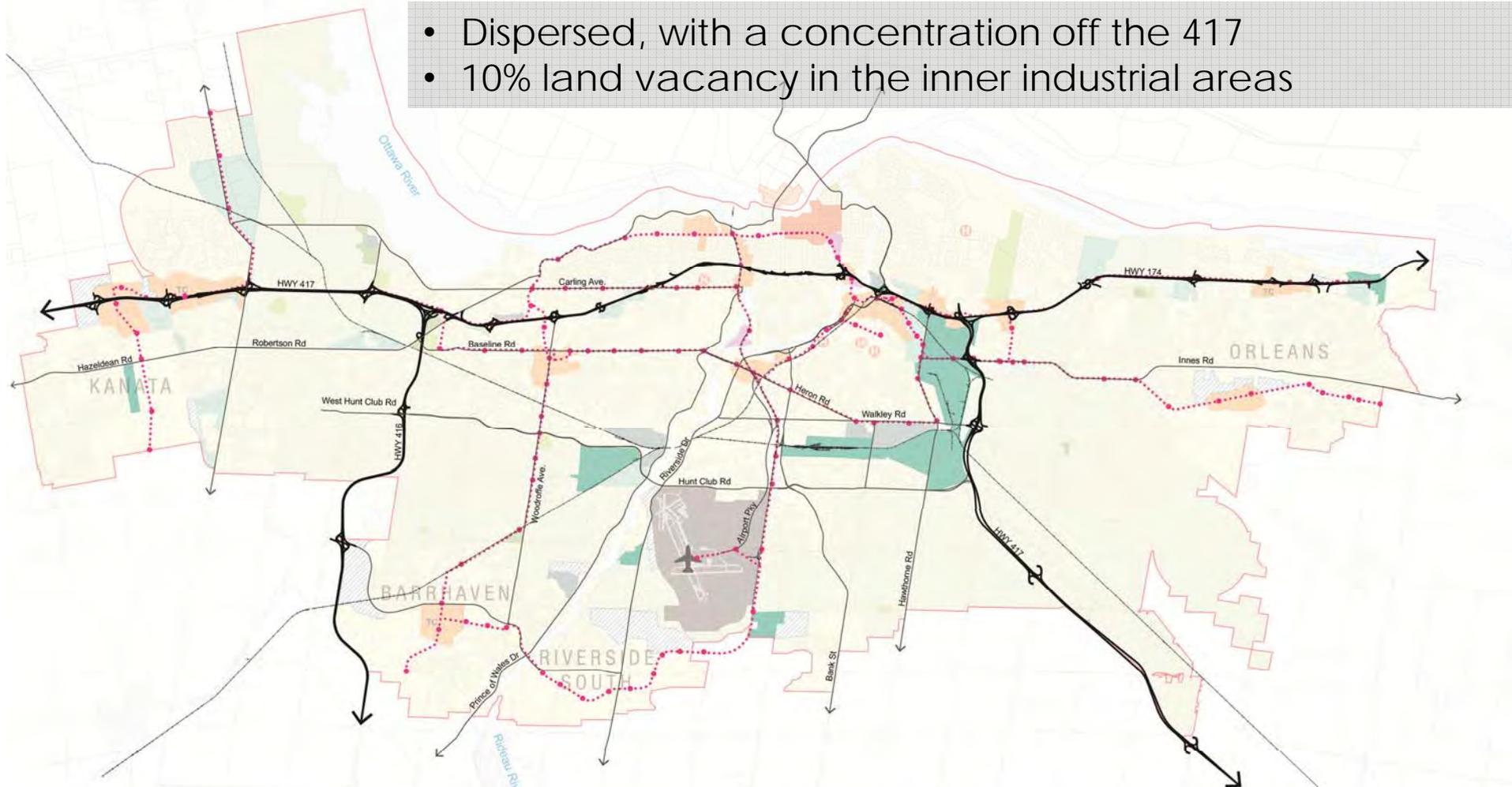
- Employment and Enterprise Areas
- Mixed Use Centre
- TC Town Centre
- Urban Area
- Greenbelt
- Urban Boundary
- Highways
- Major Arterials
- Railways
- Airport
- Downtown Core

Industrial Employers by size:

- 142-750 Employees
- 751-1900 Employees
- 1901-4600 Employees

Industrial Parks

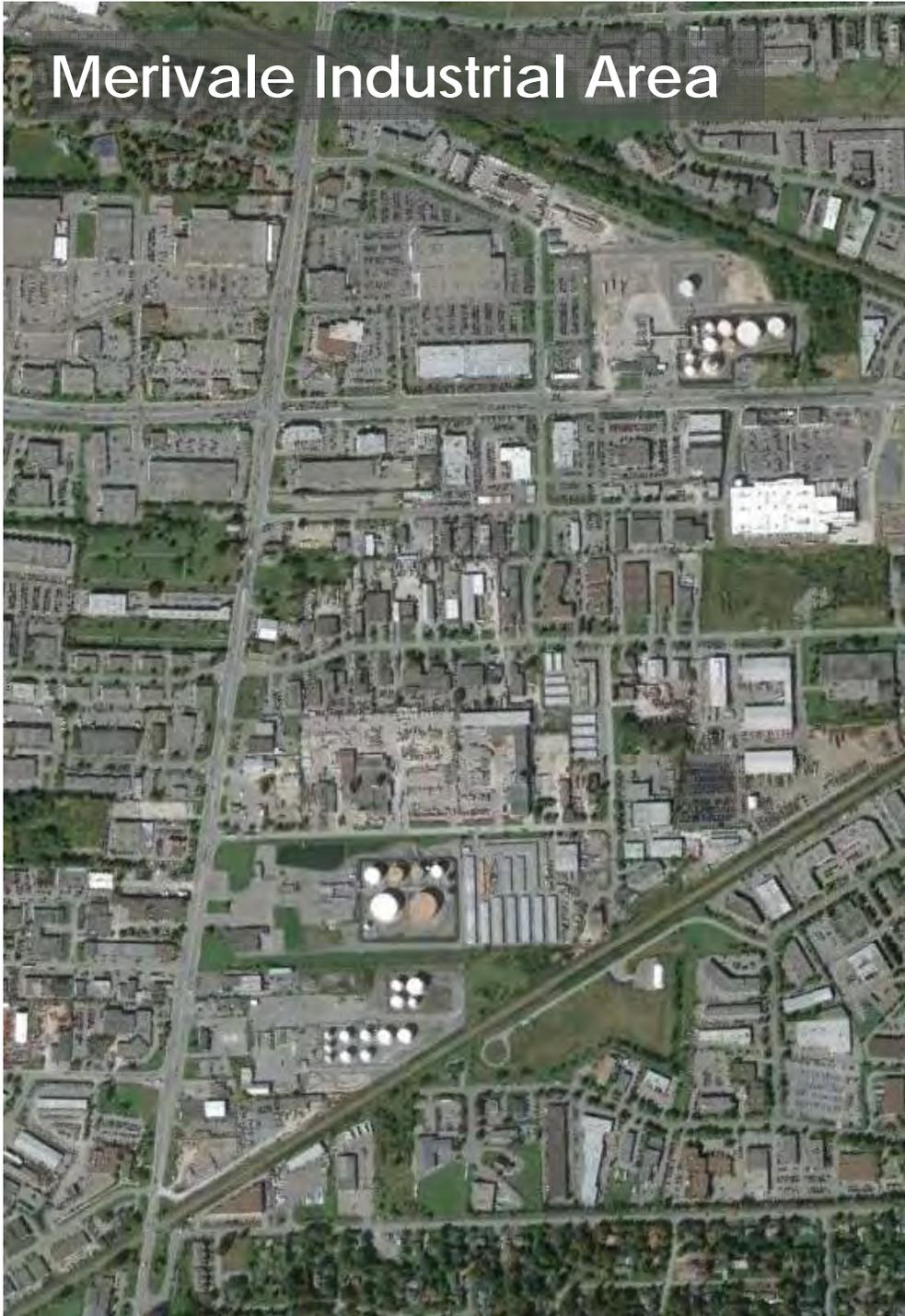
- Dispersed, with a concentration off the 417
- 10% land vacancy in the inner industrial areas



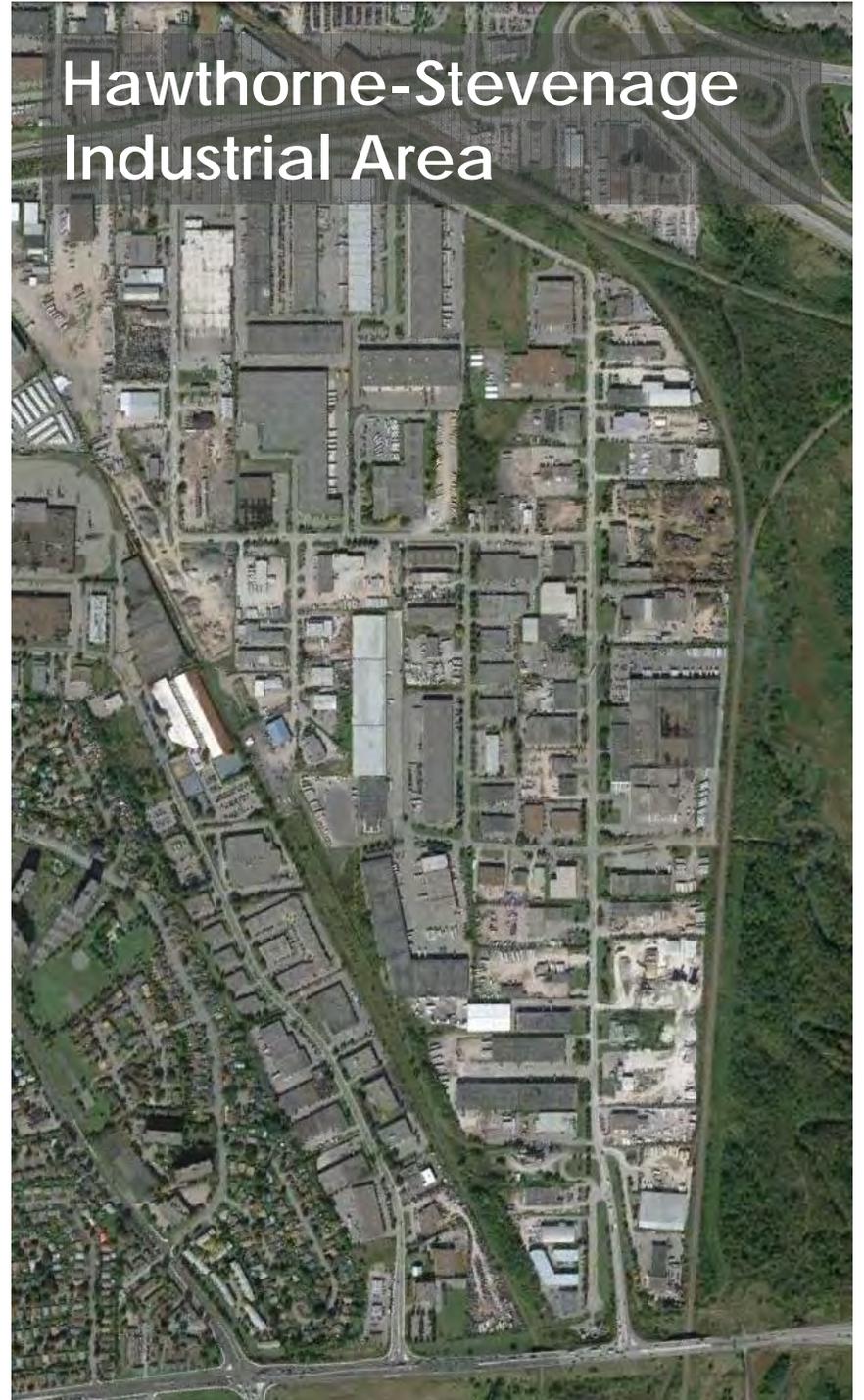
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Merivale Industrial Area

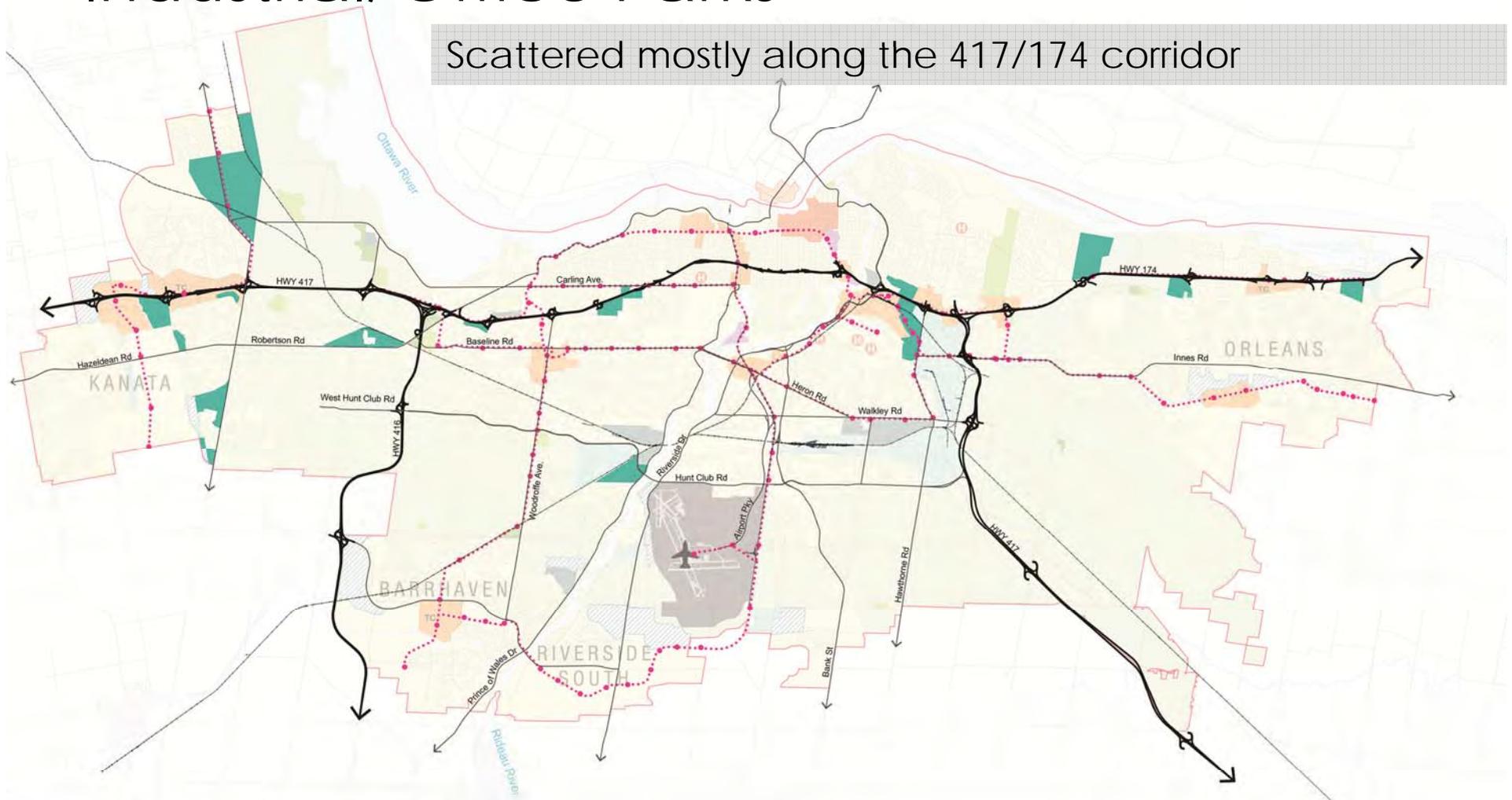


Hawthorne-Stevenage Industrial Area



Industrial/Office Parks

Scattered mostly along the 417/174 corridor



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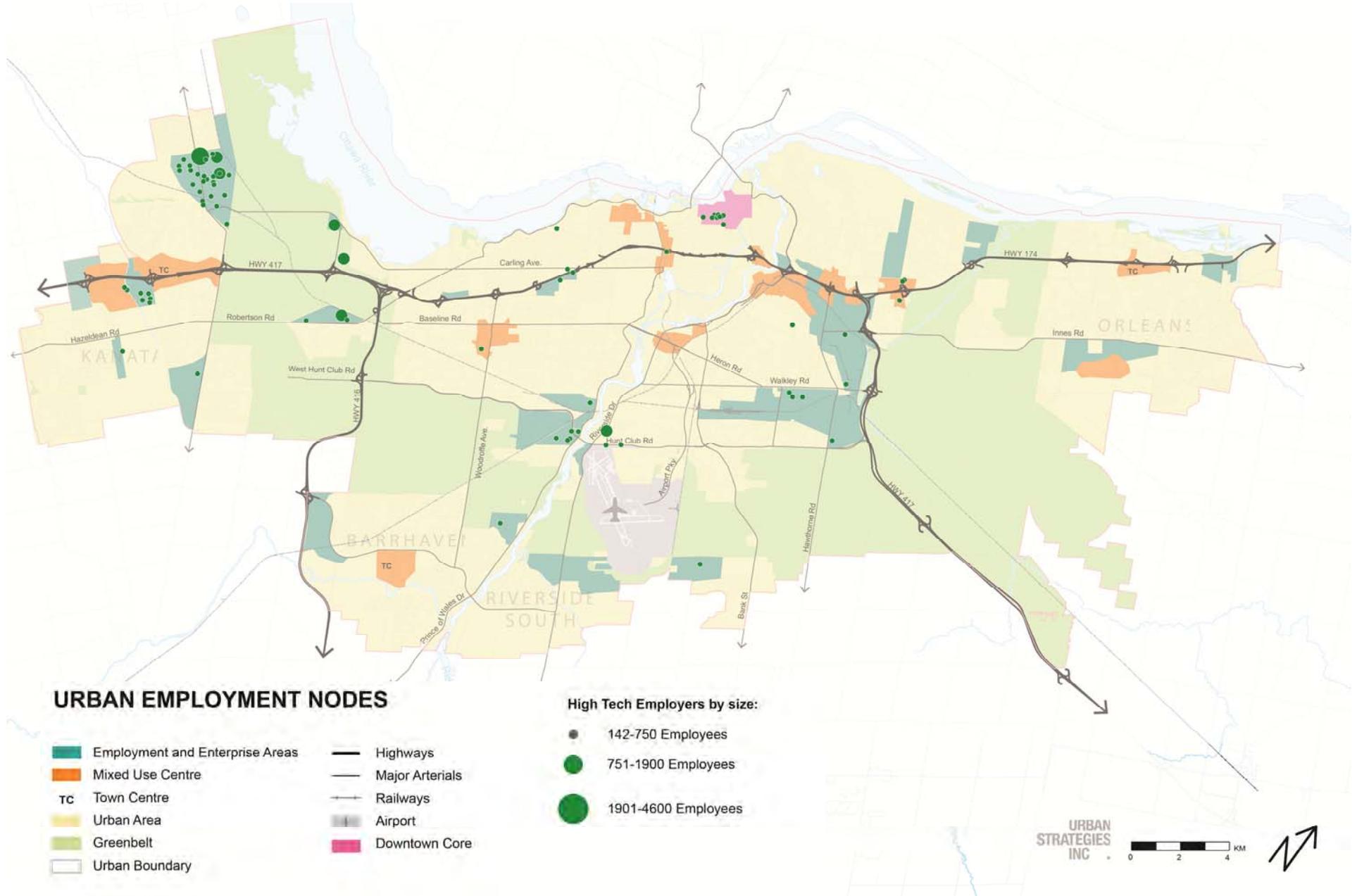


Terry Fox Business Park
A mixed-use business park



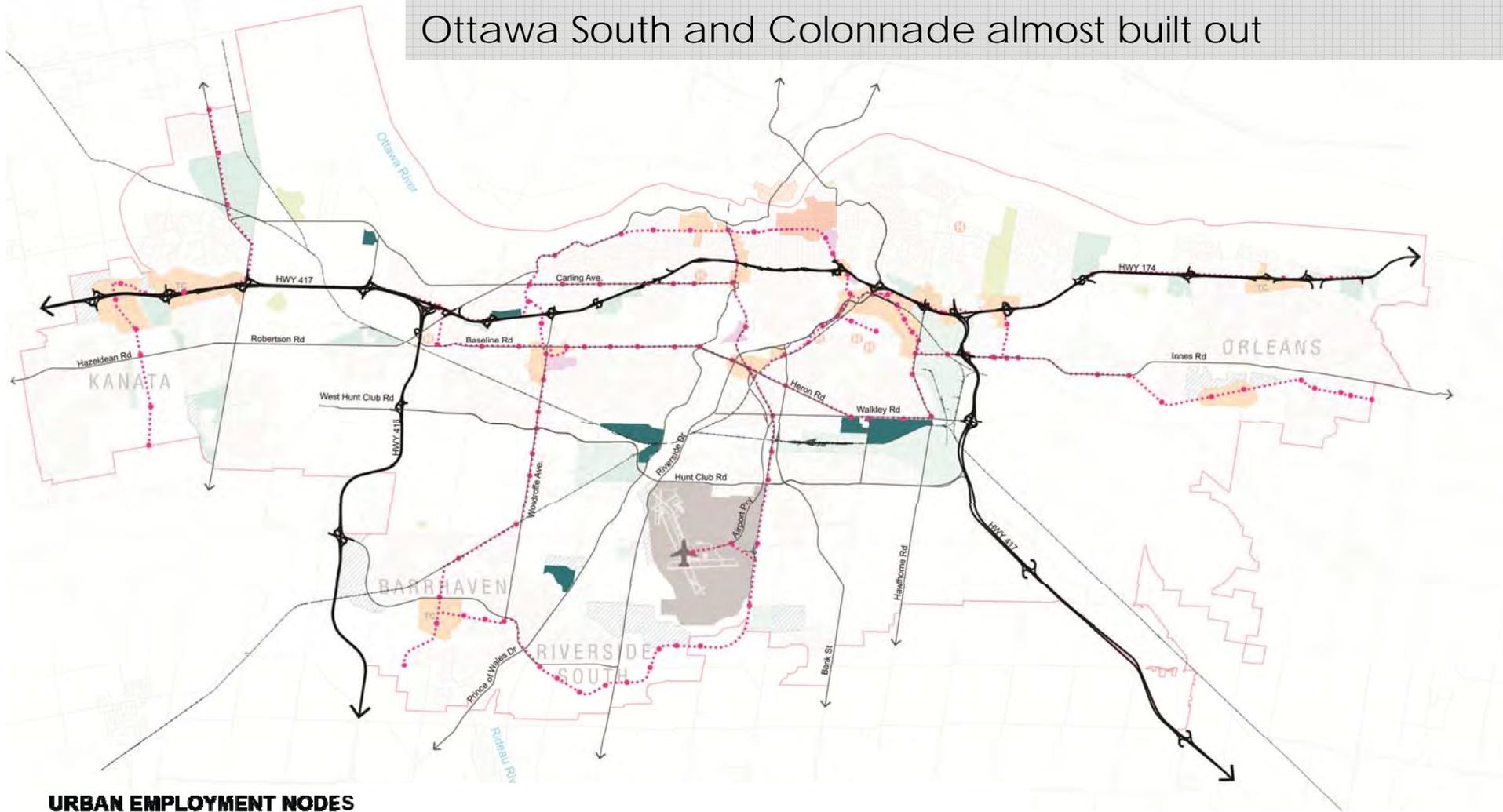
Kanata North Business Park
Continues to attract high tech employers but may face competition from urban locations

Where the high tech jobs are



Office Parks

Ottawa South and Colonnade almost built out



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South Merivale Business Park

- Two-thirds vacant
- Can it compete with Kanata for high tech jobs?



Enterprise Area Policies

- Minimum 2,000 jobs at higher densities
- Minimum 50% of the land for employment
- Townhouses and/or apartment buildings to be integrated
- Retail uses permitted as exceptions

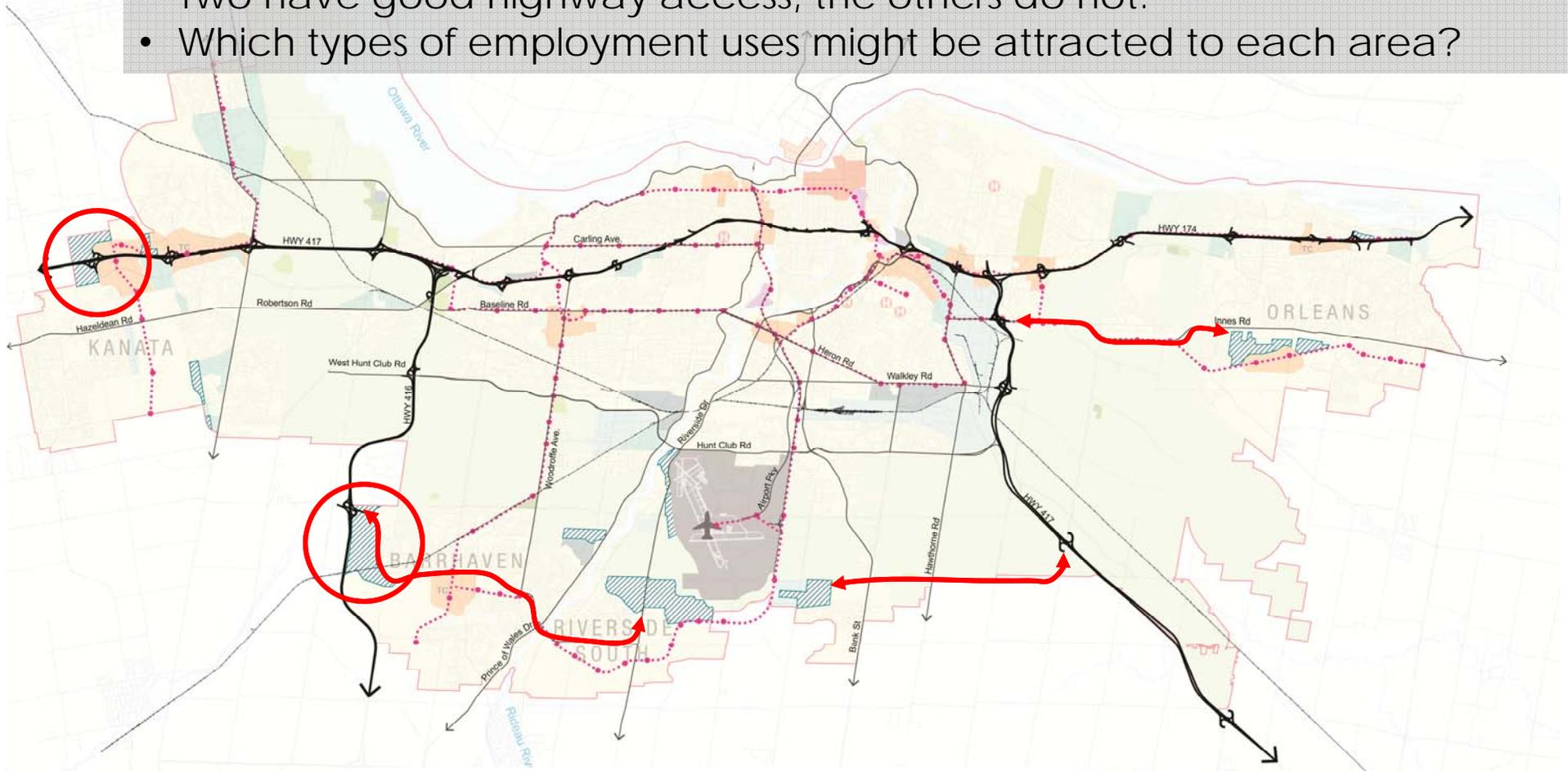
Kanata South Enterprise Area

The vision of integrated mixed-use employment areas has not been achieved.



Vacant Employment Areas

- Two have good highway access, the others do not.
- Which types of employment uses might be attracted to each area?

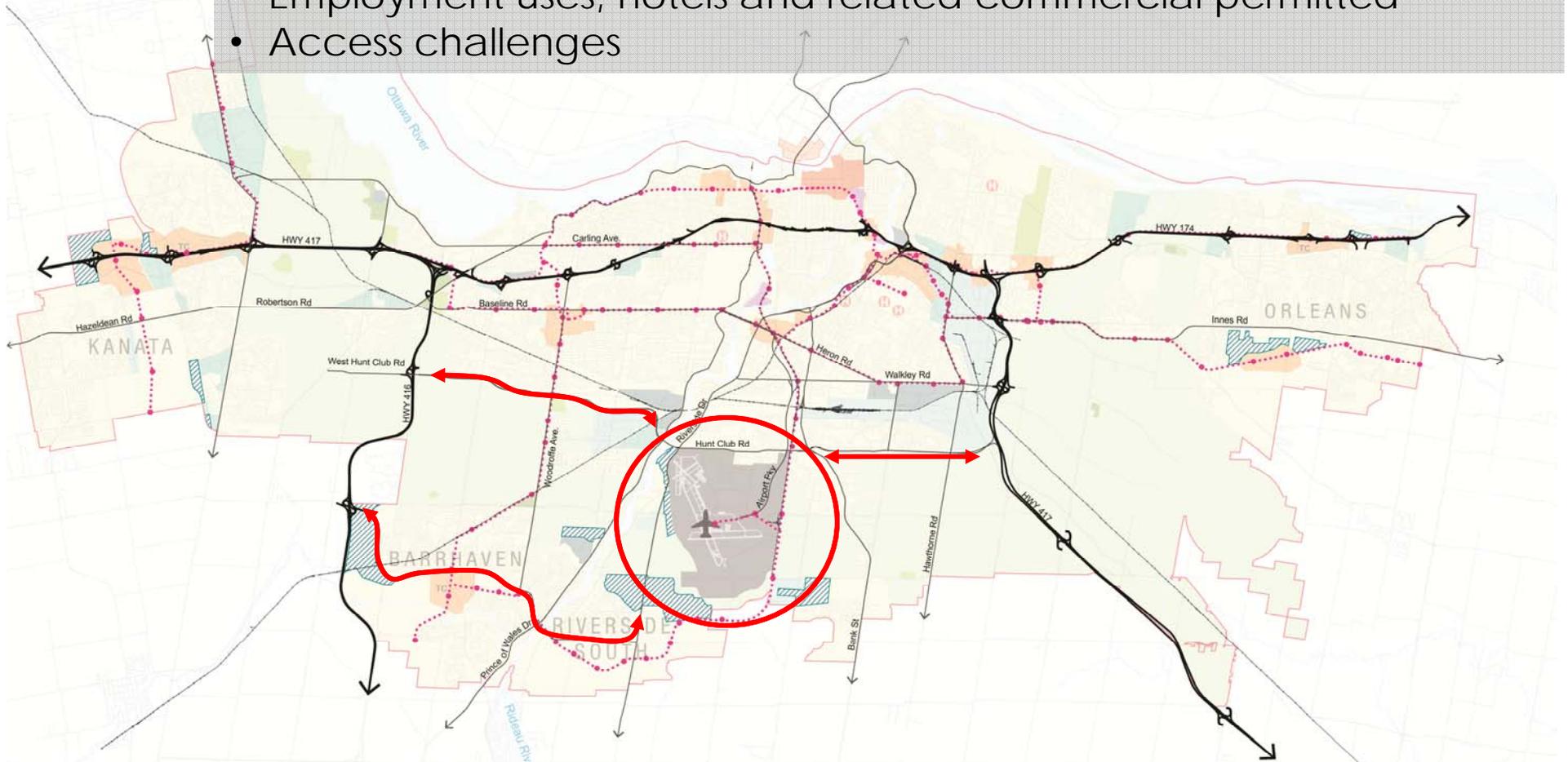


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The Airport

- Employment uses, hotels and related commercial permitted
- Access challenges



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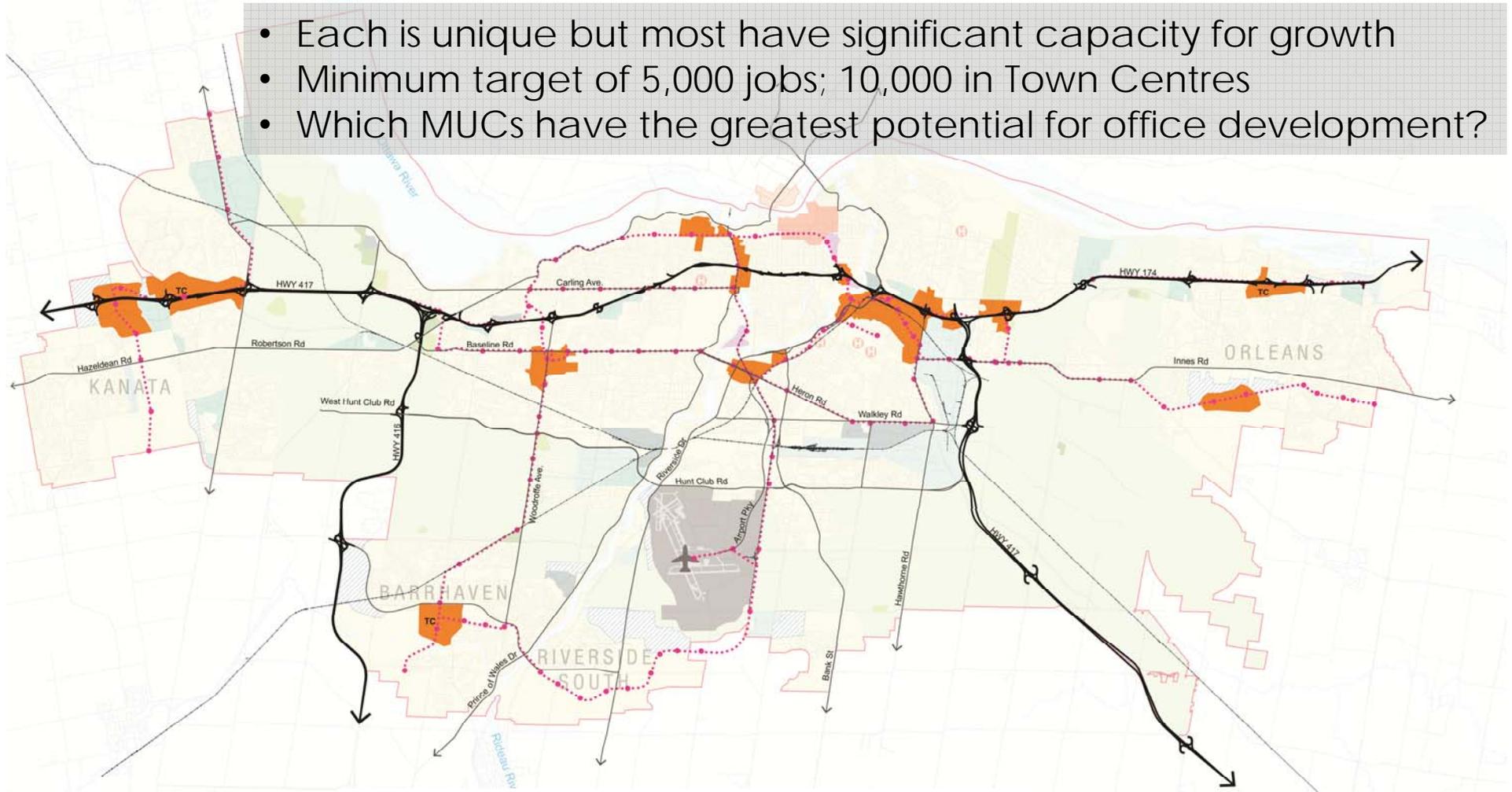
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URBAN STRATEGIES INC.



Mixed-Use Centres

- Each is unique but most have significant capacity for growth
- Minimum target of 5,000 jobs; 10,000 in Town Centres
- Which MUCs have the greatest potential for office development?



URBAN EMPLOYMENT NODES

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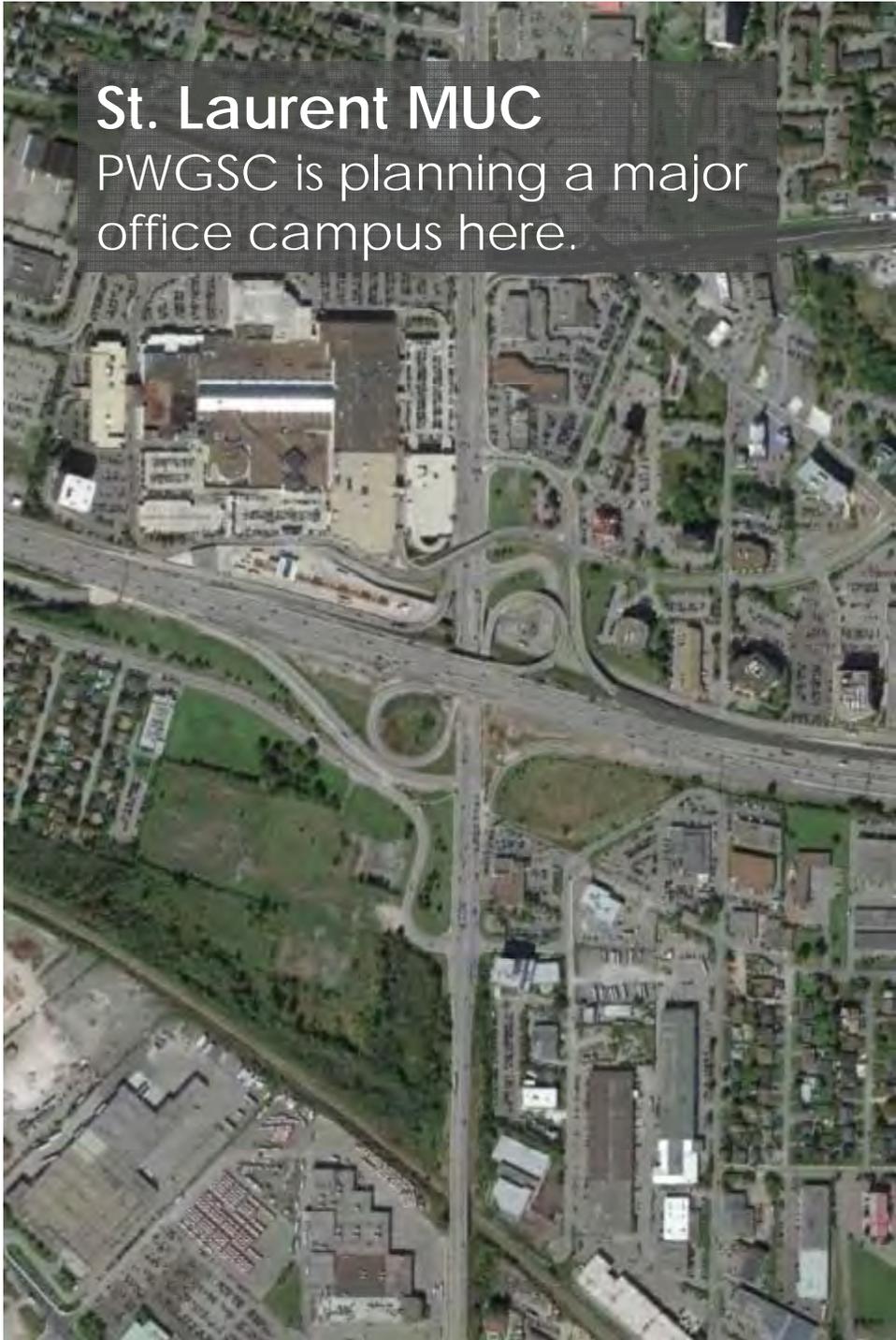
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St. Laurent MUC

PWGSC is planning a major office campus here.



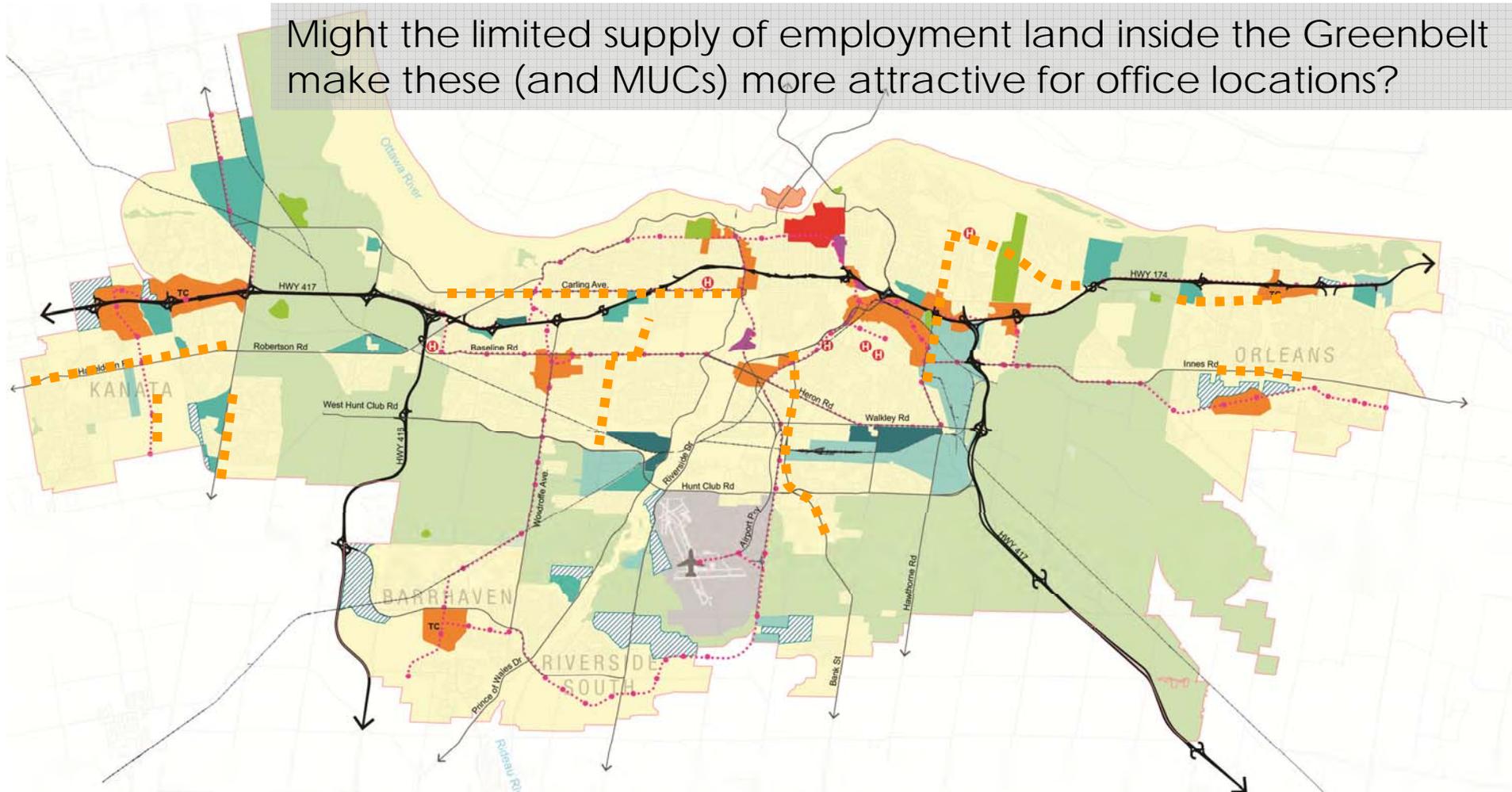
Blair Road MUC

Existing development in many MUCs will pose a challenge to intensification.



Arterial Main Streets

Might the limited supply of employment land inside the Greenbelt make these (and MUCs) more attractive for office locations?



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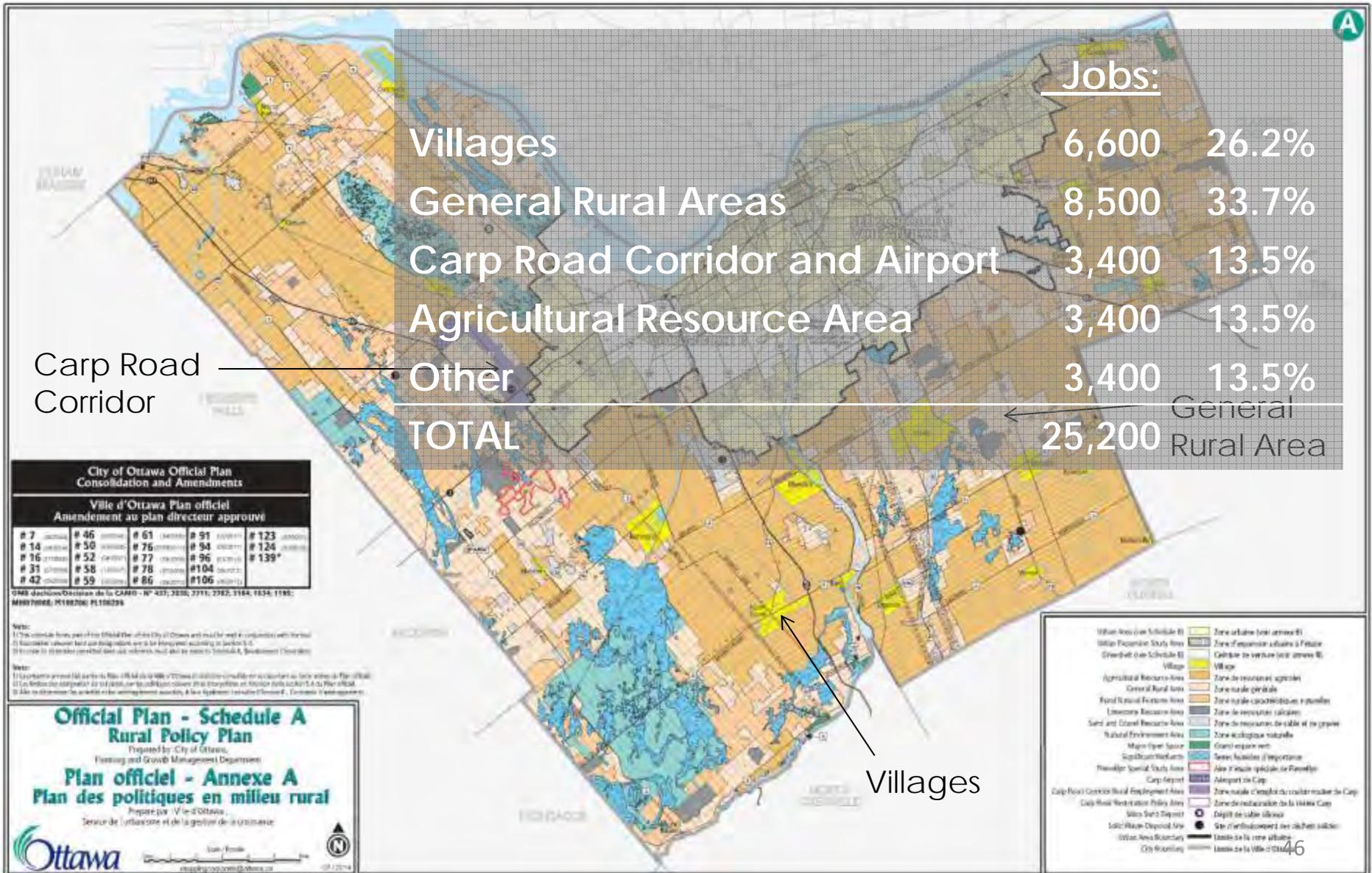
Merivale Road

Older commercial corridors inside the Greenbelt have the greatest potential to be regenerated with office and other uses.



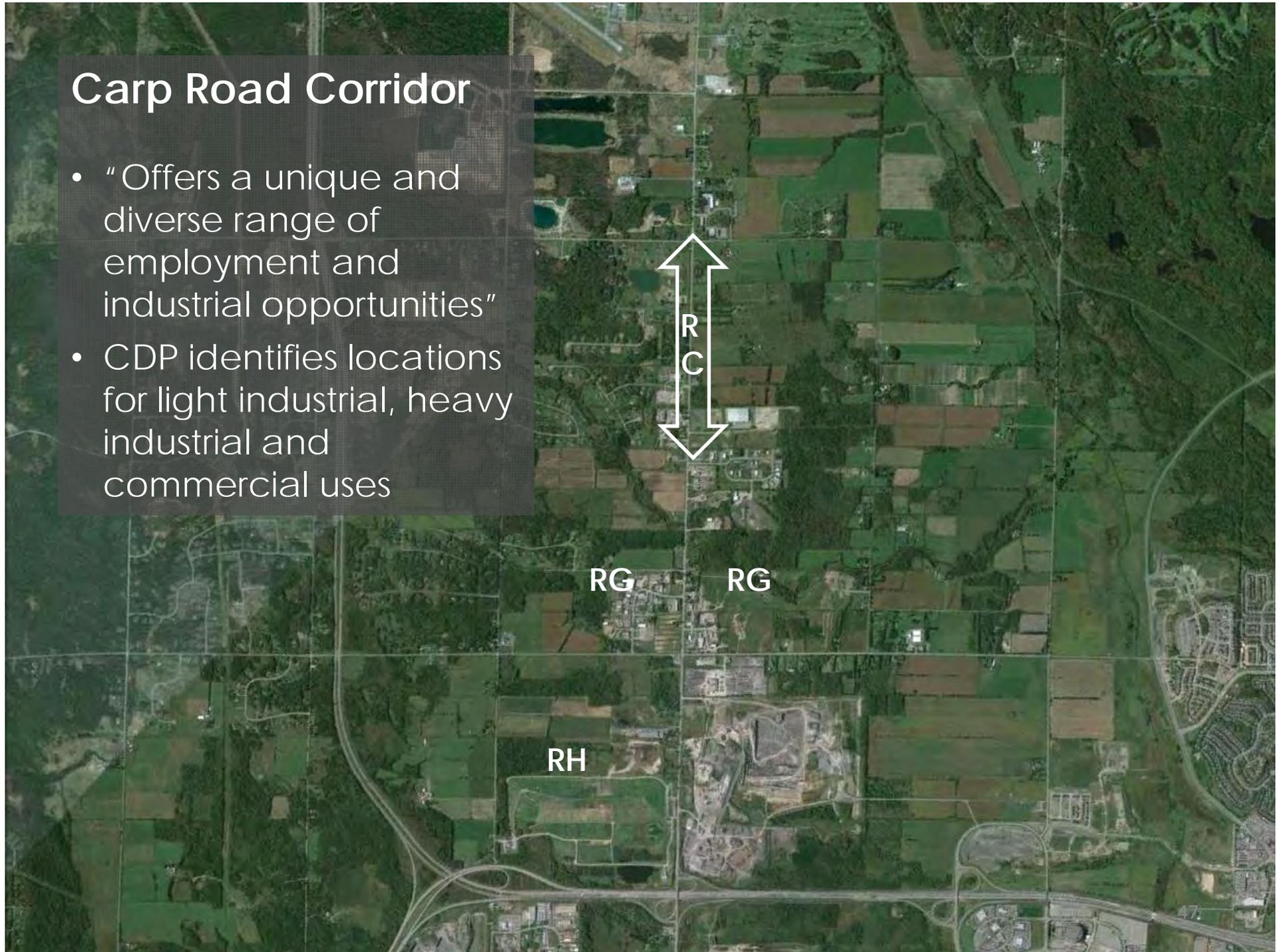
Merivale Road

Rural Employment

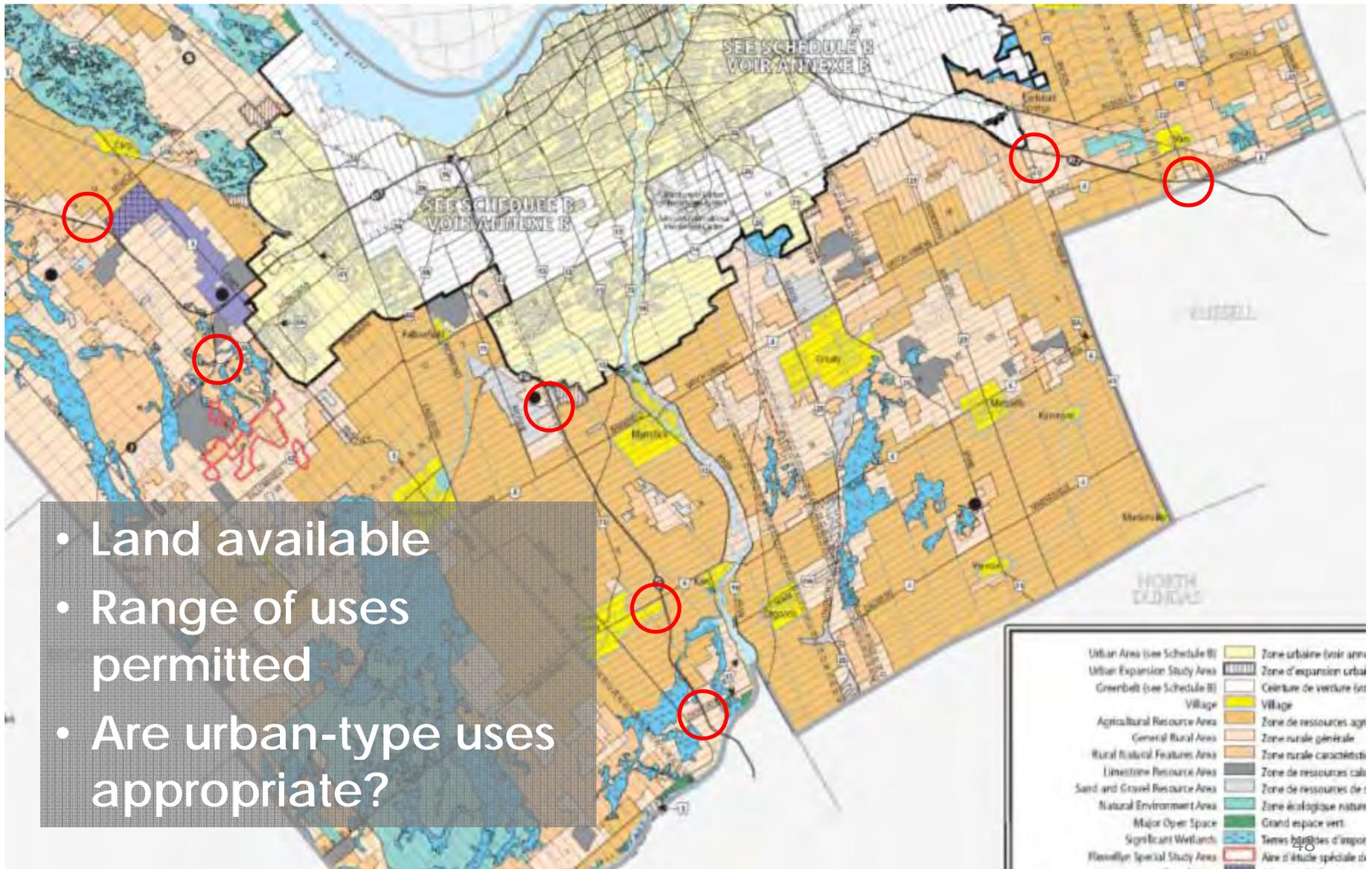


Carp Road Corridor

- “Offers a unique and diverse range of employment and industrial opportunities”
- CDP identifies locations for light industrial, heavy industrial and commercial uses



Rural Interchanges



- Land available
- Range of uses permitted
- Are urban-type uses appropriate?

Summary of Preliminary Findings

- There is limited vacant employment land remaining inside the GB, but job growth will continue there, supported by transit.
- The pace of population growth outside the Greenbelt could make it challenging to achieve “balanced communities” everywhere.
- There are many locations outside employment areas planned for higher-order office buildings and with development capacity—downtown, Federal parks, MUCs.

Summary of Preliminary Findings

- New industrial parks outside the Greenbelt likely will be needed over the long-term, and locations close to highways likely will be the most attractive.
- Two planned employment areas have good highway access, but those in Riverside South, Leirtrim and Orleans and around the airport are not near interchanges.
- There is plenty of land designated General Rural Area around rural highway interchanges, and the land use policies are flexible.

- Questions and discussion...

Ottawa Employment Land Review

Preliminary Supply and Demand Analysis

Preliminary Conclusions...

- Preliminary analysis results suggests a sufficient supply of land to accommodate employment growth beyond 2041
- Consistent with findings of City's prior employment land studies
- Difference between supply and estimated demand is not an end result but a starting point for discussion about the potential for employment land conversions
- Established employment areas must be kept intact
- Quality of land, location and timing to come to market are among the planning considerations for further discussion

Unique Local Economy

- As the national capital, heavy reliance on public sector employment affects many aspects of the city, including:
 - More jobs accommodated in offices than elsewhere
 - Higher transit use,
 - Less industrial land and built space
 - Fewer trucks on the road
- Other sectors are important including high tech and the provision of central place functions for the surrounding region
- City also includes a very large rural area with rural and urban-related economic activities

City forecasts moderate employment growth to 2031

- Ottawa is planning to accommodate more than 120,000 additional jobs to 2031

Forecast Total Place of Work Employment City of Ottawa, 2006-2031			
Year	Total Place of Work Employment	Growth	Growth Rate
2006	530,000		
2011	578,000	48,000	1.75%
2021	640,000	62,000	1.02%
2031	703,000	63,000	0.94%

Source: City of Ottawa Official Plan, Growth Projections for Ottawa, 2006-2031.

Significant land supply in business parks

- City has over 1,800 net ha of vacant employment land supply
- Most of the vacant supply is in the Urban Area Business Parks and Industrial Areas

Employment Land Supply City of Ottawa Business Parks and Industrial Areas, 2013				
Business Park / Industrial Area	Developed Land (ha)		Net Vacant (ha)	Total Net Supply ³ (ha)
	Occupied ¹	Vacant Building ²		
Urban Area	2,620	70	1,050	3,750
Rural Area	1,040	250	760	2,050
City-wide	3,660	320	1,810	5,800

Source: Hemson Consulting Ltd. based on information provided by the City of Ottawa.

Note: All figures above are rounded.

¹ Parcels that contain a physical structure and are occupied.

² Parcels that contain a structure which is unoccupied.

³ Total net supply is the sum of the above. This does not include any parcels that are undevelopable which were included in the Non-Vacant part of the City of Ottawa's Vacant Industrial Study, 2013

Why are we assessing supply and demand?

Purpose of the Supply Demand analysis is four-fold, to:

- Estimate demand for employment land, based on job growth to 2031 and trends in the marketplace and workplace
- Assess whether the City's current employment land supply is adequate to meet future requirements to 2031 and beyond
- Identify the implications of changing policies and designations in the Official Plan
- Provide input to a clear rationale to add or delete employment lands to meet future requirements

Why are we assessing supply and demand?

The Supply Demand Analysis:

- Builds on, confirms and updates as needed findings from prior work undertaken by the City
- Is based on a well-established method and the most current available information regarding Ottawa's economy and employment
- Provides a key input to the development of strategies for achieving the City's economic and long-range land use planning objectives

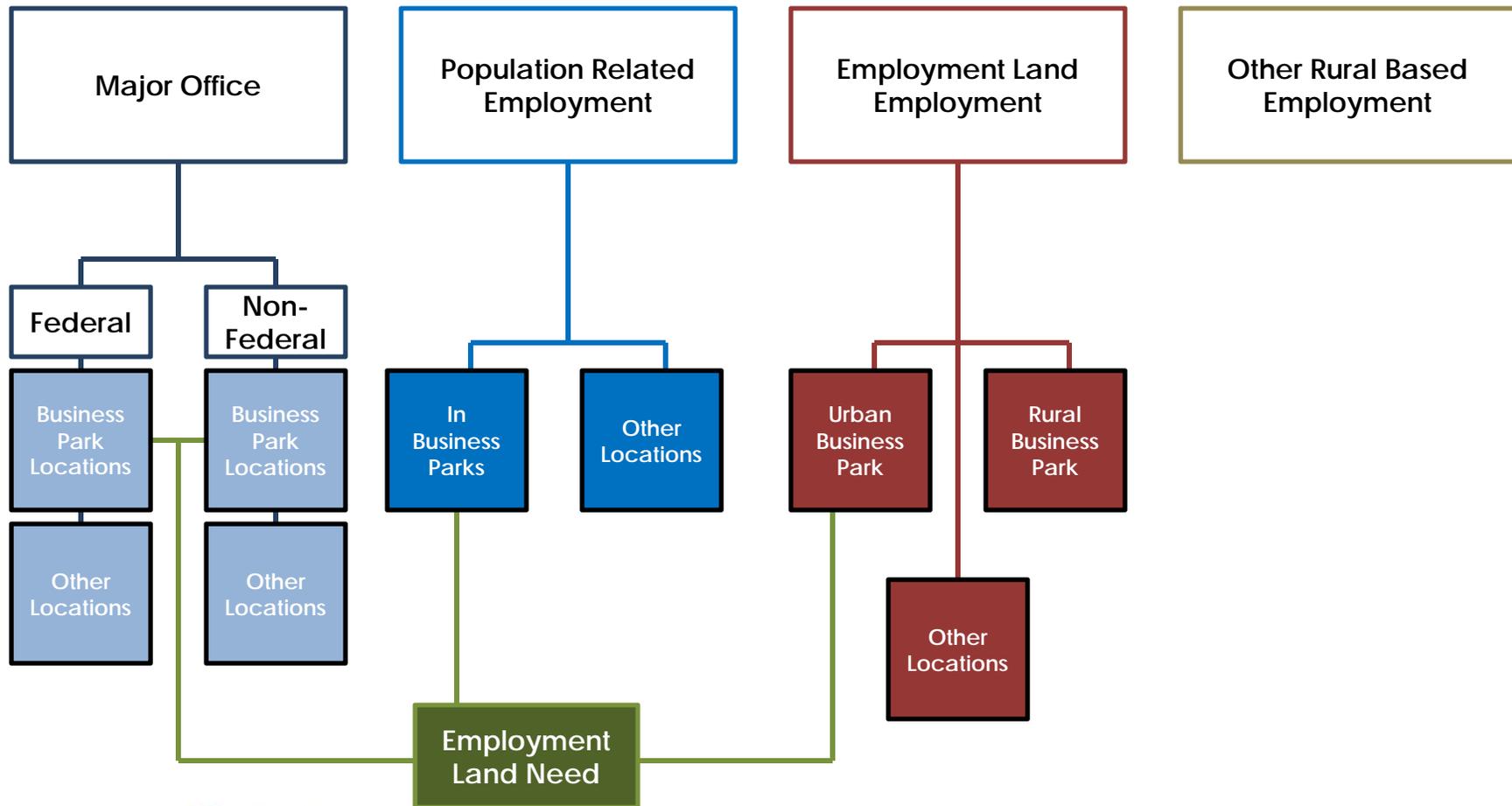
Approach to forecast

- For planning purposes a land-use based employment forecast is appropriate
- Many economic sectors occur in a range of built forms and locations, meaning sector forecasts are not as helpful for land planning
- Most of Ontario now uses a 4 category land-use based forecast approach

4 category land-use based forecast approach

- **Major Office:** all jobs in office buildings of 20,000 sq.ft. or larger
- **Population Related Employment:** jobs that grow in response to population growth including retail, health, education, local government and work at home
- **Employment Land Employment:** jobs occurring in industrial-type buildings, generally in urban and rural business parks and industrial areas
- **Other Rural-Based Employment:** jobs in the rural area that are not in the employment areas or villages

Further sub-categories reflect Ottawa's economy



Preliminary Assumptions – Office Employment

- Federal office employment growth is tied to growth in the Canadian population and economy
 - Forecast to grow 1.1% annually compared to Canada's population growth of 1.0%
- Other office employment grows somewhat more quickly, reflecting continued shift of the service sector
 - Forecast to grow at 1.3% annually compared to Ottawa's total employment at 1.1%

Preliminary Key Assumptions – Employment Land Employment

- Employment land employment is expected to grow somewhat more slowly than the overall rate of employment growth in the City, owing to:
 - Nature of Ottawa economy as more oriented to office-based employment
 - General expectation of a continued shift from traditional industries to services
 - However, forecast to grow at 0.7% annually compared to 0.6% over past decade (which captured the high-tech manufacturing decline)

Preliminary Assumptions – Population-Related Employment

- Population-related employment will grow at the same ratio to population as it is now
- Current and forecast ratio of about 3.5 population per population-related job
- Includes shift in the types of population-serving jobs:
 - Increased proportion of health and social services
 - Decreased proportion of retail employment

Existing Employment and Employment Growth by City Geography

Employment and Employment Growth by Geographic Area						
	Urban Business Park and Industrial Areas	Other Urban (incl. Downtown and Airport)	Greenbelt	Rural Area (inc. Business Parks and Villages)	Total	
Employment						
2001	113,900	351,000	6,900	18,200	490,000	
2006	124,700	375,200	8,000	22,100	530,000	
2012	138,600	402,400	8,200	25,800	575,000	
Employment Growth						
2001-06	10,800	24,200	1,100	3,900	40,000	
2006-12	13,900	27,200	200	3,700	45,000	
Share of Employment Growth						
2001-06	27.0%	60.5%	2.8%	9.8%	100.0%	
2006-12	30.9%	60.4%	0.4%	8.2%	100.0%	

Forecast Employment by Land-Use Based Category

Preliminary Forecast Employment by Land-Use Based Category						
	Major Office		Employment Land Employment	Population-Related Employment	Other Rural Employment	Total
	Federal	Other				
Employment						
2001	87,100	74,100	95,300	232,200	1,300	490,000
2012	115,400	83,300	101,600	267,600	7,300	575,000
2031	141,700	106,900	117,000	328,500	8,900	703,000
Employment Growth Rate (Compound Annual)						
2001-12	2.6%	1.1%	0.6%	1.3%	17.2%	1.5%
2012-31	1.1%	1.3%	0.7%	1.1%	1.1%	1.1%

Note: Other rural employment as a land use based category is scattered rural employment including farms; rural business park and village employment is part of Employment Lands and Population Related in this chart.

Forecast Employment by Land-Use Based Category

Preliminary Forecast Employment Growth by Land-Use Based Category						
	Major Office		Employment Land Employment	Population-Related Employment	Other Rural Employment	Total
	Federal	Other				
Employment Growth						
2001-12	28,300	9,100	6,200	35,400	6,000	85,000
2012-31	26,300	23,700	15,500	60,900	1,600	128,000
Share of Employment Growth						
2001-12	33.3%	10.7%	7.3%	41.6%	7.0%	100.0%
2012-31	20.5%	18.5%	12.1%	47.6%	1.3%	100.0%

Note: Other rural employment as a land use based category is scattered rural employment including farms; rural business park and village employment is part of Employment Lands and Population Related in this chart.

Preliminary Assumptions – Urban Business Park & Industrial Area Demand

- Federal office employment in Business Parks expected to decline somewhat as leased space is released
 - Except new DND employment at former Nortel is part of the business park area
- 30% of non-Federal office assumed to occur in existing space taking up vacated Federal space and other vacant space (i.e. re-occupancy of existing built space)
- Overall, expect that there will be net growth of office employment in Business Parks

Preliminary Assumptions – Urban Business Park & Industrial Area Demand

- Expect most employment land employment growth, 85%, will occur in urban Business Parks and Industrial Areas
- Other 15% is employment growth at Airport (on site) and in rural areas
- All employment land employment growth will be in new space
- Aging existing space, while used, typically has stable or declining total employment
- A small portion, ~7% of population-related employment growth expected to occur in Business Parks as it does today

Preliminary Results – Forecast Growth in Urban Area Business Parks

Estimated Urban Business Park Forecast Employment Growth						
	Major Office		Employment Land Employment	Population-Related Employment	Other Rural	Total
	Federal	Other				
2012-2031 Growth	26,300	23,700	15,500	60,900	1,600	128,000
Share in Urban Business Parks	25.0%	25.0%	85.0%	6.6%	0.0%	23.2%
Growth in Urban Business Parks	6,600	5,900	13,200	4,000	0	29,700

Urban Business Park Growth to Be Accommodated in New Space						
	Major Office		Employment Land Employment	Population-Related Employment	Other Rural	Total
	Federal	Other				
2012-2031 Growth in Urban Business Parks	6,600	5,900	13,200	4,000	0	29,700
Share of Growth in New Space	0.0%	70.0%	100.0%	90.0%	0.0%	70.4%
Employment Growth in New Space	0	4,100	13,200	3,600	0	20,900

Note: The 0.0% Federal Major Office is based on an assumption some existing leased space will be vacated, there will be a future 8,500 National Defense Employees in the former Nortel Campus.

Preliminary Results – Forecast Urban Area Employment Land Demand

- Employment densities based on typical averages for new development in Ottawa

Urban Business Park Preliminary Forecast Land Demand				
	Major Office	Employment Land Employment	Population-Related Employment	Total
Employment Growth in New Space	4,100	13,200	3,600	20,900
Low End of Density Range				
Density (employees per ha)	130	35	60	45
Net Land Need (ha)	32	377	60	469
High End of Density Range				
Density (employees per ha)	200	40	80	53
Net Land Need (ha)	21	330	45	396

Preliminary Results – Long-range Land Need for Planning

Preliminary Land Need Analysis for Long-Term Planning Purposes		
	Lower Density (net ha)	Higher Density (net ha)
Developed Land 2012	2,620.0	2,620.0
Estimated New Development to 2031	470.0	390.0
Developed Land 2031	3,090.0	3,010.0
Estimated Additional Absorption to 2041	250.0	210.0
Development Extended to 2041	3,340.0	3,230.0
Factor for Long-Term Vacancy <i>(3% of total occupied and vacant)</i>	110.0	110.0
Change in Use and Under-Utilization in Existing Base <i>(3% of 2012 occupied land)</i>	80.0	80.0
Estimated Total Planning Land Need to 2041	3,530.0	3,420.0
Net Needed	910.0	800.0
Current Supply	1,050.0	1,050.0
Difference	140.0	250.0

Rural Area Employment

- Preliminary forecast also provides for growth in the rural area
- Population-related growth is expected primarily in the villages
- Some growth in scattered rural employment outside of villages and business parks is anticipated
- Forecast would accommodate approximate growth of 1,000 jobs in the rural business parks
- Analysis suggests more than sufficient supply to accommodate rural demand

Preliminary Conclusions...

- Preliminary analysis results suggests a sufficient supply of land to accommodate employment growth beyond 2041
- Consistent with findings of City's prior employment land studies
- Difference between supply and estimated demand is not an end result but a starting point for discussion about the potential for employment land conversions
- Established employment areas must be kept intact
- Quality of land, location and timing to come to market are among the planning considerations for further discussion

- Questions and discussion...

Ottawa Employment Land Review

Summary of Emerging Issues and Points for Discussion

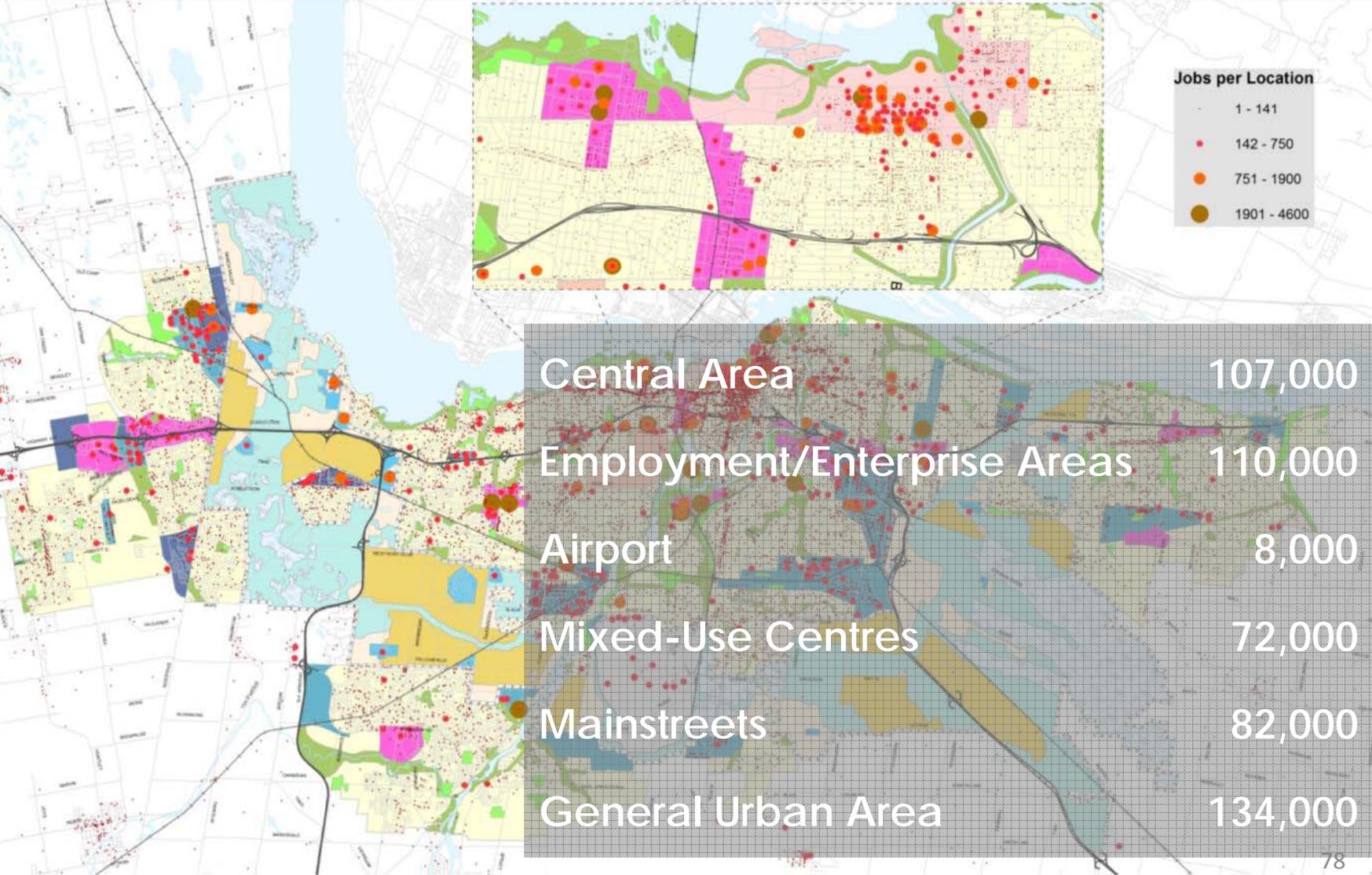
Emerging Issues

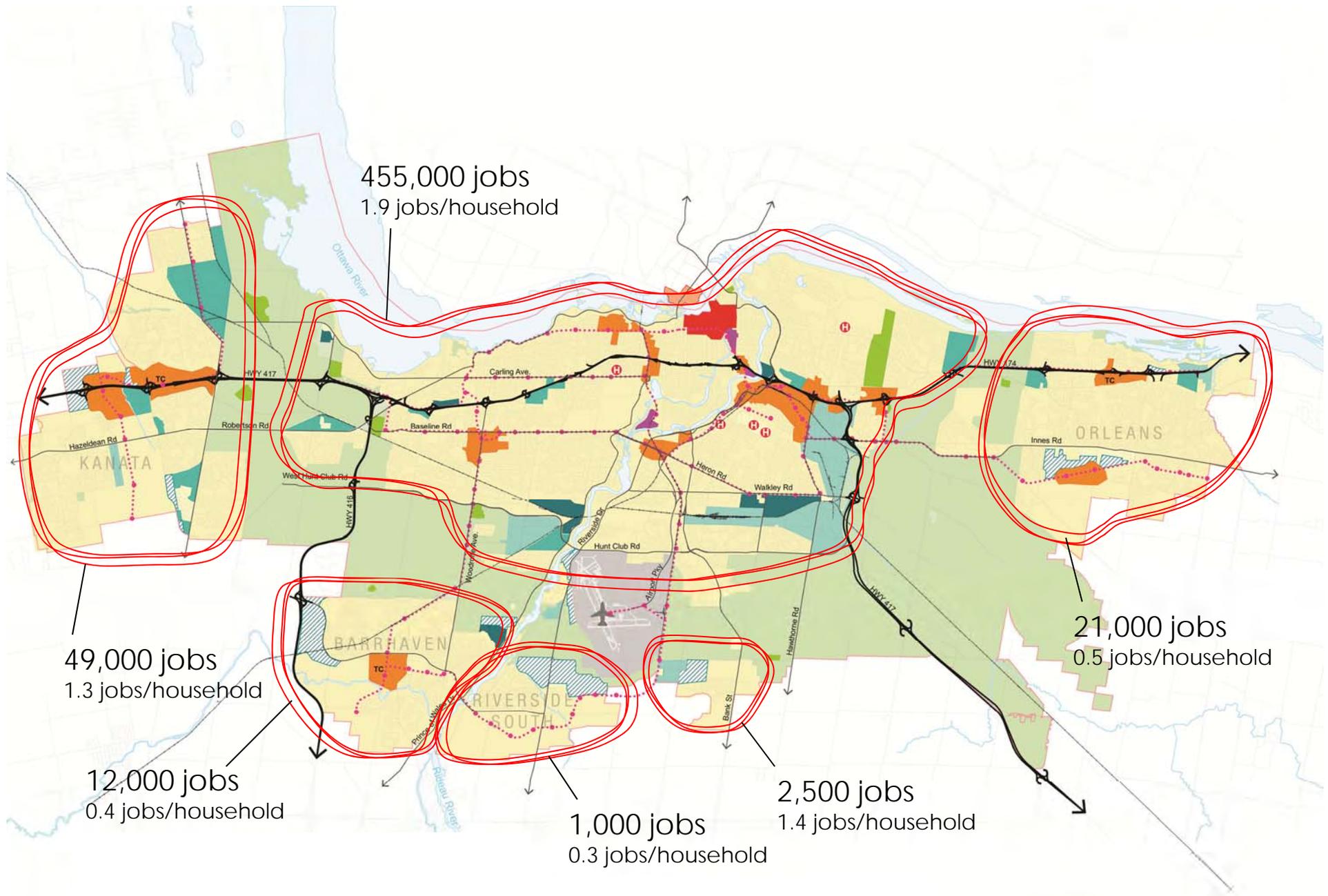
- Jobs are distributed across the city, but the vast majority are located inside the Greenbelt.
- Despite little employment land remaining inside the GB, job growth will continue there, and transit investments will support this.
- Job growth can also be expected in the outer communities, but the pace of population growth will make it challenging to achieve “balanced communities” everywhere.

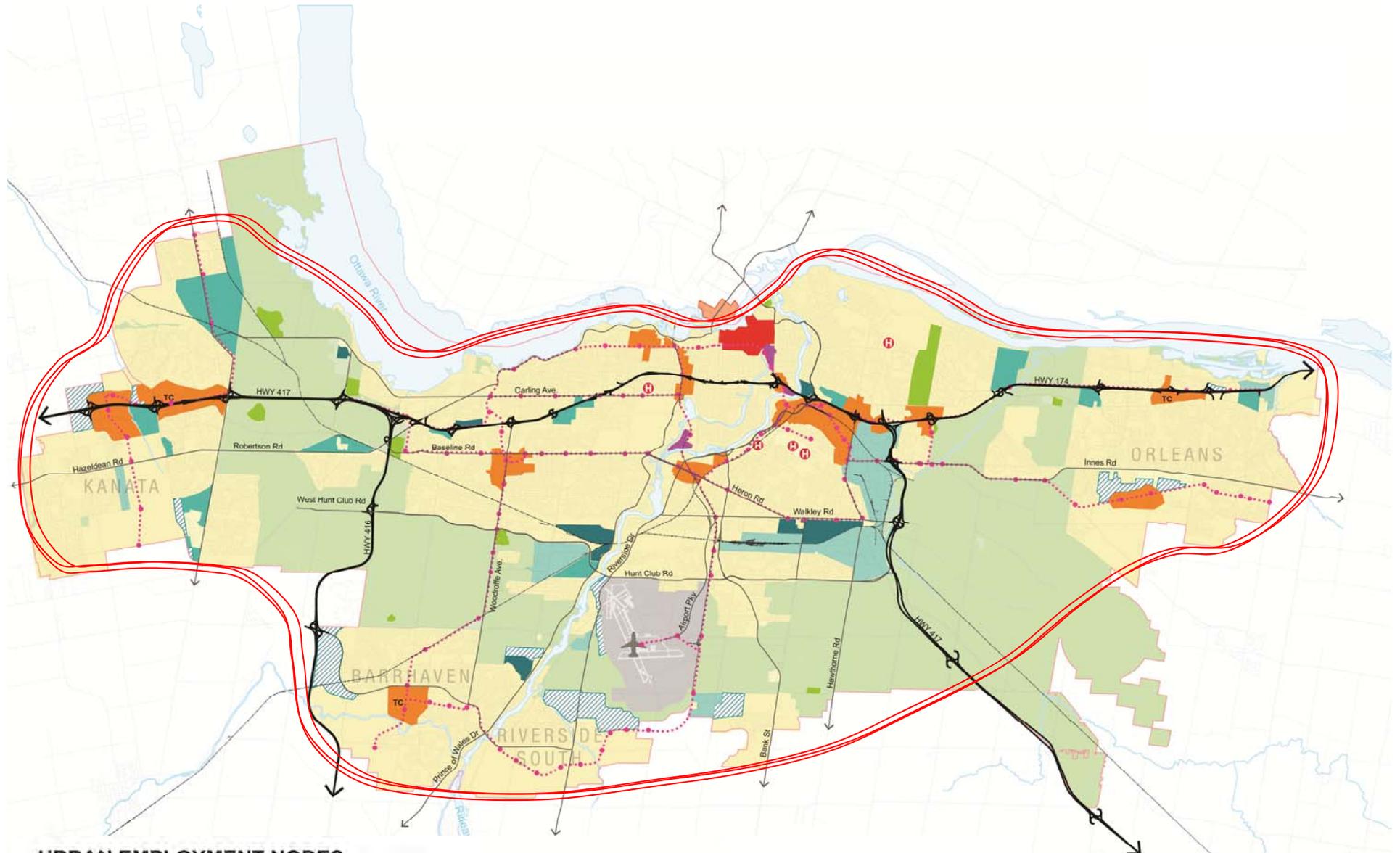
What are the prospects for suburban job growth?

Where should job growth be encouraged?

Where the jobs are







URBAN EMPLOYMENT NODES

Industrial/Business Parks:

- Primarily Office
- Mixed Office/Industrial/Retail
- Primarily Industrial
- Vacant Industrial Area

Other Employment Areas:

- Downtown Core
- Downtown Gatineau
- Federal Government
- University/College
- Major Hospital
- Airport
- Mixed Use Centre
- tc Town Centre
- Urban Area
- Greenbelt
- Urban Boundary

- Highways
- Major Arterials
- Rapid Transit (existing and planned LRT and BRT)
- Railways

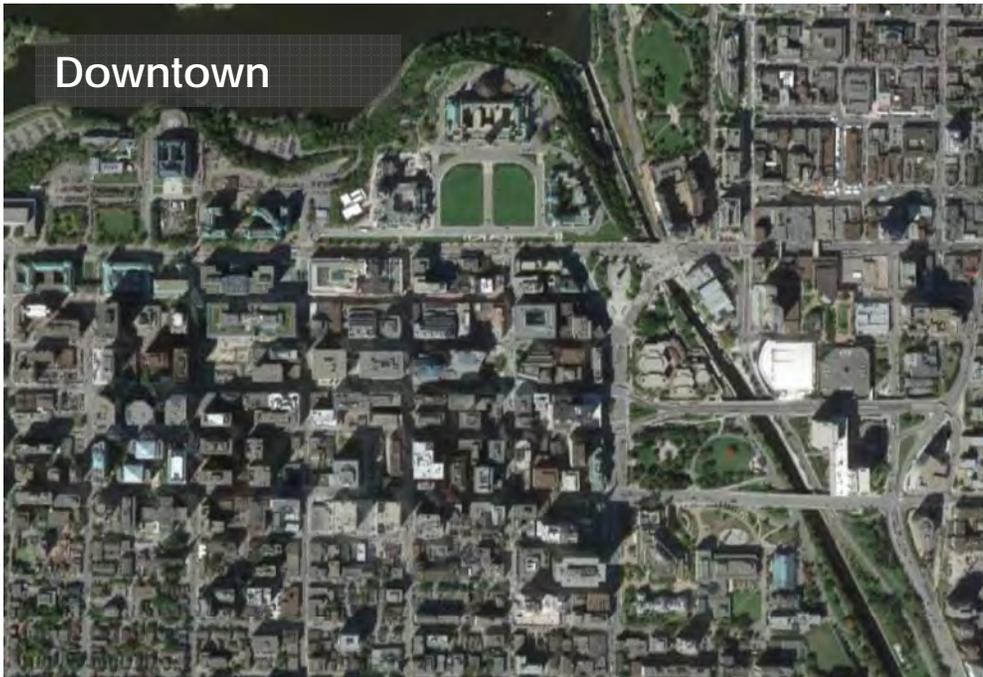
Emerging Issues

- Ottawa's economy is heavily office-based and this is not expected to change, with growth projected to be split between Federal and non-Federal.
- There remains capacity for new office development downtown and in Federal office parks.
- Mixed Use Centres are targeted for office buildings, and Arterial Mainstreets have the potential to attract office uses.

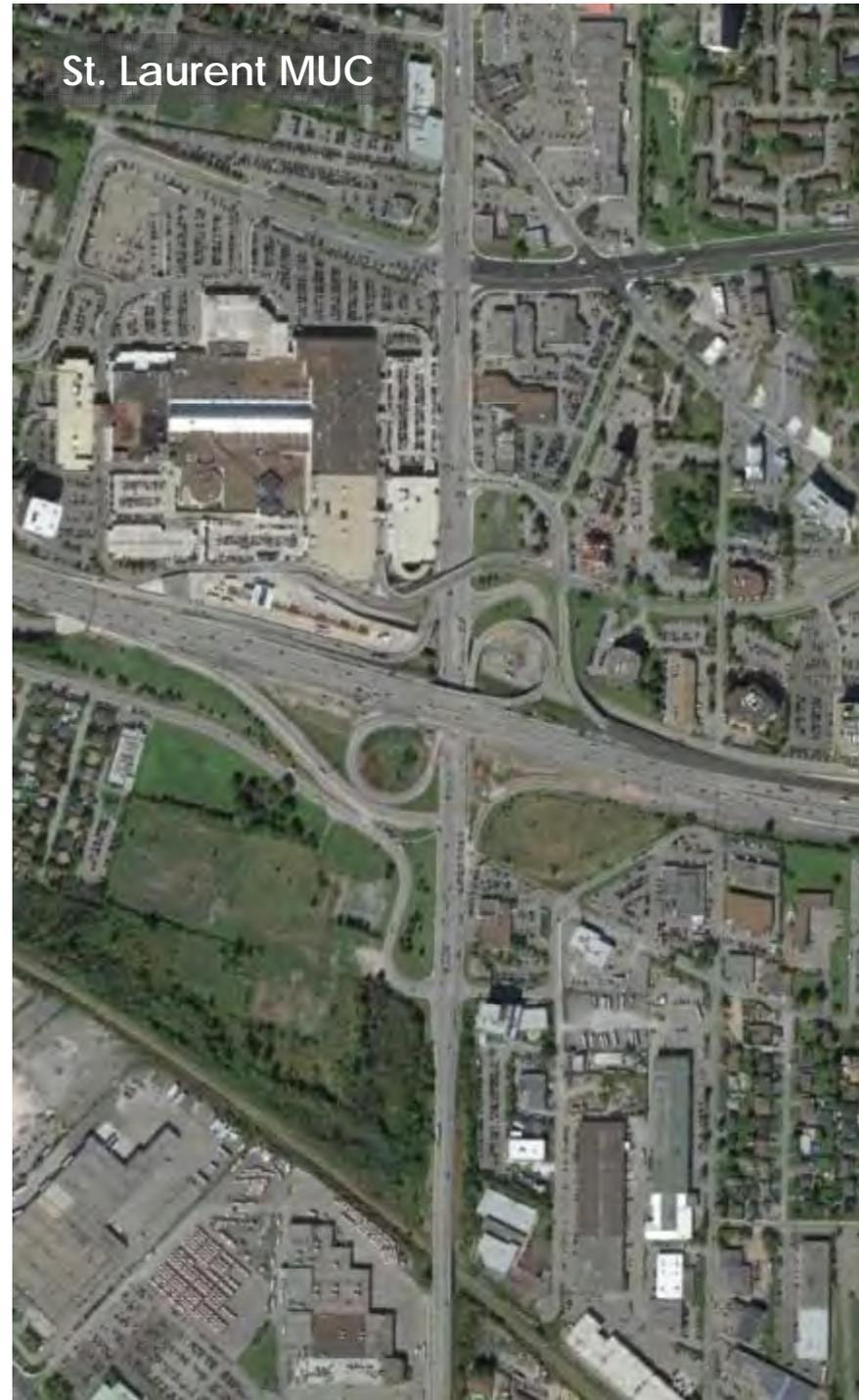
Where are the best locations for non-Federal office developments?

How do we get them there?

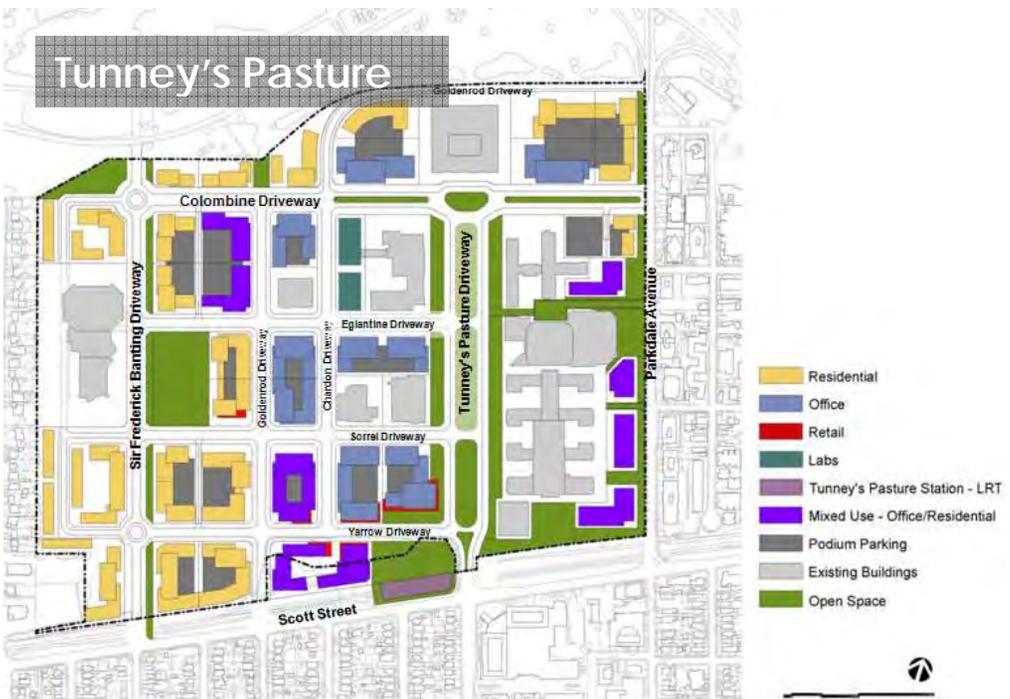
Downtown



St. Laurent MUC



Tunney's Pasture



Mixed-Use Centres and Arterial Main Streets

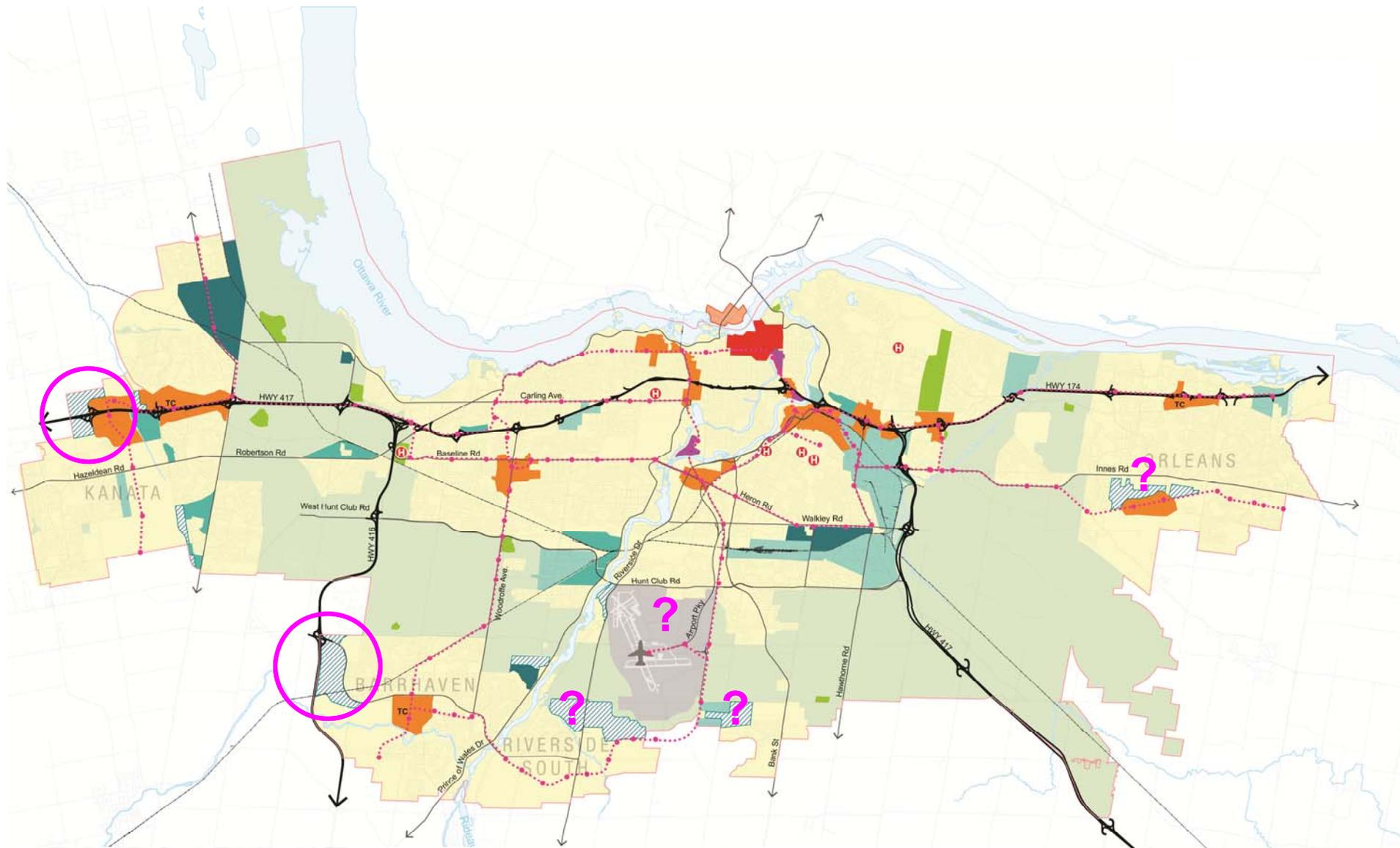


Emerging Issues

- With little vacant employment land inside the GB, new industrial parks outside the GB will likely be needed over the long-term.
- Industrial uses generally seek locations close to highways.
- Two planned employment areas have good access, but those in Riverside South, Leirtrim and Orleans and around the airport are not near interchanges.

**Where are the best locations for future industrial uses—
manufacturing, warehousing, distribution, construction, service-related?**

**Which types of employment uses can be attracted to
access-challenged areas?**



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- Highways
- Major Arterials
- Rapid Transit (existing and planned LRT and BRT)
- Railways

URBAN STRATEGIES INC.



Emerging Issues

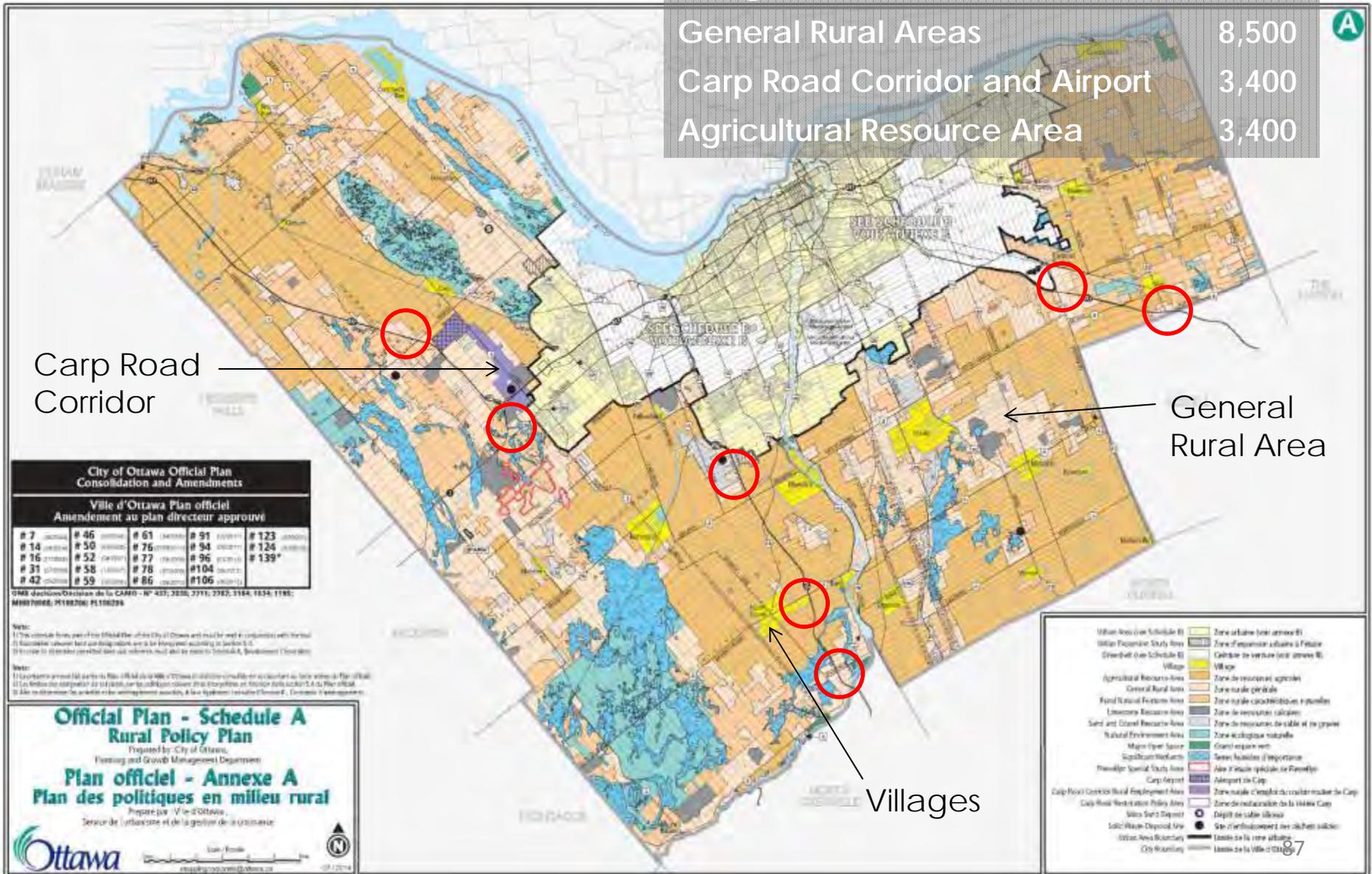
- Less than 5% of the city's jobs are in the rural area, most of them in the General Rural Area, Villages and the Carp Road Corridor.
- The Carp Road Corridor has a unique mix of commercial and industrial uses.
- The land and locations for rural employment uses are abundant, and the General Rural Area policies permit a range of uses.

Should typically urban uses be encouraged in the rural area? If so, where and how?

Rural Area Employment

Villages	6,600
General Rural Areas	8,500
Carp Road Corridor and Airport	3,400
Agricultural Resource Area	3,400

A



Carp Road Corridor

General Rural Area

Villages

Emerging Issues

- There appears to be more than sufficient supply of land to accommodate employment growth beyond 2041.
- Any potential changes to designated employment lands need to be approached cautiously to ensure established areas and well-located areas for future employment are protected.

What considerations would help to determine potential lands for alternative uses?

Which areas should be protected for employment to 2041? Beyond 2041?

Topics for Discussion

- Which areas of the city are the most attractive locations for office and industrial development and should be targeted for employment growth?
- What are the challenges to developing and intensifying existing employment areas (including employment lands and mixed-use centres)?
- How might these challenges be overcome?