2019 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Infrastructure, and Economic Development

August 2020

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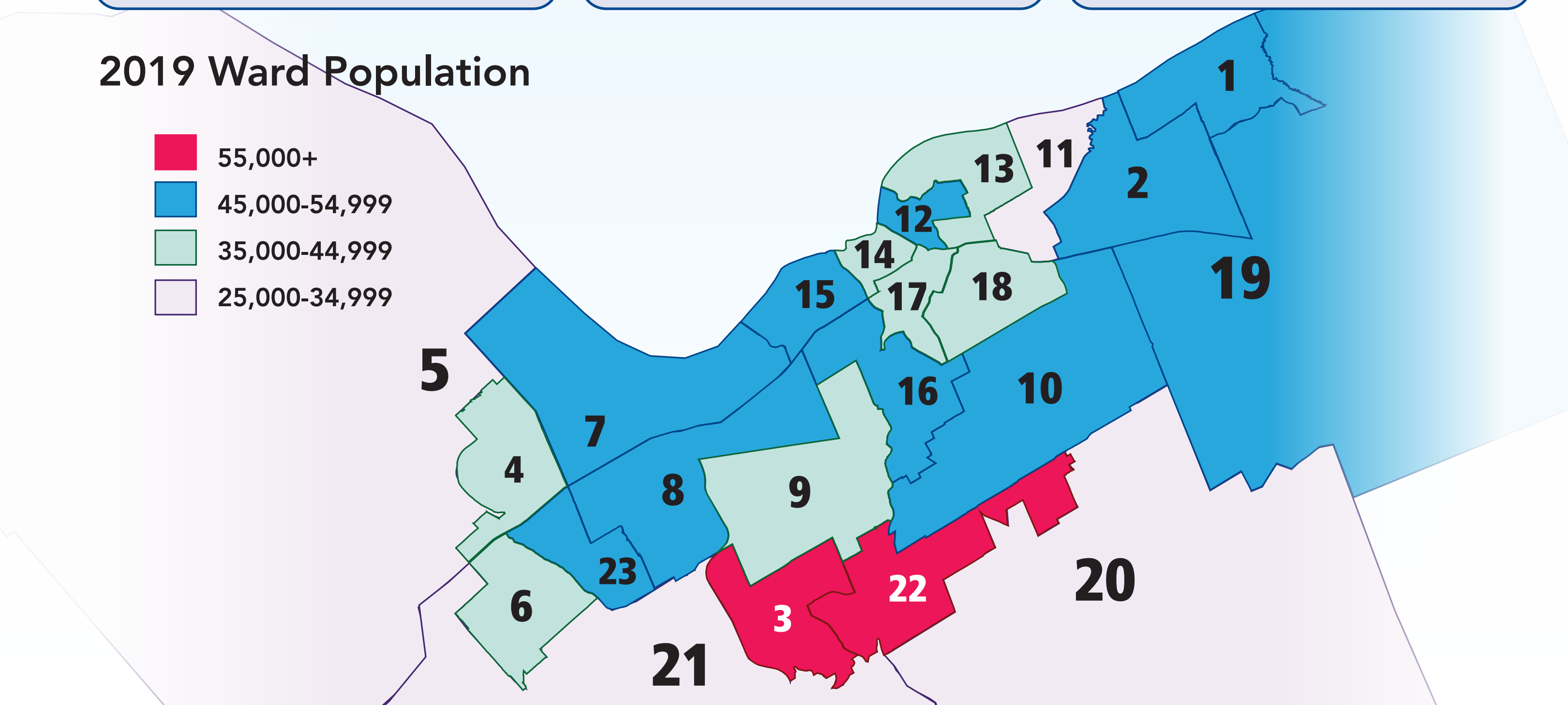
POPULATION & MIGRATION

Population (Dec 31, 2019)

1,508,134 ▲ 1.7%	1,441,118 ▲ 2.1%	1,006,211 ▲ 1.5%
Greater Ottawa-Gatineau Area	Ottawa-Gatineau CMA	City of Ottawa

2019 Ward Population



Net Migration (2017-2018, most recent data)

International	Interprovincial	Intraprovincial	Total
+8,780	+4,118	+2,270	15,168

EMPLOYMENT AND ECONOMY

Ottawa

590,100 ▲ 5.8%
Employed residents

4.7% ▲ 0.1%
Unemployment

Employed Residents by Cluster ('000s)

Industrial & Resource
48.3

Culture & Tourism
59.4

Office
78.9

Retail
89.6

Government
125.6

Knowledge
188.3

HOUSING STARTS

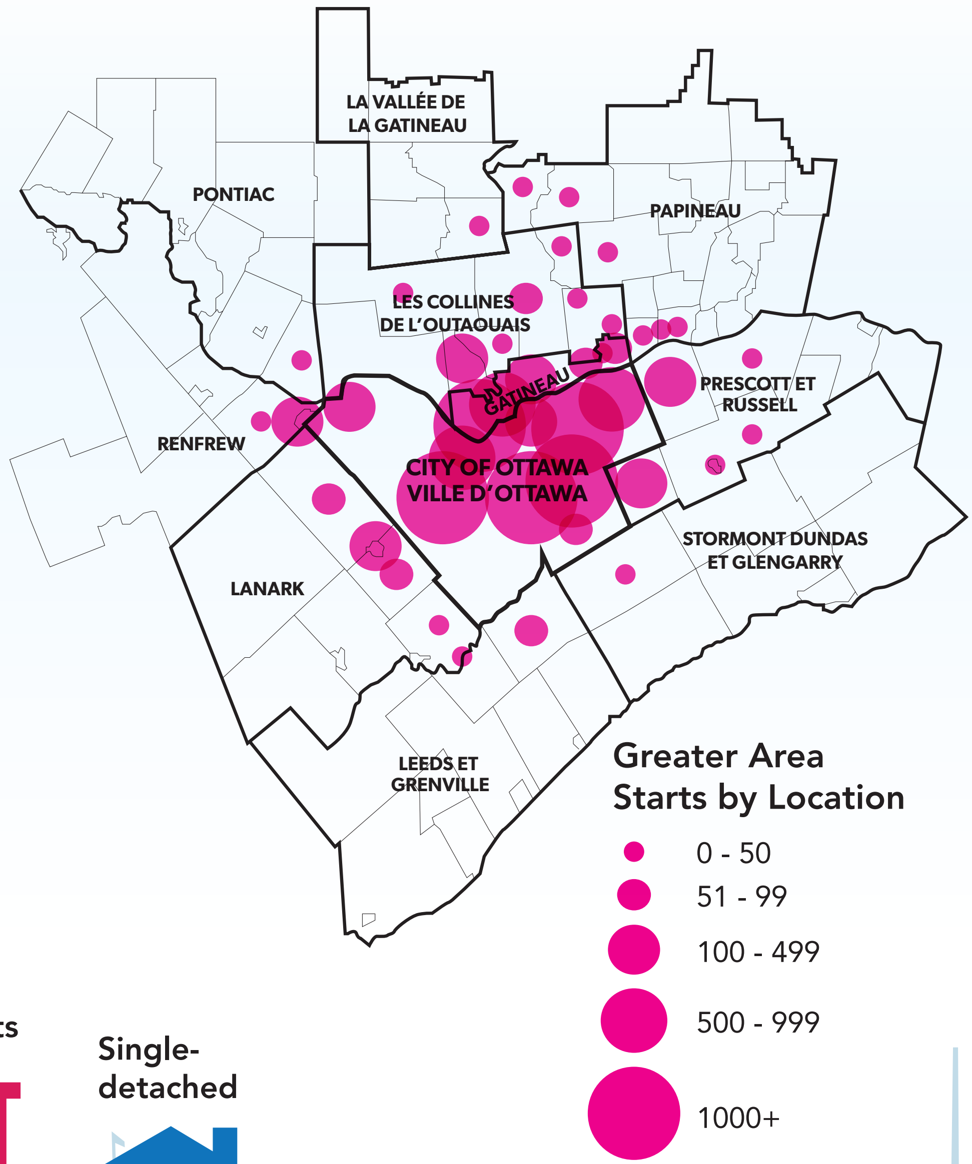
Ottawa

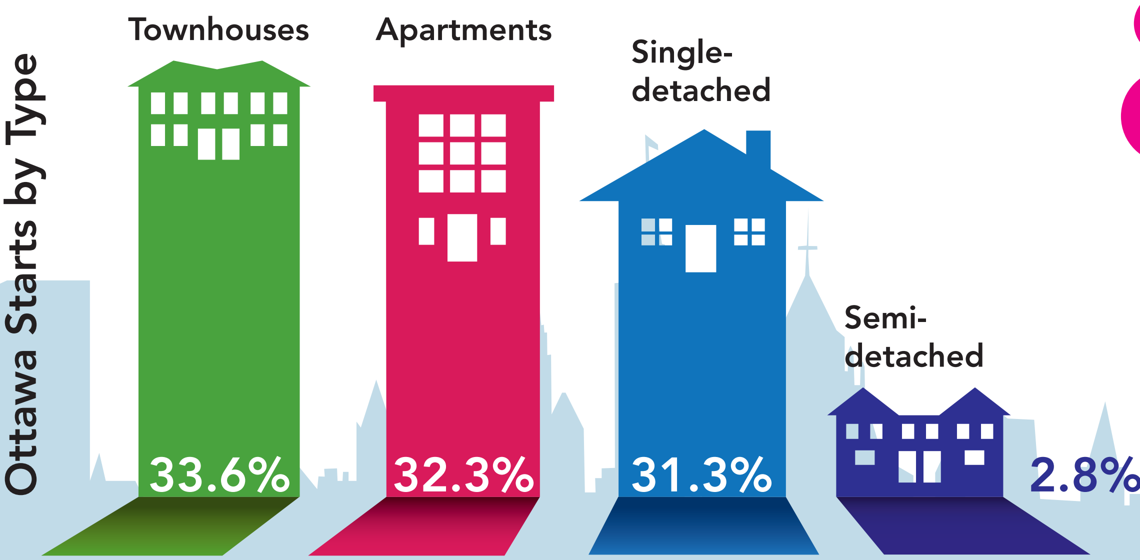
7,069 ▲ 1.7%
Housing starts

1.8% ▲ 0.2%
Rental vacancy rate

51.4% ▼ 3.8%
Urban intensification

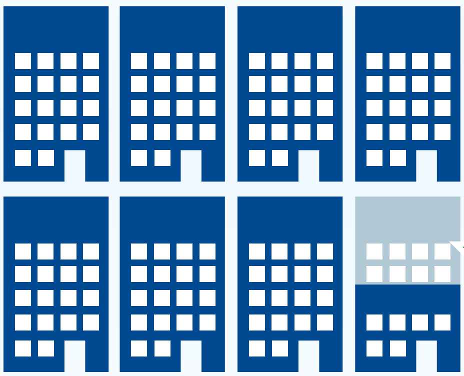
$441,693 ▲ 8.4%
Average resale price (all units)





NON-RESIDENTIAL DEVELOPMENT

Office

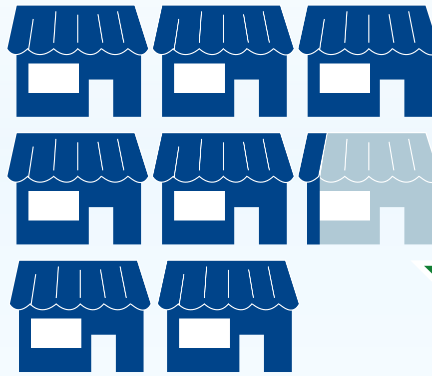


9.6%
2018

Vacancy
8.7%
2019

Inventory
3.8 million m² ↓ 1.2%
40.6 million ft²

Retail

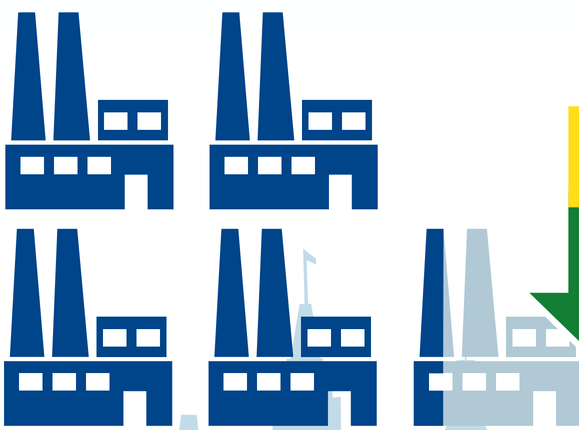


5.0%
2018

Vacancy
4.5%
2019

Inventory
3.7 million m² ↑ 1.6%
39.6 million ft²

Industrial

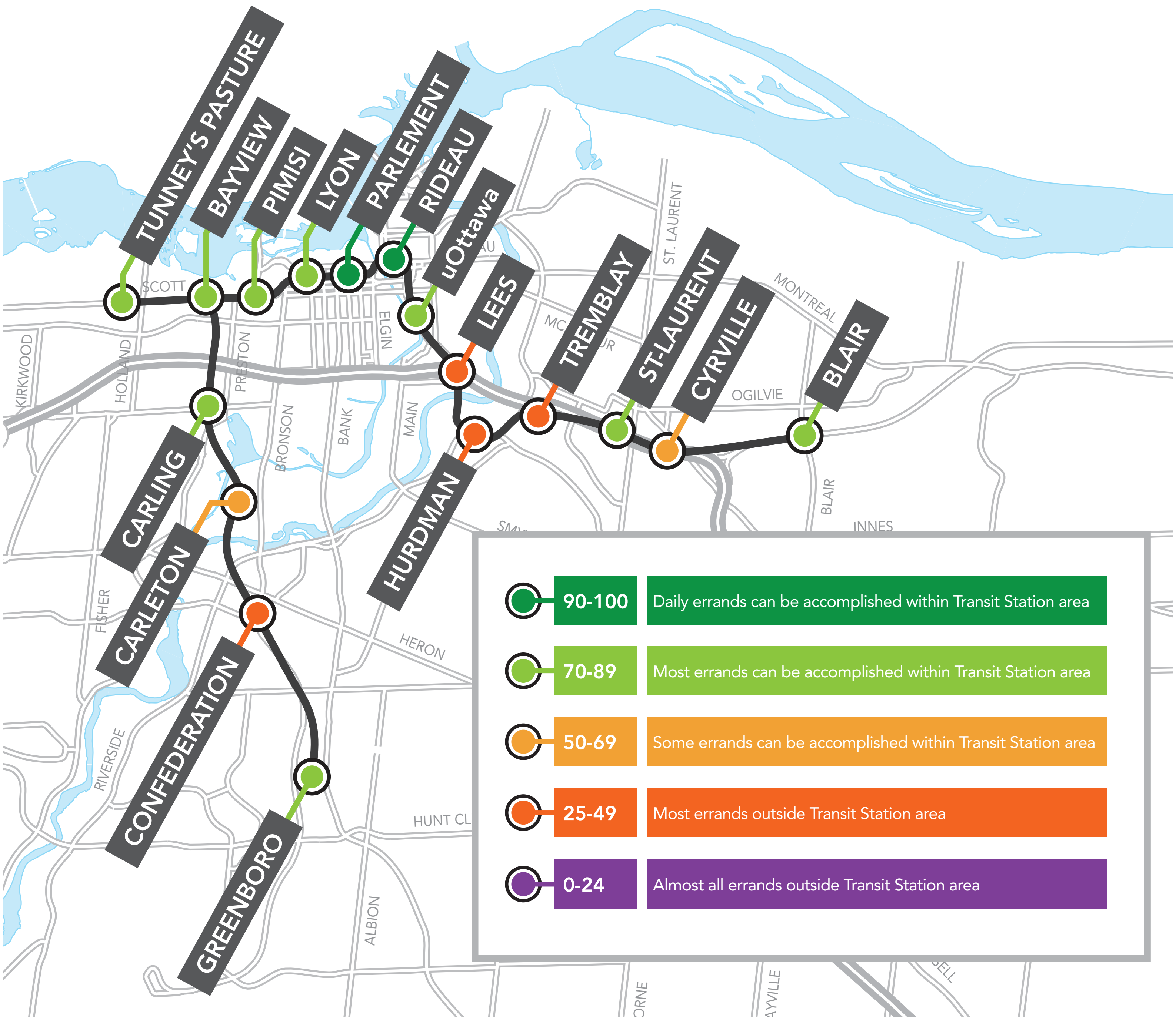


4.6%
2018

Vacancy
4.2%
2019

Inventory
2.2 million m² ↑ 5.0%
23.9 million ft²

INDEX OF COMMERCIAL SERVICES AROUND TRANSIT STATIONS



2019 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Infrastructure and Economic Development
Research and Forecasting Unit
August 2020

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2019 ANNUAL DEVELOPMENT REPORT

Purpose

The Annual Development Report (ADR) provides updates and analysis of demographic and economic statistics and related development activity in the city of Ottawa, and measures these, where applicable, against the City's planning policy objectives.

The ADR monitors population and employment change and housing, commercial, industrial and retail development. In addition, the ADR also provides information on the Gatineau/Québec Census Metropolitan Area (CMA) and on the Greater Ottawa-Gatineau Area, where possible, to provide a complete overview of the Regional Market Area[1](see maps on pages 3 and 4).

For each section, the body of the report contains a brief analysis and the appendix contains supporting tables. All references to tables within the text refer to data tables in the Appendix.

1. Population

HIGHLIGHTS

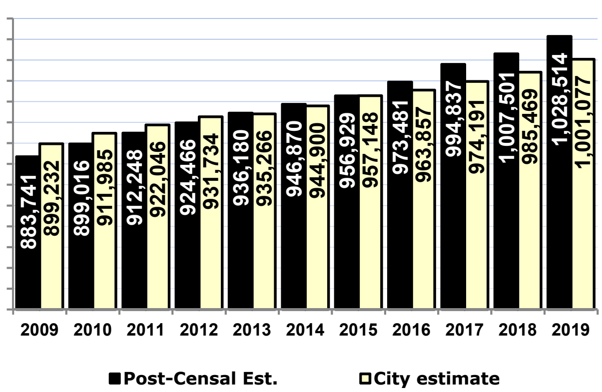
- City of Ottawa population, year-end 2019 (City estimate): 1,006,211, up 1.5% from 2018
- Greater Ottawa-Gatineau Area population, year-end 2019: 1,508,314 up 1.7% from 2018
- Net migration to Ottawa-Gatineau increased 15.4% from the year before

1.1 Population Growth

Major Cities

In 2019, the Ottawa-Gatineau Census Metropolitan Area (CMA) was the sixth largest in Canada, with 1,441,118 persons. Population growth during 2018-19 was 2.1%, slightly above the 1.9% average for the six major Canadian centres. The Ontario part of the CMA continues to have roughly 75% of the overall CMA population (Table 1).

City of Ottawa Population, Post-Censal and City Estimates, 2008-2019 (mid-year)
Source: Statistics Canada and City of Ottawa



2019 Population based on 2016 Census

Statistics Canada prepares annual mid-year population estimates for Ottawa and other centres. The current series is based on the 2016 Census adjusted for undercounting (people missed in the Census). To this base each year births and net in-migration are added and deaths are

[1] The City of Ottawa, City of Gatineau, Ontario Municipalities Adjacent to Ottawa (OMATO) and Quebec Municipalities Adjacent to Gatineau (QMAG) are individual jurisdictional boundaries that together share a high degree of social and economic interaction and thus form the *Regional Market Area* as defined in the *2020 Ontario Provincial Policy Statement*.

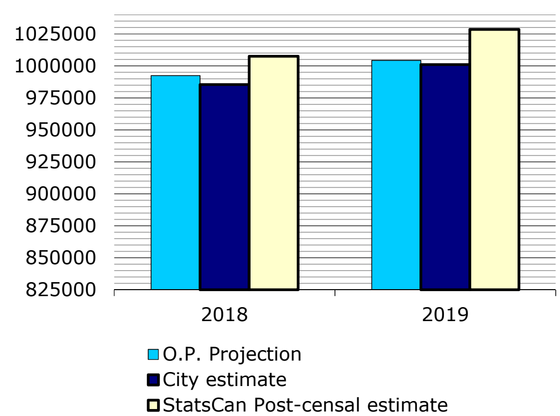
subtracted. Estimates undergo two cycles of revision before a final estimate is arrived at. Statistics Canada's preliminary mid-year 2019 post-censal population estimate for Ottawa was 1,028,514 (Table 1).

City Estimate

The Planning, Infrastructure and Economic Development Department tracks population change by tabulating the number of new dwellings for which building permits were issued, lagged to allow for occupancy. From these demolished units are subtracted, and an allowance for rental vacancies, adjusted based on the most recent Canadian Mortgage and Housing Corporation (CMHC) Rental Market Report, is introduced. The resulting number of dwellings is multiplied by the average number of persons per dwelling by house type (extrapolated from Census data). This is combined with the population in existing housing and adjusted for ongoing small declines in average household size to arrive at a final population estimate.

This method provides regular updates of population and household growth for detailed geographic areas of the city, including wards, sub-areas and traffic zones. Based on this technique, the city of Ottawa had a mid-year 2019 population of 1,001,077 and a year-end 2019 population of 1,006,211, a 1.5% increase from 2018 (Table 3).

Projections Tracking
2018-2019 (mid-year)
Source: Statistics Canada and City of Ottawa



Projections Tracking

Population projections in the Official Plan[2] (OP) project Ottawa's population at 1,004,277 in mid-2019. The OP projection continues to slightly exceed city actual estimates, being 3,200 (0.3%) more than the 2019 city estimate based on building permits. The OP mid-year 2019 projection is 24,237 (2.4%) less than Statistics Canada's 2019 post-censal estimate.

Summary

There is a range of population figures for the city of Ottawa in 2019 depending on source:

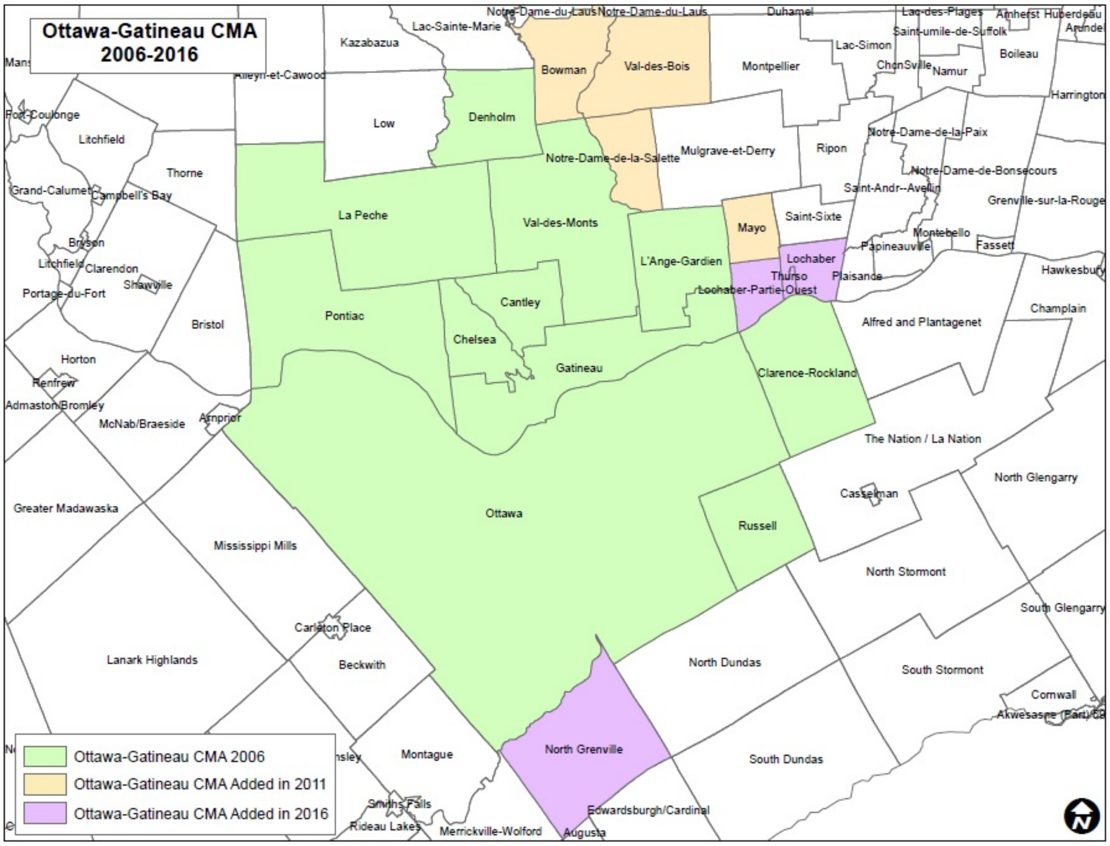
City of Ottawa Population by Source	mid-2019	year-end 2019
StatsCan Preliminary Post-censal Estimate	1,028,514	n/a
Official Plan Projection	1,004,277	1,010,289
City Estimate of actual population	1,001,077	1,006,211

Source: Statistics Canada; City of Ottawa

[2] Official Plan projection from Official Plan Amendment #180, Growth Projection for Ottawa 2014-2036 report.

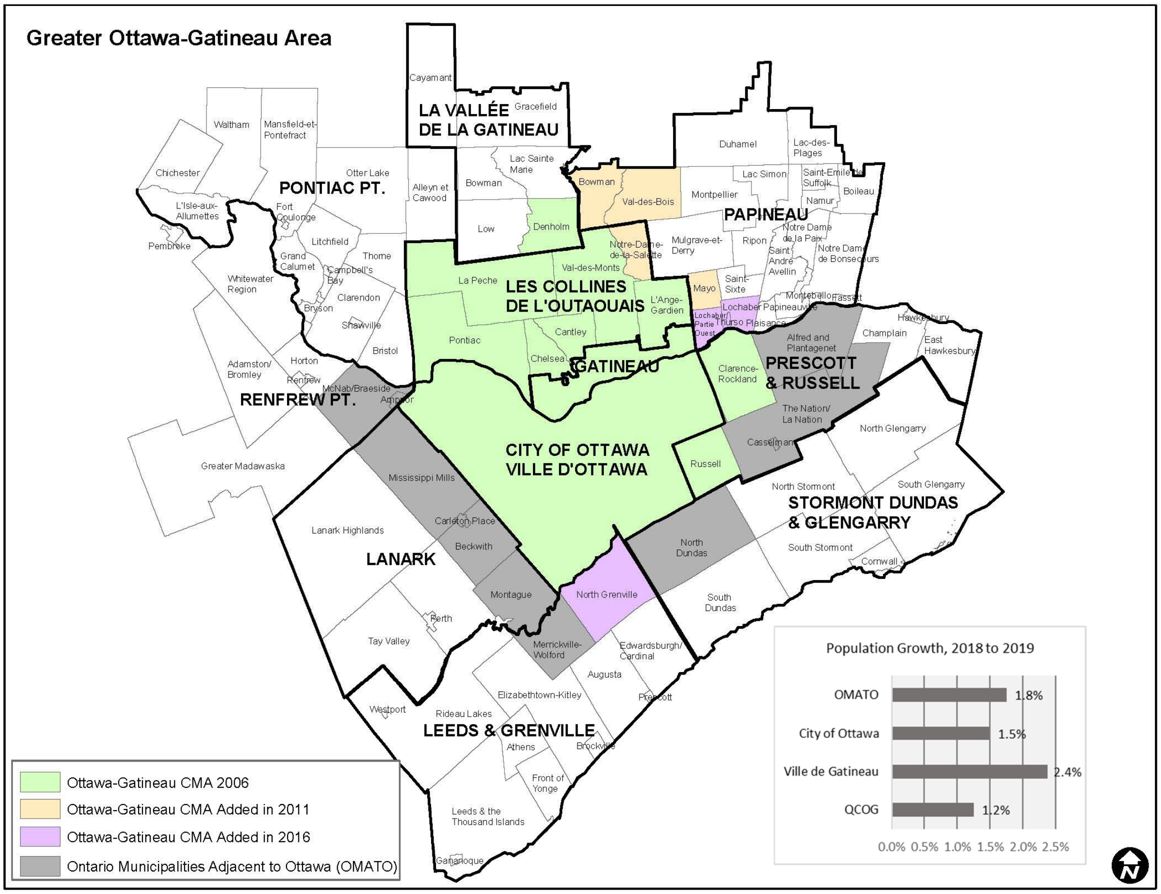
1.2 Population Distribution & Growth in the Greater Ottawa-Gatineau Area

The Greater Ottawa-Gatineau Area includes the Ottawa-Gatineau CMA, shown on Map 1, plus other municipalities adjacent to the city of Ottawa as shown on Map 2. There were 1,508,134 people in the Greater Ottawa-Gatineau Area in 2019, with the city of Ottawa having the bulk of the region's population followed by the Ville de Gatineau, OMATO, Prescott & Russell, and QMAG[3] (Table 2; Map 2).



Map 1: The Ottawa-Gatineau Census Metropolitan Area (CMA)

[3] OMATO: Ontario Municipalities Adjacent to Ottawa.
QMAG: Québec Municiaplities Adjacent to Gatineau.



Map 2: The Greater Ottawa-Gatineau Area, showing Upper Tier/Regional Counties
The Greater Ottawa-Gatineau Area includes the City of Ottawa, Ville de Gatineau and the surrounding shaded areas. Shaded areas denote Ontario Municipalities Adjacent to Ottawa (OMATO) and the Québec Municipalities Adjacent to Gatineau (QMAG). Shaded areas not physically adjacent to Ottawa, such as Carleton Place in Lanark County, have a high-degree of their work force employed in Ottawa.

Ottawa

Within Ottawa, the strongest population growth in 2019 continued to take place in the suburban centres outside the Greenbelt, following the pattern of past years. The percentage share of the population living inside the Greenbelt is becoming more stable with a smaller drop each year; at the end of 2019 the share was 53.6% compared to 54.1% a year earlier. Downtown's[4] share of the population remained steady at 10.4%, 0.1% down from 2018. The suburban centres increased to 36.8% of the population from 36.3% in 2018, while the rural area was steady at 9.6% (Table 3).

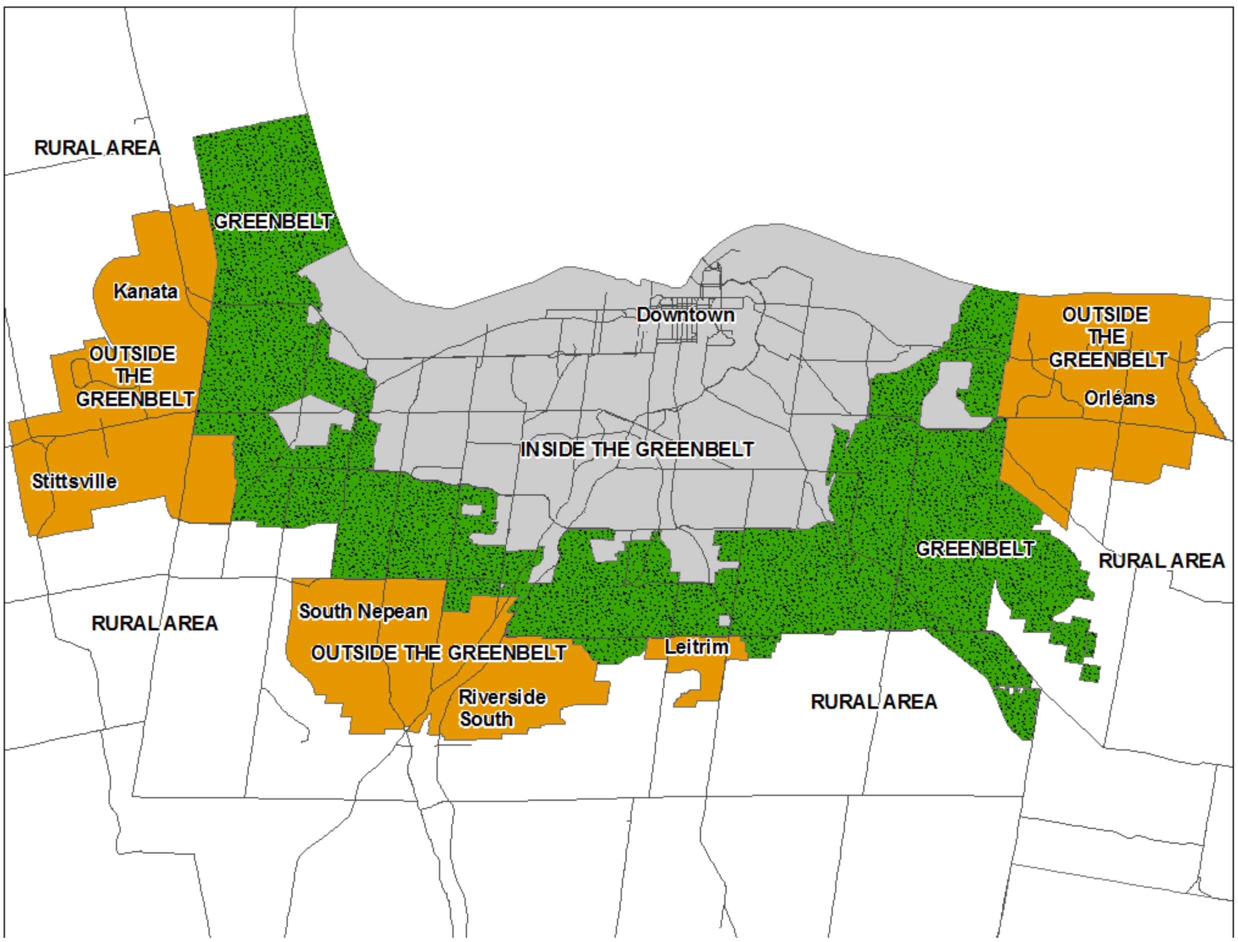
In the suburban centres, population grew 3.0% from 2018 to an estimated 370,393 people in 2019. Suburban households increased by 3.2%. The population of Downtown was estimated at 104,988, a 0.4% increase. Downtown households increased by 0.5%. Areas inside the Greenbelt outside of

[4] "**Downtown**" refers to the Central Area and Inner Area (see map attached to Table 3).

Downtown had an estimated population of 434,319, 0.6% higher than in 2018. In the rural area the population reached 96,511, up 1.0% from 2018, while rural households increased 1.4%.

The largest portion of population growth in 2018 was in Kanata-Stittsville (32.2% of all growth), Orléans (13.2%), Leitrim (9.5%), South Nepean (8.6%), and Riverside South (8.5%). All areas in the city, except Central Area (-104) and Alta Vista (-120) experienced a total household increase, and four areas had decreased in total population due to declining household sizes, being Central Area, Alta Vista, Hunt Club, and Rural Northeast (Table 3).

Distribution of population (%) 2005-2019
Source: City of Ottawa



Map 3: Ottawa's geographic areas (Downtown; Inside the Greenbelt; Greenbelt; Outside the Greenbelt; Rural Area)

Gatineau and Periphery

City of Ottawa staff estimate Gatineau had a population of 288,865 at the end of 2019, an increase of 2.4% from 2018 (Table 2). The most recent estimates from the *Ministère des Affaires municipales et Occupation du territoire*, which issues updates every year for all municipalities in Québec, puts Ville de Gatineau's population at 286,755 at mid-2019. Statistics Canada's post-censal estimate for July 2019 pegs the population of the Ville de Gatineau at 287,868.

Quebec municipalities outside of Gatineau and within the CMA increased by 1.2% in 2019 to a total of 53,003. The majority of communities increased in population, except L'Ange-Gardien (-1.4%), Bowman (-0.8%) and Val-des-Bois (-0.2%) which all decreased in 2019 (Table 2).

Ontario Municipalities Adjacent to Ottawa (OMATO)

The City of Ottawa estimate for OMATO's 2019 year-end population is 160,055, a 1.8% increase from 2018. The five most populous OMATO municipalities were Clarence-Rockland (23,964, up 1.7% from 2018), North Grenville (18,133, up 0.4%), Russell (17,002, up 7.1%), North Dundas (14,453, down 0.1%), and Mississippi Mills (12,272, down 0.8%) (Table 2).

1.3 Migration

Migration data for 2017-18 (the most recent available at the city level) shows the net number of people moving to Ottawa was 15,168, a 13.1% increase from the year before. This is the highest net migration to Ottawa since 2001. While Ottawa still saw positive net in-migration, with more people moving to than from the city, differences were an increase in movers from the Greater Toronto Area and British Columbia (Tables 4 and 5).

International net migration increased to 8,780 in 2017-18, an increase of 2,669 persons from a year earlier. Intraprovincial net migration decreased to 2,270 from 2,892, while interprovincial decreased to 4,118 from 4,412 (Table 4).

In 2017-2018, more people moved to adjacent municipalities from Ottawa (-795 people). From 2013-2018, Ottawa had a net migration of 388 people from outlying regions, with the largest movement being 3,310 persons from Gatineau to Ottawa. At the same time, 2,260 persons moved to Lanark County, possibly retirees moving to cottage country (Table 6).

Major Cities

All six of Canada's major centres experienced strong net migration in 2018-2019. Ottawa-Gatineau had the third largest year-over-year increase of 15.4% to reach 25,131 net migration. Toronto continued to attract the biggest share of the migrants at 96,458 people. While all major centres increased year-over-year, Calgary and Edmonton had the lowest shares of migrants at 20,433 and 20,784 respectively (Table 7).

In terms of net migration per thousand population (table to the right), Ottawa-Gatineau and Toronto were the highest for 2018-2019, followed by Edmonton and Calgary. Montréal and Vancouver showed the lowest rates.

NET MIGRATION PER 1,000 INHABITANTS, 2018-2019 (preliminary)

Source: Statistics Canada

CMA	
Ottawa-Gatineau	**17.4**
Toronto	14.9
Edmonton	14.4
Calgary	13.5
Montréal	11.9
Vancouver	11.7

2. Housing

HIGHLIGHTS

- Housing starts were up 1.7% in the city of Ottawa in 2019
- 33.6% of Ottawa starts were row units
- 32.3% of Ottawa starts were apartments
- Residential intensification was 51.4% in 2019
- Rental vacancy rate increased to 1.8% in 2019 from 1.6% in 2018

2.1 New Construction

There are two measures of new housing activity tracked by this report, one by CMHC (housing starts) and the other by the City of Ottawa (building permits). The two don’t exactly match because CMHC housing starts do not include all new housing built in the city[5], therefore building permits (net of demolitions) are a more accurate meausre of total housing activty. However, due to the difference in time between permit issuance and when CMHC reports a new start, annual data for starts and permits are not directly comparable.

City of Ottawa and Ottawa-Gatineau CMA Housing Starts, 2019

Sources: CMHC

	Starts, 2019	% chg. 2017-18
City of Ottawa	7,069	1.7%
Ott-Gat CMA	11,203	18.3%

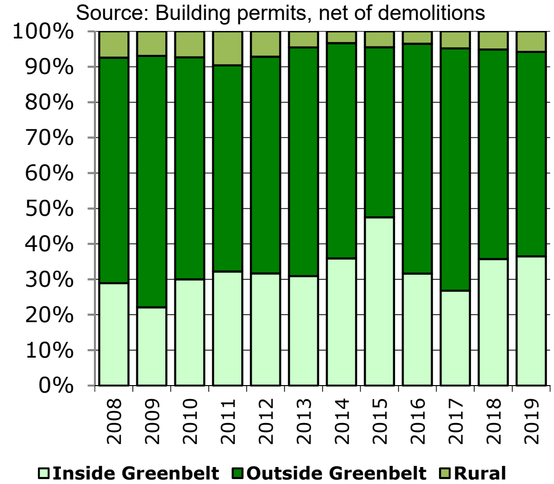
In the city of Ottawa, housing starts totaled 7,069 units, a 1.7% increase from 2018. The larger Ottawa-Gatineau Census Metropolitan Area ranked fifth in absolute housing starts among Canada’s six largest metropolitan areas in 2019 with 11,203 units. Vancouver had the largest year-over-year increase of 20.2%, followed by Ottawa with 18.3%. Calgary, Edmonton, and Montréal also experienced an increase year-over-year, while Toronto experienced a decline in total housing starts from 2018. Apartment starts were the largest in relative terms in all major centres except Edmonton (Table 10).

Ottawa Permits by Location

In 2019, there were 9,426 residential unit permits issued in the city of Ottawa, a 12.5% increase from 2018 (Table 12). This is the most permits issued in a single year since amalgamation in 2001. The percentage of housing starts inside the Greenbelt increased to 36.5% from 35.7% in 2018 (adjacent chart).

New Housing Inside and Outside the Greenbelt, 2008-2019

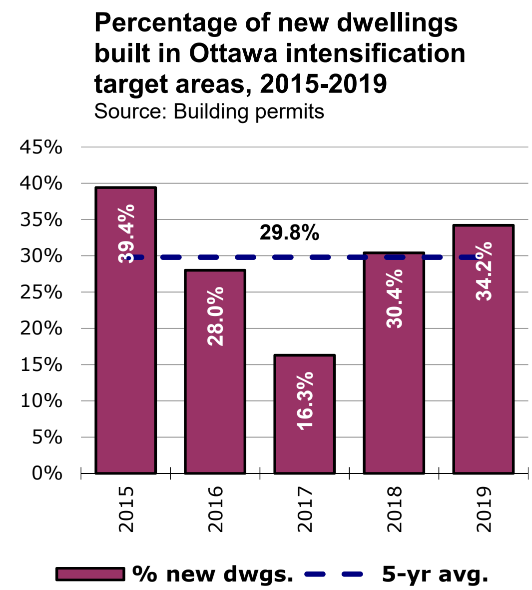
Source: Building permits, net of demolitions



[5] “Housing Starts” do not include all forms of new dwelling units. Apartments in houses, conversions and new units added to existing multi-residential buildings are not captured by CMHC starts data. Housing starts therefore understate the total number of units created each year and the number created through intensification.

New Housing by Official Plan Designation

The Official Plan directs intensification to areas with high levels of transit service or where dwellings may be located close to employment. Areas designated in the Official Plan are the Central Area, Mainstreets, Mixed-Use Centres, Town Centres, and the vicinity (600 m) of Rapid Transit Stations.

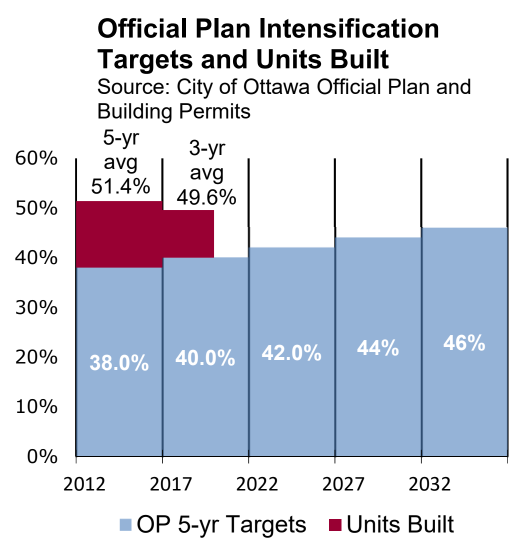


In 2019, 3,034 residential units were issued building permits in intensification target areas. This amounts to 32.2% of net new units issued permits in Ottawa. The top designated areas were existing Rapid Transit Stations (2,029), Mainstreets (1,266), and Town Centres (614) (Table 12).

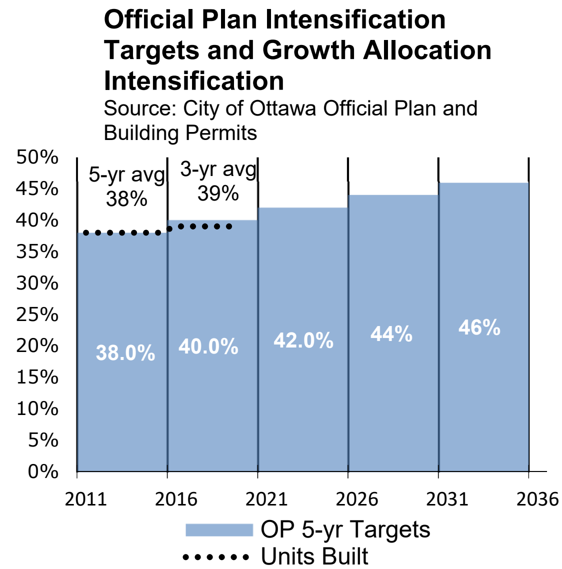
Target areas received 61.5% of all apartments, 2.1% of single and semi-detached units and 5.4% of townhouses in 2019 (Table 12). It should be noted that target areas contain only part of all intensification activity; in 2019, target areas accounted for 65.2% of total intensification, up from 54.4% in 2018.

Residential Intensification

The current Official Plan (OP) establishes an increasing residential intensification target to 2036. For the five-year period 2012-2016 the OP target was 38.0% of new units in urban and suburban areas combined, with actual achieved intensification averaging 51.4%. The next five-year period from 2017-2022 has an OP target of 40.0%. In 2019, a 51.4% intensification share was achieved (Table 13a). The three year average intensification share was 49.6%; higher than the OP target of 40.0% for the five-year period from 2017-2022.

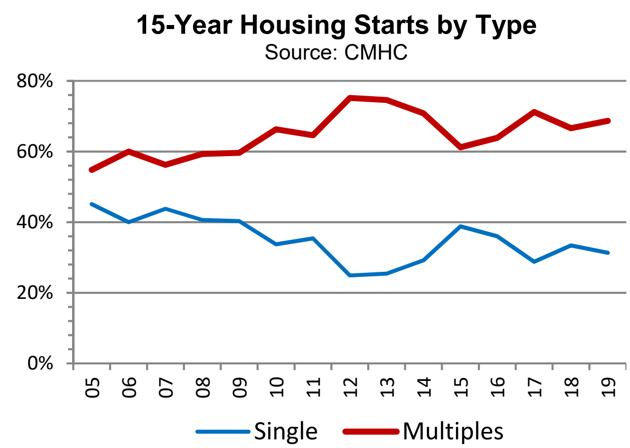


The recently approved Residential Growth Management Strategy for the New Official Plan[6] states that for growth management purposes, the intensification rate should also be calculated to align with the growth projections. This requires shifting the measurement of intensification from a calendar year to a mid-year basis and to include only private dwellings in the built-up area. With this revised intensification method, a 40.0% intensification rate was achieved from mid-2018 to mid-2019. For the past three-years, an intensification rate of 39.1% was achieved (Table 13b).



Ottawa Starts and Completions by Unit Type

More multiple dwellings were built than single-detached units in 2019 for the eighteenth year in a row. In 2019, there were 2,211 single-detached starts, less than the 2,320 started in 2018. The share of single-detached starts accounted for 31.3% of all new starts, down from 33.4% in 2018 (Table 15).



The most popular house form, with a 33.6% share, was townhomes, with 2,376 units started in 2019, up from 1,906 units in 2018. Apartment units were slightly behind with 2,282 units started in 2019 for a 32.3% share, down slightly from 34.7% in 2018. The freehold market completed 3,920 units and tracked above its five-year average of 3,673 annual completed units. Overall, freehold singles lead the way, followed by freehold townhomes then private rental apartments. This is the first time since 2001 that private rental apartments have surpassed condominium apartments in completions (Table 16).

[6] City of Ottawa, 2020. *Residential Growth Management Strategy for the New Official Plan*, page 15.

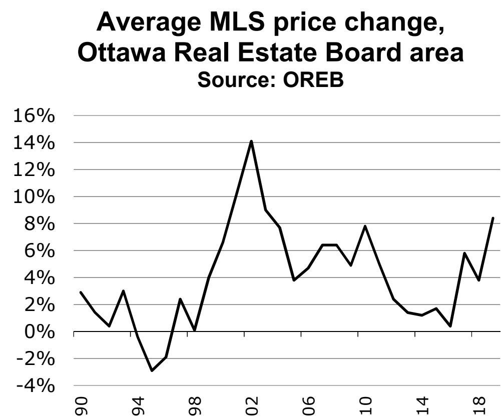
Ottawa New Single-Detached Prices

New single-detached home prices increased to $606,665 in 2019, an increase of 5.2% from last year. After factoring for inflation, the annual change was 3.1% (Table 17). Inflation is generally derived from the All-Items Consumer Price Index (CPI), which averaged 135.9 in 2019 (from a base of 100 in 2002). The annual 2019 inflation rate as measured by the CPI was 2.0%, down from 2.5% in 2018.

2.2 Resale Housing

Resale House Prices

The average MLS[7] residential resale price in the area covered by the Ottawa Real Estate Board (OREB) was $441,693 in 2019, an annual increase of 8.4%.



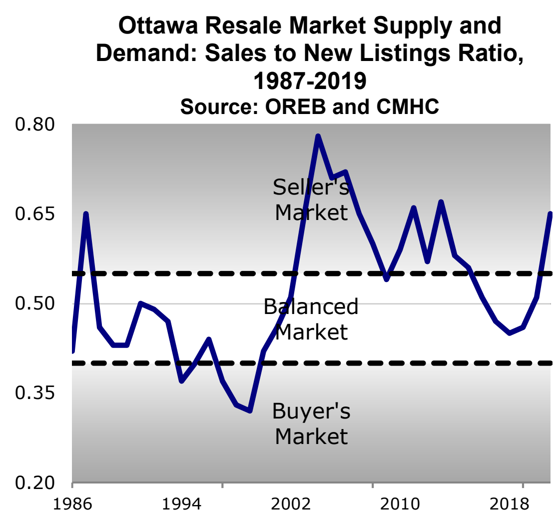
Sales Activity and Trends

2019 continued the trend of increasing MLS sales from 2018 in the larger OREB area. 2019 MLS sales of 18,622 units were up 6.6% from 2018 to 2019 (Table 19).

Supply and Demand

The resale market is usually considered "balanced" when the sales-to-new-listings ratio is between 0.40 and 0.55. A ratio below 0.40 represents a buyers' market while a ratio above 0.55 is considered a sellers' market. A ratio of 0.55 means that on average, every month, 55 per cent of all newly-listed houses were sold.

In 2019, the ratio decreased to 0.60 from 0.71 in 2018 meaning that Ottawa had a seller's market. This is similar to 2018; however, differs from 2012 to 2016 where Ottawa maintained a balanced market.



7 MLS: Multiple Listing Service, a registered trademark of the Canadian Real Estate Association.

Major Cities

Similar to 2018, price changes for the entire resale market in 2019 varied across the major cities. There were incremental increases in Toronto (+4.1%), and Montreal (+4.4%), with Ottawa experiencing the largest increase (+8.4%). Vancouver, Calgary, and Edmonton all experienced decreases of –5.6%, -4.3%, and -1.9%, respectively (Table 18).

When condominium and non-condominium average prices are seperated, Ottawa still experienced the largest increase in both condominium (+9.3%) and non-condominium (+8.9%) price changes (Tables to the right).

2019 AVG MLS® RESALE PRICE* & 2018-2019 % CHANGE				
	Price: Condominium	**% Change**	**Price: Non-Condominium**	**% Change**
Vancouver	$623,208	-7.3%	$1,187,974	-5.4%
Toronto	$587,959	6.4%	$904,013	2.1%
Calgary	$270,982	-5.9%	$531,024	-4.0%
Ottawa	**$304,203**	**9.3%**	**$486,590**	**8.9%**
Montréal	$319,009	4.8%	$452,281	4.6%
Edmonton	$227,429	-4.6%	$425,068	-2.2%

*Corresponds to Real Estate Board Territories

Source: Canadian Real Estate Association and Local Real Estate Boards

2019 AVG MLS® RESALE SALES* & 2018-2019 % CHANGE				
	Sales: Condominium	**% Change**	**Sales: Non-Condominium**	**% Change**
Vancouver	14,468	-3.5%	17,389	5.1%
Toronto	23,507	2.9%	64,645	16.4%
Calgary	2,817	0.9%	16,110	1.4%
Ottawa	**4,584**	**13.0%**	**14,038**	**4.7%**
Montréal	18,784	14.3%	33,034	7.4%
Edmonton	4,125	-1.3%	10,313	-1.4%

*Corresponds to Real Estate Board Territories

Source: Canadian Real Estate Association and Local Real Estate Boards

2.3 Rental Housing

Supply

CMHC estimates there was an increase of 1.7% in the total number of rental purpose row and apartment units to 71,210 in 2019 from 70,004 in 2018. The overall supply of condominium rental units increased 3.3% to 10,593 in 2019 from 10,250 in 2018. The percentage of condominiums that are rental has increased from 24.2% in 2014 to 29.9% in 2019 showing that rental condominiums are becoming an increasing part of the rental supply, although largely limited to the highest rent quintile.

RENTAL VACANCY RATES BY CMHC ZONE, 2019

New Edinb./Manor Park/Overbrook	1.6%
Nepean	2.5%
Alta Vista	1.7%
City Average	**1.8%**
Chinatown/Hintonburg/Westboro N	2.3%
Downtown	2.6%
Carlington/Iris	1.1%
Gloucester North/Orleans	1.9%
Sandy Hill/Lowertown	2.7%
Western Ottawa Surrounding Areas	2.1%
Westboro S/Hampton Pk/Britannia	0.9%
Eastern Ottawa Surrounding Areas	0.9%
Glebe/Old Ottawa South	0.9%
Hunt Club/South Keys	1.5%
Vanier	1.4%

Source: CMHC Rental Market Report Ottawa Fall 2019, Table 1.1.1

**Data is supressed as it is not reliable

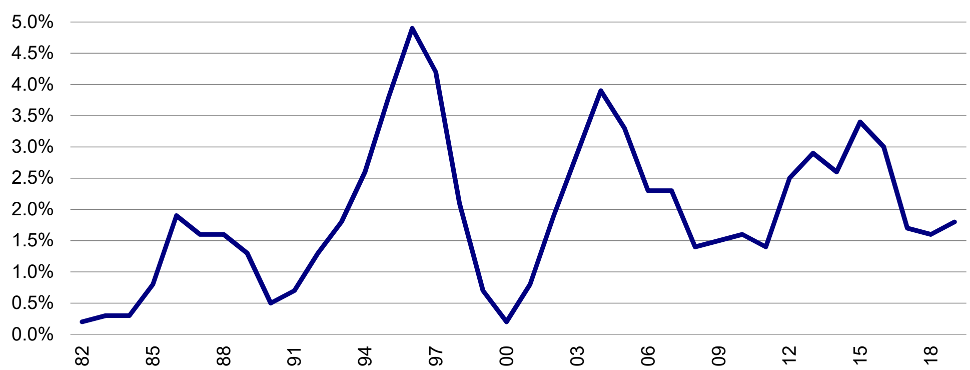
Vacancy Rates

Ottawa's rental vacancy rate increased slightly to 1.8% in 2019 from 1.6% in 2018. The vacancy rate is lower for one-bedroom (1.7%) compared to two-bedroom units (1.9%) and bachelor units (2.2%). Strong demographic and economic fundamentals have remained supportive of housing demand benefiting the rental market and maintaining low vacancy rates.

Official Plan policy restricts conversions of rental buildings with five or more units to condominium or freehold ownership when the rental vacancy rate is below 3.0%; and considers the possibility for conversion only when the vacancy rate is at or above 3.0% for two consecutive annual reporting periods, and rents in the building to be converted are above the CMHC zone average (by unit type). The low vacancy rate this year does not permit conversions.

Rental Vacancy Rate, Ottawa, 1982-2019

Source: CMHC



Private Rental Prices

The average rent for a two-bedroom apartment in Ottawa in 2019 was $1,410, an increase of 8.4% from 2018 and above the 2019 provincial Rent Increase Guideline of 1.8%. The average rent of a two-bedroom apartment in Gatineau in 2019 was $874. The rent gap between Ottawa and Gatineau for a two-bedroom apartment is $536 and 61%; slightly lower than the 64% gap in 2018.

3. Economy

HIGHLIGHTS

- The number of employed residents increased by 5.8% in Ottawa from 2018 to 2019
- The Knowledge cluster was Ottawa's highest growth cluster in 2019, adding 12,200 jobs
- The Knowledge cluster also had the largest employment numbers with 188,300 jobs in 2019

3.1 Labour Force

Employed Residents

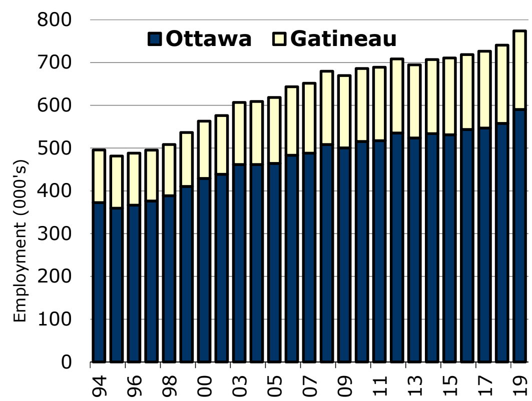
The Ottawa-Gatineau CMA gained 33,400 jobs in 2019. Gains were made in all of the nation's six largest metro areas, with Toronto seeing the largest increase of 138,500 jobs (adjacent table). About 75% of the jobs in the Ottawa-Gatineau CMA have historically been in the city of Ottawa.

Employment Changes, Major Centres, 2018-2019
Source: Statistics Canada, Labour Force Survey, CANSIM 14-10-0098-01

CMA	Net job change
Toronto	138,500
Vancouver	48,300
Calgary	33,800
Ottawa-Gatineau	**33,400**
Montréal	17,900
Edmonton	8,500

Statistics Canada's sample-based Labour Force Survey (LFS) shows the number of employed residents in the Ottawa CMA averaged 590,100 in 2019, up 5.8% or 32,500 employed residents from 2018[8]. The unemployment rate increased slightly to 4.7% in 2019 from 4.6% in 2018. The local unemployment rate remained lower than provincial (5.6%) and national (5.7%) rates (Table 8).

Total Employment, Ottawa and Gatineau, 1994-2019
Source: Statistics Canada LFS



The North American Industry Classification System's (NAICS) Major Sectors have been categorized into five main clusters of the local economy. The Knowledge cluster was Ottawa's highest growth cluster in 2019, adding 12,200 employed residents. While all other clusters also experienced growth, the Industrial and Resource cluster experienced a decline (-2,200) in employed residents. In 2019, the Knowledge cluster also had the largest employment numbers with 188,300 employed residents (Table 9).

In 2019 private-sector employment remained steady representing 63.2% of all employed residents in Ottawa (Table 9).

[8] The City's Employment Survey, undertaken every few years, the most recent in 2012, reports employment by location of the job. The LFS reports employment by the place of residence of the person employed. The City's survey always shows a higher number of jobs because it captures Ottawa jobs held by residents of neighbouring jurisdictions who commute to Ottawa to work. The 2012 Ottawa survey recorded 565,997 jobs while the LFS for 2012 reported 539,100 employed residents of the Ottawa CMA.

High-Tech

In 2019, Ottawa's Advanced Technology sector gained an estimated 4,200 employed residents after a loss of 5,800 in 2018. Software and Telecommunications gained 5,400 employed residents, while Tourism gained 2,400. Telecommunications Equipment and Microelectronics both experienced zero growth, while Health Sciences lost an estimated 1,200 employed residents in 2019 (Table 9).

3.2 Office, Industrial and Retail Markets

Office Market

Ottawa has a commercial office space inventory of approximately 3.8 million square metres (41.0 million square feet). Ottawa's overall vacancy rate decreased to 8.7% at the end of 2019 from 9.6% in 2018. Ottawa West area had the lowest vacancy rate of 7.2%, followed by Downtown at 7.4% while Ottawa East had the highest vacancy rate of 12.8% at the end of 2019.

Industrial Market

Ottawa is estimated to have over 2.2 million square metres (23.9 million square feet) of industrial floor area at the end of 2019. Over 60% of the industrial inventory is east of the Rideau River, which saw a decrease in vacancy to 4.8% from 5.4%. West of the Rideau River, vacancies decreased to 3.1% from 3.4%. Overall, the city saw the vacancy rate decrease to 4.2% in 2019 from 4.6% in 2018 (Table 21).

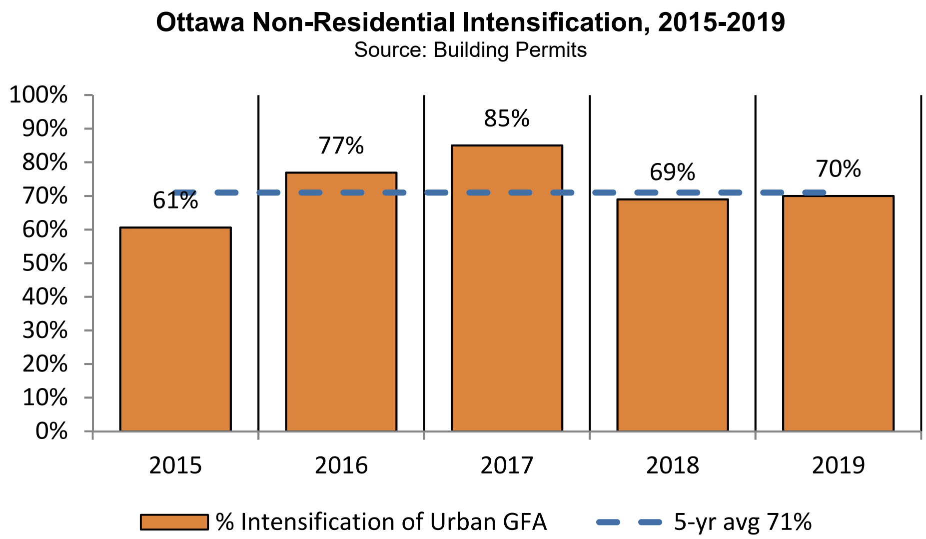
Retail Market

Retail space is categorized into several format categories. In 2019, all retail categories maintained similar shares of total floor area compared to 2018. Power Centres and standalone big box stores had the largest share of space, increasing to 27.6% of the total in 2019 from 27.5% in 2018.

Power Centres and Regional Shopping Centres both saw a vacancy increase of 0.6 percentage points to 3.8% in 2019 from 3.2% in 2018. Community Shopping Centres experienced the largest decline in vacancy rate, falling 2.5 percentage points to 4.5%. The city's overall retail vacancy rate decreased to 4.5% in 2019 from 5.0% in 2018 (Table 22).

3.3 Non-Residential Intensification

Non-residential intensification is the amount of commercial, industrial and institutional gross floor area (GFA) constructed within built-up urban and suburban areas. Applying the definition in the Official Plan, in 2019 approximately 133,300 m^2 (about 1,434,800 ft^2) had been constructed within the developed area, representing an intensification rate of 70%. Over the past five-years, non-residential intensification averaged 71% of total built space *(*Table 14).



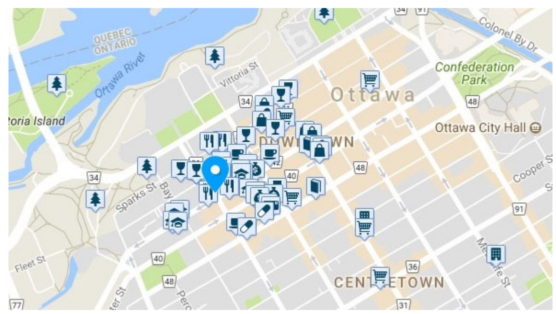
4. Transit Stations

HIGHLIGHTS

- The average commercial service index of Ottawa's O-Train stations was 71.7
- Parliament Station received the highest commercial service indices of 98
- Two stations had an index within the 90s

4.0 Index of Commercial Services around Transit Stations

The growth management strategy of the Official Plan is to direct new residential and commercial growth to locations that are easily accessible by transit making Ottawa's rapid transit stations key areas to accommodate new development. In additional to transit services, these areas also attract development by being diverse with a mix of housing, shopping, services, recreation and employment. Commercial service density, or the amount of commercial services in proximity to transit stations, is a measure of how many amenities are close to transit stations and how this amount might change over time.



Walk Score[9] analyzes walking routes at a given location to nearby amenities that are contained within their database of services and businesses. Despite the name, Walk Score measures commercial services close to a given point rather than how walkable an area is in terms of infrastructure capacity and design. Points are awarded based on the distance to these amenities in each category and those within a 5 minute walk are given maximum points and decline the further away they are. The higher the score the greater the density of commercial services around transit stations. As such, the scores can be used as an index of commercial service density.

Commercial Services Index Results	
Highest: Parliament Station	98 - Daily errands can be accomplished within transit station area
Average	71.7 - Most errands can be accomplished within transit station areas
Lowest: Tremblay Station	29 - Almost all errands outside transit station area

For the 2019 ADR, the scores were provided directly from Walk Score, the company; where previously they were gathered from the website. For all stations, the average commercial service index was 71.7, which means most errands can be accomplished within transit station areas. Line 1's Parliament and Rideau Stations both had indices within the 90s meaning daily errands can be accomplished within transit station areas. Line 1's Blair station and Line 2's Carleton station both experienced increases – Blair with the largest increase of an index of 80 in 2019 from 67 in 2018. Some stations decreased scores, but unfortunately Walk Score cannot identify what amenities have changed to result in a change of score. However, Walk Score completed work to improve accuracy of scores, specifically for school results in Canada, by removing locations such as driving schools and administration offices to only include Kindergarten to Grade 12 schools, which may have resulted in drops in scores.

[9] Walk Score: https://www.walkscore.com/

Appendix: Data Tables

TABLE 1
POPULATION OF CANADA'S SIX LARGEST METROPOLITAN AREAS, 2015-2019

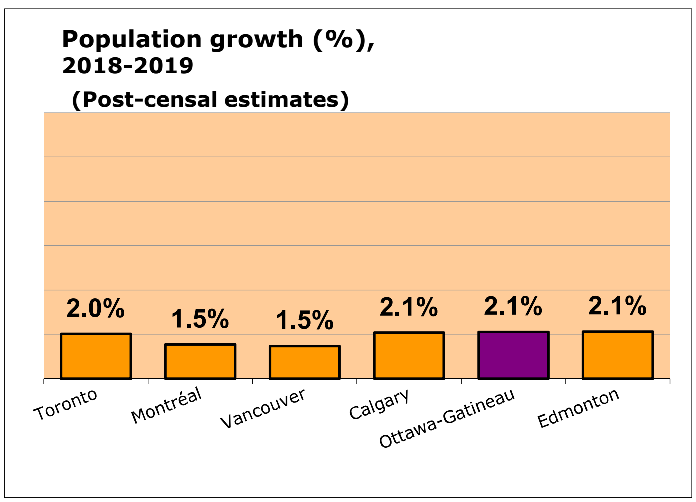
CMA *	POST-CENSAL ESTIMATES					*2018-2019*
	2015	**2016**	**2017**	**2018**	**2019**	***% chg.***
Toronto	6,045,240	6,125,013	6,219,114	6,344,275	6,471,850	*2.0%*
Montréal	4,109,712	4,140,425	4,190,786	4,253,300	4,318,505	*1.5%*
Vancouver	2,544,484	2,582,202	2,612,874	2,652,306	2,691,351	*1.5%*
Calgary	1,414,010	1,438,160	1,459,256	1,483,983	1,514,723	*2.1%*
Ottawa-Gatineau	**1,337,305**	**1,358,100**	**1,384,983**	**1,411,320**	**1,441,118**	*2.1%*
Edmonton	1,338,092	1,364,394	1,391,219	1,417,062	1,447,143	*2.1%*
City of Ottawa**	948,461	964,341	983,901	1,005,259	1,028,514	*2.3%*

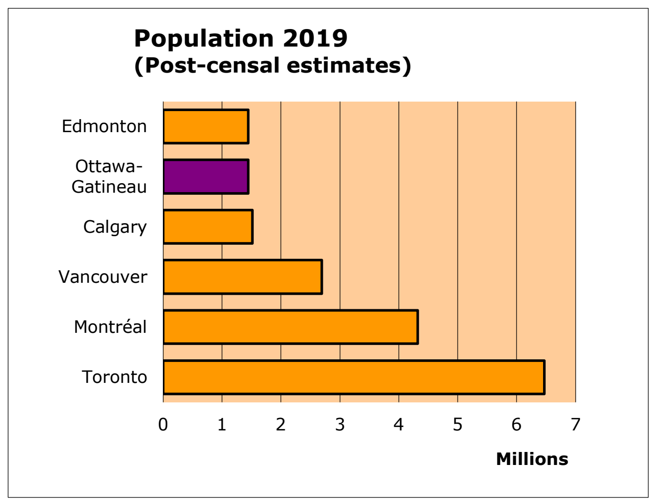
Source: Statistics Canada, Tables 17-10-0135-01 and 17-10-0139-01 ; estimates are for July 1 each year

Estimates are final intercensal for 2015, final postcensal for 2016, updated postcensal for 2017to 2018 and preliminary postcensal for 2019.

* CMA = Census Metropolitan Area, as defined by Statistics Canada. CMA boundaries vary slightly from Census to Census.

** Census Division, as defined by Statistics Canada, corresponding to Single and Upper-Tier Municipaliies in Ontario.





POST-CENSAL POPULATION ESTIMATES, OTTAWA-GATINEAU CMA

Statistics Canada Ottawa-Gatineau CMA	2015	2016	2017	2018	2019	*2018-2019 % chg.*
Ontario part of CMA	1,006,491	1,026,678	1,047,592	1,070,338	1,095,134	*2.3%*
(%)	75.3%	75.4%	75.6%	75.8%	76.0%	
Quebec part of CMA	330,814	334,422	337,391	340,982	345,984	*1.5%*
(%)	24.7%	24.6%	24.4%	24.2%	24.0%	
Total CMA Population	**1,337,305**	**1,361,100**	**1,384,983**	**1,411,320**	**1,441,118**	***2.1%***

Source: Table 17-10-0135-04, Statistics Canada.

Estimates are final intercensal for 2015, final postcensal for 2016, updated postcensal for 2017to 2018 and preliminary postcensal for 2019.

TABLE 2
GREATER OTTAWA-GATINEAU AREA POPULATION & DWELLINGS

Municipality	2016 Census Population	2016 Census Occupied Dwellings	2017 City Estimates Population	2017 City Estimates Occupied Dwellings	2018 City Estimates Population	2018 City Estimates Occupied Dwellings	2019 City Estimates Population	2019 City Estimates Occupied Dwellings
Ottawa, C	**934,243**	**373,756**	**979,173**	**416,219**	**991,429**	**422,327**	**1,006,211**	**429,080**
Gatineau, V	**276,245**	**118,385**	**278,979**	**119,971**	**282,154**	**121,576**	**288,865**	**124,715**
Prescott & Russell (part)	**67,068**	**25,361**	**62,925**	**23,904**	**63,949**	**24,379**	**65,405**	**25,008**
Alfred and Plantagenet, TP	9,680	3,959	9,183	3,762	9,208	3,779	9,192	3,779
Casselman, Vlg.	3,548	1,435	3,572	1,452	3,621	1,478	3,603	1,478
Clarence-Rockland, C (part of ON CMA)	24,512	9,329	23,203	8,868	23,571	9,046	23,964	9,235
Russell, TP (part of ON CMA)	16,520	5,873	15,393	5,500	15,895	5,708	17,022	6,143
The Nation Municipality	12,808	4,765	11,574	4,322	11,654	4,368	11,624	4,373
Leeds & Grenville (part)	**19,518**	**7,671**	**28,699**	**11,414**	**29,069**	**11,628**	**29,157**	**11,732**
Merrickville-Wolford, Vlg.	3,067	1,232	10,999	4,437	11,004	4,457	11,024	4,484
North Grenville, TP (part of ON CMA)	16,451	6,439	17,700	6,977	18,065	7,171	18,133	7,248
Stormont, Dundas, Glengarry (pt	**11,278**	**4,481**	**14,393**	**5,729**	**14,473**	**5,770**	**14,453**	**5,772**
North Dundas, TP	11,278	4,481	14,393	5,729	14,473	5,770	14,453	5,772
Lanark (part)	**35,212**	**13,858**	**32,908**	**13,055**	**34,326**	**13,722**	**35,260**	**14,195**
Beckwith, TP	7,644	2,864	7,045	2,649	7,304	2,756	7,499	2,840
Carleton Place, Tn.	10,644	4,278	10,202	4,094	11,152	4,468	11,999	4,800
Mississippi Mills, Tn.	13,163	5,292	12,162	4,985	12,375	5,171	12,272	5,228
Montague, TP	3,761	1,424	3,499	1,327	3,495	1,327	3,490	1,327
Renfrew (part)	**15,973**	**6,796**	**15,355**	**6,550**	**15,485**	**6,629**	**15,780**	**6,781**
Arnprior, Tn.	8,795	3,912	8,353	3,709	8,514	3,774	8,793	3,891
McNab/Braeside, TP	7,178	2,884	7,002	2,841	6,971	2,855	6,987	2,890
Québec Municipalities Adjacent to Gatineau (QMAG)	**55,812**	**21,717**	**51,632**	**20,508**	**52,349**	**20,900**	**53,003**	**21,269**
Cantley, M	10,699	3,768	9,868	3,488	10,012	3,552	10,098	3,595
Chelsea, M	6,909	2,610	6,913	2,624	7,040	2,685	7,329	2,809
La Pêche, M	7,863	3,274	7,613	3,180	7,734	3,241	7,805	3,282
L'Ange-Gardien, M	5,464	1,960	4,178	1,811	4,119	1,846	4,060	1,880
Pontiac, M	5,850	2,252	5,598	2,163	5,628	2,182	5,635	2,193
Val-des-Monts, M	11,582	4,564	10,586	4,177	10,908	4,309	11,105	4,391
Denholm, M	505	224	556	248	558	250	563	254
Notre-Dame-de-la-Salette, M	727	328	736	334	736	336	741	340
Mayo, M	601	259	571	247	580	252	585	255
Bowman, M	658	312	629	302	624	303	619	304
Val-des-Bois, M	865	452	890	469	882	469	880	472
Lochaber, CT	415	162	419	155	449	157	474	157
Lochaber-Ouest, CT	856	324	640	243	637	243	653	250
Thurso, V	2,818	1,228	2,435	1,067	2,442	1,075	2,456	1,087
GREATER OTTAWA-GATINEAU AREA	**1,415,349**	**572,025**	**1,464,064**	**617,350**	**1,483,234**	**626,931**	**1,508,134**	**638,552**
Ottawa-Gatineau CMA	1,307,332	529,060	1,348,380	571,066	1,365,398	579,557	1,389,065	590,442
Ontario portion of the CMA	991,726	395,397	1,035,469	437,564	1,048,960	444,252	1,065,330	451,706
Québec portion of the CMA	332,057	140,102	330,611	140,479	334,503	142,476	341,868	145,984
OMATO	149,049	58,167	154,280	60,652	157,302	62,128	160,055	63,488

Sources: Statistics Canada, Census; estimates based on CMHC starts and municipal building permits

2018-19 City Estimates are year-end.

City of Ottawa (2018 and 2019 population estimates based on building permits adjusted for demolitions, vacancies and ongoing declines in average household size);

Note 1: because they are derived from different sources, 2018 and 2019 population estimates should not be compared to Census population figures.

Note 2: sub-totals by County include only those areas within OMATO or QMAG, not the entire County.

Note 3: Notre-Dame-de-la-Salette, Mayo, Bowman, and Val-des-Bois were added to the CMA in 2011 and are not included in the "QMAG" or "Québec portion of the CMA sub-totals" prior to 2011.

Note 4: Lochaber, Lochaber-Ouest, and Thurso were added to the CMA in 2016 and are not included in the "QMAG" or "Quebect portion of the CMA sub-totals" prior to 2016

OMATO: Ontario Municipalities Adjacent To Ottawa, including Clarence-Rockland, Russell and North-Grenville. Clarence-Rockland and Russell are also in the Ontario part of the CMA as of 2011. North-Grenville is also in the Ontario part of the CMA as of 2016.

QMAG: Québec Municipalities Adjacent to Gatineau

TABLE 3
POPULATION AND HOUSEHOLD ESTIMATES BY SUB-AREA, 2015-2019

SUB-AREA	POPULATION							HOUSEHOLDS						
						Growth							Growth	
	2015	2016	2017	2018	2019	18-19	*% 18-19*	2015	2016	2017	2018	2019	18-19	*% 18-19*
Downtown*														
Central Area	12,026	12,570	12,544	12,605	12,465	-140	*-1.1%*	7,473	7,906	7,979	8,058	7,954	-104	*-1.3%*
Inner Area	89,605	90,122	91,380	91,953	92,523	570	*0.6%*	48,014	48,484	49,444	49,873	50,257	384	*0.8%*
Other Areas Inside Greenbelt														
Ottawa East	51,117	51,164	51,755	51,805	52,728	923	*1.8%*	25,641	25,885	26,457	26,637	27,247	610	*2.3%*
Beacon Hill	30,275	30,650	30,771	31,042	31,712	670	*2.2%*	14,001	14,343	14,496	14,610	14,933	323	*2.2%*
Alta Vista	74,998	75,059	75,027	75,172	74,926	-246	*-0.3%*	32,500	32,726	32,857	32,979	32,859	-120	*-0.4%*
Hunt Club	65,555	65,595	65,694	65,792	65,772	-20	*0.0%*	26,451	26,577	26,748	26,861	26,863	2	*0.0%*
Merivale	77,531	77,769	77,953	78,008	78,854	846	*1.1%*	33,780	34,152	34,493	34,641	35,181	540	*1.6%*
Ottawa West	44,598	45,380	45,524	45,901	46,398	497	*1.1%*	21,191	21,685	21,789	21,974	22,235	261	*1.2%*
Bayshore	38,477	38,397	38,497	38,559	38,602	43	*0.1%*	17,698	17,732	17,865	17,942	17,975	33	*0.2%*
Cedarview	46,162	45,822	45,619	45,315	45,327	12	*0.0%*	18,634	18,699	18,843	18,842	18,870	28	*0.1%*
Urban Areas Outside Greenbelt														
Kanata-Stittsville	116,777	118,949	121,730	126,179	130,939	4,760	*3.8%*	43,174	44,266	45,475	47,399	49,437	2,038	*4.3%*
South Nepean	83,252	84,925	87,115	89,042	90,318	1,276	*1.4%*	30,674	31,438	32,369	33,174	33,687	513	*1.5%*
Riverside South	14,145	14,590	15,425	16,614	17,873	1,259	*7.6%*	5,126	5,273	5,542	5,940	6,355	415	*7.0%*
Leitrim	8,527	8,808	9,284	10,084	11,483	1,399	*13.9%*	2,806	2,907	3,073	3,335	3,773	438	*13.1%*
Orléans	113,595	114,473	115,971	117,832	119,780	1,948	*1.7%*	43,490	44,149	45,086	46,048	46,980	932	*2.0%*
Rural														
Rural Northeast	11,937	11,952	12,012	12,009	11,993	-16	*-0.1%*	4,296	4,309	4,339	4,354	4,378	24	*0.6%*
Rural Southeast	28,316	28,415	28,610	28,790	28,929	139	*0.5%*	9,892	9,940	10,016	10,104	10,193	89	*0.9%*
Rural Southwest	28,296	28,395	28,660	29,105	29,610	505	*1.7%*	10,014	10,088	10,214	10,391	10,594	203	*2.0%*
Rural Northwest	25,568	25,545	25,602	25,619	25,979	360	*1.4%*	9,063	9,086	9,134	9,164	9,309	145	*1.6%*
City of Ottawa	**960,757**	**968,580**	**979,173**	**991,426**	**1,006,211**	**14,785**	**1.5%**	**403,918**	**409,645**	**416,219**	**422,326**	**429,080**	**6,754**	**1.6%**
Downtown*	101,631	102,692	103,924	104,558	104,988	430	*0.4%*	55,487	56,390	57,423	57,931	58,211	280	*0.5%*
Other Inside Greenbelt	428,713	429,836	430,840	431,594	434,319	2,725	*0.6%*	189,896	191,799	193,548	194,486	196,163	1,677	*0.9%*
Total Inside GB	*530,344*	*532,528*	*534,764*	*536,152*	*539,307*	*3,155*	*0.6%*	*245,383*	*248,189*	*250,971*	*252,417*	*254,374*	*1,957*	*0.8%*
Urban Areas Outside GB	336,296	341,745	349,525	359,751	370,393	10,642	*3.0%*	125,270	128,033	131,545	135,896	140,232	4,336	*3.2%*
Rural	94,117	94,307	94,884	95,523	96,511	988	*1.0%*	33,265	33,423	33,703	34,013	34,474	461	*1.4%*
Downtown*	10.6%	10.6%	10.6%	10.5%	10.4%			13.7%	13.8%	13.8%	13.7%	13.6%		
Other Inside Greenbelt	44.6%	44.4%	44.0%	43.5%	43.2%			47.0%	46.8%	46.5%	46.1%	45.7%		
Total Inside GB	55.2%	55.0%	54.6%	54.1%	53.6%			60.8%	60.6%	60.3%	59.8%	59.3%		
Urban Areas Outside GB	35.0%	35.3%	35.7%	36.3%	36.8%			31.0%	31.3%	31.6%	32.2%	32.7%		
Rural	9.8%	9.7%	9.7%	9.6%	9.6%			8.2%	8.2%	8.1%	8.1%	8.0%		

NOTE: Based on 2001 post-censal estimates of population and occupied dwellings, and estimates based on new occupied dwellings from building permits. **Data are year-end.**

* **Downtown** refers to the Central and Inner Areas combined.

Source: City of Ottawa, Planning and Growth Management

City of Ottawa Sub-Areas

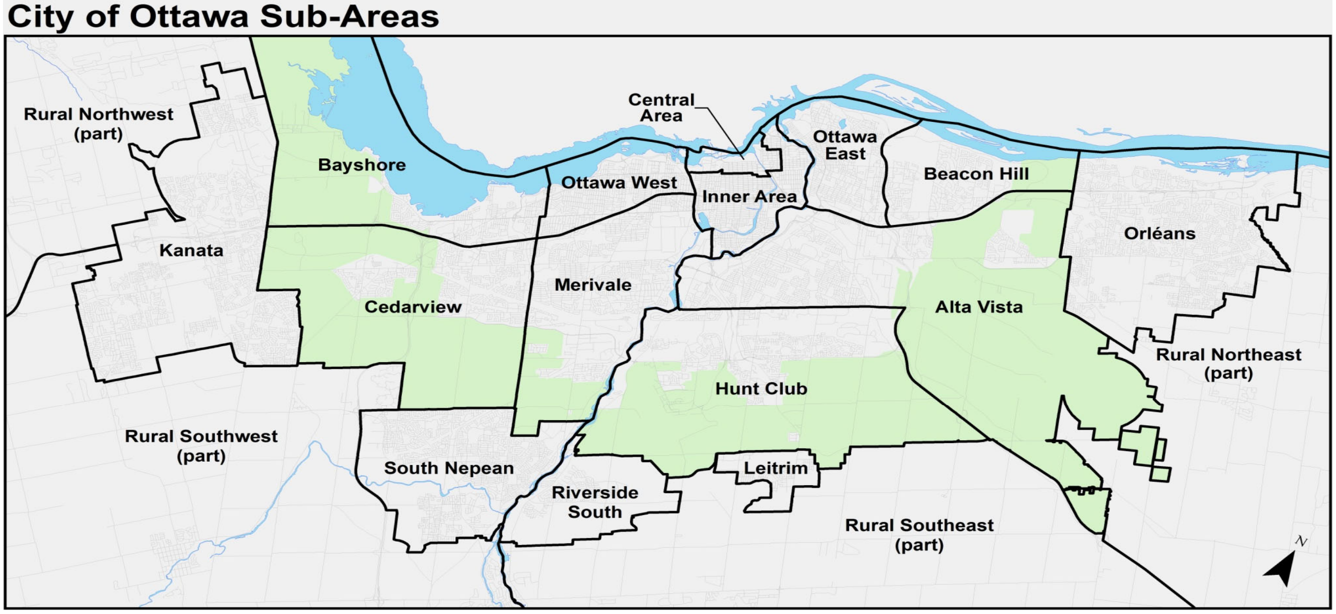


TABLE 4
NET MIGRATION TO THE CITY OF OTTAWA, 2013-2018

BY AGE GROUP

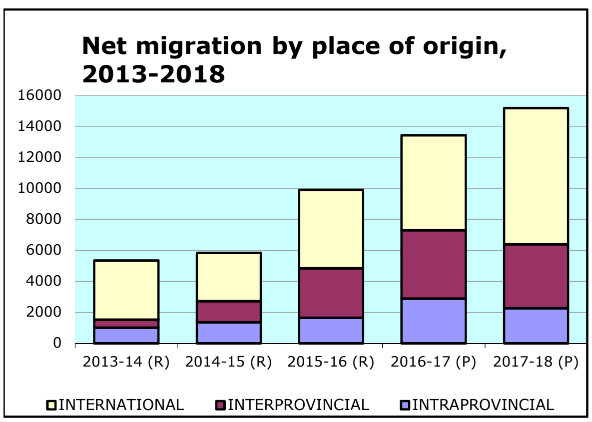
YEAR	AGE GROUP 0 - 17	18 - 24	25 - 44	45 - 64	65+	TOTAL
2013-14 (R)	1,117	1,819	2,511	-499	400	5,348
2014-15 (R)	1,230	1,688	3,237	-415	87	5,827
2015-16 (R)	2,467	2,210	4,621	110	480	9,888
2016-17 (P)	3,295	2,542	6,390	585	603	13,415
2017-18 (P)	**3,425**	**3,154**	**7,769**	**310**	**510**	**15,168**
5-year total	**11,534**	**11,413**	**24,528**	**91**	**2,080**	**49,646**
5 year %	**23.2%**	**23.0%**	**49.4%**	**0.2%**	**4.2%**	**100.0%**

Source: Statistics Canada, Migration Estimates for Census Division 3506 (R) = revised
*Time periods represent approximately May to May (P) = preliminary

BY PLACE OF ORIGIN

	INTRAPROVINCIAL	INTERPROVINCIAL	INTERNATIONAL	TOTAL
In-Migrants				
2013-14 (R)	14,090	10,258	6,626	30,974
2014-15 (R)	15,004	11,132	5,969	32,105
2015-16 (R)	15,645	12,104	7,958	35,707
2016-17 (P)	15,774	12,658	8,761	37,193
2017-18 (P)	**16,510**	**12,705**	**11,654**	**40,869**
Out-Migrants				
2013-14 (R)	13,081	9,742	2,803	25,626
2014-15 (R)	13,649	9,756	2,873	26,278
2015-16 (R)	13,985	8,922	2,912	25,819
2016-17 (P)	12,882	8,246	2,650	23,778
2017-18 (P)	**14,240**	**8,587**	**2,874**	**25,701**
Net Migration				
2013-14 (R)	1,009	516	3,823	5,348
2014-15 (R)	1,355	1,376	3,096	5,827
2015-16 (R)	1,660	3,182	5,046	9,888
2016-17 (P)	2,892	4,412	6,111	13,415
2017-18 (P)	**2,270**	**4,118**	**8,780**	**15,168**

Source: Statistics Canada, Migration Estimates for Census Division 3506 (R) = revised (P) = preliminary



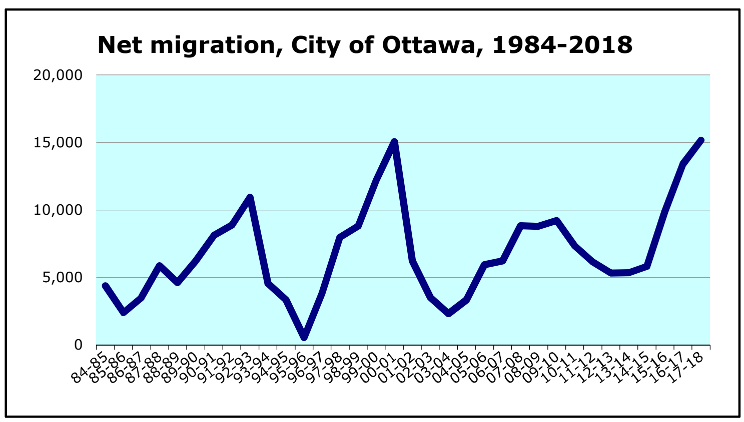


TABLE 5
NET MIGRATION IN-FLOWS AND OUT-FLOWS, CITY OF OTTAWA

2008-2018			
IN-FLOWS*		**OUT-FLOWS***	
Greater Montréal	9,567	OMATO and QMAG	-5,757
Rest of Ontario***	8,542	British Columbia	-1,950
Northern Ontario	5,951	Alberta	-970
Atlantic provinces	4,940		
Eastern Ontario	4,672		
Gatineau	3,386		
Greater Toronto Area	3,256		
Manitoba & Saskatchewan	3,062		
Rest of Québec**	2,504		
Canadian North	439		
TOTAL IN-FLOWS	**46,319**	**TOTAL OUT-FLOWS**	**-8,677**
		Net Canadian Migration 2008-2018	37,642
		Net International Migration	**48,876**
		Net Migration 2008-2018	**86,518**

2017-2018			
IN-FLOWS*		**OUT-FLOWS***	
Greater Toronto Area	1,609	OMATO and QMAG	-1,453
Greater Montréal	1,121		
Rest of Ontario***	1,034		
Atlantic provinces	952		
Gatineau	658		
Alberta	594		
Eastern Ontario	547		
Manitoba & Saskatchewan	514		
Northern Ontario	503		
Rest of Québec**	215		
Canadian North	89		
British Columbia	5		
TOTAL IN-FLOWS	**7,841**	**TOTAL OUT-FLOWS**	**-1,453**
		Net Canadian Migration 2017-2018	6,388
		Net International Migration *(Table 4)*	**8,780**
		Net Migration 2016-2017	**15,168**

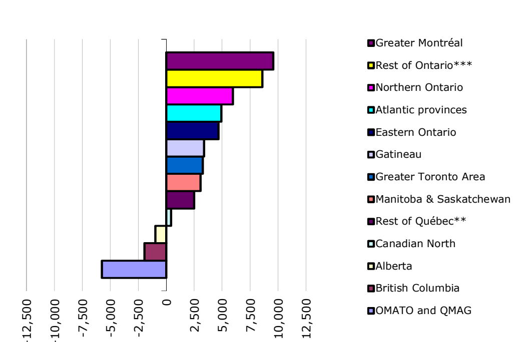
Source: Statistics Canada, Migration Estimates for Census Division 3506

* Most significant destinations in order of magnitude

** Rest of Québec = All of Québec outside Gatineau, Suburban Gatineau and Greater Montréal

*** Rest of Ontario = All of Ontario outside OMATO, Eastern Ontario, Northern Ontario and the Greater Toronto Area

Migration In- and Out- Flows, 2008-2018



Migration In- and Out- Flows, 2017-18

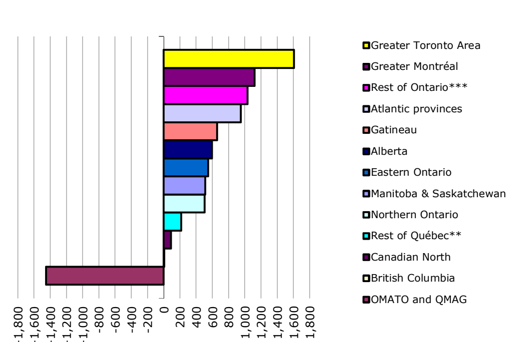


TABLE 6
MIGRATION BETWEEN OTTAWA AND ADJACENT MUNICIPALITIES, 2013-18

	2013-2014 (R)	2014-2015 (R)	2015-2016 (R)	2016-2017 (R)	2017-2018 (P)	TOTAL 2013-2018
PRESCOTT-RUSSELL TO OTTAWA	*1,780*	*1,789*	*1,795*	*1,622*	*1,755*	*8,741*
OTTAWA TO PRESCOTT-RUSSELL	*1,782*	*1,828*	*1,654*	*1,695*	*2,121*	*9,080*
PRESCOTT-RUSSELL - NET MIGRATION	**-2**	**-39**	**141**	**-73**	**-366**	**-339**
*S.D.&G.** TO OTTAWA*	*883*	*889*	*925*	*824*	*866*	*4,387*
OTTAWA TO S.D.&G.	*714*	*697*	*663*	*716*	*770*	*3,560*
S.D.&G. - NET MIGRATION	**169**	**192**	**262**	**108**	**96**	**827**
LEEDS-GRENVILLE TO OTTAWA	*841*	*878*	*862*	*827*	*873*	*4,281*
OTTAWA TO LEEDS-GRENVILLE	*1,046*	*1,084*	*1,052*	*1,074*	*1,277*	*5,533*
LEEDS-GRENVILLE - NET MIGRATION	**-205**	**-206**	**-190**	**-247**	**-404**	**-1,252**
LANARK TO OTTAWA	*953*	*1,002*	*1,038*	*947*	*1,001*	*4,941*
OTTAWA TO LANARK	*1,367*	*1,326*	*1,530*	*1,340*	*1,638*	*7,201*
LANARK - NET MIGRATION	**-414**	**-324**	**-492**	**-393**	**-637**	**-2,260**
RENFREW TO OTTAWA	*939*	*1,078*	*1,036*	*924*	*976*	*4,953*
OTTAWA TO RENFREW	*935*	*979*	*916*	*967*	*1,088*	*4,885*
RENFREW - NET MIGRATION	**4**	**99**	**120**	**-43**	**-112**	**68**
GATINEAU TO OTTAWA*	*2,402*	*2,448*	*2,320*	*2,538*	*2,431*	*12,139*
OTTAWA TO GATINEAU	*1,800*	*1,729*	*1,848*	*1,679*	*1,773*	*8,829*
GATINEAU - NET MIGRATION	**602**	**719**	**472**	**859**	**658**	**3,310**
LES-COLLINES-DE-L'OUTAOUAIS TO OTTAWA	*284*	*268*	*247*	*244*	*223*	*1,266*
OTTAWA TO LES-COLLINES-DE-L'OUTAOUAIS	*220*	*233*	*256*	*273*	*244*	*1,226*
LES-COLLINES - NET MIGRATION	**64**	**35**	**-9**	**-29**	**-21**	**40**
PAPINEAU TO OTTAWA	*18*	*18*	*15*	*17*	*25*	*93*
OTTAWA TO PAPINEAU	*27*	*23*	*28*	*16*	*22*	*116*
PAPINEAU - NET MIGRATION	**-9**	**-5**	**-13**	**1**	**3**	**-23**
LA-VALLÉE-DE-LA-GATINEAU TO OTTAWA	*15*	*20*	*29*	*34*	*10*	*108*
OTTAWA TO LA-VALLÉE-DE-LA-GATINEAU	*41*	*40*	*18*	*25*	*31*	*155*
LA-VALLÉE - NET MIGRATION	**-26**	**-20**	**11**	**9**	**-21**	**-47**
PONTIAC TO OTTAWA	*69*	*39*	*41*	*38*	*58*	*245*
OTTAWA TO PONTIAC	*30*	*41*	*28*	*33*	*49*	*181*
PONTIAC - NET MIGRATION	**39**	**-2**	**13**	**5**	**9**	**64**
TOTAL	**222**	**449**	**315**	**197**	**-795**	**388**
Gatineau	**602**	**719**	**472**	**859**	**658**	**3,310**
OMATO Counties*	**-448**	**-278**	**-159**	**-648**	**-1,423**	**-2,956**
QMAG Counties*	**68**	**8**	**2**	**-14**	**-30**	**34**

OMATO: Ontario Municipalities Adjacent to Ottawa; **QMAG:** Québec Municipalities Adjacent to Gatineau

** S.D.&G. = Stormont, Dundas and Glengarry United Counties

Source: Statistics Canada, Migration Estimates for Census Division 3506, City of Ottawa

Time periods represent approximately May to May.

(R) = Revised; (P) = Preliminary

TABLE 7
TOTAL NET MIGRATION, SIX LARGEST CENSUS METROPOLITAN AREAS

CMA	2014-2015 (F)	2015-2016 (F)	2016-2017 (U)	2017-2018 (U)	2018-2019 (P)	% chg. 17-18/18-19	2014-2018 TOTAL
Toronto	29,983	62,814	62,995	94,610	96,458	2.0%	346,860
Montréal	11,579	24,059	35,546	48,475	51,199	5.6%	170,858
Vancouver	17,593	20,274	22,378	31,407	31,623	0.7%	123,275
Calgary	17,283	13,313	9,965	14,228	20,433	43.6%	75,222
Edmonton	20,134	19,087	16,613	16,312	20,784	27.4%	92,930
Ottawa-Gatineau	**7,150**	**16,124**	**21,990**	**21,772**	**25,131**	**15.4%**	**92,167**
TOTAL 6 CMA's	**103,722**	**155,671**	**169,487**	**226,804**	**245,628**	**8.3%**	**901,312**
Ottawa-Gatineau % of 6 largest CMA's	6.9%	10.4%	13.0%	9.6%	10.2%		10.2%

Source: Statistics Canada, Table 17-10-0136-01

(F) = Final; (P) = Preliminary; (U) = Updated

Note: Statistics Canada publishes two sets of migration data. The first, Migration Estimates for Census Division 3506, is used as the basis for Tables 4, 5 and 6 because it reports data at a detailed level of geography not available elsewhere. It provides data up to 2016-2017. The second dataset is CANSIM Table 17-10-0136-01, which is used for Table 7 and has data up to 2017-2018.

TABLE 8
LABOUR FORCE INDICATORS, OTTAWA*, 2000-2019

YEAR	POPULATION 15 YEARS + (000)	LABOUR FORCE (000)	EMPLOYED RESIDENTS (000)	UNEM-PLOYED (000)	NOT IN LABOUR FORCE (000)	PARTICI-PATION RATE (%)	UNEMPLOYMENT RATE OTTAWA CMA (%)	UNEMPLOYMENT RATE ONTARIO (%)	UNEMPLOYMENT RATE CANADA (%)
2000	647.1	453.4	428.4	25.0	193.7	70.1%	5.5%	5.8%	6.8%
2001	663.8	469.8	441.3	28.5	194.0	70.8%	6.1%	6.3%	7.2%
2002	676.6	474.4	438.8	35.6	202.2	70.1%	7.5%	7.1%	7.7%
2003	686.2	495.4	461.4	34.0	190.8	72.2%	6.9%	6.9%	7.6%
2004	693.5	493.7	461.0	32.7	199.8	71.2%	6.6%	6.8%	7.2%
2005	701.2	496.4	463.6	32.9	204.8	70.8%	6.6%	6.6%	6.8%
2006	711.0	509.4	483.3	26.1	201.6	71.6%	5.1%	6.3%	6.3%
2007	722.3	520.1	493.7	26.4	202.2	72.0%	5.1%	6.4%	6.0%
2008	735.0	535.0	508.3	26.7	200.0	72.8%	5.0%	6.5%	6.1%
2009	748.8	531.2	500.4	30.7	217.6	70.9%	5.8%	9.0%	8.3%
2010	763.1	551.4	515.3	36.1	211.7	72.3%	6.5%	8.7%	8.0%
2011	776.1	549.2	517.4	31.9	226.9	70.8%	5.8%	7.8%	7.4%
2012	789.7	570.2	535.4	34.9	219.5	72.2%	6.1%	7.8%	7.2%
2013	802.8	559.6	523.5	36.1	243.2	69.7%	6.5%	7.5%	7.1%
2014	814.8	571.8	533.8	38.0	243.0	70.2%	6.6%	7.3%	6.9%
2015	825.3	566.9	531.1	35.8	258.3	68.7%	6.3%	6.8%	6.9%
2016	836.8	580.0	543.4	36.6	256.7	69.3%	6.3%	6.5%	7.0%
2017	850.7	578.9	546.7	32.2	271.8	68.0%	5.6%	6.0%	6.3%
2018	869.6	584.6	557.6	27.0	285.0	67.2%	4.6%	5.6%	5.8%
2019	**890.4**	**619.5**	**590.1**	**29.4**	**270.9**	**69.6%**	**4.7%**	**5.6%**	**5.7%**
% change:									
2018-19	2.4	6.0	5.8	8.9	-4.9	2.4%	0.1%	0.0%	-0.1%
2015-19	7.9	9.3	11.1	-17.9	4.9	0.9%	-1.6%	-1.2%	-1.2%

Source: 2000: Statistics Canada, Labour Force Survey, Table 282-0110 (Annual Averages) [Table has been discontinued]

2001-2017: Statistics Canada, Labour Force Survey, Table 282-0129 & Table 282-0002 (Annual Averages),

2018-19: Statistics Canada, Labour Force Survey, Table 14-10-0096-01 and Table 14-10-0090-01

* The Ottawa CMA (the Ontario part of the Ottawa-Gatineau Census Metropolitan Area) is defined by Statistics Canada as the City of Ottawa, the City of Clarence-Rockland, the Township of Russell & the Municipality of North Grenville starting in 2016.

NOTE: Labour Force Survey data is reported by place of residence.

TABLE 9

EMPLOYMENT BY SECTOR (000's), OTTAWA CMA, 2013-2019

By Major Clusters	2013	2014	2015	2016	2017	2018	2019
Industrial & Resource Cluster	**39.0**	**40.4**	**48.5**	**42.1**	**46.6**	**50.5**	**48.3**
Primary	1.5	1.7	0.0	0.0	0.0	1.6	1.8
Utilities	0.0	1.6	0.0	0.0	0.0	1.9	2.2
Construction	20.5	19.6	31.8	25.2	28.9	29.2	27.8
Manufacturing	17.0	17.5	16.7	16.9	17.7	17.8	16.5
Retail Cluster	**77.6**	**83.8**	**82.2**	**81.6**	**82.4**	**88.7**	**89.6**
Wholesale Trade	11.7	16.4	11.5	16.6	13.3	14.7	13.4
Retail Trade	51.7	52.6	55.4	48.7	53.2	53.0	56.1
Transportation and Warehousing	14.2	14.8	15.3	16.3	15.9	21.0	20.1
Office Cluster	**74.7**	**69.3**	**71.8**	**71.2**	**69.9**	**71.9**	**78.9**
Administrative and Support Services	23.0	21.3	25.1	25.2	18.1	19.6	20.8
F.I.R.E.*	28.1	24.4	27.2	25.2	28.4	25.8	28.6
Other Services	23.6	23.6	19.5	20.8	23.4	26.5	29.5
Culture and Tourism Cluster	**54.6**	**63.0**	**58.9**	**58.7**	**51.5**	**55.5**	**59.4**
Accommodation and Food Services	31.7	35.8	33.2	31.3	28.2	30.1	34.8
Information and Cultural Industries	13.2	14.8	13.0	12.5	11.2	11.1	12.6
Arts, Entertainment and Recreation	9.7	12.4	12.7	14.9	12.1	14.3	12.0
Knowledge Cluster	**168.6**	**166.6**	**165.6**	**181.7**	**171.1**	**176.1**	**188.3**
Health and Education	103.4	106.1	110.7	119.6	110.3	114.7	116.3
Professional, Sci. & Tech. Services	65.2	60.5	54.9	62.1	60.8	61.4	72.0
Government Cluster	**108.2**	**108.6**	**101.1**	**104.8**	**123.4**	**114.4**	**125.6**
Public Administration	108.2	108.6	101.1	104.8	123.4	114.4	125.6
Total Employed Residents	**523.5**	**533.8**	**531.1**	**543.4**	**546.7**	**557.6**	**590.1**
By Primary, Secondary and Tertiary Sector							
Primary	1.5	1.7	0.0	0.0	0.0	1.6	1.8
Secondary	37.5	38.7	48.5	42.1	46.6	48.9	46.5
Tertiary	484.5	493.4	482.6	501.3	500.1	507.1	541.8
Total	**523.5**	**533.8**	**531.1**	**543.4**	**546.7**	**557.6**	**590.1**
By Type of Sector							
Private sector	330.4	342.0	346.2	347.2	339.7	345.8	373.1
Public sector	175.8	176.6	168.4	178.8	193.7	192.4	194.7
Non-profit sector	17.3	15.2	16.5	17.4	13.3	19.4	22.3
Total	**523.5**	**533.8**	**531.1**	**543.4**	**546.7**	**557.6**	**590.1**
% private	63.1%	64.1%	65.2%	63.9%	62.1%	62.0%	63.2%
By High-Tech Cluster							
Telecommunications equipment	2.4	1.5	1.5	0.0	2.3	0.0	0.0
Microelectronics	2.4	3.0	1.5	0.0	2.3	0.0	0.0
Software and Telecommunications	51.6	50.2	40.6	43.3	47.8	46.3	51.7
Health Sciences	0.0	1.5	1.9	1.8	2.4	2.7	1.5
Tourism	41.4	48.2	45.9	46.2	40.3	44.4	46.8
Total, all clusters	**97.8**	**104.4**	**91.4**	**91.3**	**95.1**	**93.4**	**100.0**
Advanced Technology	***56.4***	***56.2***	***45.5***	***45.1***	***54.8***	***49.0***	***53.2***

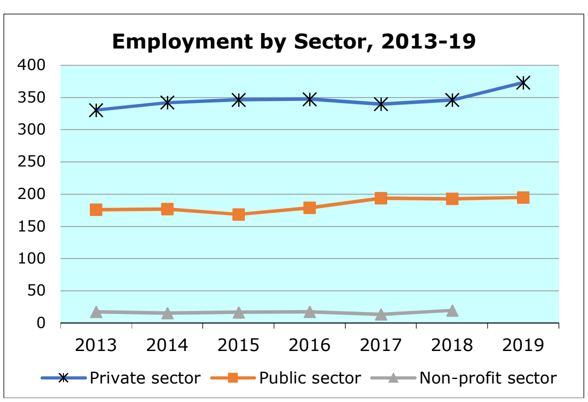
Source: Statistics Canada, Labour Force Survey, custom tabulations

Figures may not add due to rounding & data suppression by Statistics Canada

* F.I.R.E. = Finance, Insurance and Real Estate

Note: "0.0" indicates estimate is less than 1,500

(see footnote to Table 8 for definition of Ottawa CMA)



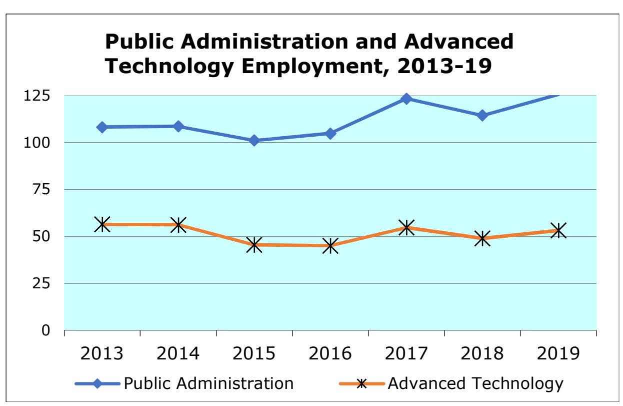
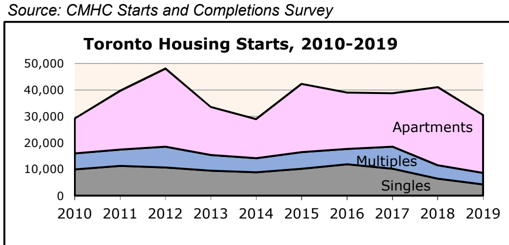


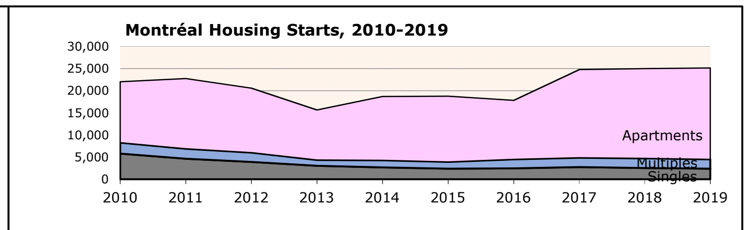
TABLE 10
HOUSING STARTS IN CANADA'S SIX LARGEST CMA's, 2010-2019

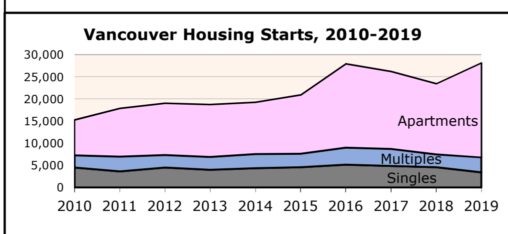
CMA	Dwg. Type	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% change 2018-19	% change 2010-19
Toronto	Singles	9,936	11,247	10,699	9,421	8,830	10,223	11,884	10,172	6,405	4,209	-34.3%	-57.6%
	Multiples	6,019	6,241	7,789	5,977	5,391	6,239	5,823	8,392	5,063	4,410	-12.9%	-26.7%
	Apartments	13,240	22,257	29,617	18,149	14,708	25,825	21,320	20,174	29,639	21,843	-26.3%	65.0%
	Total	**29,195**	**39,745**	**48,105**	**33,547**	**28,929**	**42,287**	**39,027**	**38,738**	**41,107**	**30,462**	-25.9%	4.3%
Vancouver	Singles	4,533	3,686	4,516	4,004	4,374	4,622	5,169	4,911	4,592	3,426	-25.4%	-24.4%
	Multiples	2,738	3,338	2,869	2,883	3,227	2,998	3,828	3,795	2,924	3,394	16.1%	24.0%
	Apartments	7,946	10,843	11,642	11,809	11,611	13,243	18,917	17,498	15,888	21,321	34.2%	168.3%
	Total	**15,217**	**17,867**	**19,027**	**18,696**	**19,212**	**20,863**	**27,914**	**26,204**	**23,404**	**28,141**	20.2%	84.9%
Montréal	Singles	5,789	4,653	3,959	3,039	2,677	2,402	2,499	2,771	2,549	2,369	-7.1%	-59.1%
	Multiples	2,452	2,233	2,084	1,289	1,608	1,511	2,018	2,130	2,182	2,104	-3.6%	-14.2%
	Apartments	13,760	15,833	14,548	11,304	14,387	14,831	13,317	19,855	20,269	20,639	1.8%	50.0%
	Total	**22,001**	**22,719**	**20,591**	**15,632**	**18,672**	**18,744**	**17,834**	**24,756**	**25,000**	**25,112**	0.4%	14.1%
Edmonton	Singles	6,062	5,017	5,658	5,970	6,832	5,683	4,335	5,028	4,814	4,140	-14.0%	-31.7%
	Multiples	2,149	2,110	3,252	3,555	3,880	4,442	3,278	3,273	3,134	2,698	-13.9%	25.5%
	Apartments	1,748	2,205	3,927	5,164	3,160	6,925	2,423	3,134	2,090	3,882	85.7%	122.1%
	Total	**9,959**	**9,332**	**12,837**	**14,689**	**13,872**	**17,050**	**10,036**	**11,435**	**10,038**	**10,720**	6.8%	7.6%
Calgary	Singles	5,782	5,084	5,961	6,402	6,494	4,138	3,489	4,423	3,791	3,535	-6.8%	-38.9%
	Multiples	2,131	2,102	2,886	3,207	3,903	3,150	2,055	2,885	2,777	2,991	7.7%	40.4%
	Apartments	1,349	2,106	3,994	2,975	6,734	5,745	3,701	4,226	4,403	5,383	22.3%	299.0%
	Total	**9,262**	**9,292**	**12,841**	**12,584**	**17,131**	**13,033**	**9,245**	**11,534**	**10,971**	**11,909**	8.5%	28.6%
Ottawa-Gatineau	Singles	3,212	2,918	2,280	2,262	2,254	2,414	2,365	2,703	3,131	3,017	-3.6%	-6.1%
	Multiples	3,259	2,846	2,307	2,424	2,450	1,961	2,364	2,508	2,636	3,308	25.5%	1.5%
	Apartments	2,662	2,450	4,192	3,798	2,961	2,181	2,388	4,116	3,701	4,878	31.8%	83.2%
	Total	**9,133**	**8,214**	**8,779**	**8,484**	**7,665**	**6,556**	**7,117**	**9,327**	**9,468**	**11,203**	18.3%	22.7%

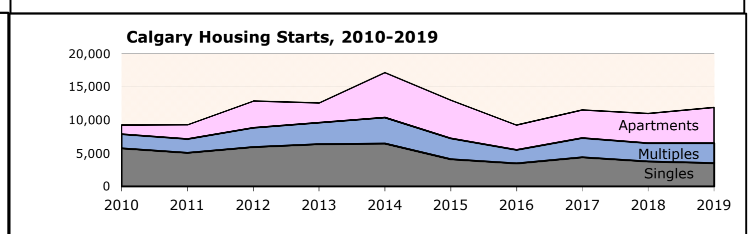
Multiples = Semi-detached and Row units

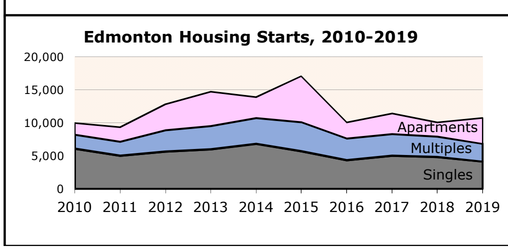
Source: CMHC Starts and Completions Survey











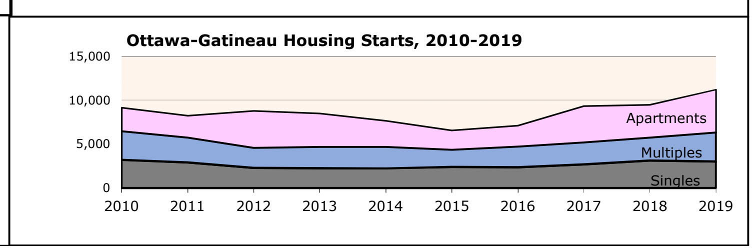


TABLE 11
NEW HOUSING IN MUNICIPALITIES IN GREATER OTTAWA-GATINEAU AREA, 2011-19

	2011	2012	2013	2014	2015	2016	2017	2018	2019	% chng. 2018-19
OTTAWA	**5,521**	**5,730**	**6,284**	**5,537**	**4,696**	**5,019**	**6,849**	**6,950**	**7,069**	**1.7%**
Ottawa, Vanier, Rockcliffe (former)	952	2,057	2,262	1,244	1,406	979	2,363	1,971	1,488	-24.5%
Nepean (former)	1,541	1,093	965	1,292	900	1,116	958	806	1,341	66.4%
Gloucester (former)	752	660	959	797	770	736	1,092	1,173	1,259	7.3%
Kanata (former)	588	761	1,124	1,225	860	944	649	902	734	-18.6%
Cumberland (former)	896	685	440	549	311	611	760	731	612	-16.3%
Goulbourn (former)	428	214	253	75	315	413	811	1,079	1,084	0.5%
Osgoode (former)	183	89	73	104	60	69	57	85	71	-16.5%
Rideau (former)	43	23	37	36	33	102	263	293	104	-64.5%
West Carleton (former)	138	148	171	215	41	49	56	107	129	20.6%
Inside the Greenbelt	1,130	2,224	2,336	1,488	1,447	1,052	2,776	2,069	1,709	-17.4%
Outside the Greenbelt	4,391	3,506	3,948	4,049	3,249	3,967	4,073	4,881	5,360	9.8%
Prescott & Russell (part)	**532**	**502**	**392**	**299**	**335**	**391**	**560**	**483**	**639**	**32.3%**
Alfred and Plantagenet, TP†	99	91	55	29	28	7	35	17	0	-100.0%
Casselman, Vlg.†	10	2	2	1	5	20	14	27	0	-100.0%
Clarence-Rockland, C (part of ON CMA)	213	190	153	112	93	112	230	181	192	6.1%
Russell, TP (part of ON CMA)	60	100	123	113	183	167	218	211	442	109.5%
The Nation Municipality	150	119	59	44	26	85	63	47	5	-89.4%
Leeds & Grenville (part)	**183**	**262**	**116**	**103**	**93**	**169**	**175**	**218**	**106**	**-51.4%**
Merrickville-Wolford, Vlg.*	7	13	11	1	6	19	15	21	27	28.6%
North Grenville, TP	176	249	105	102	87	150	160	197	79	-59.9%
Stormont, Dundas & Glengarry (part)	**59**	**26**	**47**	**24**	**23**	**24**	**31**	**42**	**2**	**-95.2%**
North Dundas, TP†	59	26	47	24	23	24	31	42	2	-95.2%
Lanark (part)	**265**	**220**	**260**	**230**	**294**	**275**	**370**	**678**	**480**	**-29.2%**
Beckwith, TP	66	64	71	66	69	71	79	109	85	-22.0%
Carleton Place, Tn.	61	77	51	66	105	60	123	380	337	-11.3%
Mississippi Mills, Tn.	114	60	115	68	107	125	151	189	58	-69.3%
Montague, TP†	24	19	23	30	13	19	17	0	0	-100.0%
Renfrew (part)	**117**	**114**	**188**	**82**	**95**	**72**	**92**	**81**	**154**	**90.1%**
Arnprior, Tn.	92	73	173	66	76	58	70	66	119	80.3%
McNab/Braeside, TP	25	41	15	16	19	14	22	15	35	133.3%
GATINEAU	**2,103**	**2,354**	**1,571**	**1,572**	**1,312**	**1,390**	**1,610**	**1,630**	**3,186**	**95.5%**
Hull (former)	208	545	275	246	106	263	247	325	813	150.2%
Aylmer (former)	1,069	808	745	768	581	802	891	930	1,837	97.5%
Gatineau (former)	618	728	467	520	464	325	377	275	396	44.0%
Buckingham (former)	84	174	42	22	127	0	39	72	89	23.6%
Masson-Angers (former)	124	99	42	16	34	0	56	28	51	82.1%
Qué. part CMA Outside of Gatineau	**370**	**502**	**423**	**331**	**272**	**346**	**368**	**399**	**375**	**-6.0%**
Cantley	93	107	96	87	60	64	70	65	44	-32.3%
Chelsea	23	21	23	21	19	33	53	62	126	103.2%
La Pêche	54	62	31	40	35	48	60	62	41	-33.9%
L'Ange-Gardien	26	56	36	45	35	39	37	35	35	0.0%
Pontiac	16	36	16	24	19	15	16	20	11	-45.0%
Val-des-Monts	105	102	134	98	95	101	96	134	84	-37.3%
Denholm	1	8	6	0	0	3	1	2	4	100.0%
N.-D.-de-la-Salette (part of CMA in 2011)	2	0	3	9	0	7	2	2	4	100.0%
Mayo (part of CMA in 2011)	11	6	4	1	7	8	5	5	3	-40.0%
Bowman (part of CMA in 2011)	3	3	2	2	2	5	0	1	1	0.0%
Val-des-Bois (part of CMA in 2011)	3	4	4	4	0	0	0	0	3	0.0%
Lochaber (part of CMA in 2016)	n.d.	n.d.	n.d.	0	0	0	0	2	0	-100.0%
Lochaber-Ouest (part of CMA in 2016)	15	17	8	n.d.	n.d.	4	3	0	7	0.0%
Thurso (part of CMA in 2016)	18	80	60	n.d.	n.d.	19	25	9	12	33.3%
GREATER OTTAWA-GATINEAU AREA	**9,150**	**9,710**	**9,281**	**8,178**	**7,120**	**7,686**	**10,055**	**10,481**	**12,011**	**14.6%**
Ottawa-Gatineau CMA	**8,267**	**8,876**	**8,554**	**7,665**	**6,556**	**7,184**	**9,435**	**9,568**	**11,343**	**18.6%**
Ontario portion of the CMA	**5,794**	**6,020**	**6,560**	**5,762**	**4,972**	**5,448**	**7,457**	**7,539**	**7,782**	**3.2%**
Quebec portion of the CMA	**2,473**	**2,856**	**1,994**	**1,903**	**1,584**	**1,736**	**1,978**	**2,029**	**3,561**	**75.5%**
OMATO	**1,156**	**1,124**	**1,003**	**738**	**840**	**931**	**1,228**	**1,502**	**1,381**	**-8.1%**

*Sources: CMHC Starts -Housing Market Information Portal; †CMHC; * Municipal Building Permits; **Municipal Building Permits for years 2011 and earlier*

Notes: OMATO = Ontario Municipalities Adjacent To Ottawa, including Clarence-Rockland and Russell. Clarence-Rockland and Russell are also in the Ontario part of the CMA. North Grenville, TP was added to the Ottawa-Gatineau CMA in 2016.

Sub-totals by county include only municipalities within OMATO, not the entire county.

n.d. = no data. Bowman was added to the Ottawa-Gatineau CMA in 2011; data was not collected prior to that year.

N.-D.-de-la-Salette, Mayo, Bowman, and Val-des-Bois are not included in the "Remainder of QC part of CMA" or "Quebec portion of the CMA" sub-totals prior to 2011.

See Map 1 for the municipalities that comprise the Ottawa-Gatineau CMA before and after the CMA boundary adjustment in 2011.

TABLE 12: NEW DWELLING UNITS IN O.P. INTENSIFICATION TARGET AREAS, 2015-19

OP Target Area (Designation)	2015				2016				2017				2018				2019			
	Sing+Semi	Row	Apt.	Total	Sing+Semi	Row	Apt.	Total	Sing+Semi	Row	Apt.	Total	Sing+Semi	Row	Apt.	Total	Sing+Semi	Row	Apt.	Total
Central Area	0	0	311	**311**	0	0	211	**211**	0	0	7	**7**	0	0	72	**72**	0	0	276	**276**
Mixed-Use Centres																				
Inside Greenbelt	9	0	338	347	0	0	562	562	0	3	237	240	3	0	304	307	0	0	210	210
Outside Greenbelt	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	9	0	338	**347**	0	0	562	**562**	0	3	237	**240**	3	0	304	**307**	0	0	210	**210**
Town Centres	0	18	0	**18**	0	8	105	**113**	0	18	1	**19**	0	0	649	**649**	0	118	496	**614**
Mainstreets																				
Inside Greenbelt	-1	0	888	887	1	6	281	288	2	0	362	364	0	0	663	663	1	0	1145	1,146
Outside Greenbelt	0	0	48	48	0	0	0	0	0	0	1	1	0	0	0	0	0	0	120	120
Total	-1	0	936	**935**	1	6	281	**288**	2	0	363	**365**	0	0	663	**663**	1	0	1,265	**1,266**
Rapid Transit Stations																				
Inside Greenbelt	55	3	1328	1,386	47	5	1141	1,193	57	14	432	503	49	0	1494	1,543	50	5	1467	1,522
Outside Greenbelt	8	27	36	71	0	58	184	242	0	22	34	56	0	4	560	564	0	8	499	507
Total	63	30	1,364	**1,457**	47	63	1,325	**1,435**	57	36	466	**559**	49	4	2,054	**2,107**	50	13	1,966	**2,029**
Future Rapid Transit Stations																				
Inside Greenbelt	8	0	32	40	4	0	3	7	6	3	4	13	0	0	0	0	0	0	0	0
Outside Greenbelt	6	18	0	24	0	8	0	8	0	18	1	19	2	0	2	4	0	0	0	0
Total	14	18	32	**64**	4	8	3	**15**	6	21	5	**32**	2	0	2	**4**	0	0	0	**0**
Total Units in Designated Areas**	77	48	1,743	**1,868**	52	77	1,609	**1,738**	65	57	826	**948**	51	4	2,362	**2,417**	51	131	2,852	**3,034**
Total New Units	1,723	1,028	2,507	5,258	2,153	1,773	2,922	6,848	2,231	1,917	2,277	6,425	2,573	1,807	4,451	8,831	2,635	2,618	4,666	9,919
Demolitions	235	3	50	288	223	84	114	421	238	32	60	330	283	77	90	450	248	214	31	493
Total Net New Units	1,488	1,025	2,457	4,970	1,930	1,689	2,808	6,427	1,993	1,885	2,217	6,095	2,290	1,730	4,361	8,381	2,387	2,404	4,635	**9,426**
% Share in Designated Areas	5.2%	4.7%	70.9%	**37.6%**	2.7%	4.6%	57.3%	**27.0%**	3.3%	3.0%	37.3%	**15.6%**	2.2%	0.2%	54.2%	**28.8%**	2.1%	5.4%	61.5%	**32.2%**
Total New Units Urban	1,468	1,020	2,489	4,977	1,905	1,757	2,913	6,575	1,919	1,911	2,265	6,095	2,156	1,792	4,381	8,329	2,114	2,562	4,651	9,327
Demolitions -Urban	180	3	50	233	176	84	114	374	201	32	60	293	207	77	90	374	203	214	31	448
Total Net New Units Urban	1,288	1,017	2,439	4,744	1,729	1,673	2,799	6,201	1,718	1,879	2,205	5,802	1,949	1,715	4,291	7,955	1,911	2,348	4,620	**8,879**
% Share of Urban in Designated Areas	6.0%	4.7%	71.5%	**39.4%**	3.0%	4.6%	57.5%	**28.0%**	3.8%	3.0%	37.5%	**16.3%**	2.6%	0.2%	55.0%	**30.4%**	2.7%	5.6%	61.7%	**34.2%**

** Removes double-counting of units that are included in more than one category.

Official Plan refers to the Council-adopted Official Plan as amended.

SUMMARIES: 5- AND 10-YEAR

OP Target Areas: Last 5 Years	Sing+ Semi	Row	Apt.	Total
Central Area	0	0	877	877
Mixed-Use Centres	12	3	1,651	1,666
Town Centres	0	162	1,251	1,413
Mainstreets	3	6	3,508	3,517
Rapid Transit Stations	266	146	7,175	7,587
Future Rapid Transit Stations	26	47	42	115
TOTAL Units in OP Target Areas**	**296**	**317**	**9,392**	**10,005**
TOTAL Urban Units - City of Ottawa	**8,595**	**8,632**	**16,354**	**33,581**
% Share in OP Target Areas	**3.4%**	**3.7%**	**57.4%**	**29.8%**

** Removes double-counting of units that are included in two different OP designations.

OP Target Areas: Last 10 Years	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	TOTAL
Central Area	47	258	374	338	237	311	211	7	72	276	2,131
Mixed-Use Centres	110	183	326	70	451	347	562	240	307	210	2,806
Town Centres	146	165	221	173	268	18	113	19	649	614	2,386
Mainstreets	483	467	287	270	677	935	288	365	663	1,266	5,701
Rapid Transit Stations	891	1,190	1,291	1,275	1,835	1,457	1,435	559	2,107	2,029	14,069
Future Rapid Transit Stations	26	81	224	12	27	64	15	32	4	0	485
TOTAL	**1,703**	**2,344**	**2,723**	**2,138**	**3,495**	**3,132**	**2,624**	**1,222**	**3,802**	**4,395**	**27,578**

Numbers in 10-year table are not adjusted to remove double-counting of units in more than one OP designation.

Source: City of Ottawa, building permits

TABLE 13a: RESIDENTIAL INTENSIFICATION, 2015-2019

Ward		Intensification Units						2015-2019 Share of Intensification
No.	**Name**	**2015**	**2016**	**2017**	**2018**	**2019**	**2015-2019**	
12	Rideau-Vanier	419	287	277	317	666	1,966	12%
13	Rideau-Rockcliffe	326	340	181	281	433	1,561	9%
14	Somerset	829	481	47	409	720	2,486	15%
15	Kitchissippi	401	639	150	973	152	2,315	14%
17	Capital	87	151	191	782	439	1,650	10%
TOTAL - CENTRAL		**2,062**	**1,898**	**846**	**2,762**	**2,410**	**9,978**	**59%**
7	Bay	36	16	43	54	212	361	2%
8	College	55	46	46	38	219	404	2%
9	Knoxdale-Merivale	6	9	147	47	12	221	1%
10	Gloucester-Southgate	128	20	16	56	57	277	2%
11	Beacon Hill-Cyrville	10	57	231	8	217	523	3%
16	River	17	54	62	74	164	371	2%
18	Alta Vista	22	26	220	30	311	609	4%
TOTAL - INNER URBAN		**274**	**228**	**765**	**307**	**1,192**	**2,766**	**16%**
1	Orléans	30	23	38	208	187	486	3%
2	Innes	90	41	44	18	25	218	1%
3	Barrhaven	101	297	124	246	4	772	5%
4	Kanata North	47	105	144	318	138	752	4%
6	Stittsville	3	196	242	92	45	578	3%
19	Cumberland	8	0	30	149	1	188	1%
22	Gloucester-South Nepean	72	15	4	336	498	925	5%
23	Kanata South	66	65	28	6	153	318	2%
TOTAL - SUBURBAN		**417**	**742**	**654**	**1,373**	**1,051**	**4,237**	**25%**
Intensification Units Inside Greenbelt		**2,336**	**2,126**	**1,611**	**3,069**	**3,602**	**12,744**	**75%**
Intensification Units Outside Greenbelt		**417**	**742**	**654**	**1,373**	**1,051**	**4,237**	**25%**
Total Intensification Units		**2,753**	**2,868**	**2,265**	**4,442**	**4,653**	**16,981**	**100%**
Total Urban Units		**4,760**	**6,304**	**5,799**	**8,051**	**9,052**	**33,966**	
% Intensification		**57.8%**	**45.5%**	**39.1%**	**55.2%**	**51.4%**	**50.0%**	
Official Plan 5 year Target		**38%**	**38%**	**40%**	**40%**	**40%**	**38%**	

Source: City of Ottawa, Building Permits

Table 13b: Growth Allocation Intensification, mid-2011 to mid-2019

	Mid-11 to Mid-12	Mid-12 to Mid-13	Mid-13 to Mid-14	Mid-14 to Mid-15	Mid-15 to Mid-16	Mid-16 to Mid-17	Mid-17 to Mid-18	Mid-18 to Mid-19
Built-up Area	1,890	2,373	2,082	2,476	1,881	2,098	2,957	2,735
Total Urban	5,924	5,654	5,535	6,030	4,869	6,196	6,908	6,832
% Intensification*	31.9%	42.0%	37.6%	41.1%	38.6%	33.9%	42.8%	40.0%

* Includes private households only, inside greenbelt and outside greenbelt non-VURLS

Source: City of Ottawa, Building Permits

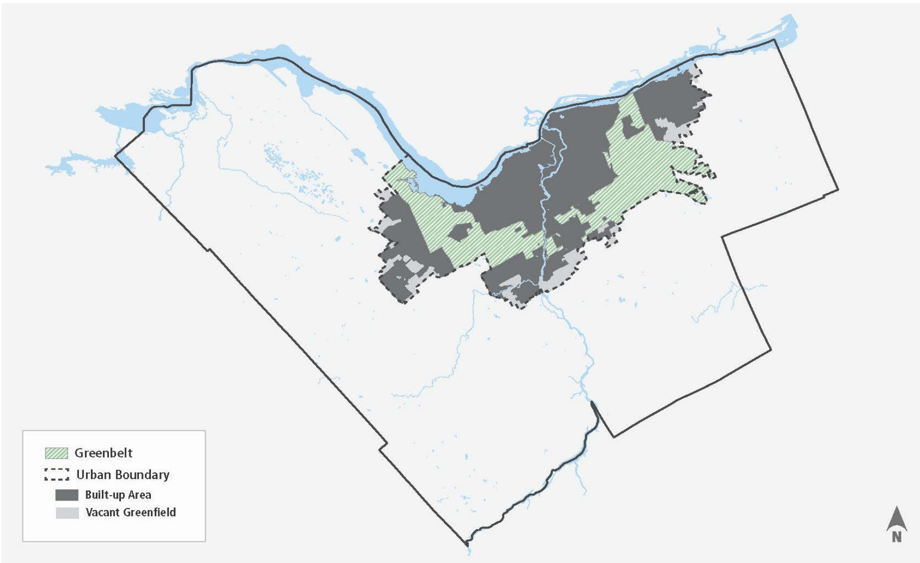


TABLE 14: NON-RESIDENTIAL INTENSIFICATION, 2015-2019

	Intensification Gross Floor Area (m^2)						2015-2019 Share of Intensification
Area	**2015**	**2016**	**2017**	**2018**	**2019**	**2015-2019**	
Inside Greenbelt	169,151	146,994	129,614	35,247	107,486	588,492	84%
Outside Greenbelt	14,571	44,474	14,529	9,904	25,863	109,341	16%
Total Urban Intensification GFA	183,722	191,468	144,143	45,151	133,349	697,833	
Total Urban GFA	303,054	248,944	170,033	65,015	191,020	978,066	
% Intensification of Urban GFA	**61%**	**77%**	**85%**	**69%**	**70%**	**71%**	
O-Train & Transitway Stations	93,451	93,820	42,842	-8,075	39,981	262,019	
% Intensification at O-Train & Transitway Stations of Urban GFA	**31%**	**38%**	**25%**	**-12%**	**21%**	**27%**	

Source: City of Ottawa, Building Permits

Notes:

1) Based on building permits issued from Jan 1 2015 to Dec 31 2019

2) Data are net of demolitions

TABLE 15
HOUSING STARTS BY TYPE, CITY OF OTTAWA, 2000-2019

YEAR	SINGLE	SEMI	ROW	APT.	TOTAL	SINGLE	SEMI	ROW	APT.
2000	3,316	392	1,306	567	5,581	59.4%	7.0%	23.4%	10.2%
2001	3,248	334	1,714	620	5,916	54.9%	5.6%	29.0%	10.5%
2002	3,471	312	1,939	1,653	7,375	47.1%	4.2%	26.3%	22.4%
2003	2,742	345	2,194	692	5,973	45.9%	5.8%	36.7%	11.6%
2004	2,967	340	2,421	1,151	6,879	43.1%	4.9%	35.2%	16.7%
2005	2,121	286	1,572	721	4,700	45.1%	6.1%	33.4%	15.3%
2006	2,252	367	1,789	1,219	5,627	40.0%	6.5%	31.8%	21.7%
2007	2,722	292	1,954	1,250	6,218	43.8%	4.7%	31.4%	20.1%
2008	2,715	203	2,136	1,625	6,679	40.6%	3.0%	32.0%	24.3%
2009	2,228	280	1,887	1,127	5,522	40.3%	5.1%	34.2%	20.4%
2010	2,035	346	1,881	1,784	6,046	33.7%	5.7%	31.1%	29.5%
2011	1,957	343	1,810	1,411	5,521	35.4%	6.2%	32.8%	25.6%
2012	1,424	274	1,363	2,669	5,730	24.9%	4.8%	23.8%	46.6%
2013	1,596	362	1,566	2,760	6,284	25.4%	5.8%	24.9%	43.9%
2014	1,616	259	1,686	1,976	5,537	29.2%	4.7%	30.4%	35.7%
2015	1,820	163	1,308	1,405	4,696	38.8%	3.5%	27.9%	29.9%
2016	1,809	202	1,764	1,244	5,019	36.0%	4.0%	35.1%	24.8%
2017	1,970	225	1,859	2,795	6,849	28.8%	3.3%	27.1%	40.8%
2018	2,320	310	1,906	2,414	6,950	33.4%	4.5%	27.4%	34.7%
2019	**2,211**	**200**	**2,376**	**2,282**	**7,069**	31.3%	2.8%	33.6%	32.3%

Source: CMHC, Starts and Completions Survey

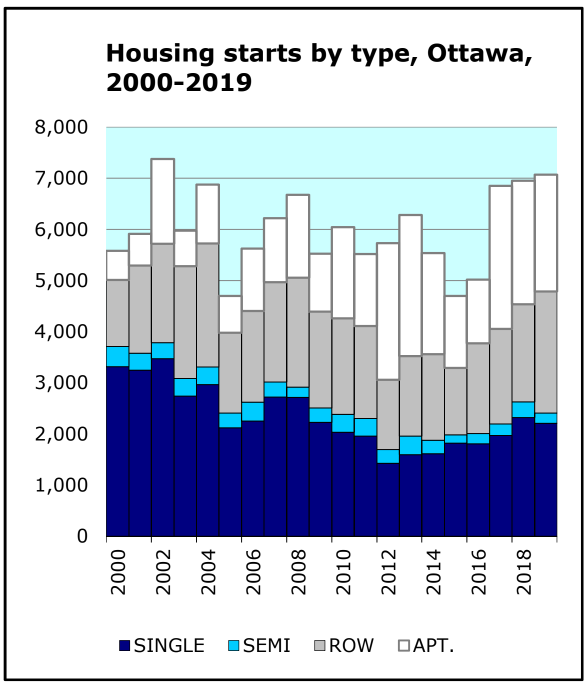


TABLE 16
HOUSING COMPLETIONS, CITY OF OTTAWA, 2011-2019, BY TYPE AND INTENDED MARKET

YEAR	FREEHOLD				CONDOMINIUM			PRIVATE RENTAL			ASSISTED RENTAL			ANNUAL
	SINGLE	SEMI	ROW	TOTAL	ROW	APT.	TOTAL	ROW	APT.	TOTAL	ROW	APT.	TOTAL	TOTAL
2010	2,490	370	2,016	**4,808**	32	1,397	**1,431**	25	144	**181**	0	0	**0**	**6,420**
2011	1,906	344	1,939	**4,189**	19	1,324	**1,343**	8	89	**97**	0	0	**0**	**5,629**
2012	1,674	224	1,520	**3,418**	0	1,390	**1,390**	0	443	**455**	0	0	**0**	**5,263**
2013	1,438	374	1,656	**3,468**	0	1,302	**1,302**	0	126	**126**	0	0	**0**	**4,896**
2014	1,713	280	1,426	**3,419**	5	2,412	**2,417**	0	684	**708**	0	0	**0**	**6,544**
2015	1,467	152	1,504	**3,126**	4	1,880	**1,884**	3	574	**635**	0	0	**0**	**5,645**
2016	1,885	132	1,462	**3,479**	31	717	**748**	18	503	**558**	0	0	**0**	**4,785**
2017	1,745	169	1,674	**3,558**	28	663	**691**	84	529	**676**	0	0	**0**	**4,955**
2018	2,179	252	1,841	**4,284**	18	965	**983**	43	855	**935**	0	0	0	**6,202**
2019	**2,070**	**170**	**1,680**	**3,920**	**5**	**264**	**269**	**9**	**1,100**	**1,134**	**0**	**0**	**0**	**5,323**

Source: CMHC, Starts and Completions Survey; not all unit types are reported for each tenure and may not add to the total for their respective tenure.

TABLE 17
ABSORBED NEW SINGLE-DETACHED HOME PRICES, OTTAWA, 2006-19

YEAR	NOMINAL AVERAGE PRICE OF ABSORBED NEW SINGLES	OTTAWA CPI (ALL ITEMS) (2002=100)	INFLATION FACTOR (INFLATOR)	AVERAGE PRICE OF ABSORBED NEW SINGLES (2016$)	YEAR-OVER-YEAR CHANGE IN CONSTANT PRICE	ANNUAL INFLATION RATE
2005	$365,551	106.8	0.802	$455,912	6.7%	2.2%
2006	$396,677	108.6	0.815	$486,532	6.7%	1.7%
2007	$407,749	110.7	0.831	$490,625	0.8%	1.9%
2008	$417,683	113.1	0.849	$491,913	0.3%	2.2%
2009	$414,696	113.7	0.854	$485,818	-1.2%	0.5%
2010	$444,185	116.6	0.875	$507,422	4.4%	2.6%
2011	$492,380	120.1	0.902	$546,087	7.6%	3.0%
2012	$492,356	121.7	0.914	$538,881	-1.3%	1.3%
2013	$509,931	122.9	0.923	$552,667	2.6%	1.0%
2014	$523,271	125.3	0.941	$556,263	0.7%	2.0%
2015	$513,173	126.5	0.950	$540,353	-2.9%	1.0%
2016	$527,609	128.1	0.962	$548,615	1.5%	1.3%
2017	$536,000	129.9	0.975	$549,617	0.2%	1.4%
2018	$576,533	133.2	1.000	$576,533	4.9%	2.5%
2019	**$606,665**	**135.9**	**1.020**	**$594,612**	**3.1%**	**2.0%**

Sources: CMHC, Housing Now Ottawa for 2005-2018; CMHC, Housing Market Information Portal for 2019; Statistics Canada, Table 18-10-0005-01, Consumer Price Index by City; City of Ottawa calculations

Note: Table reflects selling prices exclusive of any upgrades purchasers may have opted for.

TABLE 18
RESALE MARKET - ANNUAL SALES AND AVERAGE PRICE, CANADA'S SIX LARGEST CMA'S, 2013-19

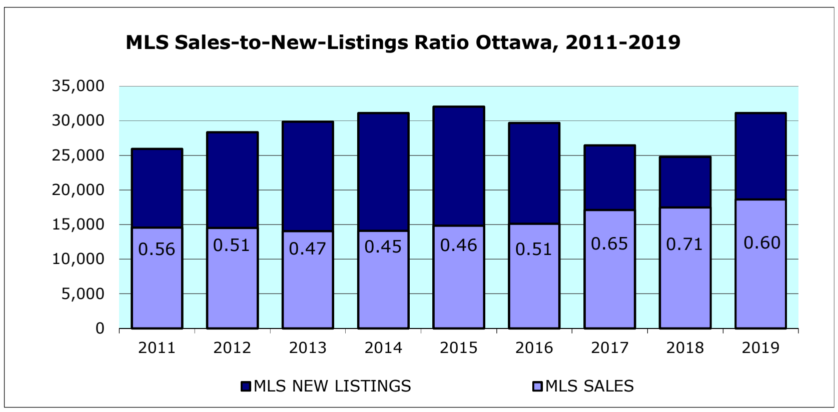
CMA		2013	2014	2015	2016	2017	2018	2019	2018-19 % change
Toronto	Sales	88,946	93,278	101,846	108,500	92,335	77,426	87,797	13.4%
	Avg Price	$524,089	$566,491	$622,046	$719,750	$822,603	$787,300	$819,382	4.1%
Montréal	Sales	36,491	35,764	37,935	39,750	44,448	46,703	51,292	9.8%
	Avg Price	$323,967	$331,036	$337,487	$347,000	$364,510	$378,709	$395,513	4.4%
Vancouver	Sales	28,985	33,693	43,145	40,000	35,994	24,619	25,351	3.0%
	Avg Price	$767,765	$812,653	$902,801	$1,007,000	$1,032,635	$1,050,885	$991,757	-5.6%
Ottawa-	Sales	17,594	17,429	18,373	19,000	21,292	21,977	23,774	8.2%
Gatineau	Avg Price	$335,595	$339,726	$345,413	$345,445	$365,258	$377,792	$404,550	7.1%
Ottawa*	Sales	14,049	14,094	14,842	15,100	17,083	17,476	18,622	6.6%
	Avg Price	$358,876	$363,161	$369,477	$371,000	$392,474	$407,571	$441,693	8.4%
Calgary	Sales	29,954	33,615	23,994	22,000	23,869	18,686	18,927	1.3%
	Avg Price	$437,036	$460,584	$453,814	$457,000	$466,259	$480,696	$460,083	-4.3%
Edmonton	Sales	19,552	19,857	18,227	16,700	16,441	15,519	16,657	7.3%
	Avg Price	$344,977	$362,657	$369,536	$365,000	$374,397	$369,607	$362,758	-1.9%

Source: CMHC, Local Real Estate Boards and the City of Ottawa

NOTE: CMHC data are derived from local Real Estate Boards; the area of each may not match municipal or CMA boundaries.
* This is the Ottawa Real Estate Board (OREB) area, which is significantly larger than the city of Ottawa.
Historic sales and price data are subject to revision.

TABLE 19
RESALE MARKET - SUPPLY AND DEMAND, OTTAWA*, 2011-19

YEAR	MLS SALES	MLS NEW LISTINGS	SALES-TO-NEW-LISTINGS RATIO
2011	14,551	25,949	0.56
2012	14,497	28,332	0.51
2013	14,049	29,876	0.47
2014	14,094	31,119	0.45
2015	14,842	32,052	0.46
2016	15,100	29,684	0.51
2017	17,083	26,422	0.65
2018	17,476	24,775	0.71
2019	**18,622**	**31,105**	**0.60**



Source: 2018 and 2019 data from OREB.

NOTE: Due to listing cancellation and/or re-listing, MLS New Listings may not represent the acutal number of properties listed in a given year.

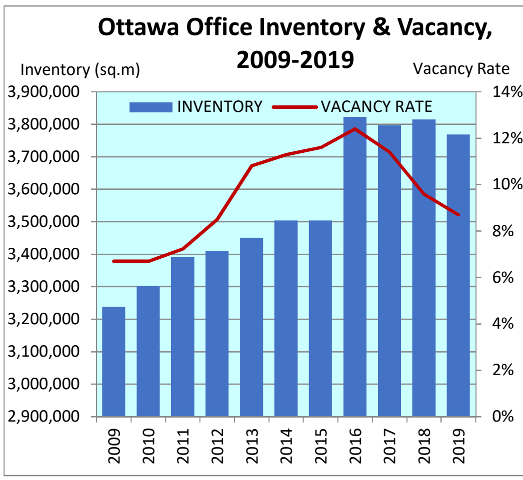
NOTE:
MLS New Listings are the annual number of properties listed on the Multiple Listings Service, which measures supply. MLS Sales are the annual number of residential sales through the MLS system, which measures demand.

SUPPLY AND DEMAND
Sales divided by New Listings produces a Sales-to-New-Listings Ratio that classifies the resale market. A ratio of 0.40 or below is considered a Buyers' market; between 0.40 and 0.55, a Balanced market; and above 0.55, a Sellers' market

TABLE 20
OTTAWA COMMERCIAL OFFICE MARKET OVERVIEW, 2009-2019

YEAR	INVENTORY		VACANCY RATE	NET ABSORPTION		NET NEW SUPPLY	
	sq.ft.	sq.m.	(%)	sq.ft.	sq.m.	sq.ft.	sq.m.
2009	34,862,411	3,238,824	6.7%	224,567	20,863	360,000	33,445
2010	35,551,293	3,302,823	6.7%	864,492	80,314	900,834	83,690
2011	36,499,100	3,390,877	7.2%	687,136	63,837	535,000	49,703
2012	36,708,442	3,410,326	8.5%	-267,052	-24,810	0	0
2013	37,147,826	3,451,146	10.8%	-431,883	-40,123	1,113,664	103,463
2014	37,712,930	3,503,646	11.3%	-215,293	-20,001	1,047,518	97,318
2015	37,712,930	3,503,646	11.6%	-133,289	-12,383	0	0
2016	41,144,460	3,822,445	12.4%	-733,506	-68,145	0	0
2017	40,868,167	3,796,776	11.4%	231,883	21,543	0	0
2018	41,066,295	3,815,184	9.6%	758,855	70,500	0	0
2019	**40,566,465**	**3,768,748**	**8.7%**	**-17,916**	**-1,664**	**n/a**	**n/a**

Source: Colliers International - Ottawa Office Market Report, Q4 2019; Inventory numbers may not add due to ongoing revisions from Colliers
Note: Net new supply was not reported for 2019



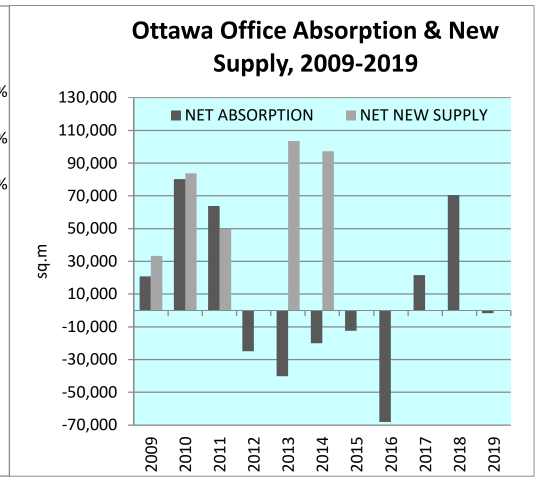
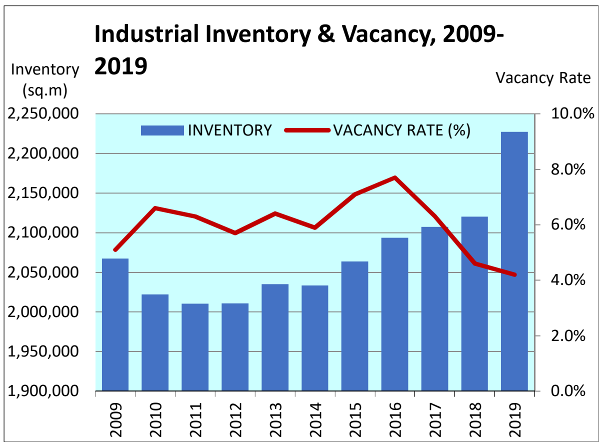


TABLE 21
INDUSTRIAL MARKET OVERVIEW, OTTAWA, 2009-2019

YEAR	INVENTORY		VACANCY	ABSORPTION		NEW SUPPLY	
	sq.ft.	sq.m.	RATE (%)	sq.ft.	sq.m.	sq.ft.	sq.m.
2009	22,253,305	2,067,332	5.1%	85,107	7,907	141,048	13,104
2010	21,762,960	2,021,845	6.6%	-196,007	-18,210	122,500	11,381
2011	21,636,205	2,010,069	6.3%	178,945	16,625	108,748	10,103
2012	21,642,376	2,010,643	5.7%	184,332	17,125	47,501	4,413
2013	21,905,169	2,035,057	6.4%	-47,996	-4,459	111,342	10,344
2014	21,887,576	2,033,422	5.9%	253,038	23,508	121,600	11,297
2015	22,214,251	2,063,771	7.1%	-55,392	-5,146	189,000	17,558
2016	22,533,022	2,093,386	7.7%	-167,368	-15,549	47,944	4,454
2017	22,682,094	2,107,235	6.3%	245,905	22,845	0	0
2018	22,819,764	2,120,025	4.6%	327,084	30,387	40,579	3,770
2019	**23,971,102**	**2,226,988**	**4.2%**	**897,957**	**83,423**	**1,405,360**	**130,562**

Source: Cushman & Wakefield, Marketbeat Industrial Q4 2019, Ottawa



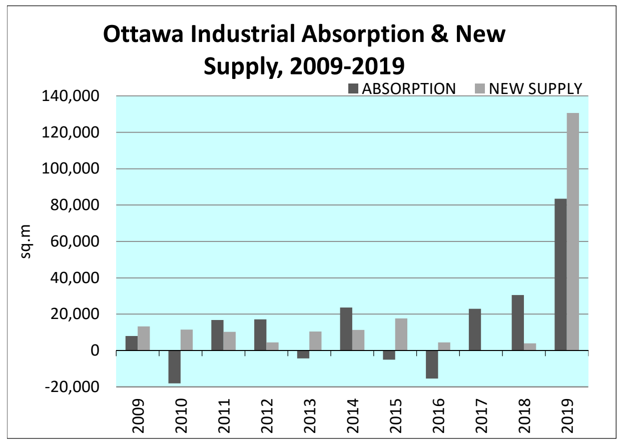


TABLE 22
OTTAWA RETAIL SPACE SUMMARY

FORMAT	Total Space, 2018			Total Space, 2019			Vacancy Rate	
	m^2	sq.ft.	Share	m^2	sq.ft.	Share	2018	2019
Power Centres	995,931	10,720,109	27.5%	1,013,633	10,910,655	27.6%	3.2%	3.8%
Other *	601,142	6,470,643	16.6%	612,155	6,589,181	16.7%	n/a	n/a
Traditional Mainstreets	483,552	5,204,914	13.4%	485,822	5,229,340	13.2%	n/a	n/a
Regional SC	383,960	4,132,914	10.6%	399,753	4,302,905	10.9%	3.2%	3.8%
Community SC	439,283	4,728,406	12.1%	446,951	4,810,940	12.2%	7.0%	4.5%
Neighbourhood SC	440,750	4,744,189	12.2%	443,871	4,777,793	12.1%	5.2%	5.6%
Mini-Plazas	225,627	2,428,626	6.2%	225,627	2,428,626	6.1%	5.2%	5.6%
Office Concourses	48,466	521,680	1.3%	48,466	521,680	1.3%	4.7%	3.1%
TOTAL	**3,618,711**	**38,951,481**	**100%**	**3,676,277**	**39,571,120**	**100%**	**5.0%**	**4.5%**

Source: City of Ottawa Building Permits; vacancy data from Cushman & Wakefield Ottawa Retail Report Q4 2019

* **Other** includes: In areas inside the Greenbelt, stretches of retail space along streets that are designated Arterial Mainstreet in the Official Plan (including Carling, Merivale south of Baseline, Bank south of the Rideau River, Montreal Road east of St. Laurent, and St. Laurent Blvd) as well as standalone retail outlets that are not part of power centres or shopping centres and may or may not be on Mainstreets.