2018 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Infrastructure, and Economic Development

July 2019

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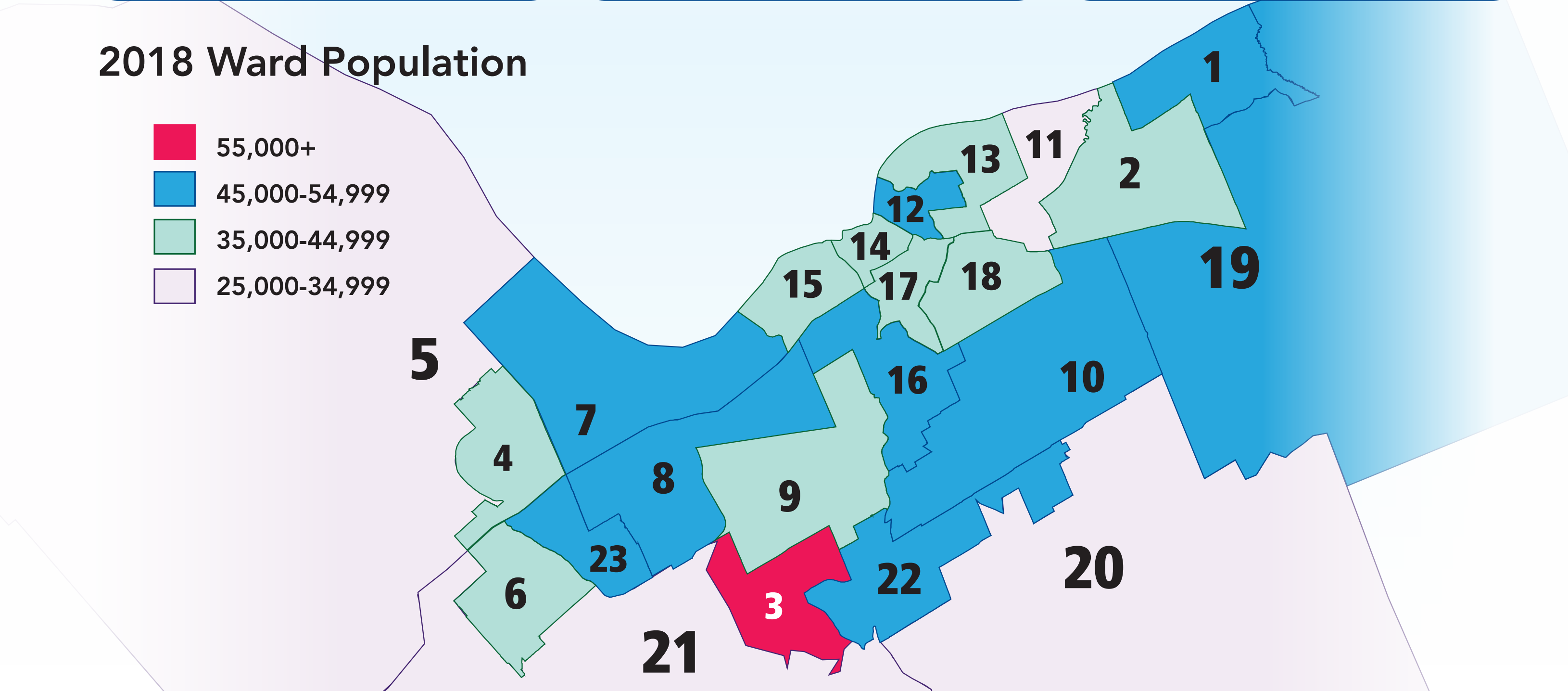
POPULATION & MIGRATION

Population (Dec 31, 2018)

1,490,650 ▲ 1.1% Greater Ottawa-Gatineau Area	1,414,399 ▲ 2.1% Ottawa-Gatineau CMA	991,429 ▲ 1.3% City of Ottawa

2018 Ward Population



Net Migration (2016-2017, most recent data)

International	Interprovincial	Intraprovincial	Total
+6,111	+4,412	+2,892	13,415

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EMPLOYMENT AND ECONOMY

Ottawa

557,600 ▲ 2.0%
Employed residents

4.6% ▼ 1.0%
Unemployment

Employed Residents by Cluster ('000s)

Industrial & Resource
50.5

Culture & Tourism
55.5

Office
71.9

Retail
88.7

Government
114.4

Knowledge
176.1

HOUSING STARTS

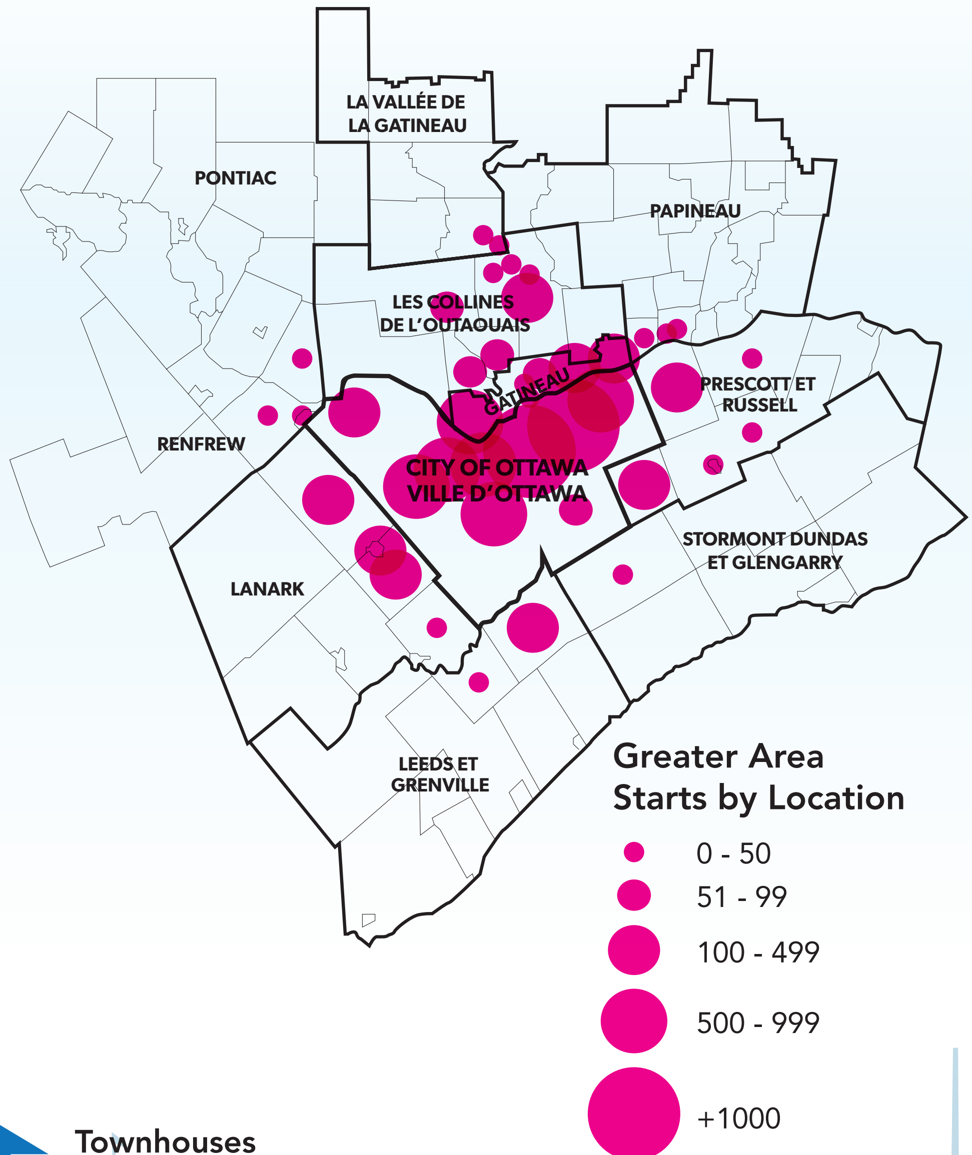
Ottawa

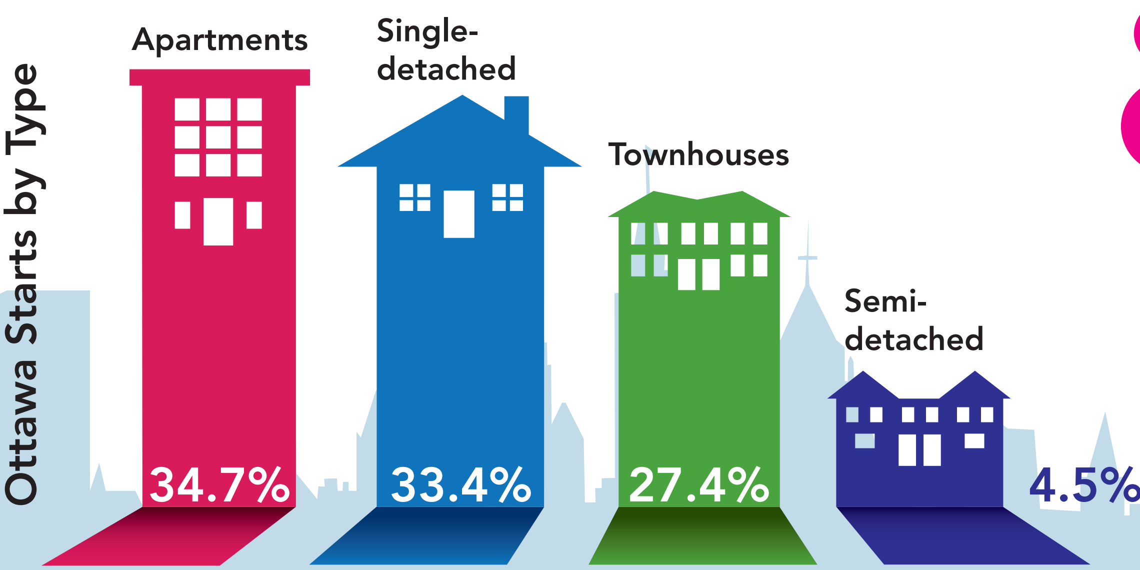
6,950 ▲ 1.5%
Housing starts

1.6% ▼ 0.1%
Rental vacancy rate

55.2% ▲ 16.1%
Urban intensification

$407,600 ▲ 3.8%
Average resale price (all units)





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NON-RESIDENTIAL DEVELOPMENT

Office

11.4%
2017
Vacancy
9.6%
2018

Inventory
3.8 million m^2 ↑ 0.5%
41.0 million ft^2

Retail

5.5%
2017
Vacancy
5.0%
2018

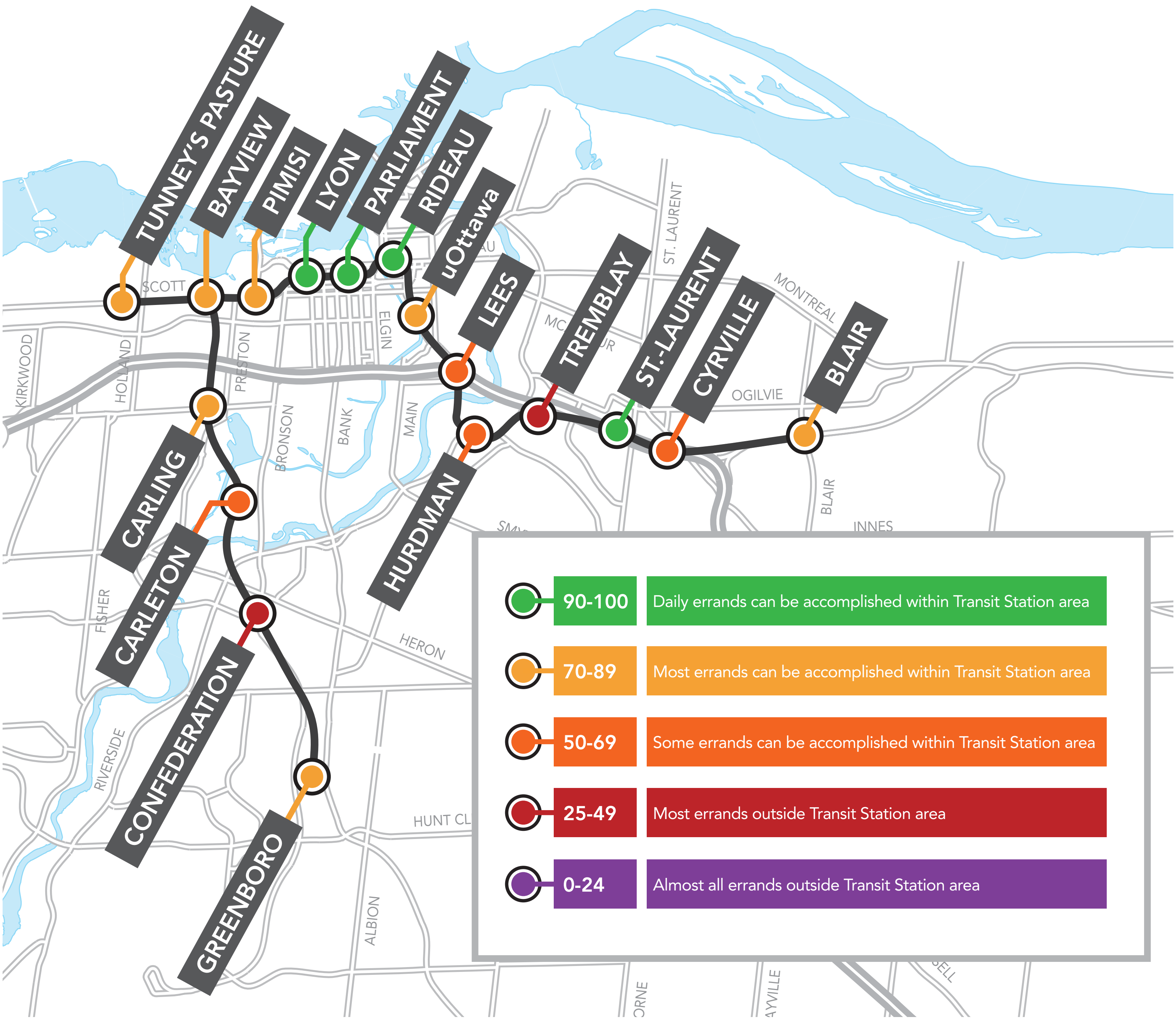
Inventory
3.6 million m^2 ↑ 0.8%
38.9 million ft^2

Industrial

6.3%
2017
Vacancy
4.6%
2018

Inventory
2.1 million m^2 ↑ 0.6%
22.8 million ft^2

INDEX OF COMMERCIAL SERVICES AROUND TRANSIT STATIONS



2018 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Infrastructure and Economic Development
Research and Forecasting Unit
July 2019

ANNUAL DEVELOPMENT REPORT 2018
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2018 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

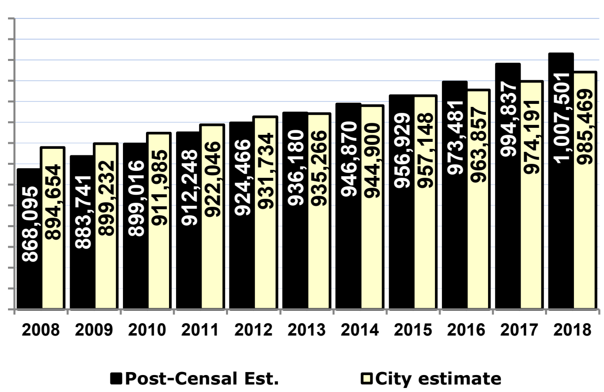
- City of Ottawa population, year-end 2018 (City estimate): 991,429, up 1.3% from 2017
- Greater Ottawa-Gatineau Area population, year-end 2017: 1,490,650, up 1.1% from 2017
- Net migration to Ottawa-Gatineau increased 12.4% from the year before

1.1 Population Growth

Major Cities

In 2018, the Ottawa-Gatineau Census Metropolitan Area (CMA) was the sixth largest in Canada, with 1,414,399 persons. Population growth during 2017-18 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, 2008-2018 (mid-year)
Source: Statistics Canada and City of Ottawa



2018 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 *2014 Ontario Provincial Policy Statement*.

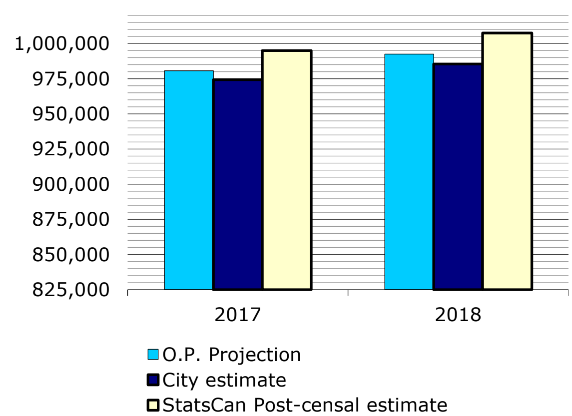
subtracted. Estimates undergo two cycles of revision before a final estimate is arrived at. Statistics Canada's preliminary mid-year 2018 post-censal population estimate for Ottawa was 1,007,501 (Table 1).

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 2018 population of 985,469 and a year-end 2018 population of 991,426, a 1.3% increase from 2017 (Table 3).

Projections Tracking
2017-2018 (mid-year)
Source: Statistics Canada and City of Ottawa



Projections Tracking

Population projections in the Official Plan[2] (OP) project Ottawa's population at 992,397 in mid-2018. The OP projection continues to slightly exceed city actual estimates, being 6,928 (0.7%) more than the 2018 city estimate based on building permits. The OP mid-year 2018 projection is 15,104 (1.5%) less than Statistics Canada's 2018 post-censal estimate.

Summary

There is a range of population figures for the city of Ottawa in 2018 depending on source:

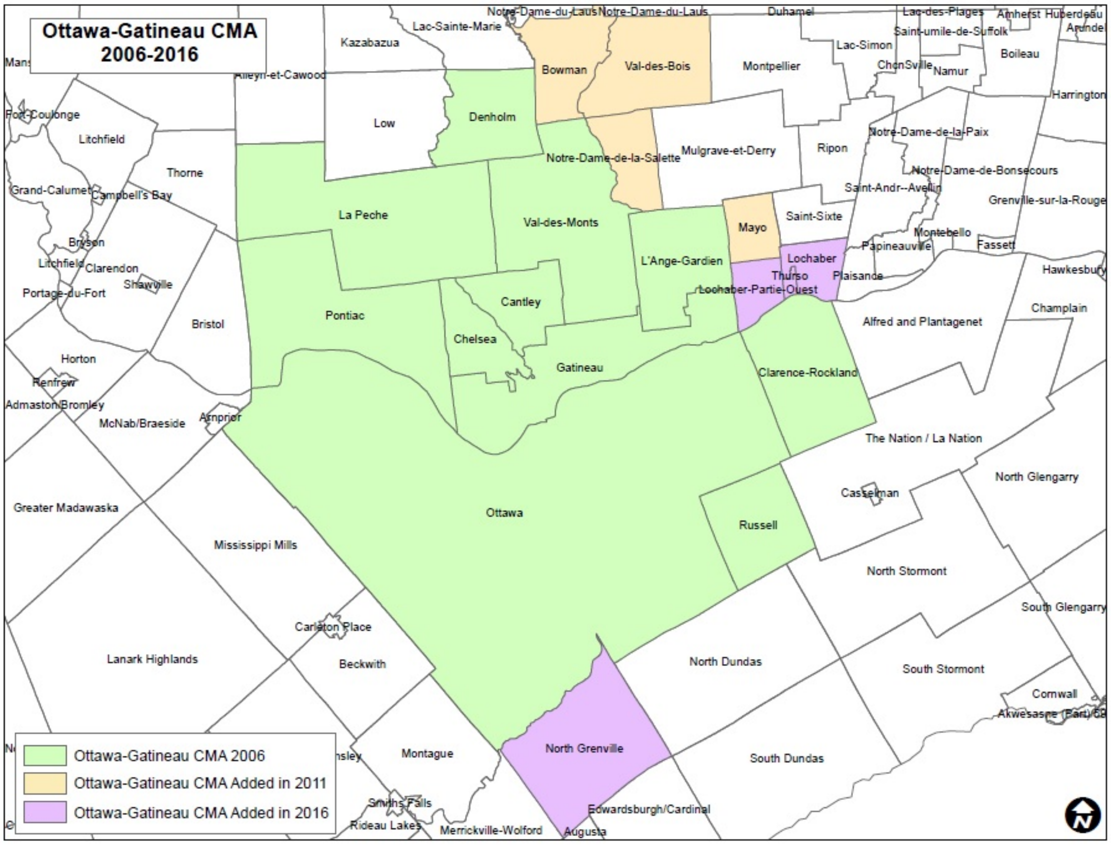
City of Ottawa Population by Source	mid-2018	year-end 2018
StatsCan Preliminary Post-censal Estimate	1,007,501	n/a
Official Plan Projection	992,397	998,337
City Estimate of actual population	985,469	991,426

Source: Statistics Canada; City of Ottawa

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

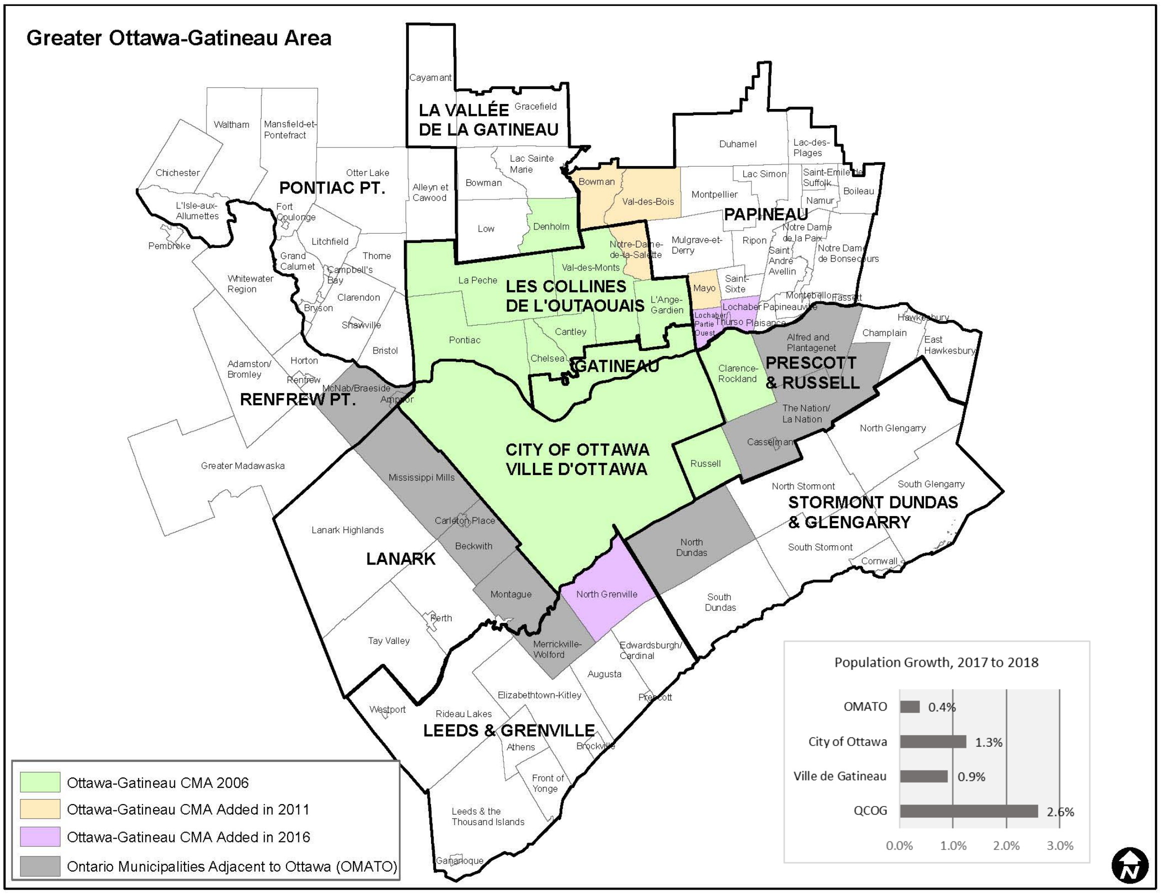
1.2 Population Distribution & Growth in the Greater Ottawa-Gatineau Area

The Greater Ottawa-Gatineau Area includes the Ottawa-Gatineau CMA, shown on Map 1, plus other municipalities adajcent to the city of Ottawa as shown on Map 2. There were 1,490,650 people in the Greater Ottawa-Gatineau Area in 2018, with the city of Ottawa having the bulk of the region's population followed by the Ville de Gatineau, OMATO, Prescott & Russell, and QCOG[3] (Table 2; Map 2).



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

[3] OMATO: Ontario Municipalities Adjacent to Ottawa.
QCOG: Québec part of the CMA Outside of 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 portion of the CMA outside of Gatineau (QCOG). 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 2018 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 2018 the share was 54.1% compared to 54.6% a year earlier. Downtown's[4] share of the population remained steady at 10.5%, 0.1% down from 2017. The suburban centres increased to 36.3% of the population from 35.7% in 2017, while the rural area was steady at 9.6% (Table 3).

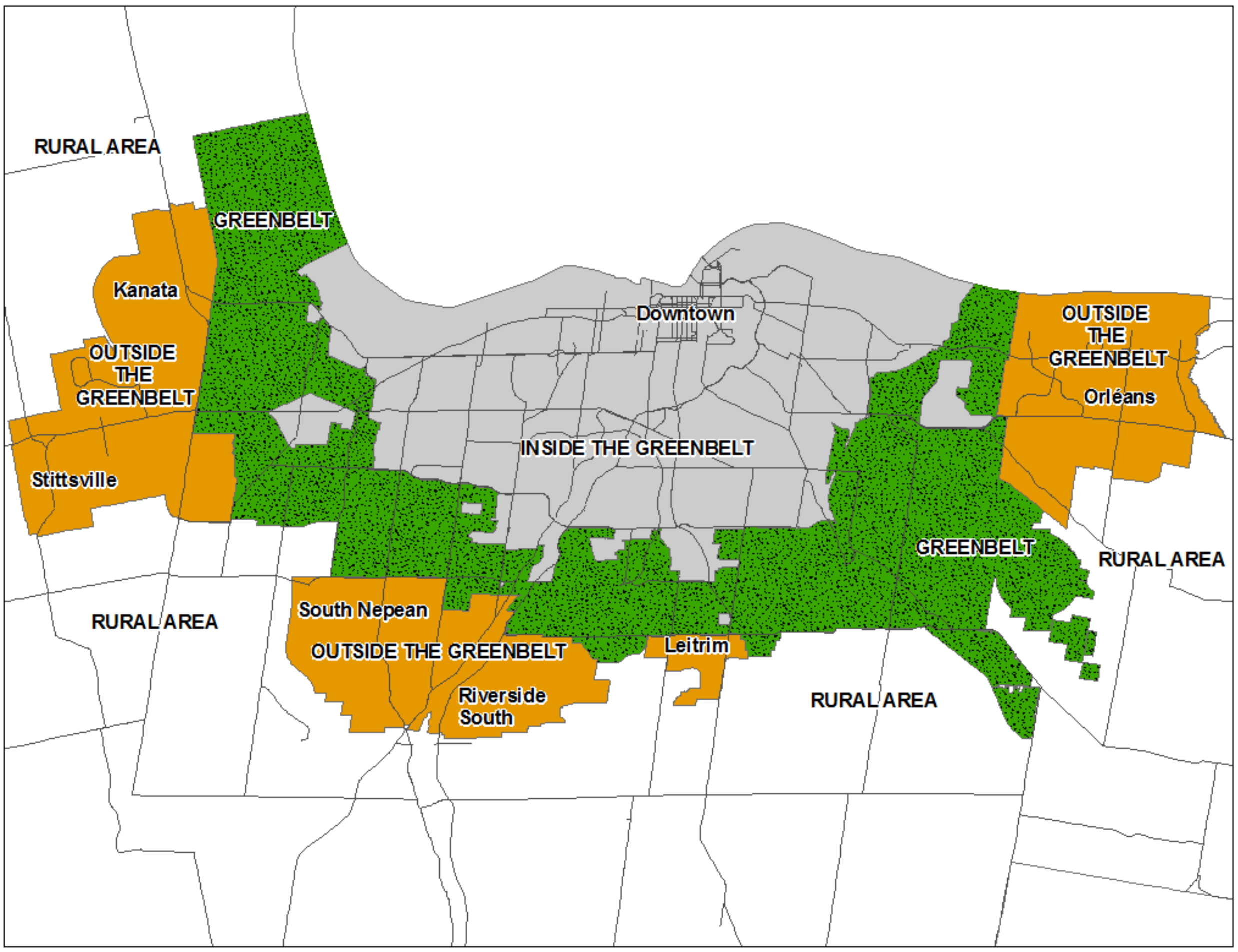
In the suburban centres, population grew 2.9% to an estimated 359,751 people, up slightly from 2.3% in 2017. Suburban households increased by 3.3%. The population of Downtown was estimated at 104,559, a 0.6% increase. Downtown households increased by 0.9%. Areas inside the Greenbelt outside of Downtown had an estimated population of 431,595, 0.2% higher than in 2017. In the

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

rural area the population reached 95,524, up 0.7% from 2017, while rural households increased 0.9%.

The largest portion of population growth in 2018 was in Kanata-Stittsville (36.3% of all growth), South Nepean (15.7%), Orléans (15.2%), Riverside South (9.7%), and Leitrim (6.5%). All areas in the city, except Cedarview (-1), experienced a total household increase, but two areas had decreased in total population due to declining household sizes, being Cedarview, and Rural Northeast (Table 3).

Distribution of population (%) 2004-2018
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 286,893 at the end of 2018, an increase of 0.9% from 2017 (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 283,961 at mid-2018. Statistics Canada's post-censal estimate for July 2018 pegs the population of the Ville de Gatineau at 282,596

Quebec municipalities outside of Gatineau and within the CMA increased by 2.6% in 2018 to a total of 58,263. All communities increased in population, except Lochbar which decreased by 23.0% in 2018 (Table 2).

Ontario Municipalities Adjacent to Ottawa (OMATO)

The City of Ottawa estimate for OMATO's 2018 year-end population is 154,065, a 0.4% increase from 2017. The five most populous OMATO municipalities were Clarence-Rockland (25,340, down 0.2% from 2017), Russell (17,983, up 4.1%), North Grenville (17,374, up 3.6%), Mississippi Mills (14,529, up 7.4%), and The Nation Municipality (12,581, down 2.4%) (Table 2).

1.3 Migration

Migration data for 2016-17 (the most recent available at the city level) shows the net number of people moving to the Ottawa was 13,415, a 35.7% 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 to than from the city, significant differences were a reduction of movers to British Columbia and an increase in movers from the Greater Toronto Area. However, the number of people moving to adjacent communities increased (Tables 4 and 5).

International net migration increased to 6,111 in 2016-17, an increase of 1,065 persons from a year earlier. Intraprovincial net migration increased to 2,892 from 1,660, while interprovincial increased to 4,412 from 3,182 (Table 4).

In 2016-2017, Ottawa gained more people from adjacent municipalities (+197 people). From 2012-2017, Ottawa had a net migration of 1,086 people from outlying regions, with the largest movement being 3,004 persons from Gatineau to Ottawa. At the same time, 1,874 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 2017-2018. Ottawa-Gatineau had the lowest year-over-year increase of 12.4% to reach 24,444 net migration. Toronto continued to attract the biggest share of the migrants at 92,888 people. While all major centres increased year-over-year, Edmonton and Calgary had the lowest shares of migrants at 19,312 and 15,304 respectively (Table 7).

In terms of net migration per thousand population (table to the right), Ottawa-Gatineau and Toronto were the highest for 2016-2017, followed by Edmonton and Vancouver. Montréal and Calgary showed the lowest rates.

NET MIGRATION PER 1,000 INHABITANTS, 2016-2017 (preliminary)

Source: Statistics Canada

CMA	
Ottawa-Gatineau	**14.5**
Toronto	14.1
Edmonton	10.9
Vancouver	10.2
Montréal	8.1
Calgary	9.2

2. Housing

HIGHLIGHTS

- Housing starts were up 1.5% in the city of Ottawa in 2018
- 34.7% of Ottawa starts were apartments
- 33.4% of Ottawa starts were single-detached houses
- Residential intensification increased to 55.2% in 2018
- Rental vacancy rate decreased to 1.6% in 2018 from 1.7% in 2016

2.1 New Construction

In the city of Ottawa, housing starts totalled 6,950 units, a 1.5% increase from 2017. The larger Ottawa-Gatineau Census Metropolitan Area ranked sixth in absolute housing starts among Canada's six largest metropolitan areas in 2018 with 9,468 units. Toronto had the largest year-over-year increase of 6.1%, followed by Ottawa with 1.5%. Montréal also experienced an increase year-over-year, while Vancouver, Edmonton, and Calgary experienced a decline in total housing starts from 2017. Apartment starts were the largest in relative terms in all major centres except Edmonton and Calgary (Table 10).

City of Ottawa and Ottawa-Gatineau CMA Housing Starts, 2018

Sources: CMHC

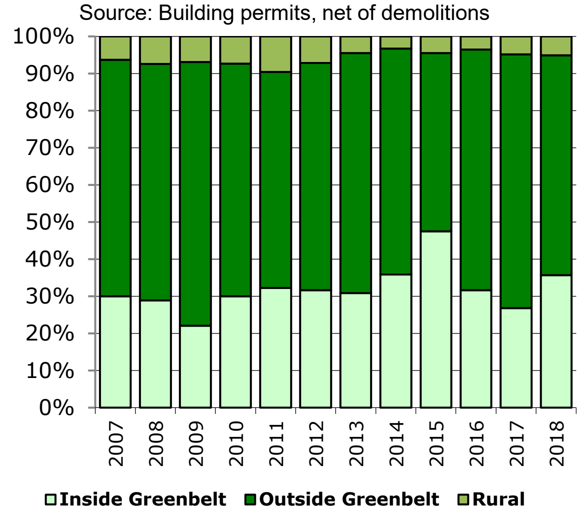
	Starts, 2018	% chg. 2017-18
City of Ottawa	6,950	1.5%
Ott-Gat CMA	9,468	1.5%

Ottawa Permits by Location

In 2018, there were 8,381 residential unit permits issued in the city of Ottawa, a 37.5% increase from 2017 (Table 12). This is the most permits issued in a single year since amalgation in 2001. The percentage of housing starts inside the Greenbelt increased to 35.7% from 26.8% in 2017 (adjacent chart). Because CMHC housing starts do not include all new housing built in the city[5], building permits (net of demolitions) are a more accurate measure of total housing activity. 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.

New Housing Inside and Outside the Greenbelt, 2007-2018

Source: Building permits, net of demolitions



Since 2014, growth of singles and semis in the urban area averaged 27% of urban units, slightly lower than the Official Plan projections[6] of 29%.

[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.

[6] See Growth Projections for Ottawa: Prospects for Population, Housing, Employment and Land, 2014-2036

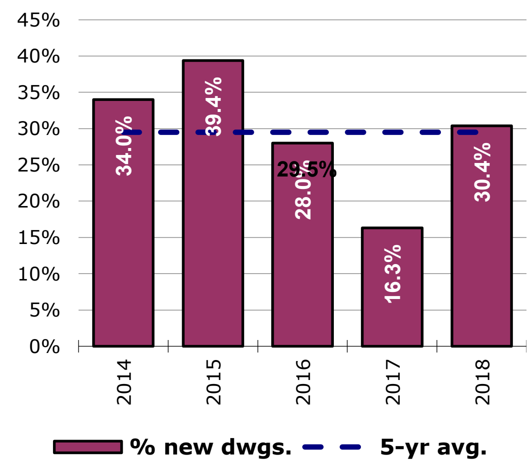
New Housing by Official Plan Designation

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 2018, 2,417 residential units were issued building permits in intensification target areas. This amounts to 30.4% of net new units issued permits in Ottawa. The top designated areas were existing Rapid Transit Stations (2,107), Mainstreets (663), and Town Centres (649) (Table 12).

Target areas received 55.0% of all apartments, 2.6% of single and semi-detached units and 0.2% of townhouses in 2018 (Table 12). It should be noted that target areas contain only part of all intensification activity; in 2018, target areas accounted for 54.4% of total intensification, up from 41.9% in 2017.

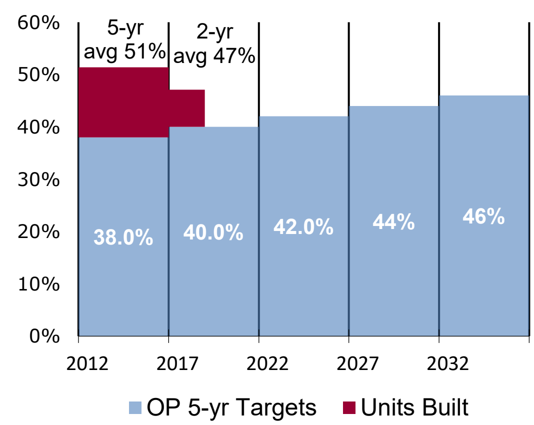
Percentage of new dwellings built in Ottawa intensification target areas, 2014-2018
Source: Building permits



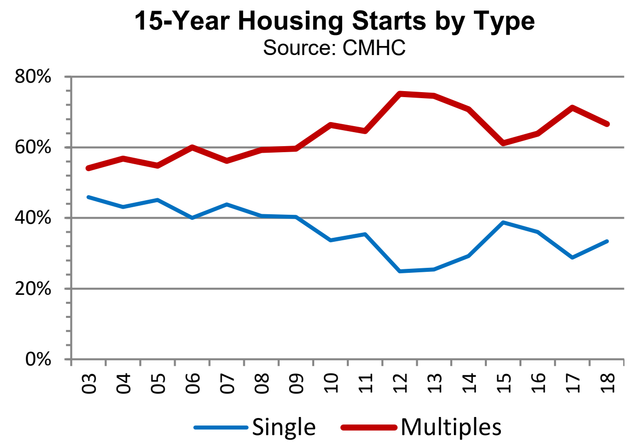
Residential Intensification

The 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 2018, a 55.2% intensification share was achieved (Table 13). The two year average intensification share was 47.1%; higher than the OP target of 40.0% for the five-year period from 2017-2022.

Official Plan Intensification Targets and Units Built
Source: City of Ottawa Official Plan and Building Permits



Ottawa Starts and Completions by Unit Type



More multiple dwellings were built than single-detached units in 2018 for the seventeenth year in a row. In 2018, there were 2,320 single-detached starts, more than the 1,970 started in 2017. The share of single-detached starts accounted for 33.4% of all new starts, up from 28.8% in 2017 (Table 15).

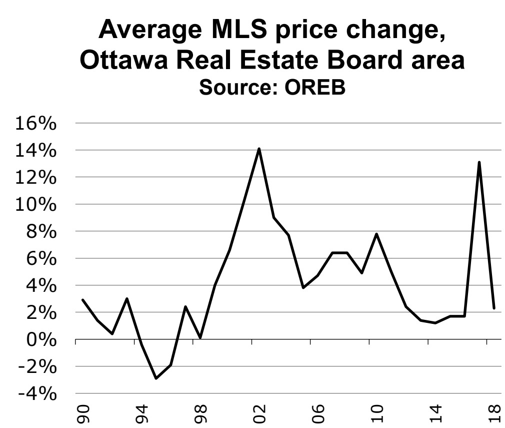
The most popular house form, with a 34.7% share, was apartment, with 2,414 units started in 2018, down from 2,795 units in 2017. Single-detached units were slightly behind with a 33.4% share. Townhome units saw 1,906 units started in 2018 for a share of 27.4%, up slightly from 27.1% in 2017. The freehold market completed 4,284 units and tracked above its five-year average of 3,573 annual completed units. Overall, freehold singles lead the way, followed by freehold townhomes then condominium apartments (Table 16).

Ottawa New Single-Detached Prices

New single-detached home prices increased to $576,533 in 2018, an increase of 7.6% from last year. After factoring for inflation, the annual change was 4.9% (Table 17). Inflation is generally derived from the All-Items Consumer Price Index (CPI), which averaged 133.2 in 2018 (from a base of 100 in 2002). The annual 2018 inflation rate as measured by the CPI was 2.5%, up from 1.4% in 2017.

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 $407,600 in 2018, an annual increase of 3.8%.

Sales Activity and Trends

2018 continued the trend of increasing MLS sales from 2017 in the larger OREB area. 2018 MLS sales of 17,476 units were up 2.3% from 2017 to 2018 (Table 19).

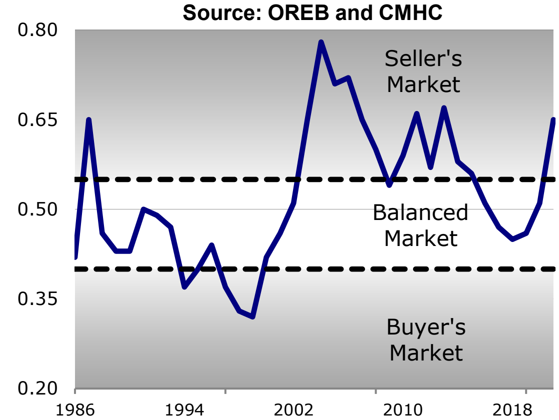
[7] MLS: Multiple Listing Service, a registered trademark of the Canadian Real Estate Association.

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 2018, the ratio increased to 0.71 from 0.65 in 2017 meaning that Ottawa had a seller's market. This is similar to 2017; however differs from 2012 to 2016 where Ottawa maintained a balanced market.

Ottawa Resale Market Supply and Demand: Sales to New Listings Ratio, 1986-2018
Source: OREB and CMHC



Major Cities

Similar to 2017, price changes in 2018 varied across the major cities. There were incremental increases in Vancouver (+1.8%), Calgary (+3.1%), Montréal (+3.9%), and Ottawa (+3.8%). Toronto and Edmonton both experienced decreases of -4.3% and -1.3%, respectively. (Table 18).

2018 AVG MLS® RESALE PRICE* & 2017-2018 % CHANGE

	Price	% Change
Vancouver	$1,050,900	+1.8%
Toronto	$787,300	-4.3%
Calgary	$480,700	+3.1%
Ottawa	**$407,500**	**+3.8%**
Edmonton	$369,600	-1.3%
Montréal	$378,700	+3.9%

**Corresponds to Real Estate Board Territories*
Source: Canadian Real Estate Association and Local Real Estate Boards

2018 MLS® RESALE SALES* & 2017-2018 % CHANGE

	Sales	% Change
Toronto	77,400	-16.1%
Vancouver	24,600	-31.6%
Montréal	46,700	+5.1%
Calgary	18,700	-21.7%
Ottawa	**17,500**	**+2.3%**
Edmonton	15,500	-5.6%

**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 0.6% in the total number of rental purpose row and apartment units to 70,004 in 2018 from 69,573 in 2017. The overall supply of condominium rental units decreased 0.6% to 10,250 in 2018 from 10,316 in 2017. The percentage of condominiums that are rental has increased from 24.0% in 2013 to 29.4% in 2018 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, 2018

New Edinb./Manor Park/Overbrook	4.5%
Nepean	2.4%
Alta Vista	1.7%
City Average	**1.6%**
Chinatown/Hintonburg/Westboro N	1.4%
Downtown	1.4%
Carlington/Iris	1.2%
Gloucester North/Orleans	1.2%
Sandy Hill/Lowertown	1.2%
Western Ottawa Surrounding Areas	1.1%
Westboro S/Hampton Pk/Britannia	0.8%
Eastern Ottawa Surrounding Areas	0.5%
Glebe/Old Ottawa South	0.5%
Hunt Club/South Keys	0.7%
Vanier	**%

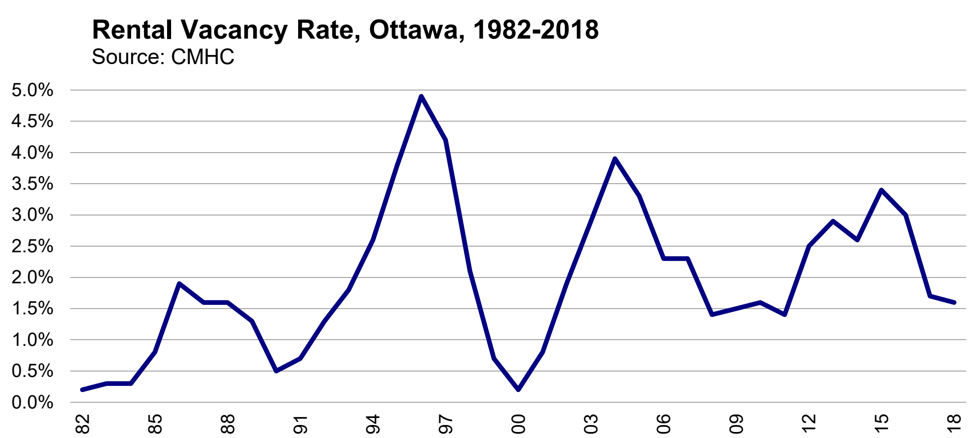
Source: CMHC Rental Market Report Ottawa Fall 2018, Table 1.1.1

**Data is supressed as it is not reliable

Vacancy Rates

Ottawa's rental vacancy rate decreased slightly to 1.6% in 2018 from 1.7% in 2017. The vacancy rate is lower for one-bedroom (1.5%) and bachelor units (1.3%) compared to two-bedroom units (1.8%). Strong demograhic and economic fundamentals have remained supportive of housing demand benefiting the rental market and lowering the 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.



Private Rental Prices

The average rent for a two-bedroom apartment in Ottawa in 2018 was $1,301, an increase of 5.6% from 2017 and above the 2018 provincial Rent Increase Guideline of 1.8%. The average rent of a two-bedroom apartment in Gatineau in 2018 was $794. The rent gap between Ottawa and Gatineau for a two-bedroom apartment is $507 and 64%; higher than the 58% gap in 2017.

3. Economy

HIGHLIGHTS

- The number of employed residents increased by 2.0% in Ottawa from 2017 to 2018
- The Retail cluster was Ottawa's highest growth cluster in 2018, adding 6,300 jobs
- The Knowledge cluster had the largest employment numbers with 176,100 jobs in 2018

3.1 Labour Force

Employed Residents

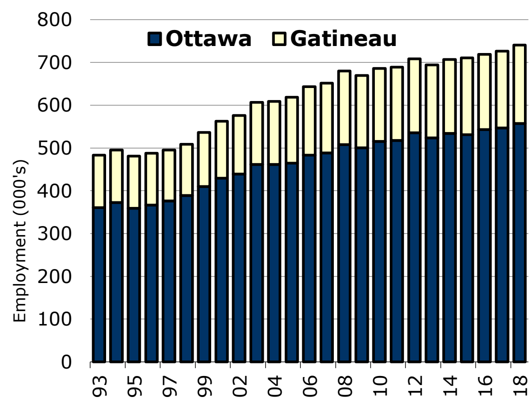
The Ottawa-Gatineau CMA gained 14,000 jobs in 2018. Gains were made in all of the nation's six largest metro areas, with Toronto seeing the largest increase of 63,400 jobs (adjacent table). About 75% of the jobs in the Ottawa-Gatineau CMA have historically been in the city of Ottawa.

Employment Changes, Major Centres, 2016-2017
Source: Statistics Canada, Labour Force Survey, CANSIM 14-10-0098-01

CMA	Net job change
Toronto	63,400
Montréal	41,300
Vancouver	24,800
Edmonton	19,200
Ottawa-Gatineau	**14,000**
Calgary	7,800

Statistics Canada's sample-based Labour Force Survey (LFS) shows the number of employed residents in the Ottawa CMA averaged 557,600 in 2018, up 2.0% or 10,900 employed residents from 2017[8]. The unemployment rate decreased to 4.6% in 2018 from 5.6% in 2017. The local unemployment rate remained lower than provincial (5.6%) and national (5.8%) rates (Table 8).

Total Employment, Ottawa and Gatineau, 1993-2018
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 Retail cluster was Ottawa's highest growth cluster in 2018, adding 6,300 employed residents. While all other clusters also experienced growth, the Government cluster experienced a decline (-9,000) in employed residents. In 2018, the Knowledge cluster had the largest employment numbers with 176,100 employed residents (Table 9).

In 2018 private-sector employment remained steady representing 62.0% 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 2018, Ottawa's Advanced Technology sector loss an estimated 5,800 employed residents after a gain of 9,700 in 2017. Tourism gained 4,100 employed residents, while Health Sciences gained 300. Telecommunications Equipment and Microelectronics both experienced a decline of 2,300 employed residents, while Software and Telecommunications lost an estimated 1,500 employed residents in 2018 (Table 9).

3.2 Office, Industrial and Retail Markets

Office Market

Ottawa has a commercial office space inventory of over 3.8 million square metres (41.0 million square feet). Ottawa's overall vacancy rate decreased to 9.6% at the end of 2018 from 11.4% in 2017. Downtown area had the lowest vacancy rate of 6.8%, followed by Ottawa West at 8.6%. Across the city, Class A building vacancy rates decreased by 1.7% to 7.9%, while Class B buildings decreased to 11.8% from 13.1%. Class C buildings had the highest vacancy rate of 13.1% given their age and the market preference for Class A or B buildings.

Industrial Market

Ottawa is estimated to have over 2.1 million square metres (22.8 million square feet) of industrial floor area at the end of 2018. Over 60% of the industrial inventory is east of the Rideau River, which saw a decrease in vacancy to 5.4% from 7.4%. West of the Rideau River, vacancies decreased to 3.4% from 4.5%. Overall, the city saw the vacancy rate decrease to 4.6% in 2018 from 6.3% in 2017 (Table 21).

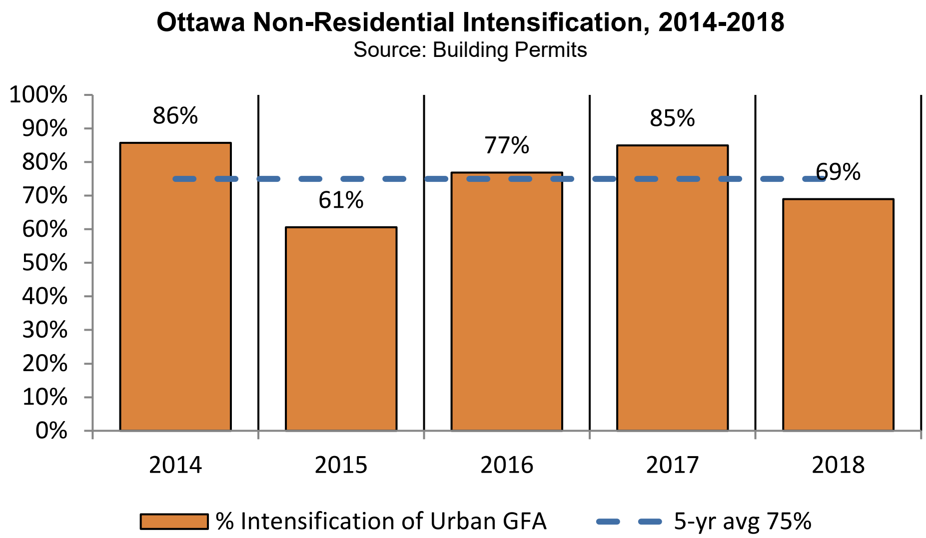
Retail Market

Retail space is categorized into several format categories. In 2018, all retail categories maintained similar shares of total floor area compared to 2017. Power Centres and standalone big box stores had the largest share of space, increasing to 27.5% of the total in 2018 from 27.3% in 2017.

The only vacancy increase was in Office Concourses, which saw an increase to 4.7% in 2018 from 3.0% in 2017. Community Shopping Centres experienced the largest decline in vacancy rate, falling 0.9% to 7.0%. The city's overall retail vacancy rate decreased to 5.0% in 2018 from 5.5% in 2017 (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 2018 approximately 45,000 m^2 (about 484,000 ft^2) had been constructed within the developed area, representing an intensification rate of 69%. Over the past five-years, non-residential intensification averaged 75% of total built space *(*Table 14).



4. Transit Stations

HIGHLIGHTS

- The average commercial service index of Ottawa’s O-Train & Confederation Line stations was 74.6
- Rideau and Parliament Stations received the highest commercial service indices of 99
- Four 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.

For all stations, the average commercial service index was 74.6, which means most errands can be accomplished within transit station areas. Confederation Line’s Lyon, Parliament, Rideau, and St. Laurent Stations all had indices within the 90s meaning daily errands can be accomplished within transit station areas. Carling Station, Greenboro Station, Bayview Station, Parliament Station, uOttawa Station, and St.Laurent Station all experienced increases – Greenboro with the largest increase of an index of 76 in 2018 from 71 in 2017. Some stations decreased scores; however no scores decreased enough to result in a change of category.

Commercial Service Index Results	
Highest: Rideau Station & Rideau Station	99 – Daily errands can be accomplished within transit station areas
Average	74.6 – Most errands can be accomplished within transit station areas
Lowest: Tremblay Station	32 – Almost all errands outside transit station areas

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

Appendix: Data Tables

TABLE 1
POPULATION OF CANADA'S SIX LARGEST METROPOLITAN AREAS, 2014-2018

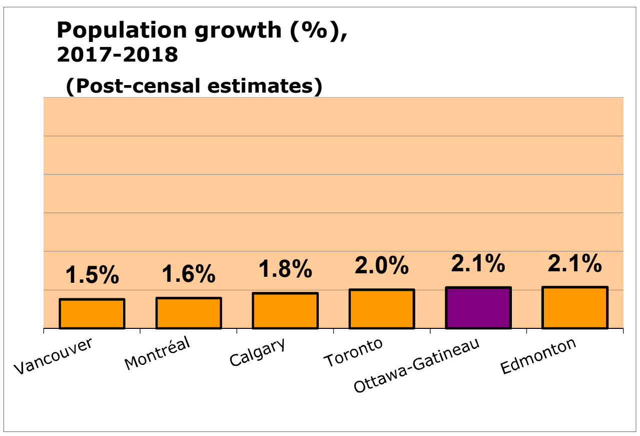
CMA *	POST-CENSAL ESTIMATES					*2017-2018*
	2014	**2015**	**2016**	**2017**	**2018**	***% chg.***
Vancouver	2,507,757	2,544,799	2,582,146	2,610,605	2,650,005	*1.5%*
Montréal	4,093,777	4,109,805	4,140,431	4,189,425	4,255,541	*1.6%*
Calgary	1,386,733	1,413,600	1,438,282	1,459,358	1,486,050	*1.8%*
Toronto	5,999,197	6,045,227	6,125,113	6,216,637	6,341,935	*2.0%*
Ottawa-Gatineau	**1,326,352**	**1,337,089**	**1,358,141**	**1,384,939**	**1,414,399**	***2.1%***
Edmonton	1,312,494	1,338,517	1,364,285	1,391,154	1,420,916	*2.1%*
City of Ottawa**	939,708	948,063	964,448	984,279	1,007,501	*2.4%*

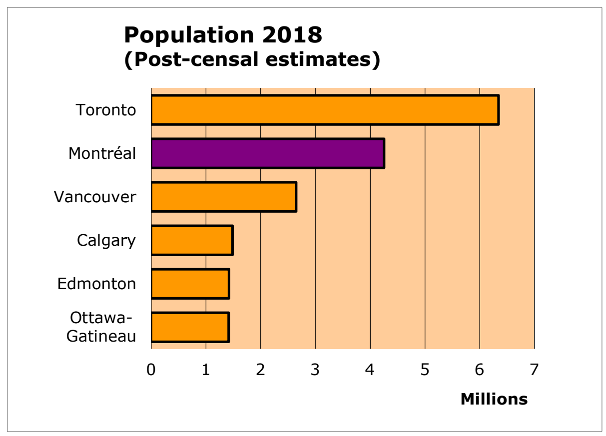
Source: Statistics Canada, Tables 17-10-0135-01 and 17-10-0139-01;estimates are for July 1 each year

Estimates are final intercensal for 2014 and 2015, final postcensal for 2016, updated postcensal for 2017 and preliminary postcensal for 2018.

* 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	2014	2015	2016	2017	2018	*2017-2016 % chg.*
Ontario part of CMA	996,968	1,006,110	1,023,782	1,047,974	1,074,524	*2.5%*
(%)	75.2%	75.2%	75.4%	75.7%	76.0%	
Quebec part of CMA	329,384	330,979	334,359	336,965	339,875	*0.9%*
(%)	24.8%	24.8%	24.6%	24.3%	24.0%	
Total CMA Population	**1,326,352**	**1,337,089**	**1,358,141**	**1,384,939**	**1,414,399**	***2.1%***

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

Estimates are final intercensal for 2014 and 2015, final postcensal for 2016, updated postcensal for 2017 and preliminary postcensal for 2018.

TABLE 2
GREATER OTTAWA-GATINEAU AREA POPULATION & DWELLINGS

Municipality	2011 Census Population	2011 Census Occupied Dwellings	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
Ottawa, C	**883,391**	**353,244**	**934,243**	**373,756**	**979,173**	**416,219**	**991,429**	**422,327**
Gatineau, V	**265,349**	**112,758**	**276,245**	**118,385**	**284,327**	**123,395**	**286,893**	**125,025**
Prescott & Russell (part)	**62,938**	**23,352**	**67,068**	**25,361**	**69,161**	**26,252**	**69,057**	**26,761**
Alfred and Plantagenet, TP	9,196	3,728	9,680	3,959	9,958	4,080	9,570	4,104
Casselman, Vlg.	3,642	1,438	3,548	1,435	3,652	1,484	3,583	1,504
Clarence-Rockland, C (part of ON CMA)	23,185	8,641	24,512	9,329	25,386	9,702	25,340	9,903
Russell, TP (part of ON CMA)	15,247	5,285	16,520	5,873	17,281	6,175	17,983	6,386
The Nation Municipality	11,668	4,260	12,808	4,765	12,884	4,811	12,581	4,864
Leeds & Grenville (part)	**17,935**	**4,422**	**19,518**	**7,671**	**19,706**	**7,795**	**20,386**	**7,983**
Merrickville-Wolford, Vlg.	2,850	4,422	3,067	1,232	2,943	1,187	3,012	1,204
North Grenville, TP (part of ON CMA)	15,085	6,819	16,451	6,439	16,763	6,607	17,374	6,779
Stormont, Dundas, Glengarry (pt	**11,225**	**1,121**	**11,278**	**4,481**	**11,644**	**4,634**	**11,118**	**4,670**
North Dundas, TP	11,225	5,698	11,278	4,481	11,644	4,634	11,118	4,670
Lanark (part)	**32,663**	**9,690**	**35,212**	**13,858**	**36,265**	**14,311**	**36,782**	**14,805**
Beckwith, TP	6,986	2,571	7,644	2,864	7,899	2,970	8,026	3,054
Carleton Place, Tn.	9,809	3,973	10,644	4,278	11,042	4,431	10,992	4,671
Mississippi Mills, Tn.	12,385	4,836	13,163	5,292	13,529	5,471	14,529	5,634
Montague, TP	3,483	1,310	3,761	1,424	3,794	1,438	3,235	1,446
Renfrew (part)	**15,485**	**6,459**	**15,973**	**6,796**	**16,698**	**7,137**	**16,722**	**7,219**
Arnprior, Tn.	8,114	3,640	8,795	3,912	9,431	4,188	9,249	4,253
McNab/Braeside, TP	7,371	2,819	7,178	2,884	7,267	2,949	7,473	2,966
Québec part of CMA Outside Gatineau (QCOG)	**49,152**	**18,708**	**55,812**	**21,717**	**56,791**	**22,109**	**58,263**	**22,415**
Cantley, M	9,888	3,419	10,699	3,768	11,172	3,933	11,587	3,997
Chelsea, M	6,977	2,572	6,909	2,610	7,200	2,718	7,548	2,768
La Pêche, M	7,619	3,121	7,863	3,274	7,991	3,328	8,216	3,370
L'Ange-Gardien, M	5,051	1,775	5,464	1,960	5,569	2,006	5,627	2,039
Pontiac, M	5,681	2,147	5,850	2,252	5,875	2,256	6,116	2,270
Val-des-Monts, M	10,420	4,082	11,582	4,564	11,490	4,544	11,504	4,622
Denholm, M	572	247	505	224	574	256	575	256
Notre-Dame-de-la-Salette, M	757	332	727	328	769	348	782	350
Mayo, M	572	242	601	259	628	270	657	273
Bowman, M	677	302	658	312	656	312	682	312
Val-des-Bois, M	938	469	865	452	914	477	964	477
Lochaber, CT	409	155	415	162	391	153	301	154
Lochaber-Ouest, CT	646	240	856	324	748	283	761	285
Thurso, V	2,455	1,042	2,818	1,228	2,814	1,225	2,943	1,242
GREATER OTTAWA-GATINEAU AREA	**1,338,138**	**529,754**	**1,415,349**	**572,025**	**1,473,765**	**621,852**	**1,490,650**	**631,205**
Ottawa-Gatineau CMA	1,236,324	498,636	1,307,332	529,060	1,362,958	577,600	1,379,908	586,056
Ontario portion of the CMA	921,823	367,170	991,726	395,397	1,038,603	438,703	1,052,126	445,395
Québec portion of the CMA	310,991	130,029	332,057	140,102	341,118	145,504	345,156	147,440
OMATO	140,246	45,044	149,049	58,167	153,474	60,129	154,065	61,438

Sources: Statistics Canada, Census; estimates based on CMHC starts and municipal building permits **2017-18 City Estimates are year-end.**

City of Ottawa (2017 and 2018 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, 2016 and 2017 population estimates should not be compared to Census population figures.

Note 2: sub-totals by County include only those areas within OMATO or QCOG, 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 "Qué. part of the CMA Outside Gatineau" 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 "Que. Part of the CMA Outside Gatineau" 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.

QCOG: Québec part of the CMA Outside Gatineau

TABLE 3
POPULATION AND HOUSEHOLD ESTIMATES BY SUB-AREA, 2014-2018

SUB-AREA	POPULATION							HOUSEHOLDS						
						Growth							Growth	
	2014	2015	2016	2017	2018	17-18	*% 17-18*	2014	2015	2016	2017	2018	17-18	*% 17-18*
Downtown*														
Central Area	11,012	12,026	12,570	12,544	12,605	61	*0.5%*	6,813	7,473	7,906	7,979	8,058	79	*1.0%*
Inner Area	88,006	89,605	90,122	91,380	91,953	573	*0.6%*	46,869	48,014	48,484	49,444	49,873	429	*0.9%*
Other Areas Inside Greenbelt														
Ottawa East	51,421	51,117	51,164	51,755	51,805	50	*0.1%*	25,614	25,641	25,885	26,457	26,637	180	*0.7%*
Beacon Hill	30,730	30,275	30,650	30,771	31,042	271	*0.9%*	14,149	14,001	14,343	14,496	14,610	114	*0.8%*
Alta Vista	75,385	74,998	75,059	75,027	75,172	145	*0.2%*	32,569	32,500	32,726	32,857	32,979	122	*0.4%*
Hunt Club	65,669	65,555	65,595	65,694	65,792	98	*0.1%*	26,397	26,451	26,577	26,748	26,861	113	*0.4%*
Merivale	77,431	77,531	77,769	77,953	78,008	55	*0.1%*	33,500	33,780	34,152	34,493	34,641	148	*0.4%*
Ottawa West	43,795	44,598	45,380	45,524	45,901	377	*0.8%*	20,671	21,191	21,685	21,789	21,974	185	*0.8%*
Bayshore	38,657	38,477	38,397	38,497	38,559	62	*0.2%*	17,729	17,698	17,732	17,865	17,942	77	*0.4%*
Cedarview	46,478	46,162	45,822	45,619	45,315	-304	*-0.7%*	18,589	18,634	18,699	18,843	18,842	-1	*0.0%*
Urban Areas Outside Greenbelt														
Kanata-Stittsville	114,020	116,777	118,949	121,730	126,179	4,449	*3.7%*	41,963	43,174	44,266	45,475	47,399	1,924	*4.2%*
South Nepean	81,273	83,252	84,925	87,115	89,042	1,927	*2.2%*	29,845	30,674	31,438	32,369	33,174	805	*2.5%*
Riverside South	13,537	14,145	14,590	15,425	16,614	1,189	*7.7%*	4,903	5,126	5,273	5,542	5,940	398	*7.2%*
Leitrim	7,846	8,527	8,808	9,284	10,084	800	*8.6%*	2,560	2,806	2,907	3,073	3,335	262	*8.5%*
Orléans	112,628	113,595	114,473	115,971	117,832	1,861	*1.6%*	42,856	43,490	44,149	45,086	46,048	962	*2.1%*
Rural														
Rural Northeast	11,868	11,937	11,952	12,012	12,009	-3	*0.0%*	4,267	4,296	4,309	4,339	4,354	15	*0.3%*
Rural Southeast	28,148	28,316	28,415	28,610	28,790	180	*0.6%*	9,828	9,892	9,940	10,016	10,104	88	*0.9%*
Rural Southwest	28,275	28,296	28,395	28,660	29,105	445	*1.6%*	9,969	10,014	10,088	10,214	10,391	177	*1.7%*
Rural Northwest	25,546	25,568	25,545	25,602	25,619	17	*0.1%*	9,028	9,063	9,086	9,134	9,164	30	*0.3%*
City of Ottawa	**951,725**	**960,757**	**968,580**	**979,173**	**991,429**	**12,256**	**1.3%**	**398,119**	**403,918**	**409,645**	**416,219**	**422,327**	**6,108**	**1.5%**
Downtown*	99,018	101,631	102,692	103,924	104,559	635	*0.6%*	53,682	55,487	56,390	57,423	57,931	508	*0.9%*
Other Inside Greenbelt	429,566	428,713	429,836	430,840	431,595	755	*0.2%*	189,218	189,896	191,799	193,548	194,486	938	*0.5%*
Total Inside GB	*528,584*	*530,344*	*532,528*	*534,764*	*536,153*	*1,389*	*0.3%*	*242,900*	*245,383*	*248,189*	*250,971*	*252,417*	*1,446*	*0.6%*
Urban Areas Outside GB	329,304	336,296	341,745	349,525	359,751	10,226	*2.9%*	122,127	125,270	128,033	131,545	135,897	4,352	*3.3%*
Rural	93,837	94,117	94,307	94,884	95,524	640	*0.7%*	33,092	33,265	33,423	33,703	34,013	310	*0.9%*
Downtown*	10.4%	10.6%	10.6%	10.6%	10.5%			13.5%	13.7%	13.8%	13.8%	13.7%		
Other Inside Greenbelt	45.1%	44.6%	44.4%	44.0%	43.5%			47.5%	47.0%	46.8%	46.5%	46.1%		
Total Inside GB	55.5%	55.2%	55.0%	54.6%	54.1%			61.0%	60.8%	60.6%	60.3%	59.8%		
Urban Areas Outside GB	34.6%	35.0%	35.3%	35.7%	36.3%			30.7%	31.0%	31.3%	31.6%	32.2%		
Rural	9.9%	9.8%	9.7%	9.7%	9.6%			8.3%	8.2%	8.2%	8.1%	8.1%		

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

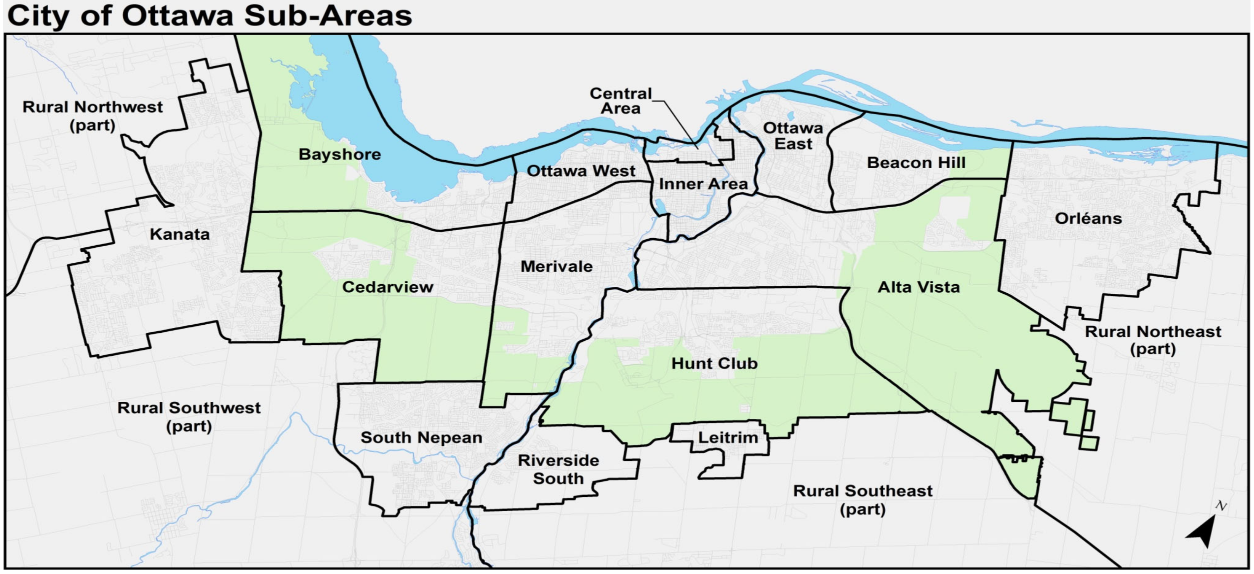


TABLE 4
NET MIGRATION TO THE CITY OF OTTAWA, 2012-2017

BY AGE GROUP

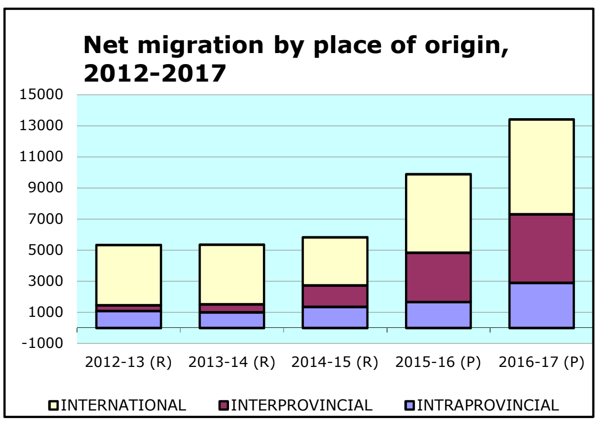
YEAR	AGE GROUP 0 - 17	18 - 24	25 - 44	45 - 64	65+	TOTAL
2012-13 (R)	1,468	2,002	2,318	-583	130	5,335
2013-14 (R)	1,117	1,819	2,511	-499	400	5,348
2014-15 (R)	1,230	1,688	3,237	-415	87	5,827
2015-16 (P)	2,467	2,210	4,621	110	480	9,888
2016-17 (P)	**3,295**	**2,542**	**6,390**	**585**	**603**	**13,415**
5-year total	**9,577**	**10,261**	**19,077**	**-802**	**1,700**	**39,813**
5 year %	**24.1%**	**25.8%**	**47.9%**	**-2.0%**	**4.3%**	**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				
2012-13 (R)	13,704	9,774	6,604	30,082
2013-14 (R)	14,090	10,258	6,626	30,974
2014-15 (R)	15,004	11,132	5,969	32,105
2015-16 (P)	15,645	12,104	7,958	35,707
2016-17 (P)	**15,774**	**12,658**	**8,761**	**37,193**
Out-Migrants				
2012-13 (R)	12,620	9,400	2,727	24,747
2013-14 (R)	13,081	9,742	2,803	25,626
2014-15 (R)	13,649	9,756	2,873	26,278
2015-16 (P)	13,985	8,922	2,912	25,819
2016-17 (P)	**12,882**	**8,246**	**2,650**	**23,778**
Net Migration				
2012-13 (R)	1,084	374	3,877	5,335
2013-14 (R)	1,009	516	3,823	5,348
2014-15 (R)	1,355	1,376	3,096	5,827
2015-16 (P)	1,660	3,182	5,046	9,888
2016-17 (P)	**2,892**	**4,412**	**6,111**	**13,415**

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



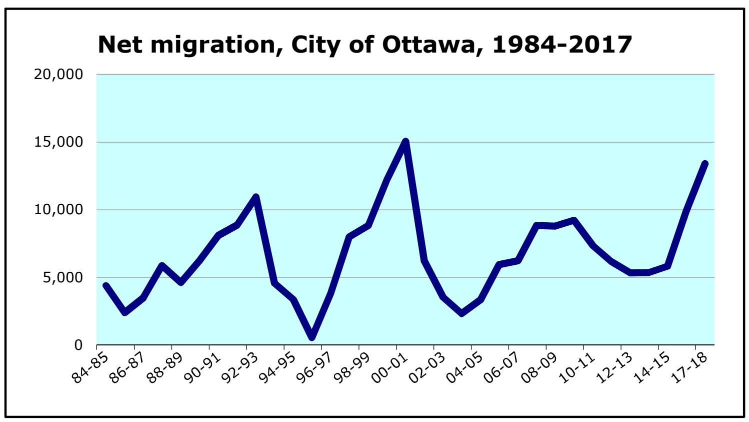


TABLE 5
NET MIGRATION IN-FLOWS AND OUT-FLOWS, CITY OF OTTAWA

2007-2017			
IN-FLOWS*		**OUT-FLOWS***	
Greater Montréal	9,445	British Columbia	-1,847
Rest of Ontario***	8,470	Alberta	-1,852
Northern Ontario	6,235	OMATO and QMAG	-4,411
Atlantic provinces	4,776		
Eastern Ontario	4,676		
Manitoba & Saskatchewan	2,881		
Rest of Québec**	2,632		
Gatineau	2,624		
Greater Toronto Area	1,703		
Canadian North	404		
TOTAL IN-FLOWS	**43,846**	**TOTAL OUT-FLOWS**	**-8,110**
		Net Canadian Migration 2007-2017	35,736
		Net International Migration	**44,458**
		Net Migration 2007-2017	**80,194**

2016-2017			
IN-FLOWS*		**OUT-FLOWS***	
Greater Montréal	1,100	OMATO and QMAG	-662
Atlantic provinces	810	British Columbia	-61
Rest of Ontario***	1,158		
Northern Ontario	643		
Gatineau	859		
Eastern Ontario	633		
Rest of Québec**	228		
Manitoba & Saskatchewan	583		
Alberta	834		
Canadian North	73		
Greater Toronto Area	1,106		
TOTAL IN-FLOWS	**8,027**	**TOTAL OUT-FLOWS**	**-723**
		Net Canadian Migration 2016-2017	7,304
		Net International Migration *(Table 4)*	**6,111**
		Net Migration 2016-2017	**13,415**

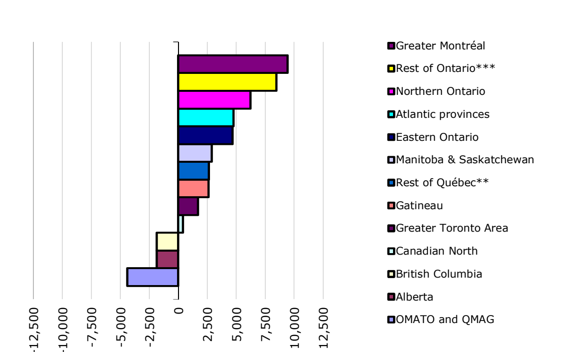
Source: Statistics Canada, Migration Estimates for Census Division 3506

* 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, 2007-2017



Migration In- and Out- Flows, 2016-17

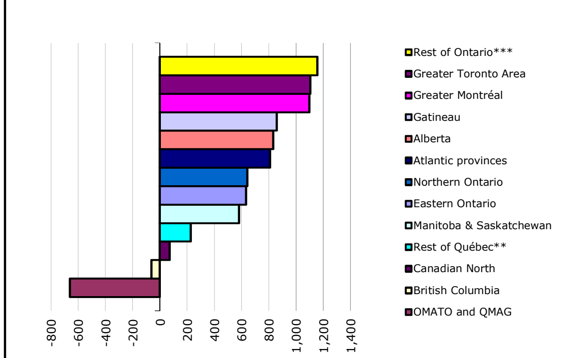


TABLE 6
MIGRATION BETWEEN OTTAWA AND ADJACENT MUNICIPALITIES, 2012-17

	2012-2013 (R)	2013-2014 (R)	2014-2015 (R)	2015-2016 (R)	2016-2017 (P)	TOTAL 2012-2017
PRESCOTT-RUSSELL TO OTTAWA	*1,630*	*1,780*	*1,789*	*1,795*	*1,622*	*8,616*
OTTAWA TO PRESCOTT-RUSSELL	*1,712*	*1,782*	*1,828*	*1,654*	*1,695*	*8,671*
PRESCOTT-RUSSELL - NET MIGRATION	**-82**	**-2**	**-39**	**141**	**-73**	**-55**
*S.D.&G.** TO OTTAWA*	*779*	*883*	*889*	*925*	*824*	*4,300*
OTTAWA TO S.D.&G.	*779*	*714*	*697*	*663*	*716*	*3,569*
S.D.&G. - NET MIGRATION	**0**	**169**	**192**	**262**	**108**	**731**
LEEDS-GRENVILLE TO OTTAWA	*843*	*841*	*878*	*862*	*827*	*4,251*
OTTAWA TO LEEDS-GRENVILLE	*1,005*	*1,046*	*1,084*	*1,052*	*1,074*	*5,261*
LEEDS-GRENVILLE - NET MIGRATION	**-162**	**-205**	**-206**	**-190**	**-247**	**-1,010**
LANARK TO OTTAWA	*959*	*953*	*1,002*	*1,038*	*947*	*4,899*
OTTAWA TO LANARK	*1,210*	*1,367*	*1,326*	*1,530*	*1,340*	*6,773*
LANARK - NET MIGRATION	**-251**	**-414**	**-324**	**-492**	**-393**	**-1,874**
RENFREW TO OTTAWA	*969*	*939*	*1,078*	*1,036*	*924*	*4,946*
OTTAWA TO RENFREW	*923*	*935*	*979*	*916*	*967*	*4,720*
RENFREW - NET MIGRATION	**46**	**4**	**99**	**120**	**-43**	**226**
GATINEAU TO OTTAWA*	*2,238*	*2,402*	*2,448*	*2,320*	*2,538*	*11,946*
OTTAWA TO GATINEAU	*1,886*	*1,800*	*1,729*	*1,848*	*1,679*	*8,942*
GATINEAU - NET MIGRATION	**352**	**602**	**719**	**472**	**859**	**3,004**
LES-COLLINES-DE-L'OUTAOUAIS TO OTTAWA	*273*	*284*	*268*	*247*	*244*	*1,316*
OTTAWA TO LES-COLLINES-DE-L'OUTAOUAIS	*270*	*220*	*233*	*256*	*273*	*1,252*
LES-COLLINES - NET MIGRATION	**3**	**64**	**35**	**-9**	**-29**	**64**
PAPINEAU TO OTTAWA	*23*	*18*	*18*	*15*	*17*	*91*
OTTAWA TO PAPINEAU	*16*	*27*	*23*	*28*	*16*	*110*
PAPINEAU - NET MIGRATION	**7**	**-9**	**-5**	**-13**	**1**	**-19**
LA-VALLÉE-DE-LA-GATINEAU TO OTTAWA	*39*	*15*	*20*	*29*	*34*	*137*
OTTAWA TO LA-VALLÉE-DE-LA-GATINEAU	*49*	*41*	*40*	*18*	*25*	*173*
LA-VALLÉE - NET MIGRATION	**-10**	**-26**	**-20**	**11**	**9**	**-36**
PONTIAC TO OTTAWA	*41*	*69*	*39*	*41*	*38*	*228*
OTTAWA TO PONTIAC	*41*	*30*	*41*	*28*	*33*	*173*
PONTIAC - NET MIGRATION	**0**	**39**	**-2**	**13**	**5**	**55**
TOTAL	**-97**	**222**	**449**	**315**	**197**	**1,086**
Gatineau	**352**	**602**	**719**	**472**	**859**	**3,004**
OMATO Counties*	**-449**	**-448**	**-278**	**-159**	**-648**	**-1,982**
QMAG Counties*	**0**	**68**	**8**	**2**	**-14**	**64**

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	2013-2014 (F)	2014-2015 (F)	2015-2016 (U)	2016-2017 (U)	2017-2018 (P)	% chg. 16-17/17-18	2013-2018 TOTAL
Toronto	49,229	30,089	63,424	59,502	92,888	56.1%	295,132
Montréal	20,021	11,563	24,139	34,164	51,966	52.1%	141,853
Vancouver	28,303	17,572	19,923	20,171	27,670	37.2%	113,639
Calgary	32,641	17,244	14,093	9,524	15,304	60.7%	88,806
Edmonton	35,002	20,090	18,377	16,234	19,312	19.0%	109,015
Ottawa-Gatineau	**6,924**	**7,226**	**16,402**	**21,755**	**24,444**	**12.4%**	**76,751**
TOTAL 6 CMA's	**172,120**	**103,784**	**156,358**	**161,350**	**231,584**	**43.5%**	**825,196**
Ottawa-Gatineau % of 6 largest CMA's	4.0%	7.0%	10.5%	13.5%	10.6%		9.3%

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*, 2000-2018

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%**
% change:									
2017-18	2.2	1.0	2.0	-16.1	4.9	-0.8%	-1.0%	-0.4%	-0.5%
2014-18	6.7	2.2	4.5	-28.9	17.3	-3.0%	-2.0%	-1.7%	-1.1%

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: Statistics Canada, Labour Force Survey, Table 14-10-0096-01 and Table 14-10-0018-01

* 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, 2012-2018

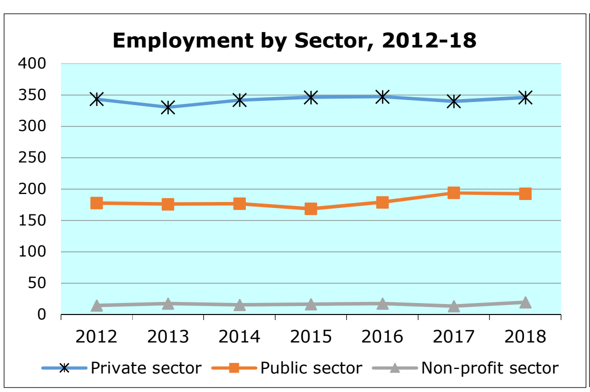
By Major Clusters	2012	2013	2014	2015	2016	2017	2018
Industrial & Resource Cluster	**49.6**	**39.0**	**40.4**	**48.5**	**42.1**	**46.6**	**50.5**
Primary	3.5	1.5	1.7	0.0	0.0	0.0	1.6
Utilities	0.0	0.0	1.6	0.0	0.0	0.0	1.9
Construction	27.0	20.5	19.6	31.8	25.2	28.9	29.2
Manufacturing	19.1	17.0	17.5	16.7	16.9	17.7	17.8
Retail Cluster	**83.9**	**77.6**	**83.8**	**82.2**	**81.6**	**82.4**	**88.7**
Wholesale Trade	11.0	11.7	16.4	11.5	16.6	13.3	14.7
Retail Trade	56.5	51.7	52.6	55.4	48.7	53.2	53.0
Transportation and Warehousing	16.4	14.2	14.8	15.3	16.3	15.9	21.0
Office Cluster	**67.3**	**74.7**	**69.3**	**71.8**	**71.2**	**69.9**	**71.9**
Administrative and Support Services	19.8	23.0	21.3	25.1	25.2	18.1	19.6
F.I.R.E.*	26.5	28.1	24.4	27.2	25.2	28.4	25.8
Other Services	21.0	23.6	23.6	19.5	20.8	23.4	26.5
Culture and Tourism Cluster	**61.7**	**54.6**	**63.0**	**58.9**	**58.7**	**51.5**	**55.5**
Accommodation and Food Services	30.4	31.7	35.8	33.2	31.3	28.2	30.1
Information and Cultural Industries	17.3	13.2	14.8	13.0	12.5	11.2	11.1
Arts, Entertainment and Recreation	14.0	9.7	12.4	12.7	14.9	12.1	14.3
Knowledge Cluster	**155.4**	**168.6**	**166.6**	**165.6**	**181.7**	**171.1**	**176.1**
Health and Education	96.2	103.4	106.1	110.7	119.6	110.3	114.7
Professional, Sci. & Tech. Services	59.2	65.2	60.5	54.9	62.1	60.8	61.4
Government Cluster	**115.2**	**108.2**	**108.6**	**101.1**	**104.8**	**123.4**	**114.4**
Public Administration	115.2	108.2	108.6	101.1	104.8	123.4	114.4
Total Employed Residents	**535.4**	**523.5**	**533.8**	**531.1**	**543.4**	**546.7**	**557.6**
By Primary, Secondary and Tertiary Sector							
Primary	3.5	1.5	1.7	0.0	0.0	0.0	1.6
Secondary	46.1	37.5	38.7	48.5	42.1	46.6	48.9
Tertiary	485.8	484.5	493.4	482.6	501.3	500.1	507.1
Total	**535.4**	**523.5**	**533.8**	**531.1**	**543.4**	**546.7**	**557.6**
By Type of Sector							
Private sector	343.4	330.4	342.0	346.2	347.2	339.7	345.8
Public sector	177.6	175.8	176.6	168.4	178.8	193.7	192.4
Non-profit sector	14.4	17.3	15.2	16.5	17.4	13.3	19.4
Total	**535.4**	**523.5**	**533.8**	**531.1**	**543.4**	**546.7**	**557.6**
% private	64.1%	63.1%	64.1%	65.2%	63.9%	62.1%	62.0%
By High-Tech Cluster							
Telecommunications equipment	3.1	2.4	1.5	1.5	0.0	2.3	0.0
Microelectronics	3.1	2.4	3.0	1.5	0.0	2.3	0.0
Software and Telecommunications	46.0	51.6	50.2	40.6	43.3	47.8	46.3
Health Sciences	1.5	0.0	1.5	1.9	1.8	2.4	2.7
Tourism	42.3	41.4	48.2	45.9	46.2	40.3	44.4
Total, all clusters	**96.0**	**97.8**	**104.4**	**91.4**	**91.3**	**95.1**	**93.4**
Advanced Technology	***53.7***	***56.4***	***56.2***	***45.5***	***45.1***	***54.8***	***49.0***

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)



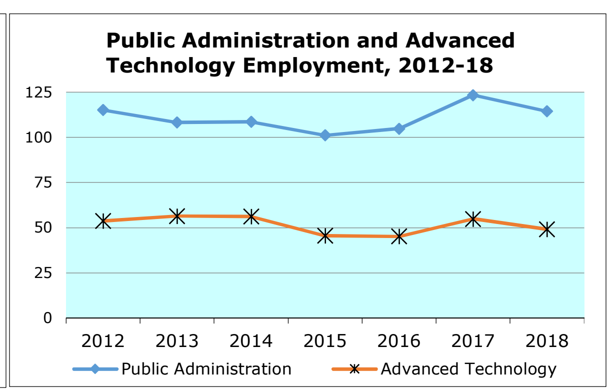
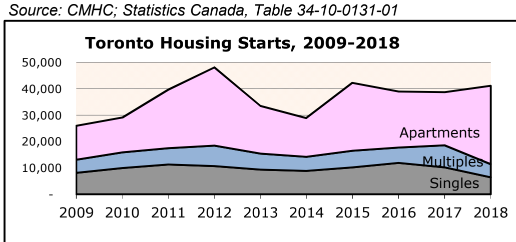


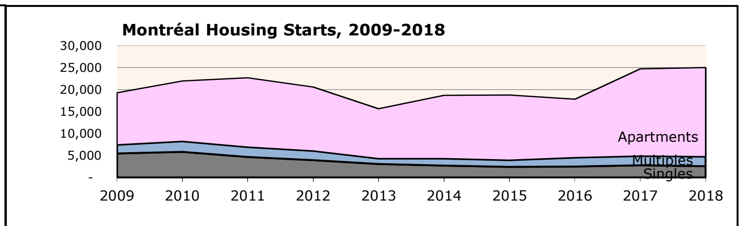
TABLE 10
HOUSING STARTS IN CANADA'S SIX LARGEST CMA's, 2009-2018

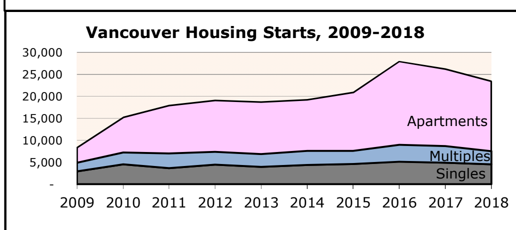
												% change	
CMA	**Dwg. Type**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2017-18**	**2009-18**
Toronto	Singles	8,130	9,936	11,247	10,699	9,421	8,830	10,223	11,884	10,172	6,405	-37.0%	-21.2%
	Multiples	4,950	6,019	6,241	7,789	5,977	5,391	6,239	5,823	8,392	5,063	-39.7%	2.3%
	Apartments	12,869	13,240	22,257	29,617	18,149	14,708	25,825	21,320	20,174	29,639	46.9%	130.3%
	Total	**25,949**	**29,195**	**39,745**	**48,105**	**33,547**	**28,929**	**42,287**	**39,027**	**38,738**	**41,107**	**6.1%**	**58.4%**
Vancouver	Singles	2,929	4,533	3,686	4,516	4,004	4,374	4,622	5,169	4,911	4,592	-6.5%	56.8%
	Multiples	1,985	2,738	3,338	2,869	2,883	3,227	2,998	3,828	3,795	2,924	-23.0%	47.3%
	Apartments	3,425	7,946	10,843	11,642	11,809	11,611	13,243	18,917	17,498	15,888	-9.2%	363.9%
	Total	**8,339**	**15,217**	**17,867**	**19,027**	**18,696**	**19,212**	**20,863**	**27,914**	**26,204**	**23,404**	**-10.7%**	**180.7%**
Montréal	Singles	5,446	5,789	4,653	3,959	3,039	2,677	2,402	2,499	2,771	2,549	-8.0%	-53.2%
	Multiples	2,005	2,452	2,233	2,084	1,289	1,608	1,511	2,018	2,130	2,182	2.4%	8.8%
	Apartments	11,800	13,760	15,833	14,548	11,304	14,387	14,831	13,317	19,855	20,269	2.1%	71.8%
	Total	**19,251**	**22,001**	**22,719**	**20,591**	**15,632**	**18,672**	**18,744**	**17,834**	**24,756**	**25,000**	**1.0%**	**29.9%**
Edmonton	Singles	3,897	6,062	5,017	5,658	5,970	6,832	5,683	4,335	5,028	4,814	-4.3%	23.5%
	Multiples	1,674	2,149	2,110	3,252	3,555	3,880	4,442	3,278	3,273	3,134	-4.2%	87.2%
	Apartments	746	1,748	2,205	3,927	5,164	3,160	6,925	2,423	3,134	2,090	-33.3%	180.2%
	Total	**6,317**	**9,959**	**9,332**	**12,837**	**14,689**	**13,872**	**17,050**	**10,036**	**11,435**	**10,038**	**-12.2%**	**58.9%**
Calgary	Singles	4,775	5,782	5,084	5,961	6,402	6,494	4,138	3,489	4,423	3,791	-14.3%	-20.6%
	Multiples	1,155	2,131	2,102	2,886	3,207	3,903	3,150	2,055	2,885	2,777	-3.7%	140.4%
	Apartments	388	1,349	2,106	3,994	2,975	6,734	5,745	3,701	4,226	4,403	4.2%	1034.8%
	Total	**6,318**	**9,262**	**9,292**	**12,841**	**12,584**	**17,131**	**13,033**	**9,245**	**11,534**	**10,971**	**-4.9%**	**73.6%**
Ottawa-Gatineau	Singles	3,527	3,212	2,918	2,280	2,262	2,254	2,414	2,365	2,703	3,131	15.8%	-11.2%
	Multiples	3,177	3,259	2,846	2,307	2,424	2,450	1,961	2,364	2,508	2,636	5.1%	-17.0%
	Apartments	2,226	2,662	2,450	4,192	3,798	2,961	2,181	2,388	4,116	3,701	-10.1%	66.3%
	Total	**8,930**	**9,133**	**8,214**	**8,779**	**8,484**	**7,665**	**6,556**	**7,117**	**9,327**	**9,468**	**1.5%**	**6.0%**

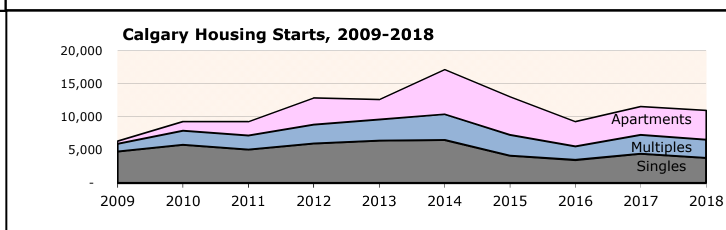
Multiples = Semi-detached and Row units

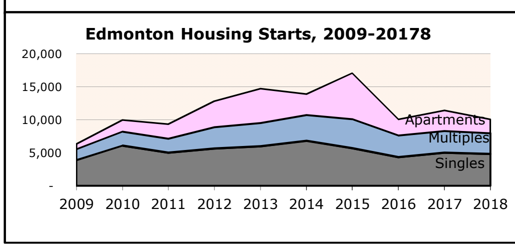
Source: CMHC; Statistics Canada, Table 34-10-0131-01











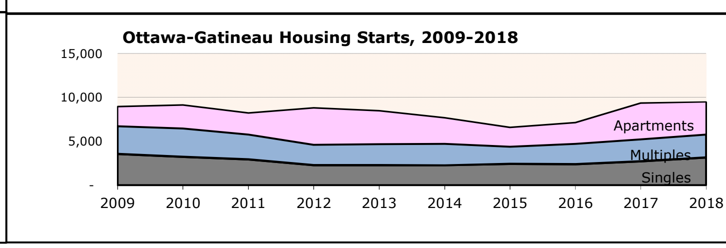


TABLE 11
NEW HOUSING IN MUNICIPALITIES IN GREATER OTTAWA-GATINEAU AREA, 2010-18

	2010	2011	2012	2013	2014	2015	2016	2017	2018	% chng. 2017-18
OTTAWA	**6,046**	**5,521**	**5,730**	**6,284**	**5,537**	**4,696**	**5,019**	**6,849**	**6,950**	**1.5%**
Ottawa, Vanier, Rockcliffe (former)	1,280	952	2,057	2,262	1,244	1,406	979	2,363	1,971	-16.6%
Nepean (former)	1,525	1,541	1,093	965	1,292	900	1,116	958	806	-15.9%
Gloucester (former)	685	752	660	959	797	770	736	1,092	1,173	7.4%
Kanata (former)	974	588	761	1,124	1,225	860	944	649	902	39.0%
Cumberland (former)	783	896	685	440	549	311	611	760	731	-3.8%
Goulbourn (former)	409	428	214	253	75	315	413	811	1,079	33.0%
Osgoode (former)	177	183	89	73	104	60	69	57	85	49.1%
Rideau (former)	42	43	23	37	36	33	102	263	293	11.4%
West Carleton (former)	171	138	148	171	215	41	49	56	107	91.1%
Inside the Greenbelt	1,518	1,130	2,224	2,336	1,488	1,447	1,052	2,776	2,069	-25.5%
Outside the Greenbelt	4,528	4,391	3,506	3,948	4,049	3,249	3,967	4,073	4,881	19.8%
Prescott & Russell (part)	**724**	**532**	**502**	**392**	**299**	**335**	**391**	**560**	**483**	**-13.8%**
Alfred and Plantagenet, TP†	73	99	91	55	29	28	7	35	17	-51.4%
Casselman, Vlg.†	26	10	2	2	1	5	20	14	27	92.9%
Clarence-Rockland, C (part of ON CMA)	323	213	190	153	112	93	112	230	181	-21.3%
Russell, TP (part of ON CMA)	77	60	100	123	113	183	167	218	211	-3.2%
The Nation Municipality	225	150	119	59	44	26	85	63	47	-25.4%
Leeds & Grenville (part)	**182**	**183**	**262**	**116**	**103**	**93**	**169**	**175**	**218**	**24.6%**
Merrickville-Wolford, Vlg.*	6	7	13	11	1	6	19	15	21	40.0%
North Grenville, TP	176	176	249	105	102	87	150	160	197	23.1%
Stormont, Dundas & Glengarry (part)	**56**	**59**	**26**	**47**	**24**	**23**	**24**	**31**	**42**	**35.5%**
North Dundas, TP†	56	59	26	47	24	23	24	31	42	35.5%
Lanark (part)	**252**	**265**	**220**	**260**	**230**	**294**	**275**	**370**	**678**	**83.2%**
Beckwith, TP	59	66	64	71	66	69	71	79	109	38.0%
Carleton Place, Tn.	73	61	77	51	66	105	60	123	380	208.9%
Mississippi Mills, Tn.	98	114	60	115	68	107	125	151	189	25.2%
Montague, TP†	22	24	19	23	30	13	19	17	0	-100.0%
Renfrew (part)	**99**	**117**	**114**	**188**	**82**	**95**	**72**	**92**	**81**	**-12.0%**
Arnprior, Tn.	71	92	73	173	66	76	58	70	66	-5.7%
McNab/Braeside, TP	28	25	41	15	16	19	14	22	15	-31.8%
GATINEAU	**2,287**	**2,103**	**2,354**	**1,571**	**1,572**	**1,312**	**1,390**	**1,610**	**1,630**	**1.2%**
Hull (former)	186	208	545	275	246	106	263	247	325	31.6%
Aylmer (former)	1,064	1,069	808	745	768	581	802	891	930	4.4%
Gatineau (former)	648	618	728	467	520	464	325	377	275	-27.1%
Buckingham (former)	193	84	174	42	22	127	0	39	72	84.6%
Masson-Angers (former)	196	124	99	42	16	34	0	56	28	-50.0%
Qué. part CMA Outside of Gatineau	**419**	**370**	**502**	**423**	**331**	**272**	**346**	**368**	**388**	**5.4%**
Cantley	132	93	107	96	87	60	64	70	65	-7.1%
Chelsea	20	23	21	23	21	19	33	53	62	17.0%
La Pêche	56	54	62	31	40	35	48	60	62	3.3%
L'Ange-Gardien	45	26	56	36	45	35	39	37	35	-5.4%
Pontiac	41	16	36	16	24	19	15	16	20	25.0%
Val-des-Monts	105	105	102	134	98	95	101	96	134	39.6%
Denholm	1	1	8	6	0	0	3	1	2	100.0%
N.-D.-de-la-Salette (part of CMA in 2011)	1	2	0	3	9	0	7	2	2	0.0%
Mayo (part of CMA in 2011)	9	11	6	4	1	7	8	5	5	0.0%
Bowman (part of CMA in 2011)	n.d.	3	3	2	2	2	5	0	1	0.0%
Val-des-Bois (part of CMA in 2011)	5	3	4	4	4	0	0	0	0	0.0%
Lochaber (part of CMA in 2016)	n.d.	n.d.	n.d.	n.d.	0	0	0	0	2	0.0%
Lochaber-Ouest (part of CMA in 2016)	3	15	17	8	n.d.	n.d.	4	3	0	-100.0%
Thurso (part of CMA in 2016)	1	18	80	60	n.d.	n.d.	19	25	9	-64.0%
GREATER OTTAWA-GATINEAU AREA	**10,065**	**9,150**	**9,710**	**9,281**	**8,178**	**7,120**	**7,686**	**10,055**	**10,470**	**4.1%**
Ottawa-Gatineau CMA	**9,137**	**8,267**	**8,876**	**8,554**	**7,665**	**6,556**	**7,184**	**9,435**	**9,557**	**1.3%**
Ontario portion of the CMA	**6,446**	**5,794**	**6,020**	**6,560**	**5,762**	**4,972**	**5,448**	**7,457**	**7,539**	**1.1%**
Quebec portion of the CMA	**2,691**	**2,473**	**2,856**	**1,994**	**1,903**	**1,584**	**1,736**	**1,978**	**2,018**	**2.0%**
OMATO	**1,313**	**1,156**	**1,124**	**1,003**	**738**	**840**	**931**	**1,228**	**1,502**	**22.3%**

*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, 2014-18

OP Target Area (Designation)	2014				2015				2016				2017				2018			
	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	237	**237**	0	0	311	**311**	0	0	211	**211**	0	0	7	**7**	0	0	72	**72**
Mixed-Use Centres																				
Inside Greenbelt	0	0	451	451	9	0	338	347	0	0	562	562	0	3	237	240	3	0	304	307
Outside Greenbelt	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	451	**451**	9	0	338	**347**	0	0	562	**562**	0	3	237	**240**	3	0	304	**307**
Town Centres	0	0	268	**268**	0	18	0	**18**	0	8	105	**113**	0	18	1	**19**	0	0	649	**649**
Mainstreets																				
Inside Greenbelt	0	0	677	677	-1	0	888	887	1	6	281	288	2	0	362	364	0	0	663	663
Outside Greenbelt	0	0	0	0	0	0	48	48	0	0	0	0	0	0	1	1	0	0	0	0
Total	0	0	677	**677**	-1	0	936	**935**	1	6	281	**288**	2	0	363	**365**	0	0	663	**663**
Rapid Transit Stations																				
Inside Greenbelt	43	20	1422	1,485	55	3	1328	1,386	47	5	1141	1,193	57	14	432	503	49	0	1494	1,543
Outside Greenbelt	25	39	306	370	8	27	36	71	0	58	184	242	0	22	34	56	0	4	560	564
Total	68	59	1,728	**1,855**	63	30	1,364	**1,457**	47	63	1,325	**1,435**	57	36	466	**559**	49	4	2,054	**2,107**
Future Rapid Transit Stations																				
Inside Greenbelt	3	20	4	27	8	0	32	40	4	0	3	7	6	3	4	13	0	0	0	0
Outside Greenbelt	0	0	0	0	6	18	0	24	0	8	0	8	0	18	1	19	2	0	2	4
Total	3	20	4	**27**	14	18	32	**64**	4	8	3	**15**	6	21	5	**32**	2	0	2	**4**
Total Units in Designated Areas**	71	98	2,328	**2,497**	77	48	1,743	**1,868**	52	77	1,609	**1,738**	65	57	826	**948**	51	4	2,362	**2,417**
Total New Units	2,215	2,066	3,633	7,914	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
Demolitions	209	30	67	306	235	3	50	288	223	84	114	421	238	32	60	330	283	77	90	450
Total Net New Units	2,006	2,036	3,566	7,608	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**
% Share in Designated Areas	3.5%	4.8%	65.3%	**32.8%**	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%**
Total New Units Urban	1,947	2,066	3,618	7,631	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
Demolitions -Urban	180	30	67	277	180	3	50	233	176	84	114	374	201	32	60	293	207	77	90	374
Total Net New Units Urban	1,767	2,036	3,551	7,354	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**
% Share of Urban in Designated Areas	4.0%	4.8%	65.6%	**34.0%**	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%**

** 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	838	838
Mixed-Use Centres	12	3	1,892	1,907
Town Centres	0	44	1,023	1,067
Mainstreets	2	6	2,920	2,928
Rapid Transit Stations	284	192	6,937	7,413
Future Rapid Transit Stations	29	67	46	142
TOTAL Units in OP Target Areas**	**316**	**284**	**8,868**	**9,468**
TOTAL Urban Units - City of Ottawa	**8,451**	**8,320**	**15,285**	**32,056**
% Share in OP Target Areas	**3.7%**	**3.4%**	**58.0%**	**29.5%**

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

OP Target Areas: Last 10 Years	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	TOTAL
Central Area	166	47	258	374	338	237	311	211	7	72	2,021
Mixed-Use Centres	35	110	183	326	70	451	347	562	240	307	2,631
Town Centres	0	146	165	221	173	268	18	113	19	649	1,772
Mainstreets	286	483	467	287	270	677	935	288	365	663	4,721
Rapid Transit Stations	345	891	1,190	1,291	1,275	1,835	1,457	1,435	559	2,107	12,385
Future Rapid Transit Stations	n/a	26	81	224	12	27	64	15	32	4	485
TOTAL	**832**	**1,703**	**2,344**	**2,723**	**2,138**	**3,495**	**3,132**	**2,624**	**1,222**	**3,802**	**24,015**

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 13: RESIDENTIAL INTENSIFICATION, 2014-2018

Ward No.	Ward Name	Intensification Units 2014	2015	2016	2017	2018	2014-2018	2014-2018 Share of Intensification
12	Rideau-Vanier	481	419	287	277	317	1,781	11%
13	Rideau-Rockcliffe	240	326	340	181	281	1,368	8%
14	Somerset	360	829	481	47	409	2,126	13%
15	Kitchissippi	600	401	639	150	973	2,763	17%
17	Capital	250	87	151	191	782	1,461	9%
	TOTAL - CENTRAL	**1,931**	**2,062**	**1,898**	**846**	**2,762**	**9,499**	**58%**
7	Bay	26	36	16	43	54	175	1%
8	College	261	55	46	46	38	446	3%
9	Knoxdale-Merivale	396	6	9	147	47	605	4%
10	Gloucester-Southgate	29	128	20	16	56	249	2%
11	Beacon Hill-Cyrville	50	10	57	231	8	356	2%
16	River	41	17	54	62	74	248	2%
18	Alta Vista	21	22	26	220	30	319	2%
	TOTAL - INNER URBAN	**824**	**274**	**228**	**765**	**307**	**2,398**	**15%**
1	Orléans	106	30	23	38	208	405	2%
2	Innes	66	90	41	44	18	259	2%
3	Barrhaven	636	101	297	124	246	1,404	9%
4	Kanata North	269	47	105	144	318	883	5%
6	Stittsville	13	3	196	242	92	546	3%
19	Cumberland	16	8	0	30	149	203	1%
22	Gloucester-South Nepean	55	72	15	4	336	482	3%
23	Kanata South	81	66	65	28	6	246	2%
	TOTAL - SUBURBAN	**1,242**	**417**	**742**	**654**	**1,373**	**4,428**	**27%**
Intensification Units Inside Greenbelt		**2,755**	**2,336**	**2,126**	**1,611**	**3,069**	**11,897**	**73%**
Intensification Units Outside Greenbelt		**1,242**	**417**	**742**	**654**	**1,373**	**4,428**	**27%**
Total Intensification Units		**3,997**	**2,753**	**2,868**	**2,265**	**4,442**	**16,325**	**100%**
Total Urban Units		**7,393**	**4,760**	**6,304**	**5,799**	**8,051**	**32,307**	
% Intensification		**54.1%**	**57.8%**	**45.5%**	**39.1%**	**55.2%**	**50.5%**	
Official Plan 5 year Target		**38%**	**38%**	**38%**	**40%**	**40%**	**38%**	

Source: City of Ottawa, Building Permits

TABLE 14: NON-RESIDENTIAL INTENSIFICATION, 2014-2018

Area	Intensification Gross Floor Area (m^2) 2014	2015	2016	2017	2018	2014-2018	2014-2018 Share of Intensification
Inside Greenbelt	136,730	169,151	146,994	129,614	35,247	617,736	82%
Outside Greenbelt	48,726	14,571	44,474	14,529	9,904	132,204	18%
Total Urban Intensification GFA	185,456	183,722	191,468	144,143	45,151	749,940	
Total Urban GFA	216,270	303,054	248,944	170,033	65,015	1,003,316	
% Intensification of Urban GFA	**86%**	**61%**	**77%**	**85%**	**69%**	**75%**	
Transitway Stations	32,244	93,451	93,820	42,842	-8,075	254,282	
% Intensification at Transitway Stations of Urban GFA	**15%**	**31%**	**38%**	**25%**	**-12%**	**25%**	

Source: City of Ottawa, Building Permits

Notes:

1) Based on building permits issued from Jan 1 2012 to Dec 31 2016

2) Data are net of demolitions

TABLE 15
HOUSING STARTS BY TYPE, CITY OF OTTAWA, 1999-2018

YEAR	SINGLE	SEMI	ROW	APT.	TOTAL	SINGLE	SEMI	ROW	APT.
1999	2,716	253	1,187	169	4,325	62.8%	5.8%	27.4%	3.9%
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%**

Source: CMHC, Starts and Completions Survey

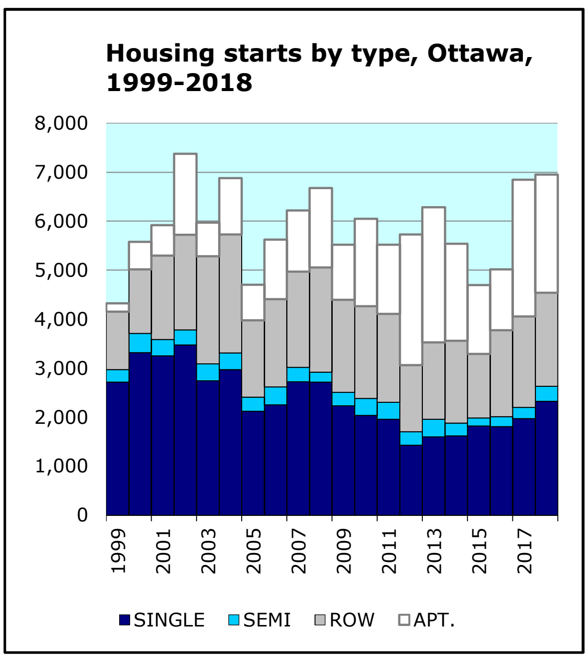


TABLE 16
HOUSING COMPLETIONS, CITY OF OTTAWA, 2010-2018, BY TYPE AND INTENDED MARKET

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**

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, 2005-18

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%**

Sources: CMHC, Housing Now Ottawa; 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, 2012-18

CMA		2012	2013	2014	2015	2016	2017	2018	2017-18 % change
Toronto	Sales	88,157	88,946	93,278	101,846	108,500	92,335	77,426	-16.1%
	Avg Price	$498,973	$524,089	$566,491	$622,046	$719,750	$822,603	$787,300	-4.3%
Montréal	Sales	40,089	36,491	35,764	37,935	39,750	44,448	46,703	5.1%
	Avg Price	$321,083	$323,967	$331,036	$337,487	$347,000	$364,510	$378,709	3.9%
Vancouver	Sales	25,445	28,985	33,693	43,145	40,000	35,994	24,619	-31.6%
	Avg Price	$730,063	$767,765	$812,653	$902,801	$1,007,000	$1,032,635	$1,050,885	1.8%
Ottawa-Gatineau	Sales	18,362	17,594	17,429	18,373	19,000	21,292	21,977	3.2%
	Avg Price	$328,656	$335,595	$339,726	$345,413	$345,445	$365,258	$377,792	3.4%
Ottawa*	Sales	14,497	14,049	14,094	14,842	15,100	17,083	17,476	2.3%
	Avg Price	$352,610	$358,876	$363,161	$369,477	$371,000	$392,474	$407,571	3.8%
Calgary	Sales	26,634	29,954	33,615	23,994	22,000	23,869	18,686	-21.7%
	Avg Price	$412,315	$437,036	$460,584	$453,814	$457,000	$466,259	$480,696	3.1%
Edmonton	Sales	17,641	19,552	19,857	18,227	16,700	16,441	15,519	-5.6%
	Avg Price	$334,318	$344,977	$362,657	$369,536	$365,000	$374,397	$369,607	-1.3%

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.

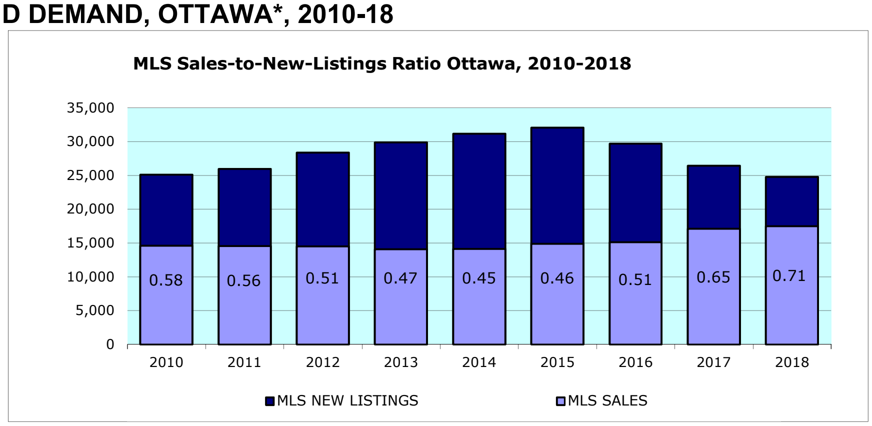
* This is the Ottawa Real Estate Board (OREB) area, which is significantly larger than the city of Ottawa

TABLE 19
RESALE MARKET - SUPPLY AND DEMAND, OTTAWA*, 2010-18

YEAR	MLS SALES	MLS NEW LISTINGS	SALES-TO-NEW-LISTINGS RATIO
2010	14,586	25,061	0.58
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**

Source: 2018 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.

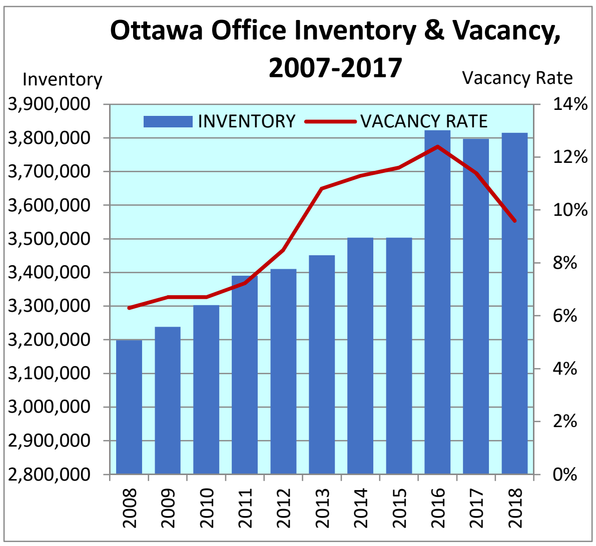
SUPPLY AND DEMAND

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, 2008-2018

YEAR	INVENTORY sq.ft.	INVENTORY sq.m.	VACANCY RATE (%)	NET ABSORPTION sq.ft.	NET ABSORPTION sq.m.	NET NEW SUPPLY sq.ft.	NET NEW SUPPLY sq.m.
2008	34,424,818	3,198,170	6.3%	10,722	996	0	0
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**

Source: Colliers International - Ottawa Office Market Report, Q4 2018; Inventory numbers may not add due to ongoing revisions from Colliers



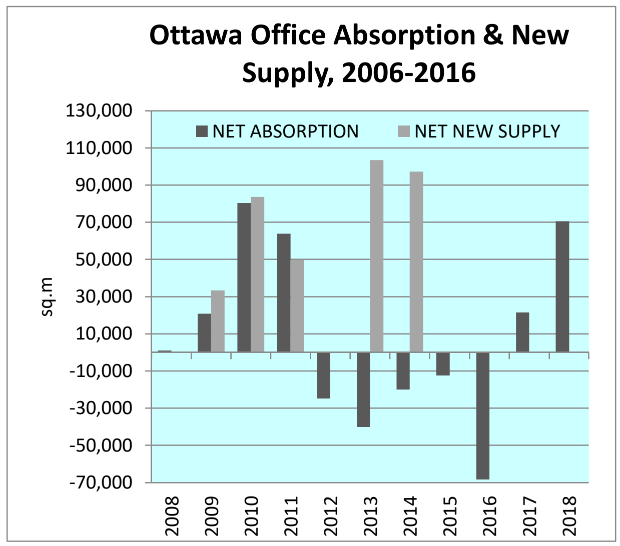
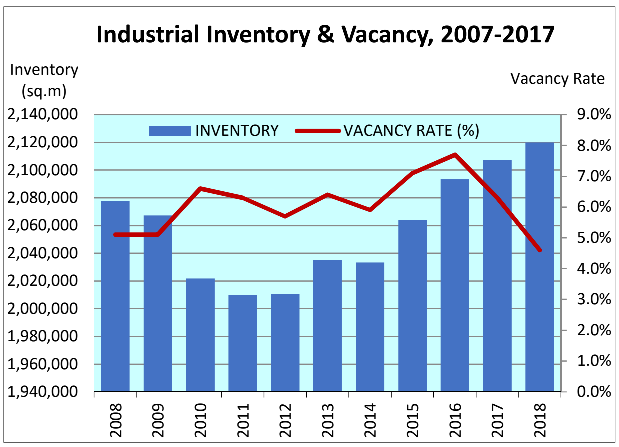


TABLE 21
INDUSTRIAL MARKET OVERVIEW, OTTAWA, 2008-2018

YEAR	INVENTORY		VACANCY	ABSORPTION		NEW SUPPLY	
	sq.ft.	sq.m.	RATE (%)	sq.ft.	sq.m.	sq.ft.	sq.m.
2008	22,364,490	2,077,661	5.1%	85,107	7,907	141,048	13,104
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**

Source: Cushman & Wakefield, Marketbeat Industrial Q4 2018, Ottawa



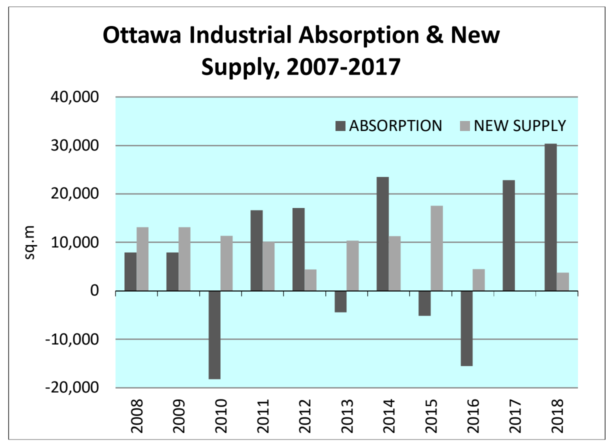


TABLE 22
OTTAWA RETAIL SPACE SUMMARY

FORMAT	Total Space, 2017			Total Space, 2018			Vacancy Rate	
	m^2	sq.ft.	Share	m^2	sq.ft.	Share	2017	2018
Power Centres	979,449	10,542,700	27.3%	995,931	10,720,109	27.5%	3.6%	3.2%
Other *	590,003	6,350,739	16.4%	601,142	6,470,643	16.6%	n/a	n/a
Traditional Mainstreets	481,888	5,186,997	13.4%	483,552	5,204,914	13.4%	n/a	n/a
Regional SC	383,960	4,132,914	10.7%	383,960	4,132,914	10.6%	3.6%	3.2%
Community SC	439,283	4,728,406	12.2%	439,283	4,728,406	12.1%	7.9%	7.0%
Neighbourhood SC	440,561	4,742,157	12.3%	440,750	4,744,189	12.2%	5.8%	5.2%
Mini-Plazas	225,627	2,428,626	6.3%	225,627	2,428,626	6.2%	5.8%	5.2%
Office Concourses	48,466	521,680	1.4%	48,466	521,680	1.3%	3.0%	4.7%
TOTAL	**3,589,236**	**38,634,219**	**100%**	**3,618,711**	**38,951,481**	**100%**	**5.5%**	**5.0%**

Source: City of Ottawa Building Permits; vacancy data from Cushman & Wakefield Ottawa Retail Report Q4 2018

* **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.