2016 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Infrastructure, and Economic Development

August 2017

Visit us:
ottawa.ca/planning

2016 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Infrastructure and Economic Development
Research and Forecasting Unit
August 2017

ANNUAL DEVELOPMENT REPORT 2016
TABLE OF CONTENTS

DATA TABLES

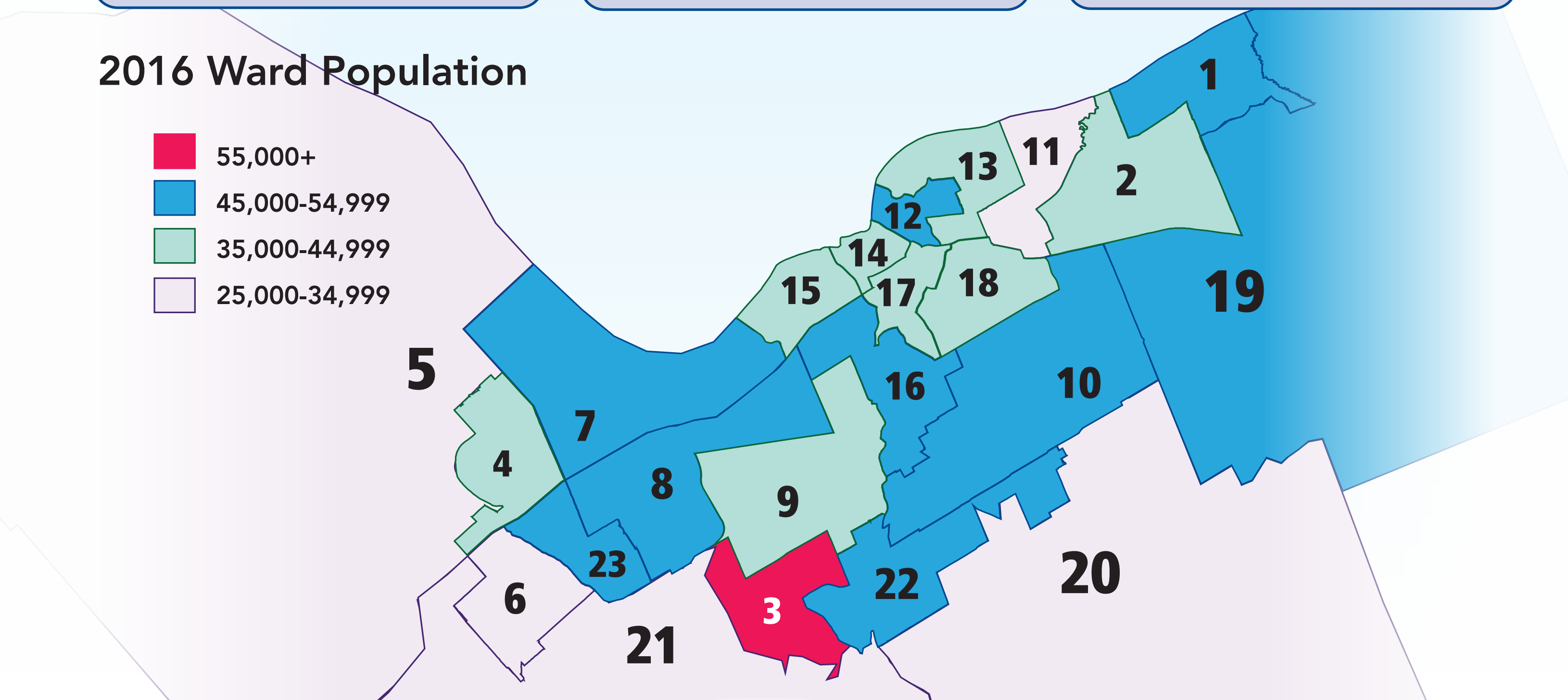
Maps

POPULATION & MIGRATION

Population (Dec 31, 2016)

1,457,464 ▲ 0.8%	1,351,135 ▲ 1.6%	968,580 ▲ 0.8%
Greater Ottawa-Gatineau Area	Ottawa-Gatineau CMA	City of Ottawa

2016 Ward Population



Net Migration

International	Interprovincial	Intraprovincial	Total
+3,096	+1,376	+1,355	5,827

(2014-2015, most recent data)

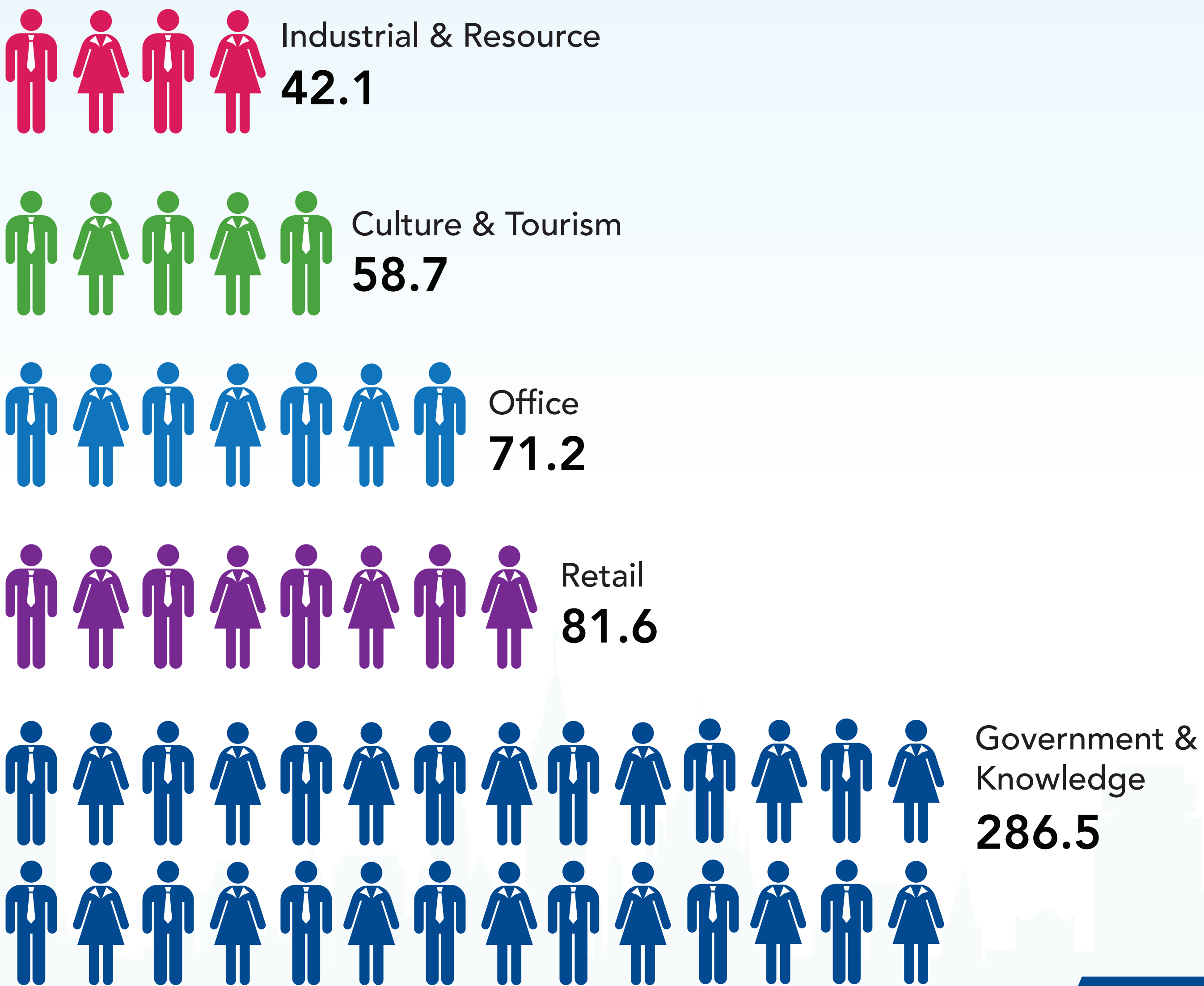
EMPLOYMENT AND ECONOMY

Ottawa

543,400 ↑ 2.3%
Employed residents

6.3% → no change
Unemployment

Employed Residents by Cluster ('000s)



HOUSING STARTS

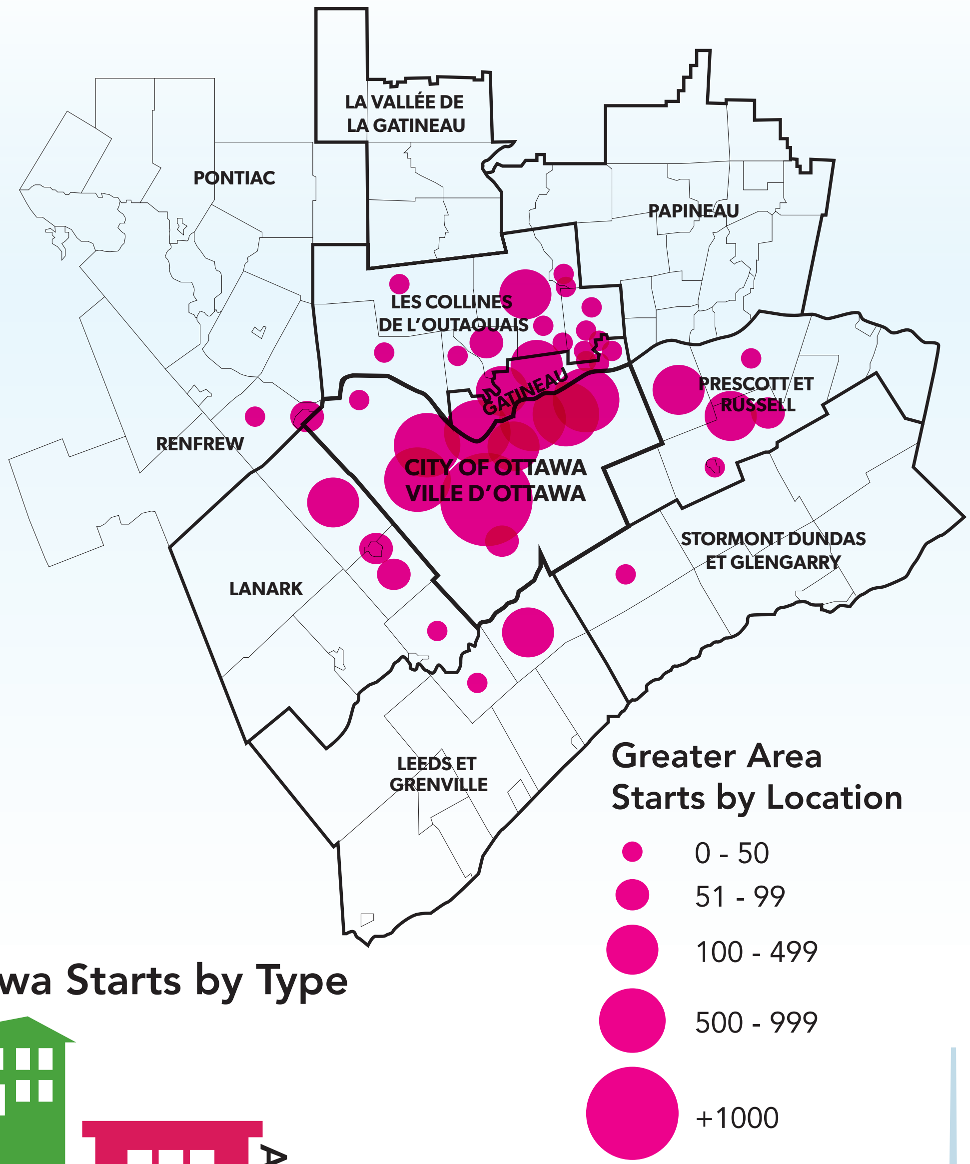
Ottawa

5,019 ▲ 6.9%
Housing starts

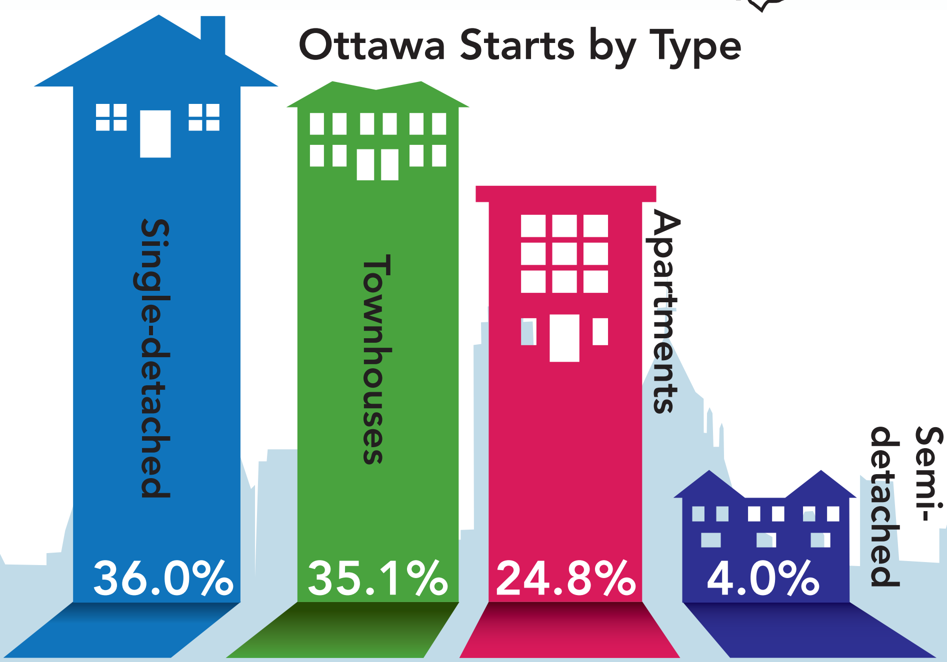
3.0% ▼ 0.4%
Rental vacancy rate

45.5% ▼ 12.3%
Urban intensification

$371,000 ▲ 1.7%
Average resale price (all units)



Ottawa Starts by Type



NON-RESIDENTIAL DEVELOPMENT

Office

Vacancy
12.4%
2016
11.6%
2015

Inventory
3.8 million m²
41.1 million ft²
9.0%

Retail

Vacancy
5.3%
2016
4.6%
2015

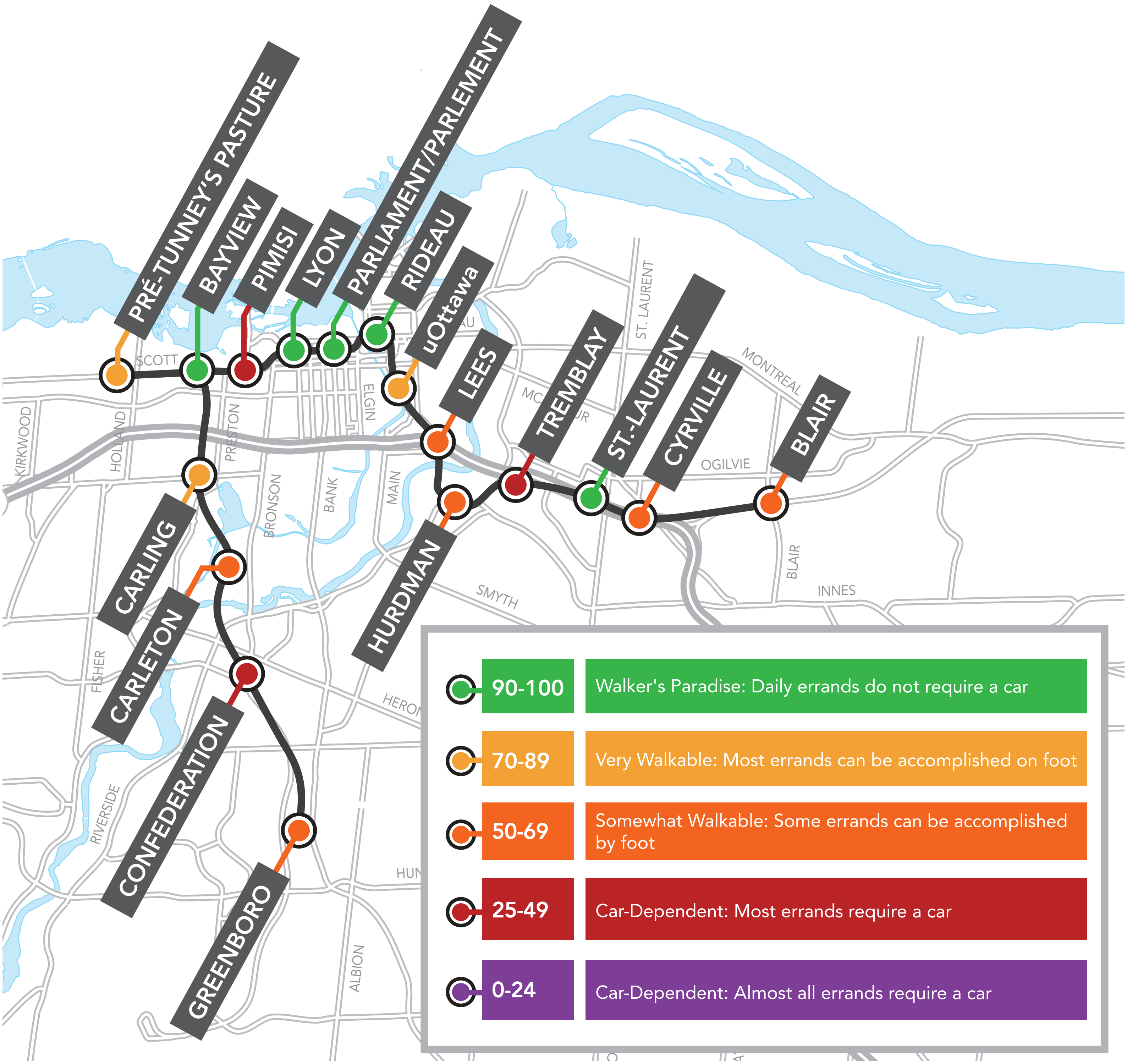
Inventory
3.5 million m²
38.1 million ft²
2.0%

Industrial

Vacancy
7.7%
2016
7.1%
2015

Inventory
2.0 million m²
41.1 million ft²
0.25%

WALK SCORE OF TRANSIT STATIONS



90-100	Walker's Paradise: Daily errands do not require a car
70-89	Very Walkable: Most errands can be accomplished on foot
50-69	Somewhat Walkable: Some errands can be accomplished by foot
25-49	Car-Dependent: Most errands require a car
0-24	Car-Dependent: Almost all errands require a car

2016 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

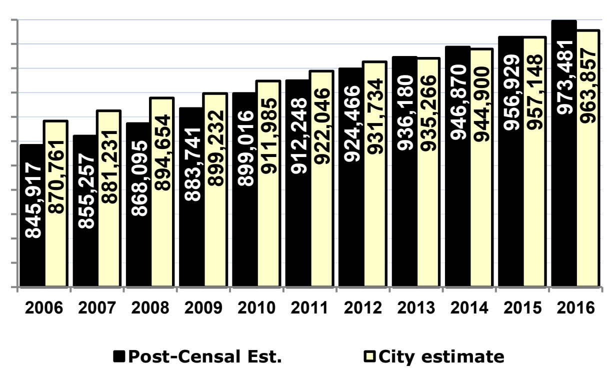
- City of Ottawa population, year-end 2016 (City estimate): 968,580, up 0.8% from 2015
- Greater Ottawa-Gatineau Area population, year-end 2016: 1,457,464, up 0.8% from 2015
- Net migration to Ottawa-Gatineau increased 117.0% from the year before

1.1 Population Growth

Major Cities

In 2016, the Ottawa-Gatineau Census Metropolitan Area (CMA) was the sixth largest in Canada, with 1,351,135 persons. Population growth during 2015-16 was 1.6%, slightly below the 1.8% 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, 2006-2016 (mid-year)
Source: Statistics Canada and City of Ottawa



Statistics Canada Post-Censal Estimate

Statistics Canada prepares annual mid-year population estimates for Ottawa and other centres. The current series is based on the 2011 Census adjusted for undercounting (people missed in the Census). To this base each year births and net in-migration are added and deaths are subtracted. Estimates undergo two cycles of revision before a final estimate is arrived at.

[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*.

Statistics Canada's preliminary mid-year 2016 post-censal population estimate for Ottawa was 973,481 (Table 1).

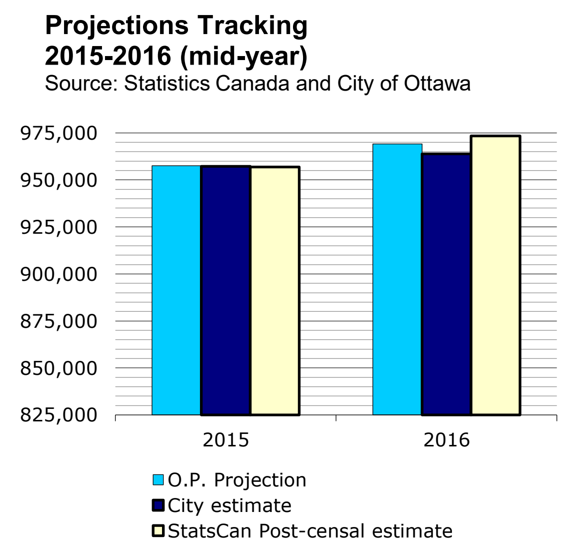
2016 Census

In February, 2017 Statistics Canada released the population and dwelling counts data from the 2016 Census. This population figure does not include the population undercoverage, being those persons not enumerated on Census Day for a variety of reasons. The undercoverage will eventually be estimated and this will increase the population figure through Statistics Canada's Post-Censal Estimates for 2016.

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 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 2016 population of 963,857 and a year-end 2016 population of 968,580, a 0.8% increase from 2015 (Table 3).



Projections Tracking

Population projections in the Official Plan[2] (OP) project Ottawa's population at 969,066 in mid-2016. The OP projection continues to slightly exceed city actual estimates, being 5,209 (0.5%) more than the 2016 city estimate based on building permits. The OP mid-year 2016 projection is 4,415 (0.5%) less than Statistics Canada's 2016 post-censal estimate.

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

Summary

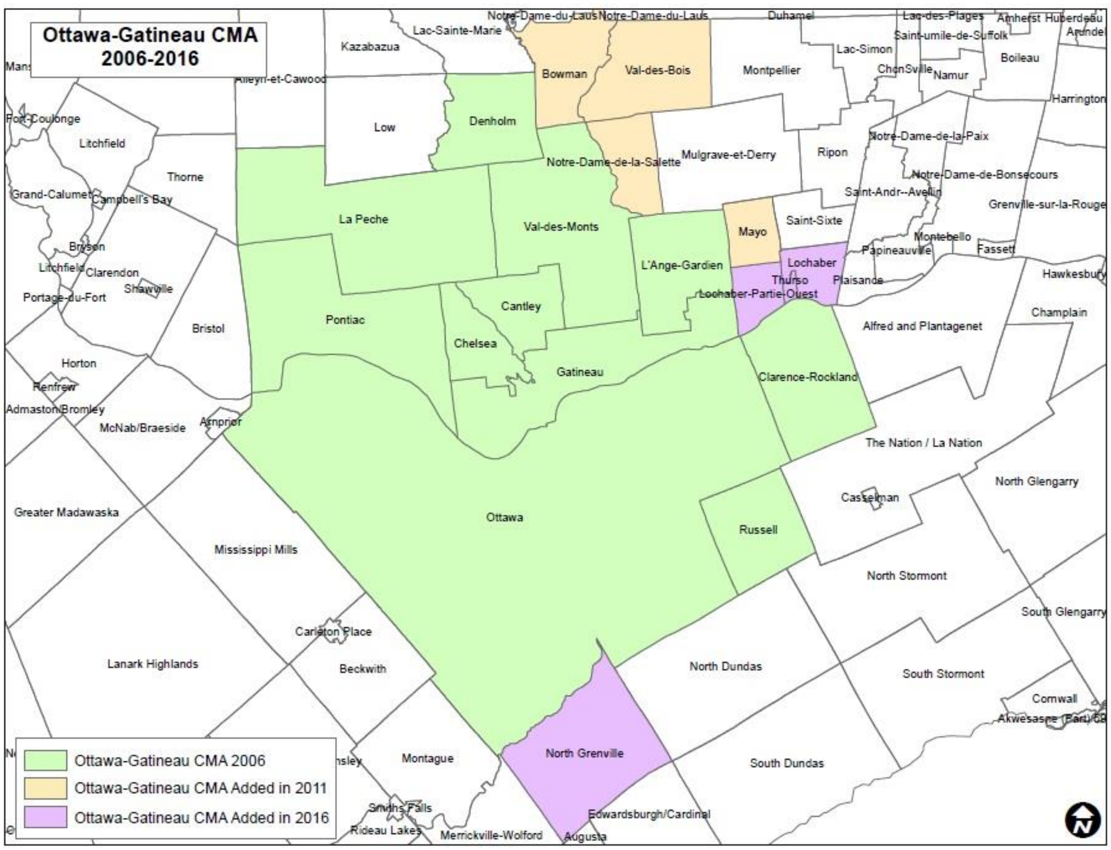
There is a range of population figures for the city of Ottawa in 2016 depending on source:

City of Ottawa Population by Source	mid-2016	year-end 2016
StatsCan Preliminary Post-2011 Censal Estimate	973,481	n/a
2016 Census without undercount	934,243	n/a
2016 Census with previous undercount	964,793	n/a
Official Plan Projection	969,066	975,008
City Estimate of actual population	963,857	968,580

Source: Statistics Canada; City of Ottawa

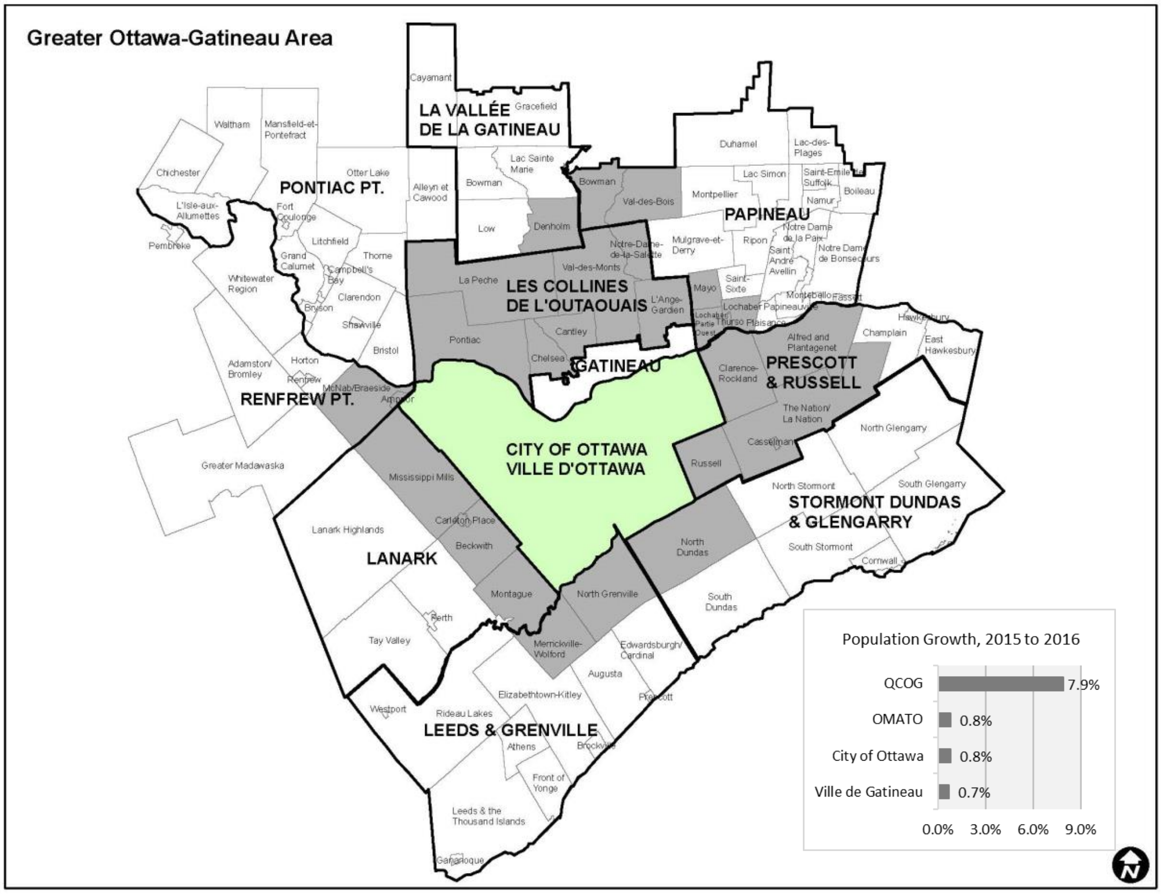
1.2 Population Distribution & Growth in the Greater Ottawa-Gatineau Area

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 1,457,464 people in the Greater Ottawa-Gatineau Area in 2016, with the city of Ottawa having the bulk of the region's population followed by the Ville de Gatineau, OMATO 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 at least 25% of their work force employed in Ottawa.

Ottawa

Within Ottawa, the strongest population growth in 2016 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 2016 the share was 55.0% compared to 55.2% a year earlier. Downtown's[4] remained at 10.6% from 2015. The suburban centres increased to 35.3% of the population from 35.0%, while the rural area was 9.7% compared to 9.8% in 2015 (Table 3).

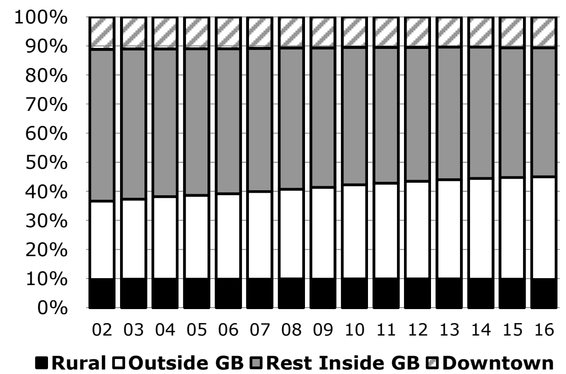
In the suburban centres, population grew 1.6% to an estimated 341,745 people, down slightly from 2.1% in 2015. Suburban households increased by 2.2%, indicating a decline in average household size. The population of Downtown was estimated at 102,692, a 1.0% increase. Downtown households increased by 1.6%. Areas inside the Greenbelt outside of Downtown had an estimated

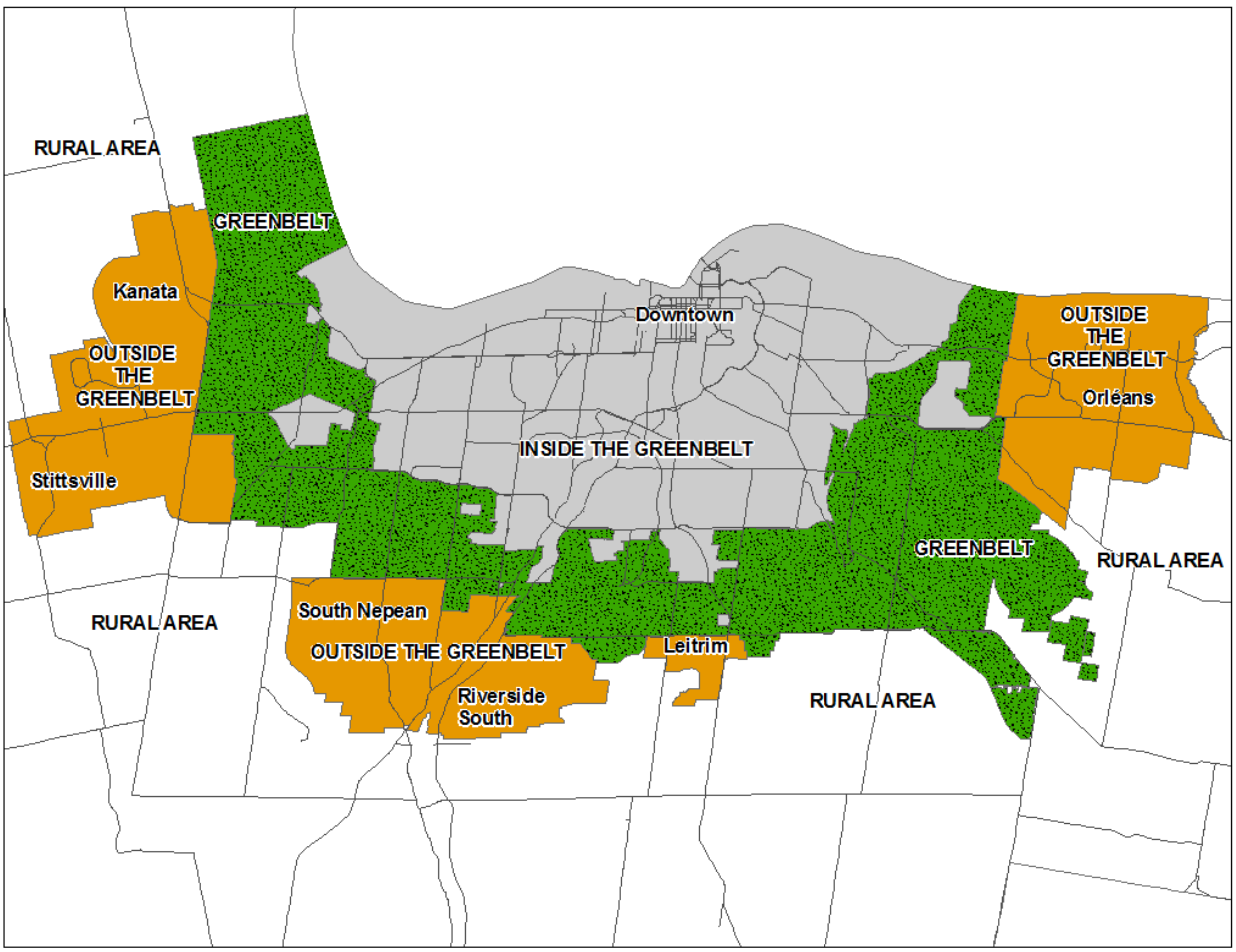
[4] "**Downtown**" refers to the Central Area and Inner Area (see map attached to Table 3).

population of 429,836, 0.3% higher than in 2015. In the rural area the population reached 94,307, up 0.2% from 2015, while rural households increased 0.5%.

The largest portion of population growth in 2016 was in Kanata-Stittsville (27.8% of all growth), South Nepean (21.4%), Orléans (11.2%), Ottawa West (10.0%) and Central Area (7.0%). All areas in the city experienced a total household increase, but three areas had decreased in total population due to declining household sizes, being Cedarview, Bayshore and Rural Northwest (Table 3).

Distribution of population (%) 2002-2016
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 282,005 at the end of 2016, an increase of 0.7% from 2015 (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 281,781 at end of 2016. Statistics Canada's 2016 census pegs the population of the Ville de Gatineau at 276,245.

Quebec municipalities outside of Gatineau and within the CMA grew by an estimated 1.1% in 2016 to a total of 56,782. Cantley (+1.6%) and L'Ange-Gardien (+1.3%) were the only communities to grow faster than the average (Table 2).

Ontario Municipalities Adjacent to Ottawa (OMATO)

The City of Ottawa estimate for OMATO's 2016 year-end population is 166,803, a 0.9% increase from 2015. The five most populous OMATO municipalities were Clarence-Rockland (24,726, up 0.4% from 2015), Russell (16,973, up 2.6%), North Grenville (16,706, up 1.3%), Mississippi Mills (14,024, up 1.2%), and The Nation Municipality (12,462, up 0.3%) (Table 2).

1.3 Migration

Migration data for 2014-15 (the most recent available at the city level) shows the net number of people moving to the Ottawa was 5,827, a 9.0% increase from the year before. While Ottawa still saw positive net in-migration, with more people moving to than from the city, significant differences were a reduction of movers to Alberta and an increase in movers to British Columbia. The number of people moving to adjacent communicates also decreased (Tables 4 and 5).

International net migration dropped to 3,096 in 2014-15, a reduction of 727 persons from a year earlier. Intraprovincial net migration increased to 1,355 from 1,009, while interprovincial more than doubled from 516 to 1,376 (Table 4).

In 2014-2015, Ottawa continued the previous year's momentum and gained more people from adjacent municipalities (+449 people). However from 2010-2015 Ottawa lost 1,072 people to outlying regions, with the largest movements being 1,521 persons to Lanark County and 1,125 to Leeds-Grenville, both possibly due to retirees moving to cottage country. During the same period, Ottawa gained 1,683 persons from Gatineau (Table 6).

Major Cities

All six of Canada's major centres experienced strong net migration in 2015-2016. Ottawa-Gatineau had a 116.6% increase from 2014-2015 to reach 15,143 net migration. Toronto continued to attract the biggest share of the migrants at 82,959 people and also had the largest year-over-year increase of 149.1% (Table 7).

In terms of net migration per thousand population (table above), Calgary and Edmonton continued to be highest, followed by Toronto and Ottawa-Gatineau. Vancouver and Montréal showed the lowest rates.

NET MIGRATION PER 1,000 INHABITANTS, 2015-2016 (preliminary)

Source: Statistics Canada

CMA	
Edmonton	16.7
Calgary	15.7
Toronto	13.3
Ottawa-Gatineau	**11.2**
Vancouver	9.9
Montréal	6.6

2. Housing

HIGHLIGHTS

- Housing starts were up 6.9% in the city of Ottawa in 2016
- 36.0% of Ottawa starts were single-detached houses
- 24.8% of Ottawa starts were apartments
- Residential intensification decreased to 45.5% in 2016
- Rental vacancy rate decreased to 3.0% in 2016 from 3.4% in 2015

2.1 New Construction

In the city of Ottawa, housing starts totalled 5,019 units, a 6.9% increase from 2015. The larger Ottawa-Gatineau Census Metropolitan Area ranked sixth in absolute housing starts among Canada's six largest metropolitan areas in 2016 with 7,117 units. Vancouver had the largest year-over-year increase of 33.8%, followed by Ottawa with 8.6%. The rest of the six largest metropolitan areas all experienced a decline in total housing starts from 2015. Single-detached starts were lower than apartment starts in relative terms in all major centres except Ottawa-Gatineau (Table 10).

City of Ottawa and Ottawa-Gatineau CMA Housing Starts, 2016

Sources: CMHC

	Starts, 2016	% chg. 2015-16
City of Ottawa	5,019	6.9%
Ott-Gat CMA	7,117	8.6%

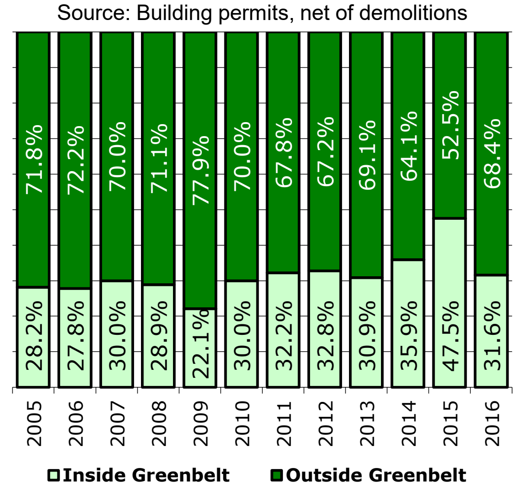
Ottawa Permits by Location

In 2016, there were 6,427 residential unit permits issued in the city of Ottawa, a 29.3% increase from 2015 (Table 12). The percentage of housing starts inside the Greenbelt dropped to 31.6% from the all-time high of 47.5% in 2015 (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.

Since 2014 singles and semis combined have averaged 28.5% of all units, lower than the projected 2014-2016[6] share of 33.6% and the long term 2014-2036 share of 36.0%.

New Housing Inside and Outside the Greenbelt, 2005-2016

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.

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

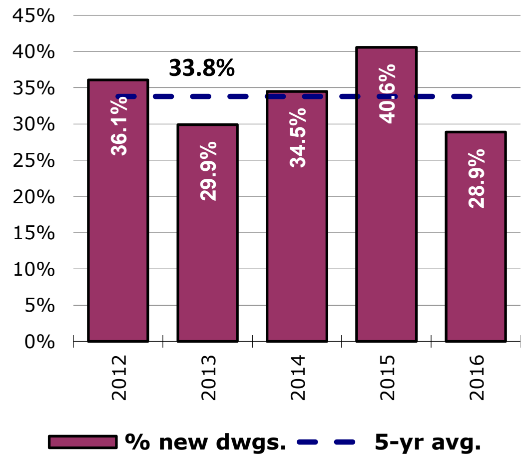
New Housing by Official Plan Designation

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 2016, 1,793 residential units were issued building permits in intensification target areas. This amounts to 28.9% of net new units issued permits in Ottawa. The top designated areas were existing Rapid Transit Stations (1,435), Mainstreets (288), Mixed-Use Centres (562) and the Central Area (211) (Table 12).

Target areas received 57.3% of all apartments, 7.8% of townhouses and 2.7% of single and semi-detached units in 2016 (Table 12). It should be noted that target areas contain only part of all intensification activity; in 2016 target areas accounted for 62.5% of total intensification, down from 69.9% in 2015.

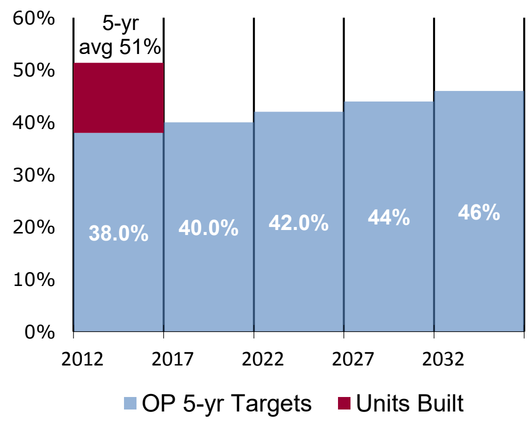
Percentage of new dwellings built in Ottawa intensification target areas, 2012-2016
Source: Building permits



Residential Intensification

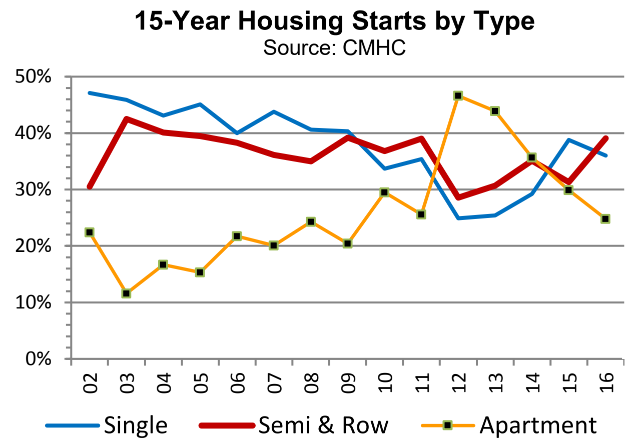
The Official Plan (OP) establishes an increasing residential intensification target to 2036. For the five-year period 2007-2011 the OP target was 36.0% of new units in urban and suburban areas combined, with actual achieved intensification averaging 39.3%. The next five-year period from 2012-2016 has an OP target of 38.0%. In 2016, a 45.5% intensification share was achieved, bringing the combined 2012-2016 average to 51.4% for the period (Table 13). The past five-year average is exceeding the Official Plan intensification target for the period and shows that the Official Plan is so far succeeding in its growth management approach.

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 2016 for the fifteenth year in a row. There were 1,809 single-detached starts, consistent with the 1,820 started in 2015. The share of single-detached starts accounted for 36.0% of all new starts, down from 38.8% in 2015 (Table 15).



The second most popular house form, with a 35.1% share, was townhome, with 1,764 units started in 2016, up from 1,308 units in 2015. Apartment units saw 1,244 units started in 2016 for a share of 24.8%, down from 29.9% in 2015. The freehold market completed 3,479 units and tracked closely to its five-year average of 3,382 annual completed units. Overall, apartment units had less completions, while townhome units remained steady and single-detached units slighty increased in numbers (Table 16).

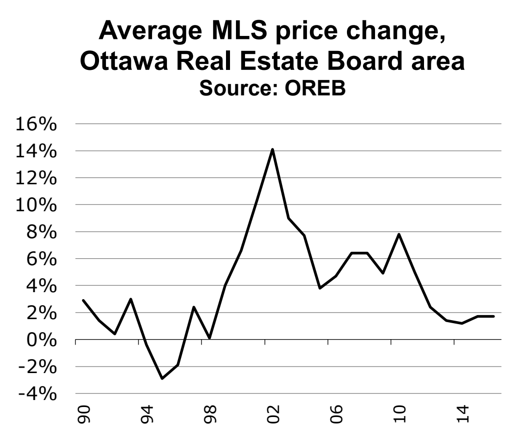
Ottawa New Single-Detached Prices

New single-detached home prices increased to $527,609 in 2016, an increase of 2.8% from last year. After factoring for inflation, the annual change was 1.5% (Table 17). Inflation is generally derived from the All-Items Consumer Price Index (CPI), which averaged 128.1 in 2016 (from a base of 100 in 2002). The annual 2016 inflation rate as measured by the CPI was 1.3%, up from 1.0% in 2015.

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 $371,000 in 2016, an annual increase of 1.7%, the same rate of increase from a year prior.



Sales Activity and Trends

2016 continued the trend of increasing MLS sales from 2015 in the larger OREB area. 2016 MLS sales of 15,100 units were up 1.7% from 2015 to 2016, but slower than the 5.3% rate of growth in between 2014 to 2015 (Table 19).

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

Major Cities

Similar to 2015, price increases in 2016 varied across the major cities. There were incremental increases in Montreal (+2.8%) Calgary (+0.7%) and Ottawa (+0.4%). Edmonton had a small decline of -1.2%, while Toronto and Vancouver had major increases of +15.7% and 11.5% respectively. (Table 18).

2016 AVG MLS® RESALE PRICE* & 2015-2016 % CHANGE

	Price	% Change
Vancouver	$1,007,000	+11.5%
Toronto	$719,750	+15.7%
Calgary	$457,000	+0.7%
Ottawa	**$371,000**	**+0.4%**
Edmonton	$365,000	-1.2%
Montréal	$347,000	+2.8%

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

2016 MLS® RESALE SALES* & 2015-2016 % CHANGE

	Sales	% Change
Toronto	108,500	+6.5%
Vancouver	40,000	-7.3%
Montréal	37,750	+4.8%
Calgary	22,000	-8.3%
Ottawa	**19,000**	**+3.4%**
Edmonton	16,700	-8.4%

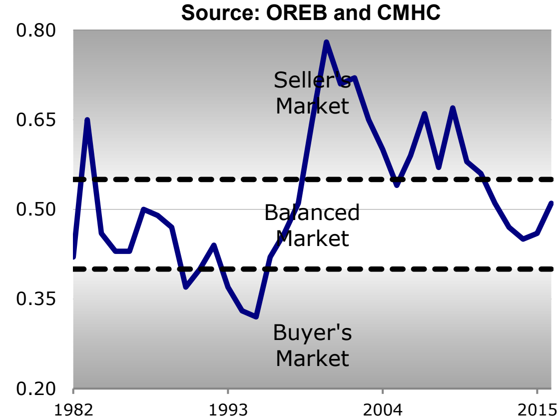
**Corresponds to Real Estate Board Territories*
Source: Canadian Real Estate Association and CMHC

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 the last five-years, Ottawa maintained a balanced market. The 0.51 ratio in 2016 is up 0.05 from 2015 and falls within the margins of a balanced market.

Ottawa Resale Market Supply and Demand: Sales to New Listings Ratio, 1982-2016
Source: OREB and CMHC



2.3 Rental Housing

RENTAL VACANCY RATES BY CMHC ZONE, 2016	
Western Ottawa Surrounding Areas	5.3%
Nepean	5.2%
Gloucester North/Orleans	4.0%
Hunt Club/South Keys	3.5%
Sandy Hill/Lowertown	3.4%
Glebe/Old Ottawa South	3.0%
City Average	**3.0%**
New Edinb./Manor Park/Overbrook	2.6%
Carlington/Iris	2.3%
Eastern Ottawa Surrounding Areas	2.2%
Alta Vista	1.9%
Downtown	1.9%
Westboro S/Hampton Pk/Britannia	1.9%
Chinatown/Hintonburg/Westboro N	1.8%
Vanier	supressed

Source: CMHC Rental Market Report Ottawa Fall 2016, Table 1.1.1

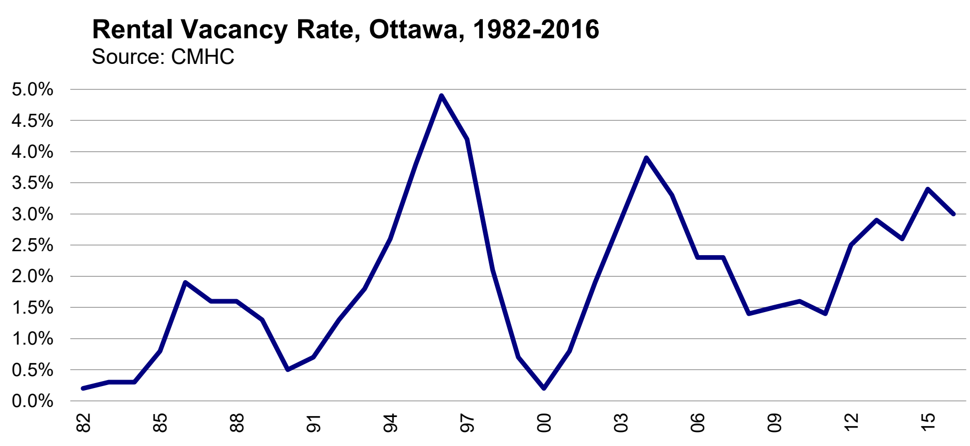
Supply

CMHC estimates there was an increase of 0.3% in the total number of rental purpose row and apartment units to 68,843 in 2016 from 68,616 in 2015, an increase of 439 apartment units and a decrease of 212 row units. In addition, the overall supply of condominium rental units increased 31.4% to 9,635 in 2016 from 7,331 in 2015. There was a decrease of 7.4% in the "secondary rental market" of rental single-detached homes, semi-detached homes, row houses and secondary dwelling units to 33,133 in 2016 from 35,766 in 2015.

Vacancy Rates

Ottawa's rental vacancy rate decreased to 3.0% in 2016 from 3.4% in 2015. The vacancy rate is lower for bachelor (2.4%) and one-bedroom units (2.8%) compared to two-bedroom units (3.0%). The decrease in vacancy is due to the supply of rental units (up 439 units) increasing slower than rental demand (+669 units).

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 vacancy rate of the previous two years now permit the consideration of conversions; however some caution should be exercised given the numbers of potential condominmum units in the approval pipeline and the relatively low number of net new purpose rental units that have been added in recent years.



Private Rental Prices

The average rent for a two-bedroom apartment in Ottawa in 2016 was $1,201, an increase of 2.3% from 2015 and above the 2015 provincial Rent Increase Guideline of 2.0%. The average rent of a two-bedroom apartment in Gatineau in 2016 was $763. The rent gap between Ottawa and Gatineau for a two-bedroom apartment is $438 and 57%, similar to the 56% in 2015.

3. Economy

HIGHLIGHTS

- The number of employed residents increased by 2.3% in Ottawa from 2015 to 2016
- The Government & Knowledge cluster was Ottawa's highest growth cluster in 2016, adding 19,800 jobs
- The Industrial & Resource cluster incurred the largest loss, with 6,400 fewer jobs in 2016

3.1 Labour Force

Employed Residents

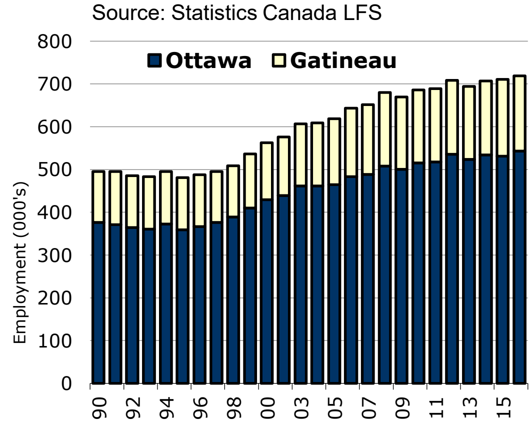
The Ottawa-Gatineau CMA gained 8,100 jobs in 2016. Gains were made in five of the nation's six largest metro areas, except for the City of Calgary, which faced a loss of 12,400 jobs (adjacent table). About 75% of the jobs in the Ottawa-Gatineau CMA have historically been in the city of Ottawa.

Employment Changes, Major Centres, 2015-2016
Source: Statistics Canada, Labour Force Survey, CANSIM 282-0131

CMA	Net job change
Vancouver	60,700
Toronto	38,300
Montréal	30,100
Ottawa-Gatineau	**8,100**
Edmonton	100
Calgary	-12,400

Statistics Canada's sample-based Labour Force Survey (LFS) shows the number of employed residents in the Ottawa CMA averaged 543,400 in 2016, up 2.3% or 12,300 employed residents from 2015[8]. The unemployment rate remained unchanged at 6.3%. The local unemployment rate remained lower than provincial (6.5%) and national (7.0%) rates (Table 8).

Total Employment, Ottawa and Gatineau, 1991-2016
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 Government & Knowledge cluster was Ottawa's highest growth cluster in 2016, adding 19,800 jobs. The other four clusters saw minimal loss: Industrial & Resource cluster (-6,400); Retail cluster (-600); Office cluster (-600); and Culture & Tourism cluster (-200).
(Table 9).

In 2016 private-sector employment represented 63.9% of all jobs in Ottawa, down from 65.2% in 2015 (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 2016 Ottawa's Advanced Technology sector lost an estimated 400 jobs after a larger loss of 13,000 in 2015. Losses were concentrated in Telecommunications Equipment (-1,500) and Microelectronics (-1,500). Software and Telecommunications gained 2,700 jobs, while Health Sciences remained relatively stable (Table 9).

3.2 Office, Industrial and Retail Markets

Office Market

Ottawa has a commercial office space inventory of just over 3.8 million m^2 (41.1 million ft^2). Ottawa's overall vacancy rate increased to 12.4% at the end of 2016 from 11.6% in 2015. Downtown Ottawa had the lowest vacancy rate of 10.9%, followed by Ottawa South/Airport area at 10.7%. Class A building vacancy rates increased by 2.4% to 12.1%, while Class B buildings decreased to 11.9% from 14.7%. Class C buildings had the highest vacancy rate of 16.8% given their age and the market preference for Class A or B buildings.

Industrial Market

Ottawa added 4,454 m^2 (47,944 ft^2) of industrial space in 2016. Over 60% of the industrial inventory is east of the Rideau River, which saw an increase in vacancy to 8.9% from 7.0%. West of the Rideau River, vacancies decreased, to 5.7% from 7.1%. Overall, the city saw the vacancy rate increase to 7.7% in 2016 from 7.1% in 2015. Ottawa is estimated to have over 2 million square metres (22.5 million square feet) of industrial floor area at the end of 2016 (Table 21).

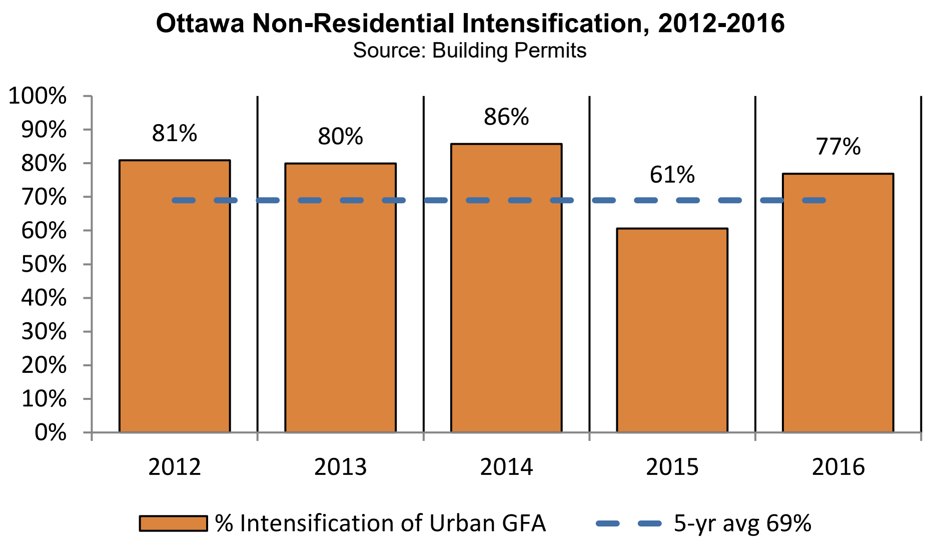
Retail Market

Retail space is categorized into several format categories. In 2016 all retail categories maintained similar shares of total floor area compared to 2015. Power Centres and standalone big box stores had the largest share of space, increasing to 27.0% of the total in 2016 from 26.6% in 2015.

Vacancy rates for most retail formats increased in 2016. The largest increases were in Community Shopping Centres, an increase to 7.2% in 2016 from 5.4% in 2015. Office Concourses experienced a substantial decline in vacancy rate, falling 5.0% to 4.9%. Compared to last year's vacancy increase in Power Centres due to Target store closures, Power Centres had a minor increase in vacancy rate of 0.1% to 3.7%. The city's overall retail vacancy rate increased to 5.3% in 2016 from 4.6% in 2015 (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 2016 approximately 191,000 m^2 (about 2 million ft^2) had been constructed within the developed area, representing an intensification rate of 77%. Over the past five-years, non-residential intensification averaged 69% of total built space (Table 14).



4. Transit Stations

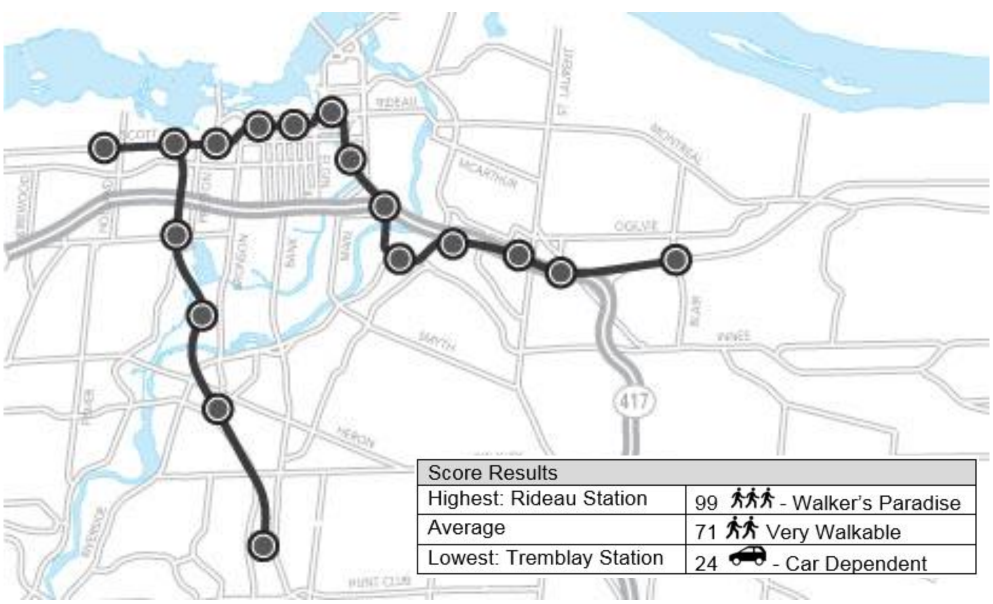
HIGHLIGHTS

- The average walk score of Ottawa's O-Train & Confederation Line Phase stations was 71.2 ,"very walkable"
- Rideau Station received the highest score of 99, "walker's paradise"
- Five stations scored within the 90s declaring them a "walker's paradise"

4.0 Walk Score of Transit Stations

It is important to note the level of suitable services around transit stations, as the Official Plan targets intensification in proximity to transit stations. Ottawa's O-Train and future Confederation Line Phase 1 transit stations' locations were analyzed using Walk Score[9]. Walk Score aims to promote walkable neighbourhoods and make it easy for people to evaluate walkability when choosing where to live. For each station, Walk Score analyzes hundreds of walking routes to nearby amenities that are contained within their database of services and businesses. Points are awarded based on the distance to amenities in each category. Amenities within a 5 minute walk are given maximum points. A decay function is used to give points to more distant amenities, with no points given after a 30 minute walk.

For all stations, the average walk score was 71.2 which is considered "very walkable" as most errands can be accomplished within walking distance. O-Train's Bayview Station and Confederation Line's Bayview, Lyon, Parliament, Rideau, and St.Laurent Stations all scored within the 90s declaring them a "walker's paradise" as daily errands do not require a car. A few of the stations' scores will increase as development is completed nearby the stations, such as Pimisi Station at Lebreton Flats providing more amenities. The Walk Score of transit stations is another tool that can be used to monitor how development proceeds surrounding transit stations.



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

Appendix: Data Tables

TABLE 1
POPULATION OF CANADA'S SIX LARGEST METROPOLITAN AREAS, 2012-2016

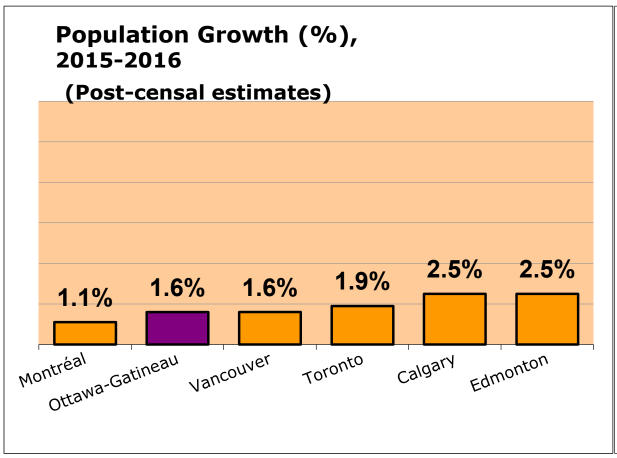
CMA *	POST-CENSAL ESTIMATES					*2015-2016*
	2012 (F)	2013 (F)	2014 (U)	2015 (P)	2016(P)	*% chg.*
Toronto	5,869,555	5,967,199	6,054,920	6,123,930	6,242,273	*1.9%*
Montréal	3,935,063	3,980,754	4,019,264	4,049,632	4,093,767	*1.1%*
Vancouver	2,411,326	2,444,333	2,481,896	2,507,420	2,548,740	*1.6%*
Calgary	1,304,711	1,353,931	1,401,747	1,433,572	1,469,341	*2.5%*
Ottawa-Gatineau	**1,288,665**	**1,303,068**	**1,316,813**	**1,329,807**	**1,351,135**	*1.6%*
Edmonton	1,238,949	1,282,237	1,327,531	1,359,158	1,392,594	*2.5%*
City of Ottawa**	924,466	936,180	946,870	956,929	973,481	*1.7%*

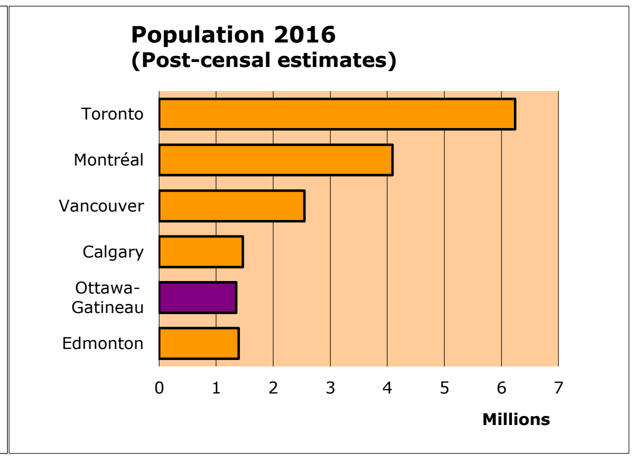
Source: Statistics Canada, Tables 051-0056 and 051-0062; estimates are for July 1 each year

* 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.

Note: (F) - Final; (U) - Updated; (P) - Preliminary





POST-CENSAL POPULATION ESTIMATES, OTTAWA-GATINEAU CMA

Statistics Canada Ottawa-Gatineau CMA	2012 (F)	2013 (F)	2014 (U)	2015 (P)	2016(P)	*2015-2016 % chg.*
Ontario part of CMA	966,617	978,490	989,927	1,001,023	1,018,741	*1.8%*
(%)	75.0%	75.1%	75.2%	75.3%	75.4%	
Quebec part of CMA	322,048	324,578	326,886	328,784	332,394	*1.1%*
(%)	25.0%	24.9%	24.8%	24.7%	24.6%	
Total CMA Population	**1,288,665**	**1,303,068**	**1,316,813**	**1,329,807**	**1,351,135**	***1.6%***

Note: (F) - Final; (U) - Updated; (P) - Preliminary

Source: Derived form CANSIM Table 051-0056, Statistics Canada.

TABLE 2
GREATER OTTAWA-GATINEAU AREA POPULATION & DWELLINGS

Municipality	2006 Census Population	2006 Census Occupied Dwellings	2011 Census Population	2011 Census Occupied Dwellings	2015 City Estimates Population	2015 City Estimates Occupied Dwellings	2016 City Estimates Population	2016 City Estimates Occupied Dwellings
Ottawa, C	**812,129**	**320,888**	**883,391**	**353,244**	**960,757**	**403,918**	**968,580**	**409,643**
Gatineau, V	**242,124**	**100,203**	**265,349**	**112,758**	**279,995**	**120,663**	**282,005**	**121,958**
Prescott & Russell (part)	**57,264**	**20,570**	**62,938**	**23,352**	**66,819**	**25,433**	**67,343**	**25,788**
Alfred and Plantagenet, TP	8,654	3,373	9,196	3,728	9,658	4,043	9,620	4,060
Casselman, Vlg.	3,294	1,243	3,642	1,438	3,561	1,456	3,559	1,468
Clarence-Rockland, C (part of ON CMA)	20,790	7,491	23,185	8,641	24,635	9,434	24,729	9,534
Russell, TP (part of ON CMA)	13,883	4,730	15,247	5,285	16,542	5,813	16,973	5,986
The Nation Municipality	10,643	3,733	11,668	4,260	12,423	4,687	12,462	4,740
Leeds & Grenville (part)	**17,065**	**6,357**	**17,935**	**4,422**	**19,412**	**7,505**	**19,651**	**7,630**
Merrickville-Wolford, Vlg.	2,867	1,115	2,850	4,422	2,924	1,160	2,946	1,172
North Grenville, TP (part of ON CMA)	14,198	5,242	15,085	6,819	16,488	6,345	16,706	6,458
Stormont, Dundas, Glengarry (pt)	**11,095**	**4,175**	**11,225**	**1,121**	**11,219**	**4,585**	**11,172**	**4,608**
North Dundas, TP	11,095	4,175	11,225	5,698	11,219	4,585	11,172	4,608
Lanark (part)	**31,169**	**11,571**	**32,663**	**9,690**	**35,061**	**13,739**	**35,425**	**14,006**
Beckwith, TP	6,387	2,296	6,986	2,571	7,569	2,839	7,698	2,901
Carleton Place, Tn.	9,453	3,702	9,809	3,973	10,246	4,265	10,364	4,344
Mississippi Mills, Tn.	11,734	4,375	12,385	4,836	13,859	5,228	14,024	5,339
Montague, TP	3,595	1,198	3,483	1,310	3,387	1,406	3,340	1,421
Renfrew (part)	**14,380**	**5,847**	**15,485**	**6,459**	**16,397**	**6,979**	**16,505**	**7,059**
Arnprior, Tn.	7,158	3,158	8,114	3,640	8,929	4,063	9,038	4,127
McNab/Braeside, TP	7,222	2,689	7,371	2,819	7,467	2,917	7,467	2,932
Québec part of CMA Outside Gatineau (QCOG)	**41,835**	**15,719**	**49,152**	**18,708**	**52,305**	**19,948**	**56,782**	**21,819**
Cantley, M	7,926	2,748	9,888	3,419	11,035	3,811	11,209	3,870
Chelsea, M	6,703	2,482	6,977	2,572	7,229	2,657	7,296	2,680
La Pêche, M	7,477	3,067	7,619	3,121	7,957	3,262	8,025	3,290
L'Ange-Gardien, M	4,348	1,492	5,051	1,775	5,418	1,938	5,487	1,971
Pontiac, M	5,238	2,003	5,681	2,147	5,959	2,229	6,011	2,243
Val-des-Monts, M	9,539	3,673	10,420	4,082	11,095	4,409	11,220	4,475
Denholm, M	604	254	572	247	578	254	577	255
Notre-Dame-de-la-Salette, M	774	335	757	332	772	342	776	345
Mayo, M	549	232	572	242	621	260	635	265
Bowman, M	676	296	677	302	681	308	683	311
Val-des-Bois, M	873	439	938	469	960	477	961	477
Lochaber, CT	497	183	409	155	302	153	301	153
Lochaber-Ouest, CT	514	193	646	240	745	278	750	280
Thurso, V	2,299	974	2,455	1,042	2,825	1,195	2,849	1,204
GREATER OTTAWA-GATINEAU AREA	**1,227,061**	**485,330**	**1,338,138**	**529,754**	**1,441,965**	**602,771**	**1,457,464**	**612,510**
Ottawa-Gatineau CMA	1,127,889	447,729	1,236,324	498,636	1,334,235	559,776	1,349,069	568,940
Ontario portion of the CMA	846,802	333,109	921,823	367,170	1,001,934	419,166	1,026,988	431,621
Québec portion of the CMA	277,777	113,270	310,991	130,029	328,428	138,985	338,787	143,777
OMATO	130,973	48,520	140,246	45,044	148,908	58,242	150,097	59,090

Sources: Statistics Canada, Census; estimates based on CMHC starts and municipal building permits **2015-16 City Estimates are year-end.**

City of Ottawa (2015 and 2016 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, 2015 and 2016 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 "Qué. Part of the CMA Outside Gatineau" or "Québec 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, 2012-2016

SUB-AREA	POPULATION							HOUSEHOLDS						
						Growth							Growth	
	2012	2013	2014	2015	2016	15-16	*% 15-16*	2012	2013	2014	2015	2016	15-16	*% 15-16*
Downtown*														
Central Area	10,763	10,637	11,012	12,026	12,570	544	*4.5%*	6,523	6,511	6,813	7,473	7,906	433	*5.8%*
Inner Area	87,112	87,114	88,006	89,605	90,122	517	*0.6%*	45,990	46,165	46,869	48,014	48,484	470	*1.0%*
Other Areas Inside Greenbelt														
Ottawa East	52,065	51,641	51,421	51,117	51,164	47	*0.1%*	25,595	25,542	25,614	25,641	25,885	244	*1.0%*
Beacon Hill	30,906	30,831	30,730	30,275	30,650	375	*1.2%*	14,038	14,100	14,149	14,001	14,343	342	*2.4%*
Alta Vista	75,624	75,430	75,385	74,998	75,059	61	*0.1%*	32,410	32,459	32,569	32,500	32,726	226	*0.7%*
Hunt Club	65,941	65,768	65,669	65,555	65,595	40	*0.1%*	26,351	26,353	26,397	26,451	26,577	126	*0.5%*
Merivale	77,408	77,303	77,431	77,531	77,769	238	*0.3%*	33,116	33,231	33,500	33,780	34,152	372	*1.1%*
Ottawa West	42,913	43,669	43,795	44,598	45,380	782	*1.8%*	20,153	20,585	20,671	21,191	21,685	494	*2.3%*
Bayshore	38,906	38,677	38,657	38,477	38,397	-80	*-0.2%*	17,713	17,660	17,729	17,698	17,732	34	*0.2%*
Cedarview	47,326	46,890	46,478	46,162	45,822	-340	*-0.7%*	18,567	18,562	18,589	18,634	18,699	65	*0.3%*
Urban Areas Outside Greenbelt														
Kanata-Stittsville	108,010	111,529	114,020	116,777	118,949	2,172	*1.9%*	39,326	40,832	41,963	43,174	44,266	1,092	*2.5%*
South Nepean	76,279	78,455	81,273	83,252	84,925	1,673	*2.0%*	27,776	28,717	29,845	30,674	31,438	764	*2.5%*
Riverside South	11,971	12,715	13,537	14,145	14,590	445	*3.1%*	4,264	4,595	4,903	5,126	5,273	147	*2.9%*
Leitrim	6,504	7,281	7,846	8,527	8,808	281	*3.3%*	2,057	2,344	2,560	2,806	2,907	101	*3.6%*
Orléans	110,865	112,152	112,628	113,595	114,473	878	*0.8%*	41,374	42,321	42,856	43,490	44,149	659	*1.5%*
Rural														
Rural Northeast	11,790	11,834	11,868	11,937	11,952	15	*0.1%*	4,226	4,248	4,267	4,296	4,309	13	*0.3%*
Rural Southeast	27,668	27,873	28,148	28,316	28,415	99	*0.3%*	9,645	9,725	9,828	9,892	9,940	48	*0.5%*
Rural Southwest	27,862	27,990	28,275	28,296	28,395	99	*0.3%*	9,701	9,779	9,969	10,014	10,088	74	*0.7%*
Rural Northwest	25,342	25,471	25,546	25,568	25,545	-23	*-0.1%*	8,908	8,975	9,028	9,063	9,086	23	*0.3%*
City of Ottawa	**935,255**	**943,260**	**951,725**	**960,757**	**968,580**	**7,823**	**0.8%**	**387,733**	**392,704**	**398,119**	**403,918**	**409,645**	**5,727**	**1.4%**
Downtown*	97,875	97,751	99,018	101,631	102,692	1,061	*1.0%*	52,513	52,676	53,682	55,487	56,390	903	*1.6%*
Other Inside Greenbelt	431,089	430,209	429,566	428,713	429,836	1,123	*0.3%*	187,943	188,492	189,218	189,896	191,799	1,903	*1.0%*
Total Inside GB	*528,964*	*527,960*	*528,584*	*530,344*	*532,528*	*2,184*	*0.4%*	*240,456*	*241,168*	*242,900*	*245,383*	*248,189*	*2,806*	*1.1%*
Urban Areas Outside GB	313,629	322,132	329,304	336,296	341,745	5,449	*1.6%*	114,797	118,809	122,127	125,270	128,033	2,763	*2.2%*
Rural	92,662	93,168	93,837	94,117	94,307	190	*0.2%*	32,480	32,727	33,092	33,265	33,423	158	*0.5%*
Downtown*	10.5%	10.4%	10.4%	10.6%	10.6%			13.5%	13.4%	13.5%	13.7%	13.8%		
Other Inside Greenbelt	46.1%	45.6%	45.1%	44.6%	44.4%			48.5%	48.0%	47.5%	47.0%	46.8%		
Total Inside GB	56.6%	56.0%	55.5%	55.2%	55.0%			62.0%	61.4%	61.0%	60.8%	60.6%		
Urban Areas Outside GB	33.5%	34.2%	34.6%	35.0%	35.3%			29.6%	30.3%	30.7%	31.0%	31.3%		
Rural	9.9%	9.9%	9.9%	9.8%	9.7%			8.4%	8.3%	8.3%	8.2%	8.2%		

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, Infrastructure and Economic Development

City of Ottawa Sub-Areas

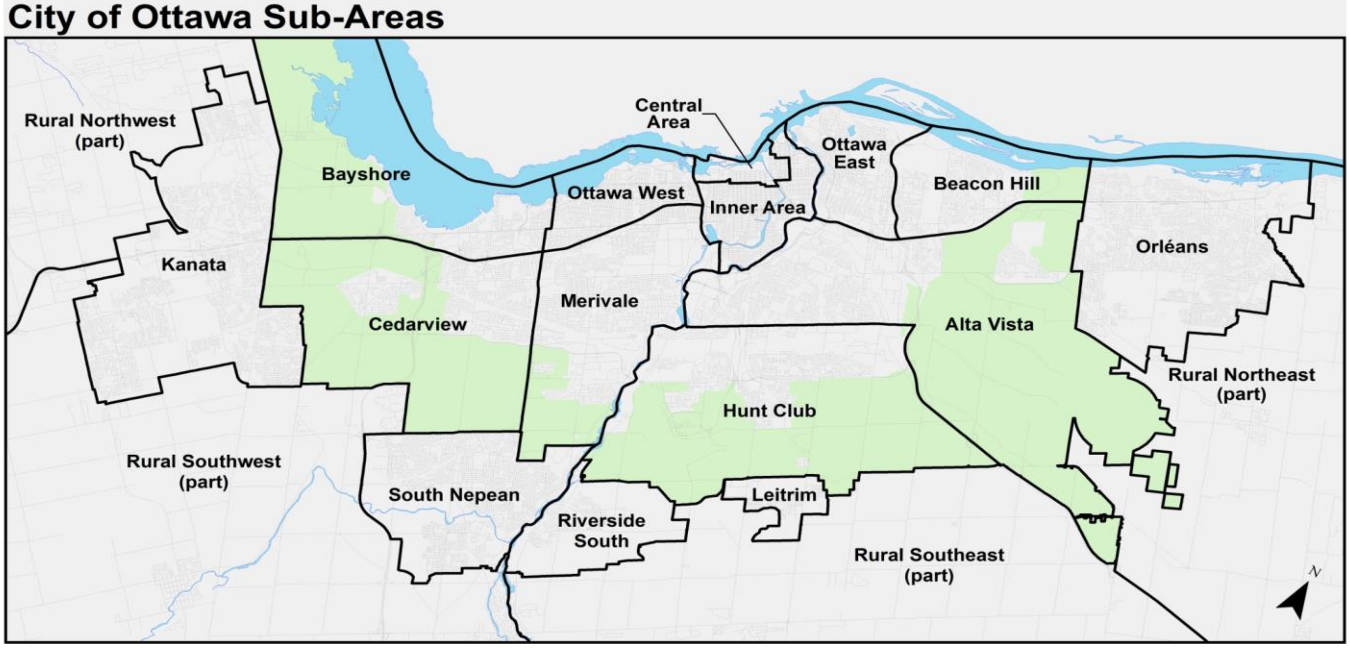


TABLE 4
NET MIGRATION TO THE CITY OF OTTAWA, 2010-2015

BY AGE GROUP

YEAR	AGE GROUP 0 - 17	18 - 24	25 - 44	45 - 64	65+	TOTAL
2010-11 (R)	1,614	2,347	3,939	-585	27	7,342
2011-12 (R)	1,511	1,880	3,191	-541	125	6,166
2012-13 (R)	1,468	2,002	2,318	-583	130	5,335
2013-14 (P)	1,117	1,819	2,511	-499	400	5,348
2014-15 (P)	**1,230**	**1,688**	**3,237**	**-415**	**87**	**5,827**
5-year total	**6,940**	**9,736**	**15,196**	**-2,623**	**769**	**30,018**
5 year %	**23.1%**	**32.4%**	**50.6%**	**-8.7%**	**2.6%**	**100.0%**

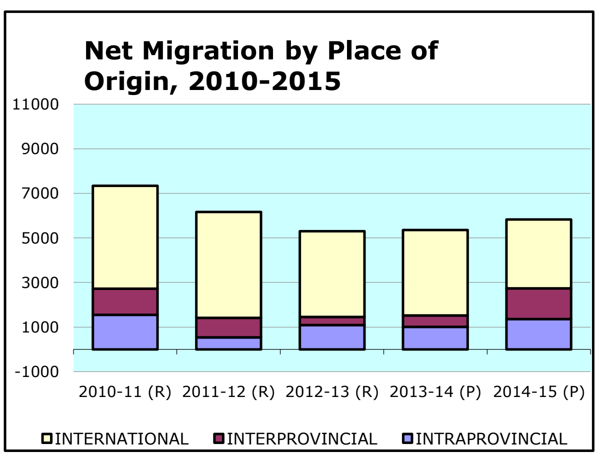
Source: Statistics Canada, Migration Estimates for Census Division 3506 (R) = revised

*Time periods represent approximately May to May (P) = preliminary

BY PLACE OF ORIGIN

	INTRAPROVINCIAL	INTERPROVINCIAL	INTERNATIONAL	TOTAL
In-Migrants				
2010-11 (R)	15,000	10,673	6,789	32,462
2011-12 (R)	15,509	11,154	7,124	33,787
2012-13 (R)	13,704	9,774	6,604	30,082
2013-14 (P)	14,090	10,258	6,626	30,974
2014-15 (P)	**15,004**	**11,132**	**5,969**	**32,105**
Out-Migrants				
2010-11 (R)	13,454	9,492	2,174	25,120
2011-12 (R)	14,968	10,286	2,367	27,621
2012-13 (R)	12,620	9,400	2,727	24,747
2013-14 (P)	13,081	9,742	2,803	25,626
2014-15 (P)	**13,649**	**9,756**	**2,873**	**26,278**
Net Migration				
2010-11 (R)	1,546	1,181	4,615	7,342
2011-12 (R)	541	868	4,757	6,166
2012-13 (R)	1,084	374	3,877	5,335
2013-14 (P)	1,009	516	3,823	5,348
2014-15 (P)	**1,355**	**1,376**	**3,096**	**5,827**

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



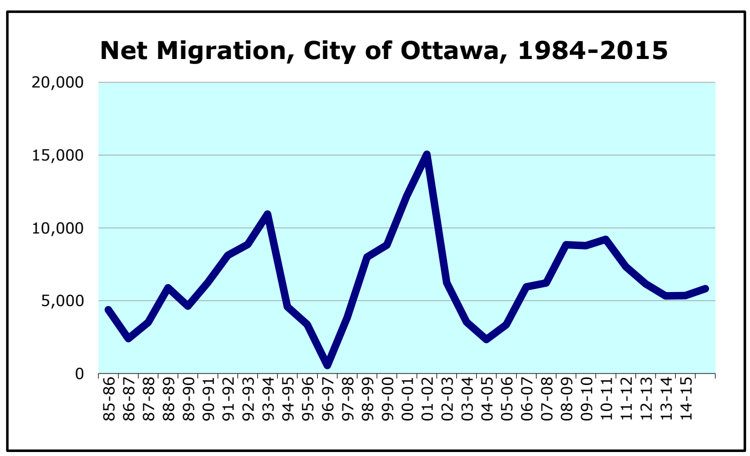


TABLE 5
NET MIGRATION IN-FLOWS AND OUT-FLOWS, CITY OF OTTAWA

2005-2015			
IN-FLOWS*		**OUT-FLOWS***	
Greater Montréal	8,727	British Columbia	-2,143
Rest of Ontario***	8,176	OMATO and QMAG	-4,800
Northern Ontario	6,119	Alberta	-5,023
Atlantic provinces	4,690		
Eastern Ontario	4,630		
Manitoba & Saskatchewan	2,598		
Rest of Québec**	2,512		
Gatineau	918		
Canadian North	386		
Greater Toronto Area	298		
TOTAL IN-FLOWS	**39,054**	**TOTAL OUT-FLOWS**	**-11,966**
		Net Canadian Migration 2005-2015	27,088
		Net International Migration	**41,825**
		Net Migration 2005-2015	**68,913**

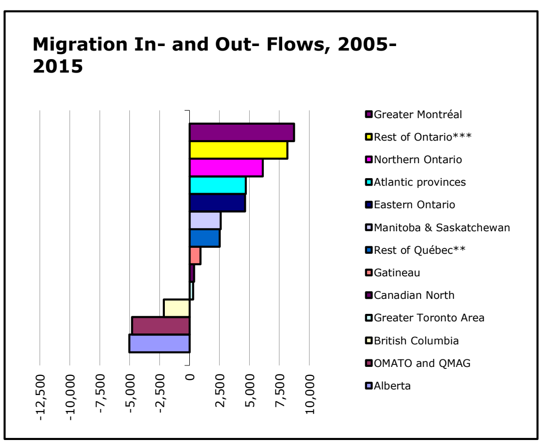
2014-2015			
IN-FLOWS*		**OUT-FLOWS***	
Greater Montréal	1,202	Greater Toronto Area	-68
Rest of Ontario***	837	OMATO and QMAG	-270
Gatineau	719	British Columbia	-740
Atlantic provinces	490	Alberta	-881
Northern Ontario	483		
Eastern Ontario	381		
Rest of Québec**	352		
Manitoba & Saskatchewan	174		
Canadian North	52		
TOTAL IN-FLOWS	**4,690**	**TOTAL OUT-FLOWS**	**-1,959**
		Net Canadian Migration 2014-2015	2,731
		Net International Migration *(Table 4)*	**3,096**
		Net Migration 2014-2015	**5,827**

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



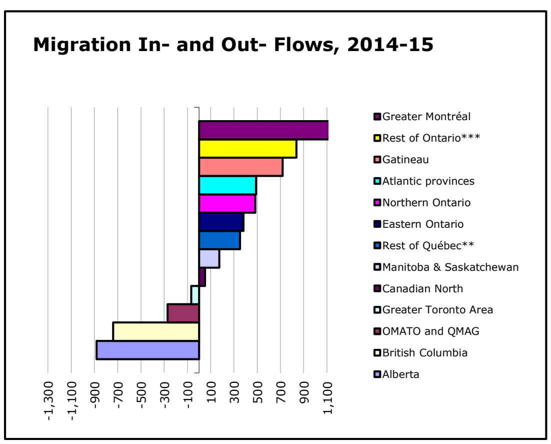


TABLE 6
MIGRATION BETWEEN OTTAWA AND ADJACENT MUNICIPALITIES, 2010-15

	2010-2011 (R)	2011-2012 (R)	2012-2013 (R)	2013-2014 (R)	2014-2015 (P)	TOTAL 2010-2015
PRESCOTT-RUSSELL TO OTTAWA	*1,588*	*1,744*	*1,630*	*1,780*	*1,789*	*8,531*
OTTAWA TO PRESCOTT-RUSSELL	*1,890*	*2,082*	*1,712*	*1,782*	*1,828*	*9,294*
PRESCOTT-RUSSELL - NET MIGRATION	**-302**	**-338**	**-82**	**-2**	**-39**	**-763**
*S.D.&G.** TO OTTAWA*	*917*	*940*	*779*	*883*	*889*	*4,408*
OTTAWA TO S.D.&G.	*777*	*816*	*779*	*714*	*697*	*3,783*
S.D.&G. - NET MIGRATION	**140**	**124**	**0**	**169**	**192**	**625**
LEEDS-GRENVILLE TO OTTAWA	*837*	*903*	*843*	*841*	*878*	*4,302*
OTTAWA TO LEEDS-GRENVILLE	*1,067*	*1,225*	*1,005*	*1,046*	*1,084*	*5,427*
LEEDS-GRENVILLE - NET MIGRATION	**-230**	**-322**	**-162**	**-205**	**-206**	**-1,125**
LANARK TO OTTAWA	*999*	*1,051*	*959*	*953*	*1,002*	*4,964*
OTTAWA TO LANARK	*1,233*	*1,349*	*1,210*	*1,367*	*1,326*	*6,485*
LANARK - NET MIGRATION	**-234**	**-298**	**-251**	**-414**	**-324**	**-1,521**
RENFREW TO OTTAWA	*1,020*	*1,037*	*969*	*939*	*1,078*	*5,043*
OTTAWA TO RENFREW	*980*	*1,125*	*923*	*935*	*979*	*4,942*
RENFREW - NET MIGRATION	**40**	**-88**	**46**	**4**	**99**	**101**
GATINEAU TO OTTAWA*	*1,983*	*2,505*	*2,238*	*2,402*	*2,448*	*11,576*
OTTAWA TO GATINEAU	*2,215*	*2,263*	*1,886*	*1,800*	*1,729*	*9,893*
GATINEAU - NET MIGRATION	**-232**	**242**	**352**	**602**	**719**	**1,683**
LES-COLLINES-DE-L'OUTAOUAIS TO OTTAWA	*226*	*237*	*273*	*284*	*268*	*1,288*
OTTAWA TO LES-COLLINES-DE-L'OUTAOUAIS	*305*	*326*	*270*	*220*	*233*	*1,354*
LES-COLLINES - NET MIGRATION	**-79**	**-89**	**3**	**64**	**35**	**-66**
PAPINEAU TO OTTAWA	*31*	*21*	*23*	*18*	*18*	*111*
OTTAWA TO PAPINEAU	*24*	*17*	*16*	*27*	*23*	*107*
PAPINEAU - NET MIGRATION	**7**	**4**	**7**	**-9**	**-5**	**4**
LA-VALLÉE-DE-LA-GATINEAU TO OTTAWA	*29*	*41*	*39*	*15*	*20*	*144*
OTTAWA TO LA-VALLÉE-DE-LA-GATINEAU	*40*	*42*	*49*	*41*	*40*	*212*
LA-VALLÉE - NET MIGRATION	**-11**	**-1**	**-10**	**-26**	**-20**	**-68**
PONTIAC TO OTTAWA	*69*	*64*	*41*	*69*	*39*	*282*
OTTAWA TO PONTIAC	*54*	*58*	*41*	*30*	*41*	*224*
PONTIAC - NET MIGRATION	**15**	**6**	**0**	**39**	**-2**	**58**
TOTAL	**-886**	**-760**	**-97**	**222**	**449**	**-1,072**
Gatineau	**-232**	**242**	**352**	**602**	**719**	**1,683**
OMATO Counties*	**-586**	**-922**	**-449**	**-448**	**-278**	**-2,683**
QMAG Counties*	**-68**	**-80**	**0**	**68**	**8**	**-72**

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	2011-2012 (F)	2012-2013 (F)	2013-2014 (U)	2014-2015 (U)	2015-2016 (P)	% chg. 14-15/15-	2011-2016 TOTAL
Toronto	63,297	61,161	51,576	33,305	82,959	149.1%	292,298
Montréal	30,335	27,235	19,763	14,194	26,986	90.1%	118,513
Vancouver	28,746	23,539	28,344	16,711	25,294	51.4%	122,634
Calgary	28,781	37,286	35,424	19,123	23,006	20.3%	143,620
Edmonton	23,924	33,653	35,293	21,392	23,200	8.5%	137,462
Ottawa-Gatineau	**11,481**	**7,902**	**7,403**	**6,992**	**15,143**	**116.6%**	**48,921**
TOTAL 6 CMA's	**186,564**	**190,776**	**177,803**	**111,717**	**196,588**	**76.0%**	**863,448**
Ottawa-Gatineau % of 6 largest CMA's	6.2%	4.1%	4.2%	6.3%	7.7%		5.7%

Source: Statistics Canada, Table 051-0057

(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 2014-2015. The second dataset is CANSIM Table 051-0057, which is used for Table 7 and has data up to 2015-2016.

TABLE 8
LABOUR FORCE INDICATORS, OTTAWA*, 1999-2016

YEAR	POPULATION 15 YEARS + (000)	LABOUR FORCE (000)	EMPLOYED RESIDENTS (000)	UNEMPLOYED (000)	NOT IN LABOUR FORCE (000)	PARTICIPATION RATE (%)	UNEMPLOYMENT RATE OTTAWA CMA (%)	UNEMPLOYMENT RATE ONTARIO (%)	UNEMPLOYMENT RATE CANADA (%)
1999	631.6	437.6	409.5	28.1	194.0	69.3%	6.4%	6.4%	7.6%
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%**
% change:									
2015-16	1.4	2.3	2.3	2.2	-0.6	0.6%	0.0%	-0.3%	0.1%
2012-16	6.0	1.7	1.5	4.9	16.9	-2.9%	0.2%	-1.3%	-0.2%

Source: 1999-2000: Statistics Canada, Labour Force Survey, Table 282-0110 (Annual Averages) [Table has been discontinued]
2001-2016: Statistics Canada, Labour Force Survey, Table 282-0129 & Table 282-0002 (Annual Averages)

* 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 MAJOR CLUSTER (000's), OTTAWA CMA, 2010-2016

By Major Clusters	2010	2011	2012	2013	2014	2015	2016
Industrial & Resource Cluster	**53.7**	**46.0**	**49.6**	**39.0**	**40.4**	**48.5**	**42.1**
Primary	2.5	2.3	3.5	1.5	1.7	0.0	0.0
Utilities	0.0	0.0	0.0	0.0	1.6	0.0	0.0
Construction	28.0	23.4	27.0	20.5	19.6	31.8	25.2
Manufacturing	23.2	20.3	19.1	17.0	17.5	16.7	16.9
Retail Cluster	**76.4**	**80.7**	**83.9**	**77.6**	**83.8**	**82.2**	**81.6**
Wholesale Trade	8.5	11.1	11.0	11.7	16.4	11.5	16.6
Retail Trade	52.9	53.0	56.5	51.7	52.6	55.4	48.7
Transportation and Warehousing	15.0	16.6	16.4	14.2	14.8	15.3	16.3
Office Cluster	**71.4**	**70.6**	**67.3**	**74.7**	**69.3**	**71.8**	**71.2**
Administrative and Support Services	17.9	21.4	19.8	23.0	21.3	25.1	25.2
F.I.R.E.*	27.4	24.8	26.5	28.1	24.4	27.2	25.2
Other Services	26.1	24.4	21.0	23.6	23.6	19.5	20.8
Culture & Tourism Cluster	**50.3**	**51.7**	**61.7**	**54.6**	**63.0**	**58.9**	**58.7**
Accommodation and Food Services	25.8	28.6	30.4	31.7	35.8	33.2	31.3
Information and Cultural Industries	13.6	12.9	17.3	13.2	14.8	13.0	12.5
Arts, Entertainment and Recreation	10.9	10.2	14.0	9.7	12.4	12.7	14.9
Government & Knowledge Cluster	**261.7**	**265.1**	**270.6**	**276.8**	**275.2**	**266.7**	**286.5**
Health and Education	96.1	97.5	96.2	103.4	106.1	110.7	119.6
Professional, Sci. & Tech. Services	54.0	57.5	59.2	65.2	60.5	54.9	62.1
Public Administration	111.6	110.1	115.2	108.2	108.6	101.1	104.8
Total Employed Residents	**515.3**	**517.4**	**535.4**	**523.5**	**533.8**	**531.1**	**543.4**
By Primary, Secondary and Tertiary Sector							
Primary	2.5	2.3	3.5	1.5	1.7	0.0	0.0
Secondary	51.2	43.7	46.1	37.5	38.7	48.5	42.1
Tertiary	461.6	471.4	485.8	484.5	493.4	482.6	501.3
Total	**515.3**	**517.4**	**535.4**	**523.5**	**533.8**	**531.1**	**543.4**
By Type of Sector							
Private sector	326.9	326.7	343.4	330.4	342.0	346.2	347.2
Public sector	170.7	173.4	177.6	175.8	176.6	168.4	178.8
Non-profit sector	17.7	17.3	14.4	17.3	15.2	16.5	17.4
Total	**515.3**	**517.4**	**535.4**	**523.5**	**533.8**	**531.1**	**543.4**
% private	63.4%	63.1%	64.1%	63.1%	64.1%	65.2%	63.9%
By High-Tech Sector							
Telecommunications Equipment	4.5	4.1	3.1	2.4	1.5	1.5	0.0
Microelectronics	8.6	4.1	3.1	2.4	3.0	1.5	0.0
Software and Telecommunications	44.5	44.4	46.0	51.6	50.2	40.6	43.3
Health Sciences	0.0	2.5	1.5	0.0	1.5	1.9	1.8
Tourism	36.0	36.7	42.3	41.4	48.2	45.9	46.2
Total, all sectors	**93.6**	**91.8**	**96.0**	**97.8**	**104.4**	**91.4**	**91.3**
Advanced Technology	***57.6***	***55.1***	***53.7***	***56.4***	***56.2***	***45.5***	***45.1***

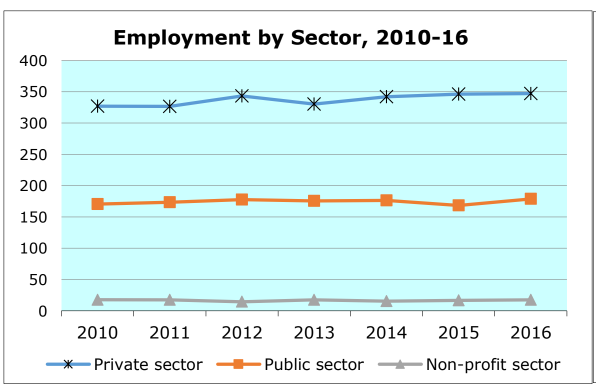
Source: Statistics Canada, Labour Force Survey, custom tabulations

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)



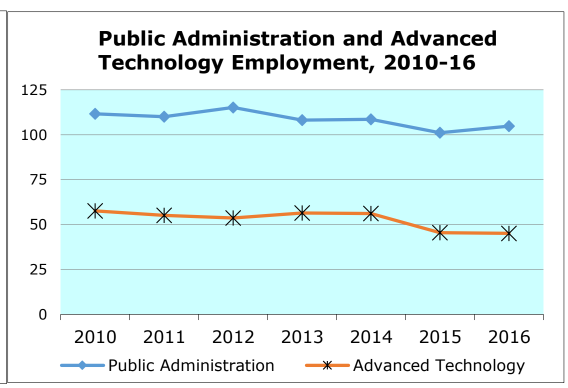
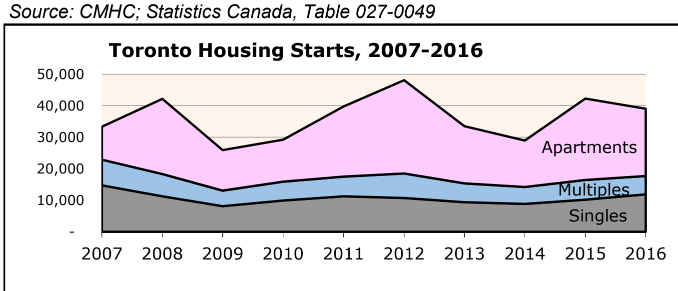


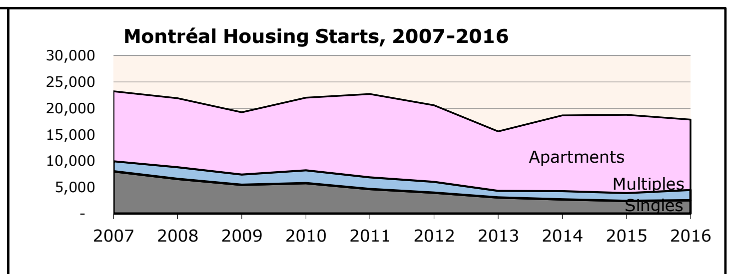
TABLE 10
HOUSING STARTS IN CANADA'S SIX LARGEST CMA's, 2007-2016

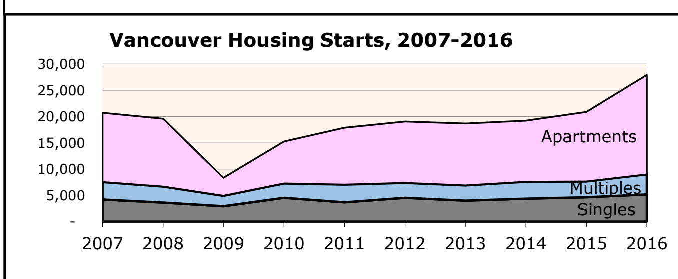
CMA	Dwg. Type	HOUSING STARTS 2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% change 2015-16	*2007-16*
Toronto	Singles	14,769	11,308	8,130	9,936	11,247	10,699	9,421	8,830	10,223	11,884	16.2%	-19.5%
	Multiples	8,144	6,974	4,950	6,019	6,241	7,789	5,977	5,391	6,239	5,823	-6.7%	*-28.5%*
	Apartments	10,380	23,930	12,869	13,240	22,257	29,617	18,149	14,708	25,825	21,320	-17.4%	*105.4%*
	Total	**33,293**	**42,212**	**25,949**	**29,195**	**39,745**	**48,105**	**33,547**	**28,929**	**42,287**	**39,027**	**-7.7%**	**17.2%**
Vancouver	Singles	4,211	3,634	2,929	4,533	3,686	4,516	4,004	4,374	4,622	5,169	11.8%	22.7%
	Multiples	3,313	3,018	1,985	2,738	3,338	2,869	2,883	3,227	2,998	3,828	27.7%	*15.5%*
	Apartments	13,212	12,939	3,425	7,946	10,843	11,642	11,809	11,611	13,243	18,917	42.8%	*43.2%*
	Total	**20,736**	**19,591**	**8,339**	**15,217**	**17,867**	**19,027**	**18,696**	**19,212**	**20,863**	**27,914**	**33.8%**	**34.6%**
Montréal	Singles	8,013	6,602	5,446	5,789	4,653	3,959	3,039	2,677	2,402	2,499	4.0%	-68.8%
	Multiples	1,956	2,241	2,005	2,452	2,233	2,084	1,289	1,608	1,511	2,018	33.6%	*3.2%*
	Apartments	13,264	13,084	11,800	13,760	15,833	14,548	11,304	14,387	14,831	13,317	-10.2%	*0.4%*
	Total	**23,233**	**21,927**	**19,251**	**22,001**	**22,719**	**20,591**	**15,632**	**18,672**	**18,744**	**17,834**	**-4.9%**	**-23.2%**
Edmonton	Singles	7,682	2,613	3,897	6,062	5,017	5,658	5,970	6,832	5,683	4,335	-23.7%	-43.6%
	Multiples	2,995	1,421	1,674	2,149	2,110	3,252	3,555	3,880	4,442	3,278	-26.2%	*9.4%*
	Apartments	4,211	2,581	746	1,748	2,205	3,927	5,164	3,160	6,925	2,423	-65.0%	*-42.5%*
	Total	**14,888**	**6,615**	**6,317**	**9,959**	**9,332**	**12,837**	**14,689**	**13,872**	**17,050**	**10,036**	**-41.1%**	**-32.6%**
Calgary	Singles	7,777	4,387	4,775	5,782	5,084	5,961	6,402	6,494	4,138	3,489	-15.7%	-55.1%
	Multiples	2,362	1,348	1,155	2,131	2,102	2,886	3,207	3,903	3,150	2,055	-34.8%	*-13.0%*
	Apartments	3,366	5,703	388	1,349	2,106	3,994	2,975	6,734	5,745	3,701	-35.6%	*10.0%*
	Total	**13,505**	**11,438**	**6,318**	**9,262**	**9,292**	**12,841**	**12,584**	**17,131**	**13,033**	**9,245**	**-29.1%**	**-31.5%**
Ottawa-Gatineau	Singles	4,010	4,076	3,527	3,212	2,918	2,280	2,262	2,254	2,414	2,365	-2.0%	-41.0%
	Multiples	3,003	3,300	3,177	3,259	2,846	2,307	2,424	2,450	1,961	2,364	20.6%	*-21.3%*
	Apartments	2,281	2,926	2,226	2,662	2,450	4,192	3,798	2,961	2,181	2,388	9.5%	*4.7%*
	Total	**9,294**	**10,302**	**8,930**	**9,133**	**8,214**	**8,779**	**8,484**	**7,665**	**6,556**	**7,117**	**8.6%**	**-23.4%**

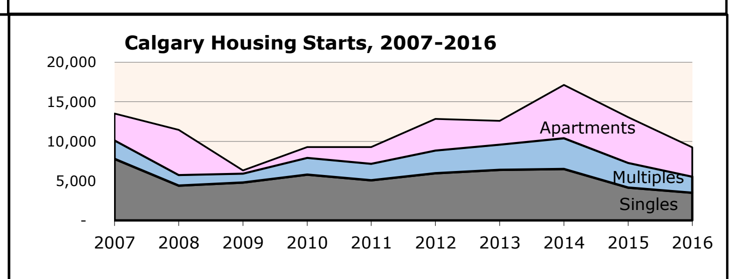
Multiples = Semi-detached and Row units

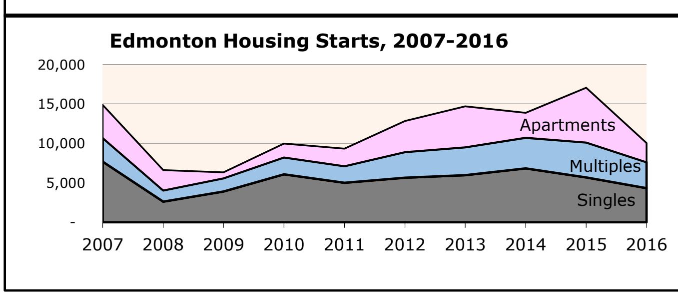
Source: CMHC; Statistics Canada, Table 027-0049











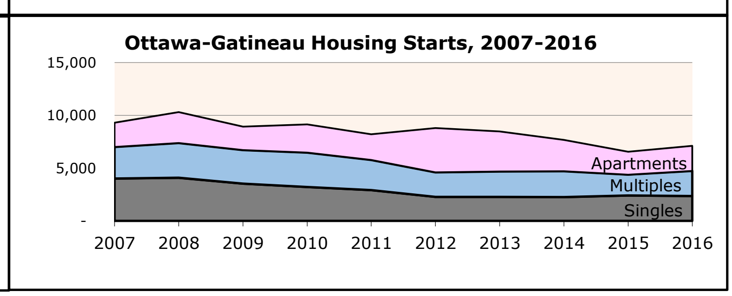


TABLE 11
NEW HOUSING IN MUNICIPALITIES IN GREATER OTTAWA-GATINEAU AREA, 2008-16

	2008	2009	2010	2011	2012	2013	2014	2015	2016	% chng. 2015-16
OTTAWA	**6,679**	**5,522**	**6,046**	**5,521**	**5,730**	**6,284**	**5,537**	**4,696**	**5,019**	**6.9%**
Ottawa, Vanier, Rockcliffe (former)	1,100	1,086	1,280	952	2,057	2,262	1,244	1,406	979	-30.4%
Nepean (former)	1,615	1,369	1,525	1,541	1,093	965	1,292	900	1,116	24.0%
Gloucester (former)	774	698	685	752	660	959	797	770	736	-4.4%
Kanata (former)	1,073	727	974	588	761	1,124	1,225	860	944	9.8%
Cumberland (former)	939	901	783	896	685	440	549	311	611	96.5%
Goulbourn (former)	675	365	409	428	214	253	75	315	413	31.1%
Osgoode (former)	153	122	177	183	89	73	104	60	69	15.0%
Rideau (former)	38	34	42	43	23	37	36	33	102	209.1%
West Carleton (former)	312	220	171	138	148	171	215	41	49	19.5%
Inside the Greenbelt	1,682	1,192	1,518	1,130	2,224	2,336	1,488	1,447	1,052	-27.3%
Outside the Greenbelt	4,997	4,330	4,528	4,391	3,506	3,948	4,049	3,249	3,967	22.1%
Prescott & Russell (part)	**568**	**492**	**724**	**532**	**502**	**392**	**299**	**335**	**391**	**16.7%**
Alfred and Plantagenet, TP	80	64	73	99	91	55	29	28	7	-75.0%
Casselman, Vlg.*	39	42	26	10	2	2	1	5	20	300.0%
Clarence-Rockland, C (part of ON CMA)	204	193	323	213	190	153	112	93	112	20.4%
Russell, TP (part of ON CMA)	133	99	77	60	100	123	113	183	167	-8.7%
The Nation Municipality	112	94	225	150	119	59	44	26	85	226.9%
Leeds & Grenville (part)	**113**	**109**	**182**	**183**	**262**	**116**	**103**	**93**	**169**	**81.7%**
Merrickville-Wolford, Vlg.*	16	8	6	7	13	11	1	6	19	216.7%
North Grenville, TP*	97	101	176	176	249	105	102	87	150	72.4%
Stormont, Dundas & Glengarry (part)	**39**	**36**	**56**	**59**	**26**	**47**	**24**	**23**	**24**	**4.3%**
North Dundas, TP	39	36	56	59	26	47	24	23	24	4.3%
Lanark (part)	**269**	**177**	**252**	**265**	**220**	**260**	**230**	**294**	**275**	**-6.5%**
Beckwith, TP *	38	48	59	66	64	71	66	69	71	2.9%
Carleton Place, Tn.	142	54	73	61	77	51	66	105	60	-42.9%
Mississippi Mills, Tn.	70	61	98	114	60	115	68	107	125	16.8%
Montague, TP	19	14	22	24	19	23	30	13	19	46.2%
Renfrew (part)	**104**	**62**	**99**	**117**	**114**	**188**	**82**	**95**	**72**	**-24.2%**
Arnprior, Tn.*	78	43	71	92	73	173	66	76	58	-23.7%
McNab/Braeside, TP*	26	19	28	25	41	15	16	19	14	-26.3%
GATINEAU	**2,889**	**2,797**	**2,287**	**2,103**	**2,354**	**1,571**	**1,572**	**1,312**	**1,390**	**5.9%**
Hull (former)	150	146	186	208	545	275	246	106	263	148.1%
Aylmer (former)	1,686	1,441	1,064	1,069	808	745	768	581	802	38.0%
Gatineau (former)	892	962	648	618	728	467	520	464	325	-30.0%
Buckingham (former)	81	78	193	84	174	42	22	127	0	-100.0%
Masson-Angers (former)	80	170	196	124	99	42	16	34	0	-100.0%
Qué. part CMA Outside of Gatineau	**453**	**346**	**419**	**370**	**502**	**423**	**331**	**272**	**323**	**18.8%**
Cantley	123	98	132	93	107	96	87	60	64	6.7%
Chelsea	34	23	20	23	21	23	21	19	33	73.7%
La Pêche	78	36	56	54	62	31	40	35	48	37.1%
L'Ange-Gardien	58	54	45	26	56	36	45	35	39	11.4%
Pontiac	36	21	41	16	36	16	24	19	15	-21.1%
Val-des-Monts	84	87	105	105	102	134	98	95	101	6.3%
Denholm	4	0	1	1	8	6	0	0	3	0.0%
N.-D.-de-la-Salette (part of CMA in 2011)	7	5	1	2	0	3	9	0	7	0.0%
Mayo (part of CMA in 2011)	8	4	9	11	6	4	1	7	8	14.3%
Bowman (part of CMA in 2011)	n.d.	n.d.	n.d.	3	3	2	2	2	5	150.0%
Val-des-Bois (part of CMA in 2011)	10	10	5	3	4	4	4	0	0	0.0%
Lochaber (part of CMA in 2016)	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	0	0.0%
Lochaber-Ouest (part of CMA in 2016)	8	8	3	15	17	8	n.d.	n.d.	4	-
Thurso (part of CMA in 2016)	3	0	1	18	80	60	n.d.	n.d.	19	-
GREATER OTTAWA-GATINEAU AREA	**11,114**	**9,541**	**10,065**	**9,150**	**9,710**	**9,281**	**8,178**	**7,120**	**7,663**	**7.6%**
Ottawa-Gatineau CMA	**10,333**	**8,938**	**9,137**	**8,267**	**8,876**	**8,554**	**7,665**	**6,556**	**7,161**	**9.2%**
Ontario portion of the CMA	**7,016**	**5,814**	**6,446**	**5,794**	**6,020**	**6,560**	**5,762**	**4,972**	**5,448**	**9.6%**
Quebec portion of the CMA	**3,317**	**3,124**	**2,691**	**2,473**	**2,856**	**1,994**	**1,903**	**1,584**	**1,713**	**8.1%**
OMATO	**1,093**	**876**	**1,313**	**1,156**	**1,124**	**1,003**	**738**	**840**	**931**	**10.8%**

*Sources: CMHC Starts -Housing Information Monthly, January 2016; * 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, 2012-16

OP Target Area (Designation)	2012				2013				2014				2015				2016			
	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	374	**374**	0	0	338	**338**	0	0	237	**237**	0	0	311	**311**	0	0	211	**211**
Mixed-Use Centres																				
Inside Greenbelt	3	16	307	326	0	0	70	70	0	0	451	451	9	0	338	347	0	0	562	562
Outside Greenbelt	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	3	16	307	**326**	0	0	70	**70**	0	0	451	**451**	9	0	338	**347**	0	0	562	**562**
Town Centres	0	0	221	**221**	0	0	173	**173**	0	0	268	**268**	0	18	0	**18**	0	8	105	**113**
Mainstreets																				
Inside Greenbelt	0	0	287	287	0	0	266	266	0	0	677	677	-1	0	888	887	1	6	281	288
Outside Greenbelt	0	0	0	0	0	0	4	4	0	0	0	0	0	0	48	48	0	0	0	0
Total	0	0	287	**287**	0	0	270	**270**	0	0	677	**677**	-1	0	936	**935**	1	6	281	**288**
Rapid Transit Stations																				
Inside Greenbelt	61	17	984	1,062	45	8	748	801	43	20	1422	1,485	55	3	1328	1,386	47	5	1141	1,193
Outside Greenbelt	3	46	180	229	55	162	233	450	25	39	306	370	8	27	36	71	0	58	184	242
Total	64	63	1,164	**1,291**	100	170	981	**1,251**	68	59	1,728	**1,855**	63	30	1,364	**1,457**	47	63	1,325	**1,435**
Future Rapid Transit Stations																				
Inside Greenbelt	4	2	175	181	4	0	5	9	3	20	4	27	8	0	32	40	4	0	3	7
Outside Greenbelt	0	0	43	43	0	2	1	3	0	0	0	0	6	18	0	24	0	8	0	8
Total	4	2	218	**224**	4	2	6	**12**	3	20	4	**27**	14	18	32	**64**	4	8	3	**15**
Total Units in Designated Areas**	70	69	1,791	**1,930**	106	170	1,228	**1,504**	71	98	2,328	**2,497**	77	48	1,743	**1,868**	52	77	1,609	**1,738**
Total New Units	1,741	1,700	3,171	6,612	2,013	1,453	2,322	5,788	2,215	2,066	3,633	7,914	1,723	1,028	2,507	5,258	2,153	1,773	2,922	6,848
Demolitions	288	0	45	333	227	7	48	282	209	30	67	306	235	3	50	288	223	84	114	421
Total Net New Units	1,453	1,700	3,126	6,279	1,786	1,446	2,274	5,506	2,006	2,036	3,566	7,608	1,488	1,025	2,457	4,970	1,930	1,689	2,808	**6,427**
% Share in Designated Areas	4.8%	4.1%	57.3%	**30.7%**	5.9%	11.8%	54.0%	**27.3%**	3.5%	4.8%	65.3%	**32.8%**	5.2%	4.7%	70.9%	**37.6%**	2.7%	4.6%	57.3%	**27.0%**
Total New Units Urban	1,465	1,700	3,032	6,197	1,739	1,453	2,313	5,505	1,947	2,066	3,618	7,631	1,468	1,020	2,489	4,977	1,905	1,757	2,913	6,575
Demolitions -Urban	230	0	44	274	193	7	48	248	180	30	67	277	180	3	50	233	176	84	114	374
Total Net New Units Urban	1,235	1,700	2,988	5,923	1,546	1,446	2,265	5,257	1,767	2,036	3,551	7,354	1,288	1,017	2,439	4,744	1,729	1,673	2,799	**6,201**
% Share of Urban in Designated Areas	5.7%	4.1%	59.9%	**32.6%**	6.9%	11.8%	54.2%	**28.6%**	4.0%	4.8%	65.6%	**34.0%**	6.0%	4.7%	71.5%	**39.4%**	3.0%	4.6%	57.5%	**28.0%**

** 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	1,471	1,471
Mixed-Use Centres	12	16	1,728	1,756
Town Centres	0	26	767	793
Mainstreets	0	6	2,451	2,457
Rapid Transit Stations	342	385	6,562	7,289
Future Rapid Transit Stations	29	50	263	342
TOTAL Units in OP Target Areas**	**376**	**462**	**8,699**	**9,537**
TOTAL Urban Units - City of Ottawa	**7,565**	**7,872**	**14,042**	**29,479**
% Share in OP Target Areas	**5.0%**	**5.9%**	**61.9%**	**32.4%**

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

OP Target Areas: Last 10 Years	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	TOTAL
Central Area	353	246	166	47	258	374	338	237	311	211	2,541
Mixed-Use Centres	78	205	35	110	183	326	70	451	347	562	2,367
Town Centres	158	0	0	146	165	221	173	268	18	113	1,262
Mainstreets	344	399	286	483	467	287	270	677	935	288	4,436
Rapid Transit Stations	545	623	345	891	1,190	1,291	1,275	1,835	1,457	1,435	10,887
Future Rapid Transit Stations	n/a	n/a	n/a	26	81	224	12	27	64	15	449
TOTAL	**1,478**	**1,473**	**832**	**1,703**	**2,344**	**2,723**	**2,138**	**3,495**	**3,132**	**2,624**	**21,942**

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 BY WARD, 2012-2016

Ward		Intensification Units						2012-2016 Share of Intensification
No.	**Name**	**2012**	**2013**	**2014**	**2015**	**2016**	**2012-2016**	
12	Rideau-Vanier	271	315	481	419	287	1,773	12%
13	Rideau-Rockcliffe	122	45	240	326	340	1,073	7%
14	Somerset	404	716	360	829	481	2,790	18%
15	Kitchissippi	522	208	600	401	639	2,370	15%
17	Capital	103	155	250	87	151	746	5%
	TOTAL - CENTRAL	**1,422**	**1,439**	**1,931**	**2,062**	**1,898**	**8,752**	**57%**
7	Bay	179	11	26	36	16	268	2%
8	College	20	30	261	55	46	412	3%
9	Knoxdale-Merivale	22	5	396	6	9	438	3%
10	Gloucester-Southgate	56	70	29	128	20	303	2%
11	Beacon Hill-Cyrville	51	39	50	10	57	207	1%
16	River	151	42	41	17	54	305	2%
18	Alta Vista	175	115	21	22	26	359	2%
	TOTAL - INNER URBAN	**654**	**312**	**824**	**274**	**228**	**2,292**	**15%**
1	Orléans	409	90	106	30	23	658	4%
2	Innes	27	194	66	90	41	418	3%
3	Barrhaven	157	299	636	101	297	1,490	10%
4	Kanata North	235	189	269	47	105	845	6%
6	Stittsville	39	21	13	3	0	76	0%
19	Cumberland	3	22	16	8	196	245	2%
22	Gloucester-South Nepean	15	23	55	72	15	180	1%
23	Kanata South	85	63	81	66	65	360	2%
	TOTAL - SUBURBAN	**970**	**901**	**1,242**	**417**	**742**	**4,272**	**28%**
Intensification Units Inside Greenbelt		**2,076**	**1,751**	**2,755**	**2,336**	**2,126**	**11,044**	**72%**
Intensification Units Outside Greenbelt		**970**	**901**	**1,242**	**417**	**742**	**4,272**	**28%**
Total Intensification Units		**3,046**	**2,652**	**3,997**	**2,753**	**2,868**	**15,316**	**100%**
Total Urban Units		**5,993**	**5,337**	**7,393**	**4,760**	**6,304**	**29,787**	
% Intensification		**50.8%**	**49.7%**	**54.1%**	**57.8%**	**45.5%**	**51.4%**	
Official Plan 5 year Target		**38%**	**38%**	**38%**	**38%**	**38%**	**38%**	

Source: City of Ottawa, Building Permits

TABLE 14: NON-RESIDENTIAL INTENSIFICATION, 2012-2016

	Intensification Gross Floor Area (m^2)						2012-2016 Share of Intensification
Area	**2012**	**2013**	**2014**	**2015**	**2016**	**2012-2016**	
Inside Greenbelt	165,818	198,126	136,730	169,151	146,994	816,818	82%
Outside Greenbelt	33,230	39,407	48,726	14,571	44,474	180,409	18%
Total Urban Intensification GFA	199,048	237,533	185,456	183,722	191,468	997,227	
Total Urban GFA	246,107	297,147	216,270	303,054	248,944	1,453,687	
% Intensification of Urban GFA	**81%**	**80%**	**86%**	**61%**	**77%**	**69%**	

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, 1997-2016

YEAR	SINGLE	SEMI	ROW	APT.	TOTAL	SINGLE	SEMI	ROW	APT.
1997	1,962	118	1,185	127	3,392	57.8%	3.5%	34.9%	3.7%
1998	2,123	108	1,135	115	3,481	61.0%	3.1%	32.6%	3.3%
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%**

Source: CMHC, Starts and Completions Survey

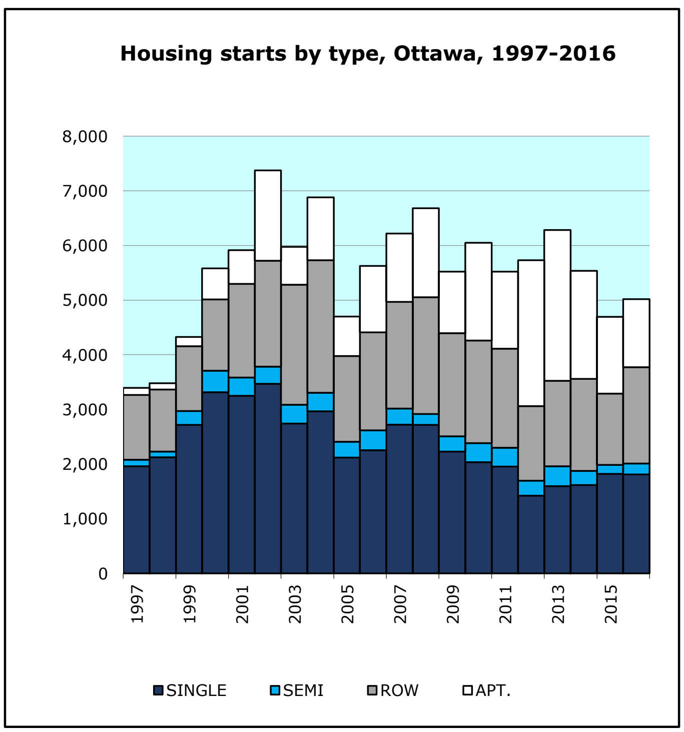


TABLE 16
HOUSING COMPLETIONS, CITY OF OTTAWA, 2008-2016, BY TYPE AND INTENDED MARKET

YEAR	FREEHOLD				CONDOMINIUM			PRIVATE RENTAL			ASSISTED RENTAL			ANNUAL TOTAL
	SINGLE	SEMI	ROW	TOTAL	ROW	APT.	TOTAL	ROW	APT.	TOTAL	ROW	APT.	TOTAL	
2008	2,685	240	1,909	**4,834**	79	1013	**1,092**	14	195	**209**	0	0	**0**	**6,135**
2009	2,484	226	1,719	**4,437**	9	945	**955**	12	214	**228**	0	0	**0**	**5,620**
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**

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, 2003-16

YEAR	NOMINAL AVERAGE PRICE OF ABSORBED	OTTAWA CPI (ALL ITEMS) (2002=100)	INFLATION FACTOR (INFLATOR)	AVERAGE PRICE OF ABSORBED NEW SINGLES (2016$)	YEAR-OVER-YEAR CHANGE	ANNUAL INFLATION RATE
2003	$305,923	102.5	0.283	$1,080,430	5.9%	2.5%
2004	$335,251	104.5	0.289	$1,161,348	7.5%	2.0%
2005	$365,551	106.8	0.295	$1,239,040	6.7%	2.2%
2006	$396,677	108.6	0.300	$1,322,257	6.7%	1.7%
2007	$407,749	110.7	0.306	$1,333,380	0.8%	1.9%
2008	$417,683	113.1	0.312	$1,336,881	0.3%	2.2%
2009	$414,696	113.7	0.314	$1,320,316	-1.2%	0.5%
2010	$444,185	116.6	0.322	$1,379,031	4.4%	2.6%
2011	$492,380	120.1	0.332	$1,484,110	7.6%	3.0%
2012	$492,356	121.7	0.336	$1,464,526	-1.3%	1.3%
2013	$509,931	122.9	0.340	$1,501,994	2.6%	1.0%
2014	$523,271	125.3	0.346	$1,511,765	0.7%	2.0%
2015	$513,173	126.5	0.349	$1,468,527	-2.9%	1.0%
2016	**$527,609**	**128.1**	**0.354**	**$1,490,979**	**1.5%**	**1.3%**

Sources: CMHC, Housing Now Ottawa; Statistics Canada, Table 326-0021, 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, 2010-16

CMA		2010	2011	2012	2013	2014	2015	2016	2015-16 % change
Toronto	Sales	88,214	91,760	88,157	88,946	93,278	101,846	108,500	6.5%
	Avg Price	$432,264	$466,352	$498,973	$524,089	$566,491	$622,046	$719,750	15.7%
Montréal	Sales	42,299	40,403	40,089	36,491	35,764	37,935	39,750	4.8%
	Avg Price	$297,588	$314,038	$321,083	$323,967	$331,036	$337,487	$347,000	2.8%
Vancouver	Sales	31,144	32,936	25,445	28,985	33,693	43,145	40,000	-7.3%
	Avg Price	$675,853	$779,730	$730,063	$767,765	$812,653	$902,801	$1,007,000	11.5%
Ottawa-Gatineau	Sales	18,824	18,410	18,362	17,594	17,429	18,373	19,000	3.4%
	Avg Price	$303,715	$321,624	$328,656	$335,595	$339,726	$345,413	$345,445	0.0%
Ottawa*	Sales	14,586	14,551	14,497	14,049	14,094	14,842	15,100	1.7%
	Avg Price	$328,439	$344,791	$352,610	$358,876	$363,161	$369,477	$371,000	0.4%
Calgary	Sales	20,996	22,466	26,634	29,954	33,615	23,994	22,000	-8.3%
	Avg Price	$398,764	$402,851	$412,315	$437,036	$460,584	$453,814	$457,000	0.7%
Edmonton	Sales	16,403	16,963	17,641	19,552	19,857	18,227	16,700	-8.4%
	Avg Price	$328,803	$328,595	$334,318	$344,977	$362,657	$369,536	$365,000	-1.2%

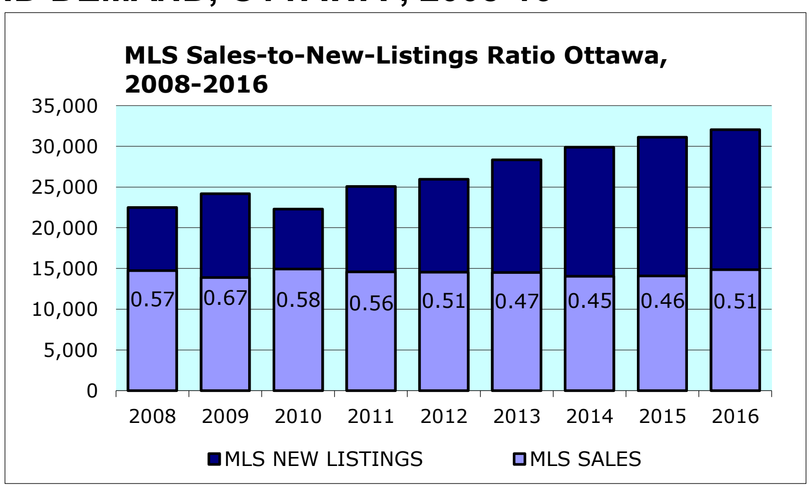
Source: CMHC and City of Ottawa

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*, 2008-16

YEAR	MLS SALES	MLS NEW LISTINGS	SALES-TO-NEW-LISTINGS RATIO
2008	13,908	24,196	0.57
2009	14,923	22,290	0.67
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**

Source: CMHC, 2016 data from OREB



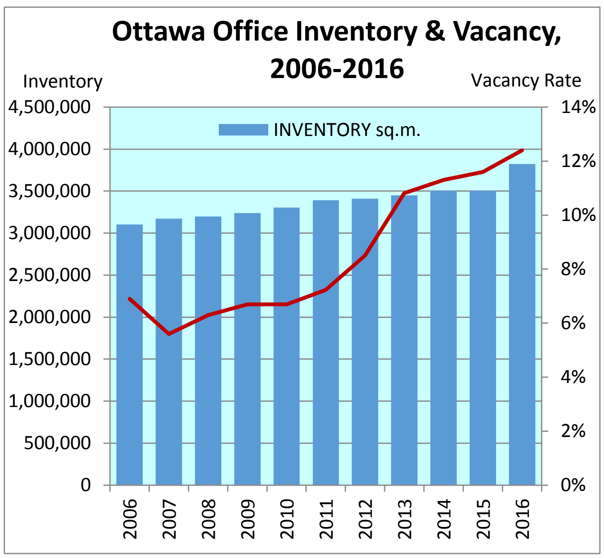
NOTE:
MLS New Listings are the annual number of properties listed on the Multiple Listings Service, which measures supply. MLS Sales are the annual number of residential sales through the MLS system, which measures demand.

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, 2006-2016

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.
2006	33,419,000	3,104,727	6.9%	1,278,000	118,730	517,806	48,106
2007	34,144,818	3,172,157	5.6%	424,802	39,465	824,155	76,567
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**

Source: Colliers International - Ottawa Office Market Report, 2016 Q4
Note: Inventory may not add due to ongoing revisions from Colliers International



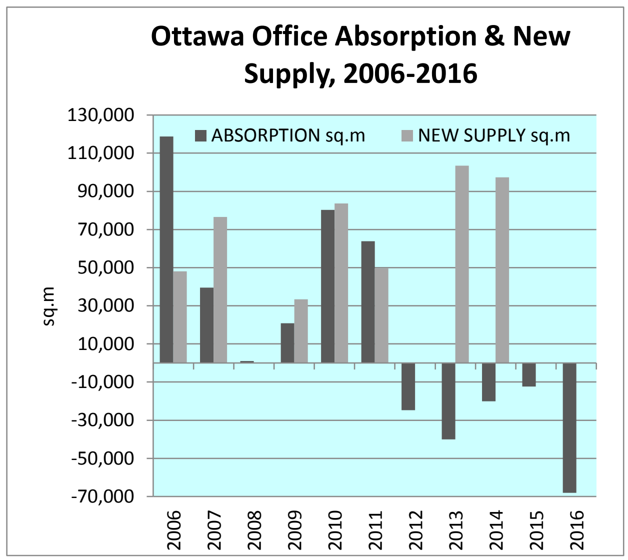
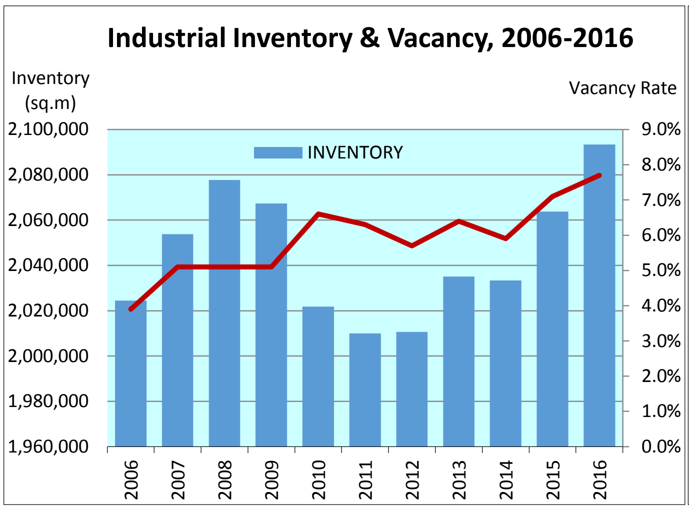


TABLE 21
INDUSTRIAL MARKET OVERVIEW, OTTAWA, 2006-2016

YEAR	INVENTORY		VACANCY	ABSORPTION		NEW SUPPLY	
	sq.ft.	sq.m.	RATE (%)	sq.ft.	sq.m.	sq.ft.	sq.m.
2006	21,791,517	2,024,432	3.9%	309,277	28,733	165,642	15,389
2007	22,107,575	2,053,794	5.1%	95,282	8,852	399,397	37,105
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**

Source: Cushman & Wakefield, Marketbeat Industrial Q4 2016, Ottawa



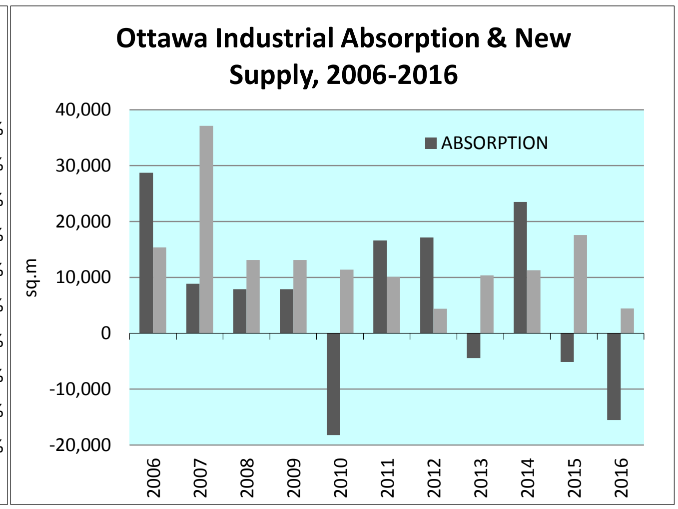


TABLE 22
OTTAWA RETAIL SPACE SUMMARY

FORMAT	Total Space, 2015			Total Space, 2016			Vacancy Rate	
	m^2	sq.ft.	Share	m^2	sq.ft.	Share	2015	2016
Power Centres	926,492	9,972,676	26.6%	959,275	10,325,547	27.0%	3.6%	3.7%
Other *	564,010	6,070,949	16.2%	575,865	6,198,562	16.2%	n/a	n/a
Traditional Mainstreets	481,069	5,178,188	13.8%	481,490	5,182,718	13.6%	n/a	n/a
Regional SC	383,009	4,122,678	11.0%	383,009	4,122,678	10.8%	3.6%	3.7%
Community SC	422,343	4,546,064	12.1%	436,182	4,695,021	12.3%	5.4%	7.2%
Neighbourhood SC	425,952	4,584,905	12.3%	437,823	4,712,688	12.3%	4.4%	5.2%
Mini-Plazas	225,627	2,428,626	6.5%	225,627	2,428,626	6.4%	4.4%	5.2%
Office Concourses	48,466	521,680	1.4%	48,466	521,680	1.4%	9.9%	4.9%
TOTAL	**3,476,967**	**37,425,766**	**100%**	**3,547,737**	**38,187,520**	**100%**	**4.6%**	**5.3%**

Source: City of Ottawa Building Permits; 2016 vacancy data from Cushman & Wakefield Ottawa Retail Report Q4 2016

* **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.