2017 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Infrastructure, and Economic Development

November 2018

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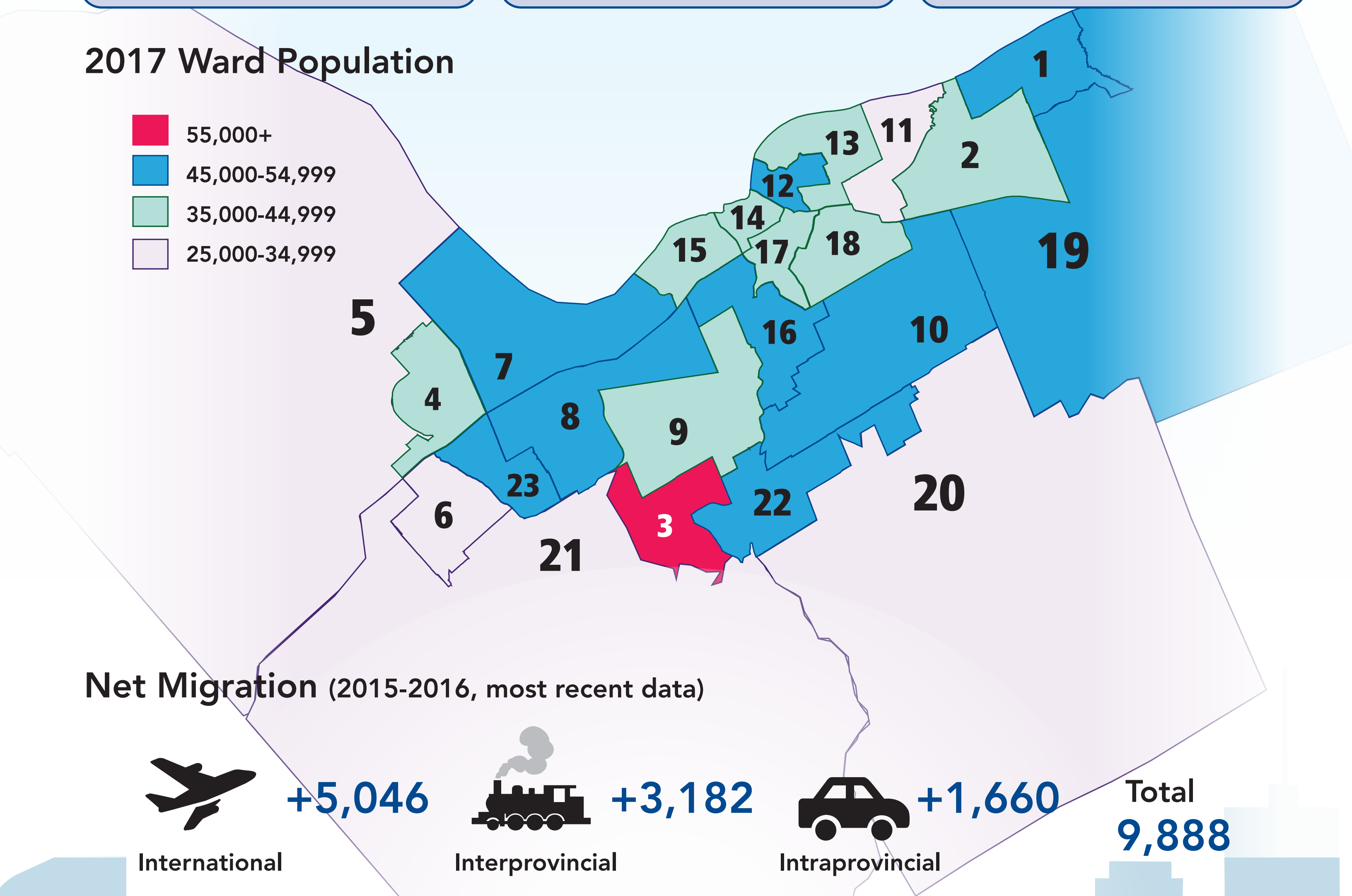
POPULATION & MIGRATION

Population (Dec 31, 2017)

1,476,008 ▲1.3%	1,377,016 ▲1.9%	979,173 ▲1.1%
Greater Ottawa-Gatineau Area	Ottawa-Gatineau CMA	City of Ottawa

2017 Ward Population



Net Migration (2015-2016, most recent data)

+5,046	+3,182	+1,660	Total 9,888
International	Interprovincial	Intraprovincial	

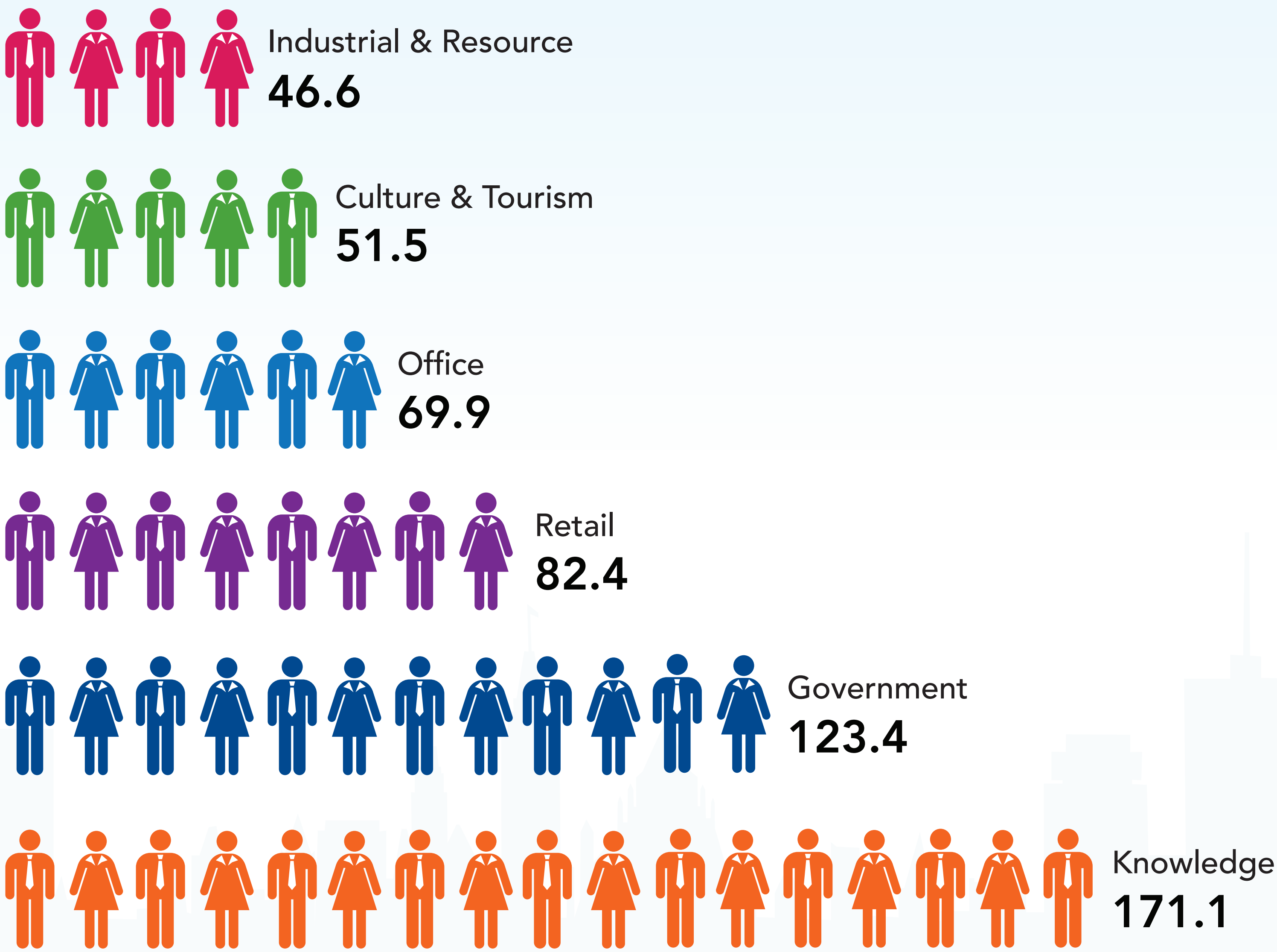
EMPLOYMENT AND ECONOMY

Ottawa

546,700 ↑ 0.6%
Employed residents

5.6% ↓ 0.7%
Unemployment

Employed Residents by Cluster ('000s)



HOUSING STARTS

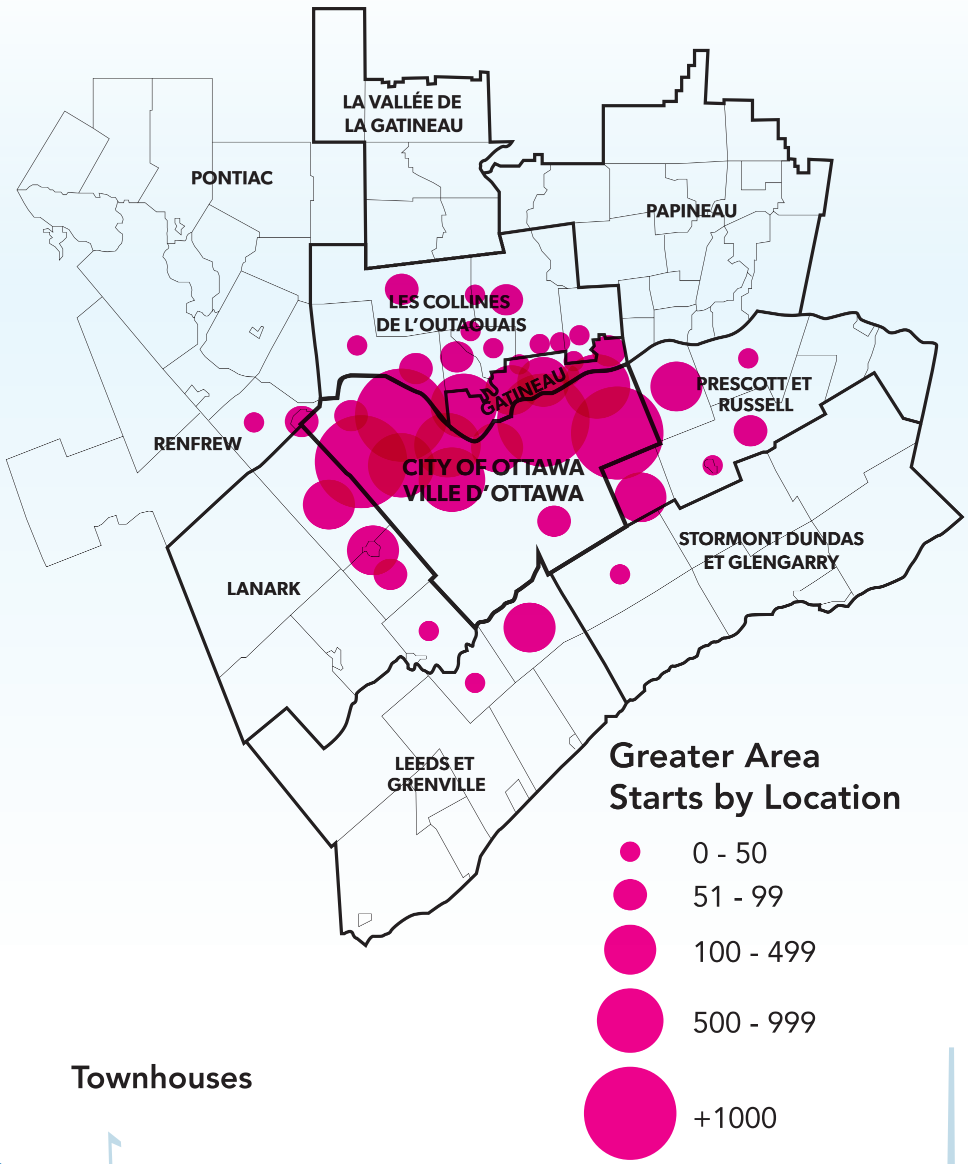
Ottawa

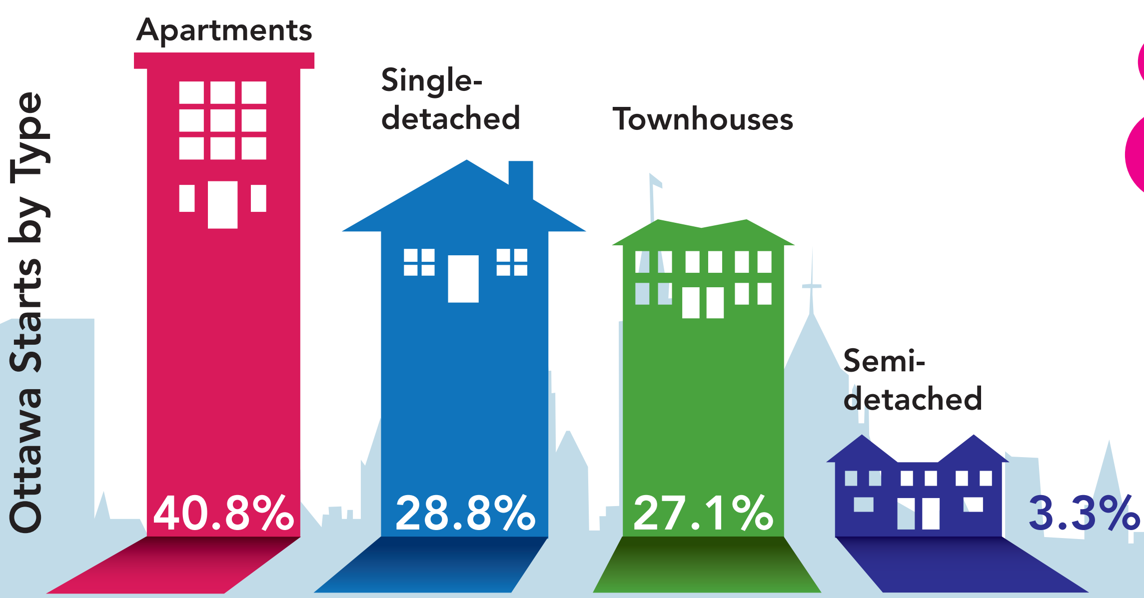
6,849 ▲ 36.5%
Housing starts

1.7% ▼ 1.3%
Rental vacancy rate

39.1% ▼ 6.4%
Urban intensification

$392,400 ▲ 5.8%
Average resale price (all units)



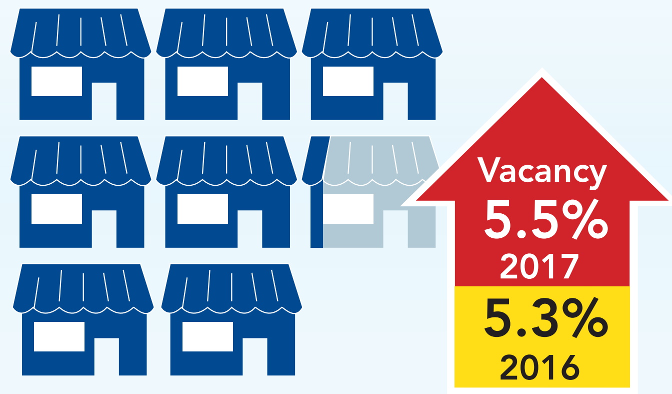


NON-RESIDENTIAL DEVELOPMENT

Office

Inventory
3.8 million m^2 0.7%
40.9 million ft^2

Retail

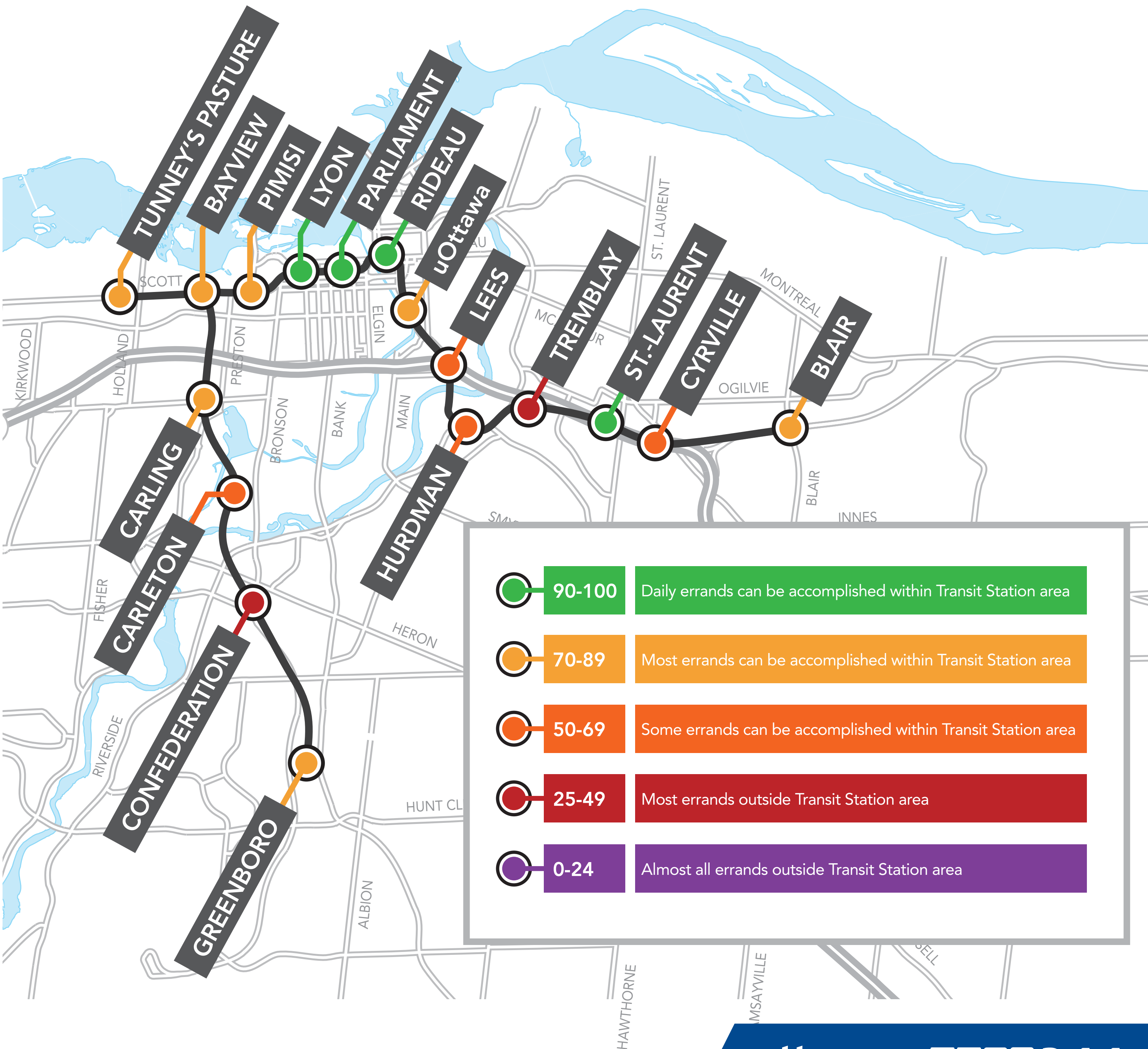


Inventory
3.6 million m^2 1.2%
38.6 million ft^2

Industrial

Inventory
2.1 million m^2 0.7%
22.6 million ft^2

INDEX OF COMMERCIAL SERVICES AROUND TRANSIT STATIONS



90-100	Daily errands can be accomplished within Transit Station area
70-89	Most errands can be accomplished within Transit Station area
50-69	Some errands can be accomplished within Transit Station area
25-49	Most errands outside Transit Station area
0-24	Almost all errands outside Transit Station area

2017 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Infrastructure and Economic Development
Research and Forecasting Unit
June 2018

ANNUAL DEVELOPMENT REPORT 2017
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2017 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

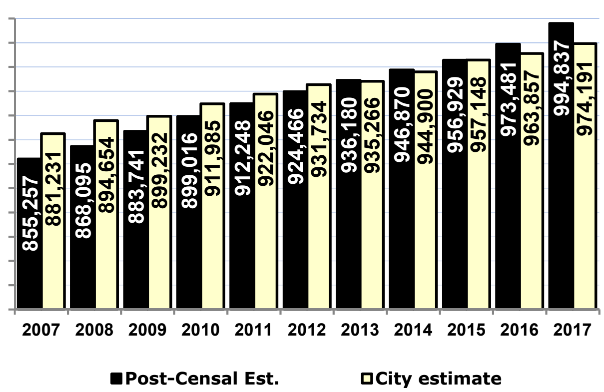
- City of Ottawa population, year-end 2017 (City estimate): 979,173, up 1.1% from 2016
- Greater Ottawa-Gatineau Area population, year-end 2017: 1,476,008, up 1.3% from 2016
- Net migration to Ottawa-Gatineau increased 30.2% from the year before

1.1 Population Growth

Major Cities

In 2017, the Ottawa-Gatineau Census Metropolitan Area (CMA) was the sixth largest in Canada, with 1,377,016 persons. Population growth during 2016-17 was 1.9%, slightly above the 1.6% 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, 2007-2017 (mid-year)
Source: Statistics Canada and City of Ottawa



2017 Population based on 2011 Census

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

[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 2017 post-censal population estimate for Ottawa was 994,837 (Table 1).

2017 Population based on 2016 Census

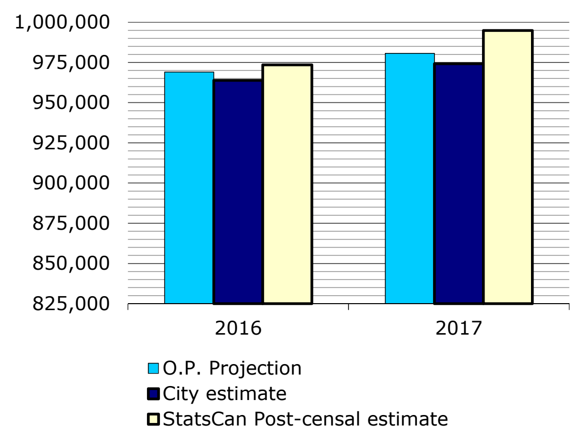
In February, 2017 Statistics Canada released the population and dwelling counts data from the 2016 Census. This population figure does not include the population undercoverage, being those persons not enumerated on Census Day for a variety of reasons. The undercoverage for the 2016 Census will be estimated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

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 2017 population of 974,191 and a year-end 2017 population of 979,173, a 1.1% increase from 2016 (Table 3).

Projections Tracking 2016-2017 (mid-year)
Source: Statistics Canada and City of Ottawa



Projections Tracking

Population projections in the Official Plan[2] (OP) project Ottawa's population at 980,654 in mid-2017. The OP projection continues to slightly exceed city actual estimates, being 6,463 (0.7%) more than the 2017 city estimate based on building permits. The OP mid-year 2017 projection is 14,183 (1.4%) less than Statistics Canada's 2017 post-censal estimate.

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

Summary

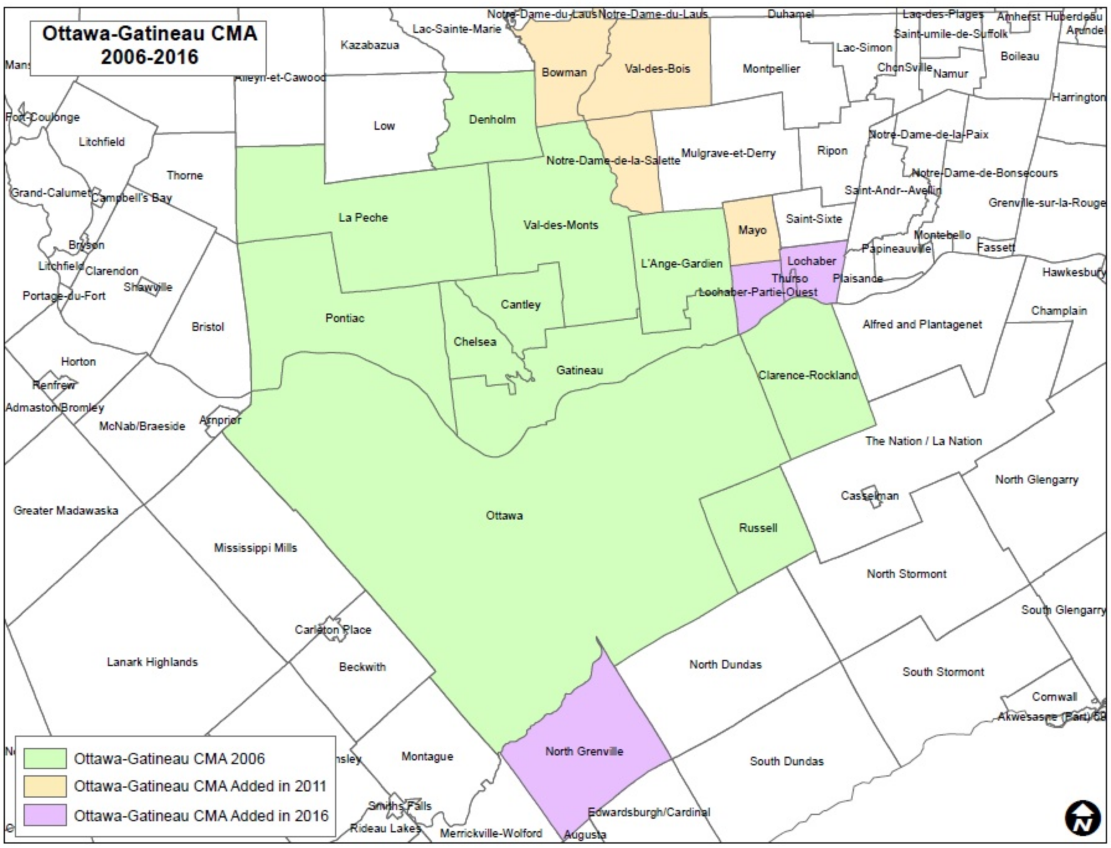
There is a range of population figures for the city of Ottawa in 2017 depending on source:

City of Ottawa Population by Source	mid-2017	year-end 2017
2017 Population based on 2011 Census	994,837	n/a
2017 Population based on 2016 Census	n/a	n/a
Official Plan Projection	980,654	986,526
City Estimate of actual population	974,191	979,173

Source: Statistics Canada; City of Ottawa

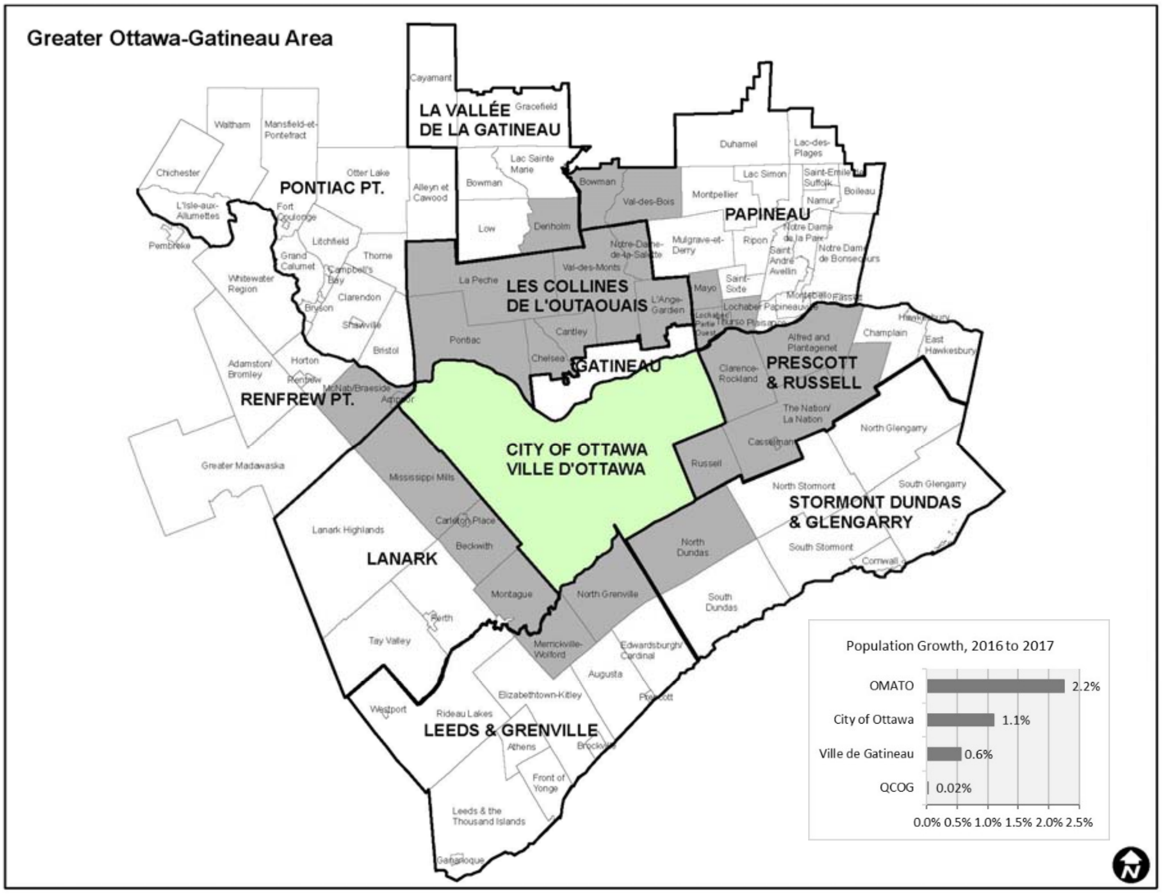
1.2 Population Distribution & Growth in the Greater Ottawa-Gatineau Area

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 1,476,008 people in the Greater Ottawa-Gatineau Area in 2017, 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 2017 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 2017 the share was 54.6% compared to 55.0% a year earlier. Downtown's[4] share of the population remained at 10.6% from 2016. The suburban centres increased to 35.7% of the population from 35.3% in 2016, while the rural area was steady at 9.7% (Table 3).

In the suburban centres, population grew 2.3% to an estimated 349,525 people, up slightly from 1.6% in 2016. Suburban households increased by 2.7%. The population of Downtown was estimated at 103,924, a 1.2% increase. Downtown households increased by 1.8%. Areas inside the Greenbelt outside of Downtown had an estimated population of 430,840, 0.2% higher than in 2016. In the

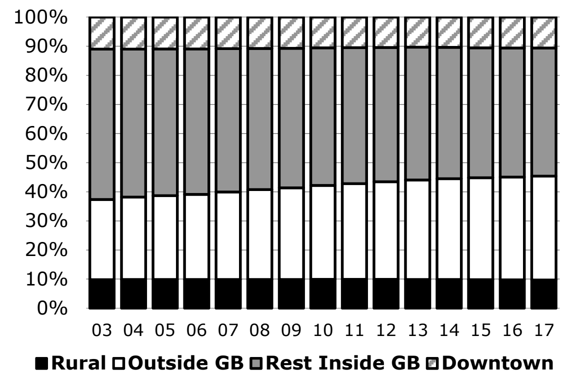
[4] **"Downtown"** refers to the Central Area and Inner Area (see map attached to Table 3).

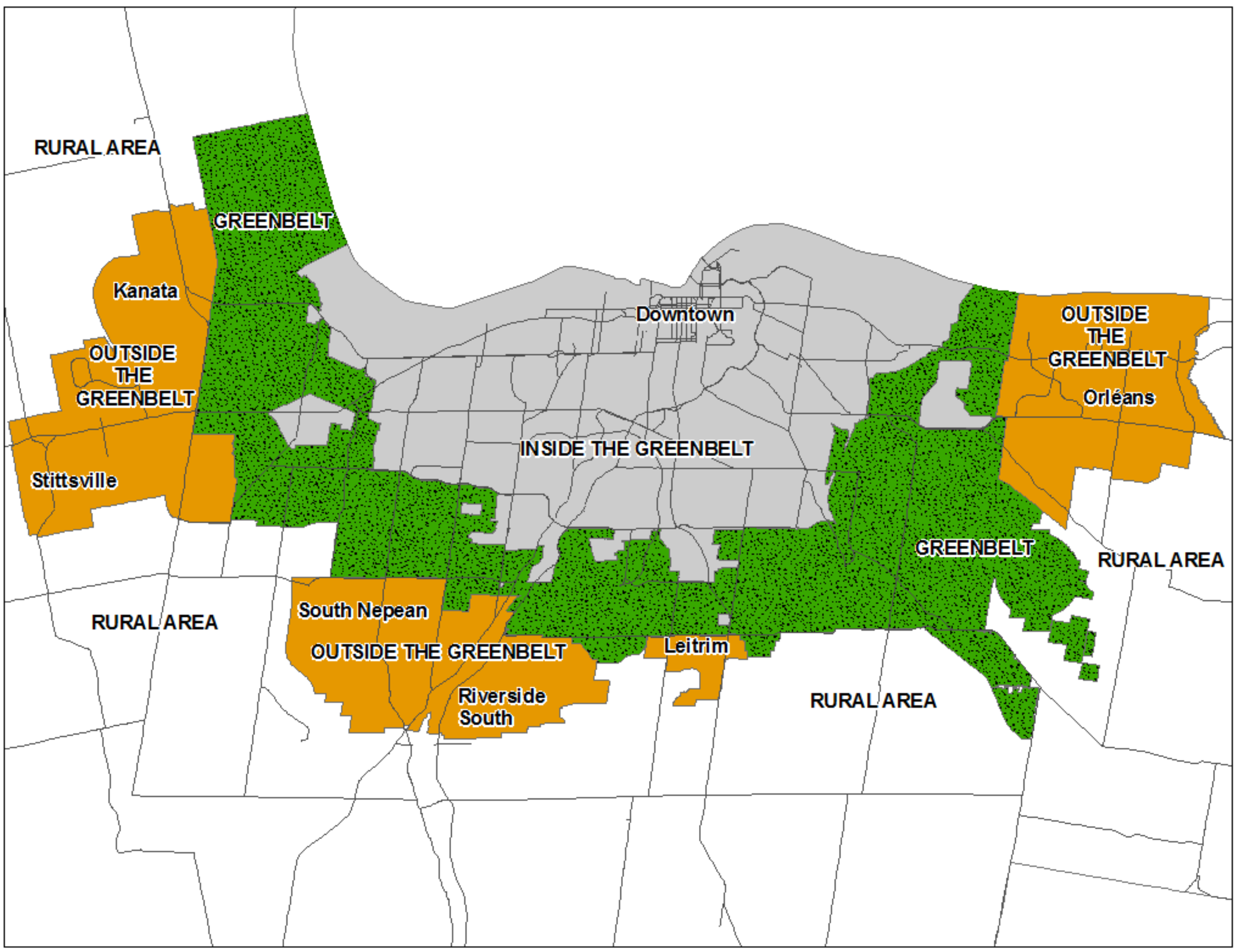
rural area the population reached 94,884, up 0.6% from 2016, while rural households increased 0.8%.

The largest portion of population growth in 2017 was in Kanata-Stittsville (26.3% of all growth), South Nepean (20.7%), Orléans (14.1%), Inner Area (11.9%) and Riverside South (7.9%). 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, Central Area and Alta Vista
(Table 3).

Distribution of population (%) 2003-2017

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 286,570 at the end of 2017, an increase of 1.6% from 2016 (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 284,373 at mid-2017. Statistics Canada's post-censal estimate for July 2017 pegs the population of the Ville de Gatineau at 284,557.

Quebec municipalities outside of Gatineau and within the CMA increased by 0.02% in 2017 to a total of 56,791. Lochaber (+29.9%), Val-des-Monts (+2.4%), and L'Ange-Gardien (+1.5%) were the communities that grew, while all others decreased in population (Table 2).

Ontario Municipalities Adjacent to Ottawa (OMATO)

The City of Ottawa estimate for OMATO's 2017 year-end population is 153,474, a 2.2% increase from 2016. The five most populous OMATO municipalities were Clarence-Rockland (25,386, up 2.7% from 2016), Russell (17,281, up 1.8%), North Grenville (16,763, up 0.3%), Mississippi Mills (13,529, which decreased -3.5%), and The Nation Municipality (12,884, up 3.4%) (Table 2).

1.3 Migration

Migration data for 2015-16 (the most recent available at the city level) shows the net number of people moving to the Ottawa was 9,888, a 69.7% increase from the year before. This is the highest net migration to Ottawa since 2001. Of note, net immigration to Ottawa from Alberta and the Greater Toronto area in 2015-16 were positive for the first time in five years. The number of people moving to adjacent communities also decreased (Tables 4 and 5).

International net migration increased to 5,046 in 2015-16, an increase of 1,950 persons from a year earlier. Intraprovincial net migration increased to 1,660 from 1,355, while interprovincial more than doubled from 1,376 to 3,182 (Table 4).

In 2015-2016, Ottawa gained more people from adjacent municipalities (+315 people). From 2011-2016, Ottawa had a net migration of 129 people from outlying regions, with the largest movement being 2,387 persons from Gatineau to Ottawa. At the same time, 1,779 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 2016-2017. Ottawa-Gatineau had the highest year-over-year increase of 30.2% to reach 19,973 net migration. Toronto continued to attract the biggest share of the migrants at 89,769 people. Calgary and Edmonton's net migration both declined from 2015-2016, by 26.0% and 17.3% 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 36.5% in the city of Ottawa in 2017
- 40.8% of Ottawa starts were apartments
- 28.8% of Ottawa starts were single-detached houses
- Residential intensification decreased to 39.1% in 2017
- Rental vacancy rate decreased to 1.7% in 2017 from 3.0% in 2016

2.1 New Construction

In the city of Ottawa, housing starts totalled 6,849 units, a 36.5% increase from 2016. The larger Ottawa-Gatineau Census Metropolitan Area ranked sixth in absolute housing starts among Canada's six largest metropolitan areas in 2017 with 9,327 units. Montréal had the largest year-over-year increase of 38.8%, followed by Ottawa with 31.1%. Edmonton and Calgary also experienced increases year-over-year, while Toronto and Vancouver experienced a decline in total housing starts from 2016. Apartment starts were the largest in relative terms in all major centres except Edmonton (Table 10).

City of Ottawa and Ottawa-Gatineau CMA Housing Starts, 2017

Sources: CMHC

	Starts, 2017	% chg. 2016-17
City of Ottawa	6,849	36.5%
Ott-Gat CMA	9,327	31.1%

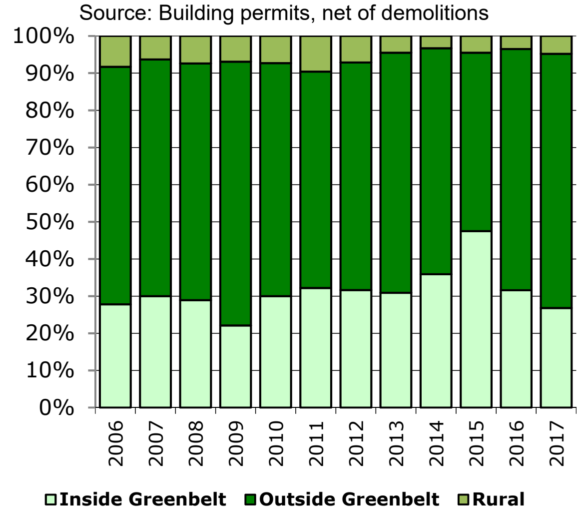
Ottawa Permits by Location

In 2017, there were 6,095 residential unit permits issued in the city of Ottawa, a 5.2% decrease from 2016 (Table 12). The percentage of housing starts inside the Greenbelt dropped to 26.8% from 31.6% in 2016 (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 growth of singles and semis in the urban area averaged 27% of urban units, slightly lower than the Official Plan projections[6] of 29%.

New Housing Inside and Outside the Greenbelt, 2006-2017

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

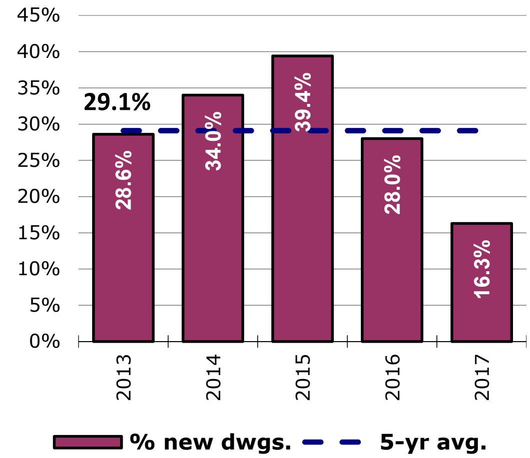
New Housing by Official Plan Designation

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 2017, 948 residential units were issued building permits in intensification target areas. This amounts to 16.3% of net new units issued permits in Ottawa. The top designated areas were existing Rapid Transit Stations (559), Mainstreets (365), and Mixed-Use Centres (240) (Table 12).

Target areas received 37.3% of all apartments, 3.3% of single and semi-detached units and 3.0% of townhouses in 2017 (Table 12). It should be noted that target areas contain only part of all intensification activity; in 2017, target areas accounted for 41.9% of total intensification, down from 60.6% in 2016.

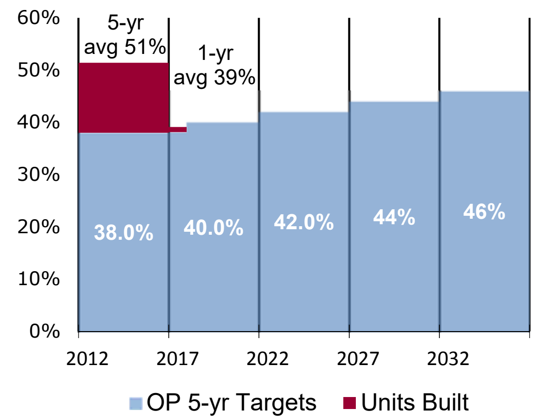
Percentage of new dwellings built in Ottawa intensification target areas, 2013-2017
Source: Building permits



Residential Intensification

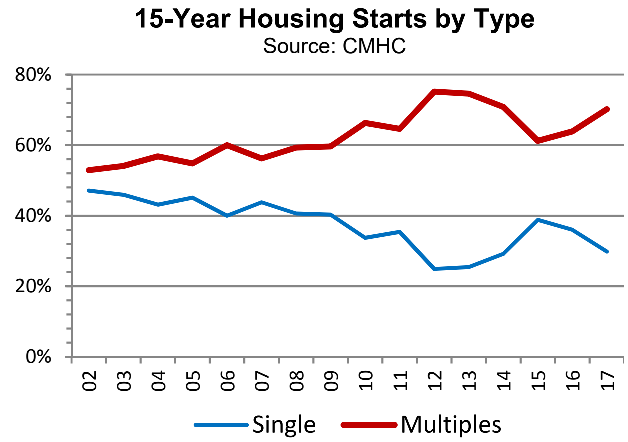
The Official Plan (OP) establishes an increasing residential intensification target to 2036.For the five-year period 2012-2016 the OP target was 38.0% of new units in urban and suburban areas combined, with actual achieved intensification averaging 51.4%. The next five-year period from 2017-2022 has an OP target of 40.0%. In 2017, a 39.1% intensification share was achieved (Table 13). The 2017 intensification share was slightly lower than the OP target of 40.0%; however, four years remain in the target period.

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 2017 for the sixteeneth year in a row. In 2017, there were 1,970 single-detached starts, slightly more than the 1,809 started in 2016. The share of single-detached starts accounted for 28.8% of all new starts, down from 36.0% in 2016 (Table 15).



The most popular house form, with a 40.8% share, was apartment, with 2,795 units started in 2017, up from 1,244 units in 2016. Townhome units saw 1,859 units started in 2017 for a share of 27.1%, down from 35.1% in 2016. The freehold market completed 4,466 units and tracked above its five-year average of 3,592 annual completed units. Overall, all units increased from 2016 with apartments leading the way, followed by single-detached units, then townhomes and semis (Table 16).

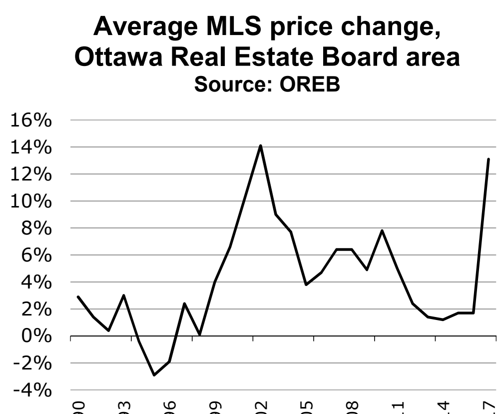
Ottawa New Single-Detached Prices

New single-detached home prices increased to $536,000 in 2017, an increase of 1.6% from last year. After factoring for inflation, the annual change was 0.2% (Table 17). Inflation is generally derived from the All-Items Consumer Price Index (CPI), which averaged 129.9 in 2017 (from a base of 100 in 2002). The annual 2017 inflation rate as measured by the CPI was 1.4%, up from 1.3% in 2016.

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 $392,400 in 2017, an annual increase of 5.8%.



Sales Activity and Trends

2017 continued the trend of increasing MLS sales from 2016 in the larger OREB area. 2017 MLS sales of 17,083 units were up 13.1% from 2017 to 2016 (Table 19).

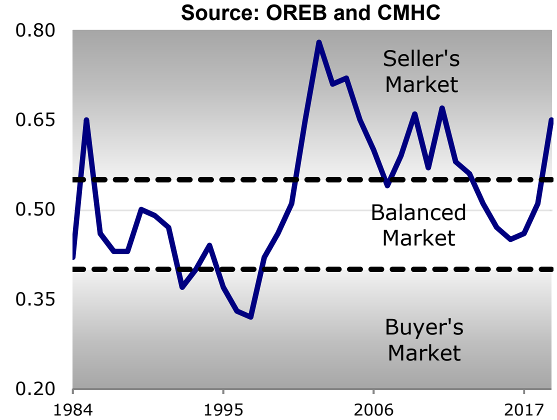
[7] MLS: Multiple Listing Service, a registered trademark of the Canadian Real Estate Association.

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 2017, the ratio increased to 0.65 from 0.51 in 2016 meaning that Ottawa had a seller's market. This differs from the previous five-years where Ottawa maintained a balanced market.

Ottawa Resale Market Supply and Demand: Sales to New Listings Ratio, 1984-2017
Source: OREB and CMHC



Major Cities

Similar to 2016, price increases in 2017 varied across the major cities. There were incremental increases in Edmonton (+2.6%), Vancouver (+2.5%) and Calgary (+2.0%). Montréal and Ottawa had similar increases of +5.0% and +5.8%, respectively, while Toronto had a major increase of +14.3%. (Table 18).

2017 AVG MLS® RESALE PRICE* & 2016-2017 % CHANGE

	Price	% Change
Vancouver	$1,032,600	+2.5%
Toronto	$822,600	+14.3%
Calgary	$466,200	+2.0%
Ottawa	**$392,400**	**+5.8%**
Edmonton	$374,400	+2.6%
Montréal	$364,500	+5.0%

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

2017 MLS® RESALE SALES* & 2016-2017 % CHANGE

	Sales	% Change
Toronto	92,300	-14.9%
Vancouver	35,900	-10.0%
Montréal	44,400	+11.8%
Calgary	23,800	+8.5%
Ottawa	**17,000**	**+13.1%**
Edmonton	16,400	-1.6%

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

2.3 Rental Housing

RENTAL VACANCY RATES BY CMHC ZONE, 2017	
Nepean	3.6%
Alta Vista	2.4%
Sandy Hill/Lowertown	2.3%
Gloucester North/Orleans	1.9%
Vanier	1.9%
City Average	**1.7%**
New Edinb./Manor Park/Overbrook	1.7%
Carlington/Iris	1.4%
Chinatown/Hintonburg/Westboro N	1.4%
Westboro S/Hampton Pk/Britannia	1.4%
Downtown	1.1%
Hunt Club/South Keys	1.0%
Western Ottawa Surrounding Areas	0.9%
Eastern Ottawa Surrounding Areas	0.7%
Glebe/Old Ottawa South	0.2%

Source: CMHC Rental Market Report Ottawa Fall 2017, Table 1.1.1

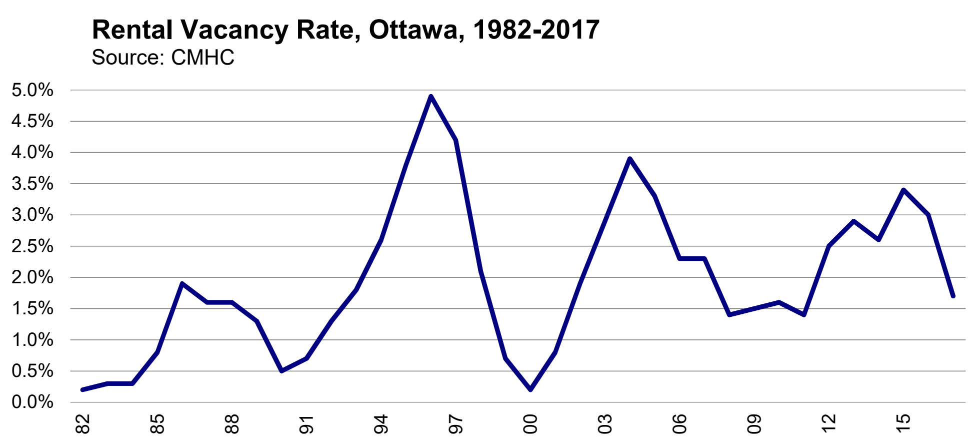
Supply

CMHC estimates there was an increase of 0.9% in the total number of rental purpose row and apartment units to 69,573 in 2017 from 68,915 in 2016, an increase of 637 apartment units and of 21 row units. However, the overall supply of condominium rental units increased 7.0% to 10,316 in 2017 from 9,635 in 2016. The percentage of condominiums that are rental has increased from 20.7% in 2012 to 30.3% in 2017 showing that rental condominiums are becoming an increasing part of the rental supply, although largely limited to the highest rent quintile.

Vacancy Rates

Ottawa's rental vacancy rate decreased to 1.7% in 2017 from 3.0% in 2016. The vacancy rate is lower for one-bedroom (1.4%) and bachelor units (1.6%) compared to two-bedroom units (2.1%). The decrease in vacancy is mainly due to stronger demand conditions. The number of occupied units is estimated to have risen by just over 1,400 units relative to a supply increase of 637 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 low vacancy rate this year does not permit conversions.



Private Rental Prices

The average rent for a two-bedroom apartment in Ottawa in 2017 was $1,232, an increase of 2.6% from 2016 and above the 2017 provincial Rent Increase Guideline of 1.5%. The average rent of a two-bedroom apartment in Gatineau in 2017 was $782. The rent gap between Ottawa and Gatineau for a two-bedroom apartment is $450 and 58%, similar to the 57% in 2016.

3. Economy

HIGHLIGHTS

- The number of employed residents increased by 0.6% in Ottawa from 2016 to 2017
- The Government cluster was Ottawa's highest growth cluster in 2017, adding 18,600 jobs
- The Knowledge cluster had the largest employment numbers with 171,100 jobs in 2017

3.1 Labour Force

Employed Residents

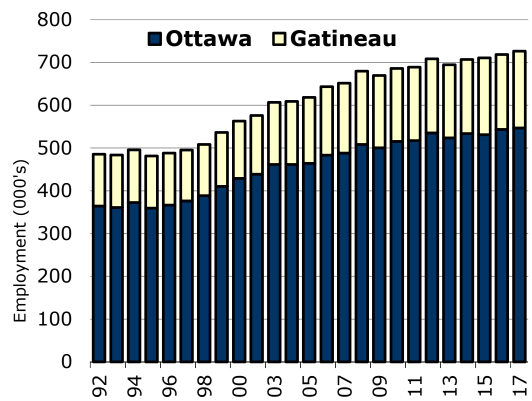
The Ottawa-Gatineau CMA gained 7,800 jobs in 2017. Gains were made in all of the nation's six largest metro areas, with Montréal seeing the largest increase of 74,800 jobs (adjacent table). About 75% of the jobs in the Ottawa-Gatineau CMA have historically been in the city of Ottawa.

Employment Changes, Major Centres, 2016-2017
Source: Statistics Canada, Labour Force Survey, CANSIM 282-0131

CMA	Net job change
Montréal	74,800
Toronto	74,600
Vancouver	41,700
Calgary	26,300
Ottawa-Gatineau	**7,800**
Edmonton	3,000

Statistics Canada's sample-based Labour Force Survey (LFS) shows the number of employed residents in the Ottawa CMA averaged 546,700 in 2017, up 0.6% or 3,300 employed residents from 2016[8]. The unemployment rate decreased to 5.6%. The local unemployment rate remained lower than provincial (6.0%) and national (7.3%) rates (Table 8).

Total Employment, Ottawa and Gatineau, 1992-2017
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 cluster was Ottawa's highest growth cluster in 2017, adding 18,600 jobs. The Industrial & Resource cluster (+4,500) and the Retail cluster (+800) also experienced growth. In 2017, the Knowledge cluster had the largest employment numbers with 171,100 jobs (Table 9).

In 2017 private-sector employment represented 62.1% of all jobs in Ottawa, down from 63.9% in 2016 (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 2017, Ottawa's Advanced Technology sector gained an estimated 9,700 jobs after a small loss of 400 in 2016. Software and Telecommunications gained 4,500 jobs, while Telecommunications Equipment and Microelectronics both experienced a growth of 2,300 jobs. Health Sciences remained relatively stable, while Tourism lost an estimated 5,900 jobs in 2017 (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 (40.9 million square feet). Ottawa's overall vacancy rate decreased to 11.4% at the end of 2017 from 12.4% in 2016. Ottawa South/Airport area had the lowest vacancy rate of 8.0%, followed by Downtown Ottawa at 10.1%. Across the city, Class A building vacancy rates decreased by 2.5% to 9.6%, while Class B buildings increased to 13.1% from 11.9%. Class C buildings had the highest vacancy rate of 17.3% 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 (22.6 million square feet) of industrial floor area at the end of 2017. Over 60% of the industrial inventory is east of the Rideau River, which saw a decrease in vacancy to 7.4% from 8.9%. West of the Rideau River, vacancies decreased, to 4.5% from 5.7%. Overall, the city saw the vacancy rate decrease to 6.3% in 2017 from 7.7% in 2016 (Table 21).

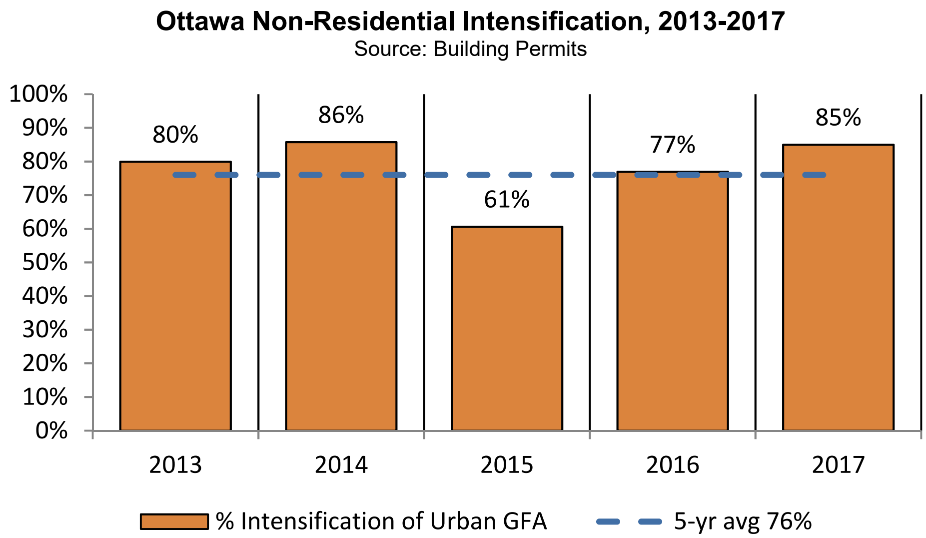
Retail Market

Retail space is categorized into several format categories. In 2017, all retail categories maintained similar shares of total floor area compared to 2016. Power Centres and standalone big box stores had the largest share of space, increasing to 27.3% of the total in 2017 from 27.0% in 2016.

The largest vacancy increases were in Community Shopping Centres, which saw an increase to 7.9% in 2017 from 7.2% in 2016. Office Concourses experienced a decline in vacancy rate, falling 1.9% to 3.0%. Power Centres had a minor decrease in vacancy rate of 0.1% to 3.6%. The city's overall retail vacancy rate increased to 5.5% in 2017 from 5.3% in 2016 (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 2017 approximately 144,000 m^2 (about 1.5 million ft^2) had been constructed within the developed area, representing an intensification rate of 85%, 25% of which was at Transitway Stations. Over the past five-years, non-residential intensification averaged 76% 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.

Commercial Service Index Results	
Highest: Rideau Station	99- Daily errands can be accomplished wtihin transit station areas
Average	74.6 - Most errands can be accomplished wtihin transit station areas
Lowest: Tremblay Station	34 - Most errands outside transit station areas

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. Pimisi Station, Tremblay Station, and Greenboro Station all experienced increases – Pimisi with an index of 89 in 2017 from 25 in 2016, Tremblay with an index of 34 from 24, and Greenboro with an index of 71 from 64. However new addresses that are currently under construction may not be in Walk Score's database and the closest address within their database may be used as a proxy. This may result in different indices during construction periods as address databases are updated. For example, the index for Bayview Station decreased scores from 91 in 2016 to 81 in 2017.

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

Appendix: Data Tables

TABLE 1
POPULATION OF CANADA'S SIX LARGEST METROPOLITAN AREAS, 2013-2017

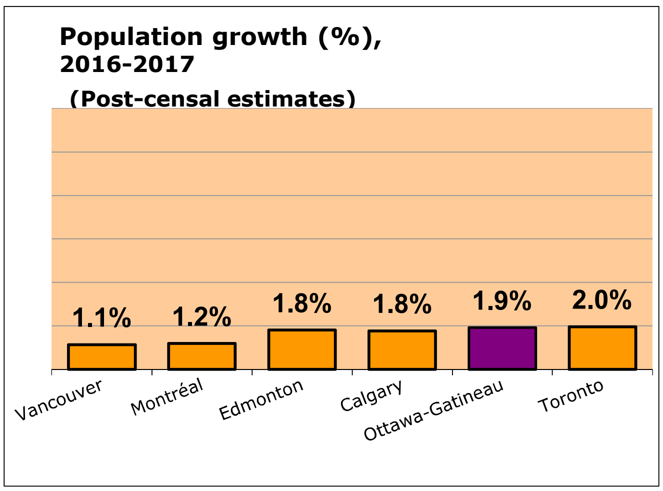
CMA *	POST-CENSAL ESTIMATES					*2016-2017*
	2013 (F)	**2014 (U)**	**2015 (U)**	**2016 (U)**	**2017(P)**	***% chg.***
Toronto	5,967,358	6,050,887	6,116,725	6,223,998	6,346,088	*2.0%*
Montréal	3,977,214	4,015,919	4,045,877	4,089,739	4,138,254	*1.2%*
Vancouver	2,445,781	2,483,743	2,509,942	2,542,278	2,571,262	*1.1%*
Calgary	1,354,223	1,401,462	1,432,169	1,462,927	1,488,841	*1.8%*
Ottawa-Gatineau	**1,302,873**	**1,316,474**	**1,329,433**	**1,351,039**	**1,377,016**	*1.9%*
Edmonton	1,282,525	1,327,425	1,358,345	1,386,788	1,411,945	*1.8%*
City of Ottawa**	936,102	946,683	956,731	973,561	994,837	*2.2%*

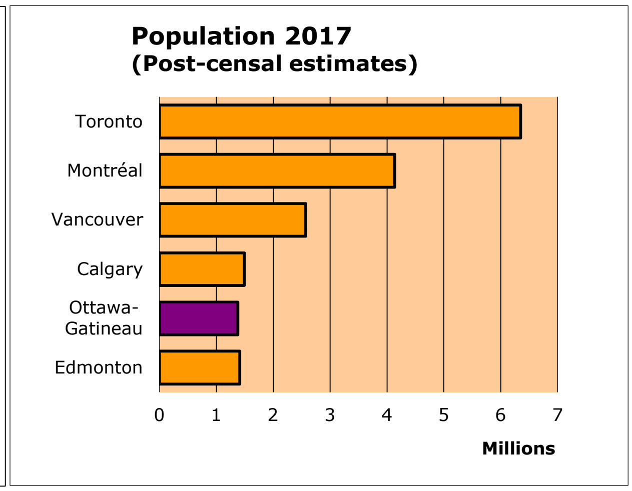
Source: Statistics Canada, Tables 051-0056 and 051-0062; estimates are for July 1 each year

* 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	2013 (F)	2014 (U)	2015 (U)	2016 (U)	2017(P)	*2016-2017 % chg.*
Ontario part of CMA	978,341	989,594	1,000,679	1,018,204	1,040,346	*2.2%*
(%)	75.1%	75.2%	75.3%	75.4%	75.6%	
Quebec part of CMA	324,532	326,880	328,754	332,835	336,670	*1.2%*
(%)	24.9%	24.8%	24.7%	24.6%	24.4%	
Total CMA Population	**1,302,873**	**1,316,474**	**1,329,433**	**1,351,039**	**1,377,016**	***1.9%***

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	2011 Census Population	2011 Census Occupied Dwellings	2016 Census Population	2016 Census Occupied Dwellings	2016 City Estimates Population	2016 City Estimates Occupied Dwellings	2017 City Estimates Population	2017 City Estimates Occupied Dwellings
Ottawa, C	**883,391**	**353,244**	**934,243**	**373,756**	**968,580**	**409,643**	**979,173**	**416,219**
Gatineau, V	**265,349**	**112,758**	**276,245**	**118,385**	**282,005**	**121,958**	**286,570**	**123,242**
Prescott & Russell (part)	**62,938**	**23,352**	**67,068**	**25,361**	**67,343**	**25,788**	**69,161**	**26,252**
Alfred and Plantagenet, TP	9,196	3,728	9,680	3,959	9,620	4,060	9,958	4,080
Casselman, Vlg.	3,642	1,438	3,548	1,435	3,559	1,468	3,652	1,484
Clarence-Rockland, C (part of ON CMA)	23,185	8,641	24,512	9,329	24,729	9,534	25,386	9,702
Russell, TP (part of ON CMA)	15,247	5,285	16,520	5,873	16,973	5,986	17,281	6,175
The Nation Municipality	11,668	4,260	12,808	4,765	12,462	4,740	12,884	4,811
Leeds & Grenville (part)	**17,935**	**4,422**	**19,518**	**7,671**	**19,651**	**7,630**	**19,706**	**7,795**
Merrickville-Wolford, Vlg.	2,850	4,422	3,067	1,232	2,946	1,172	2,943	1,187
North Grenville, TP (part of ON CMA)	15,085	6,819	16,451	6,439	16,706	6,458	16,763	6,607
Stormont, Dundas, Glengarry (pt)	**11,225**	**1,121**	**11,278**	**4,481**	**11,172**	**4,608**	**11,644**	**4,634**
North Dundas, TP	11,225	5,698	11,278	4,481	11,172	4,608	11,644	4,634
Lanark (part)	**32,663**	**9,690**	**35,212**	**13,858**	**35,425**	**14,006**	**36,265**	**14,311**
Beckwith, TP	6,986	2,571	7,644	2,864	7,698	2,901	7,899	2,970
Carleton Place, Tn.	9,809	3,973	10,644	4,278	10,364	4,344	11,042	4,431
Mississippi Mills, Tn.	12,385	4,836	13,163	5,292	14,024	5,339	13,529	5,471
Montague, TP	3,483	1,310	3,761	1,424	3,340	1,421	3,794	1,438
Renfrew (part)	**15,485**	**6,459**	**15,973**	**6,796**	**16,505**	**7,059**	**16,698**	**7,137**
Arnprior, Tn.	8,114	3,640	8,795	3,912	9,038	4,127	9,431	4,188
McNab/Braeside, TP	7,371	2,819	7,178	2,884	7,467	2,932	7,267	2,949
Québec part of CMA Outside Gatineau (QCOG)	**49,152**	**18,708**	**55,812**	**21,717**	**56,782**	**21,819**	**56,791**	**22,109**
Cantley, M	9,888	3,419	10,699	3,768	11,209	3,870	11,172	3,933
Chelsea, M	6,977	2,572	6,909	2,610	7,296	2,680	7,200	2,718
La Pêche, M	7,619	3,121	7,863	3,274	8,025	3,290	7,991	3,328
L'Ange-Gardien, M	5,051	1,775	5,464	1,960	5,487	1,971	5,569	2,006
Pontiac, M	5,681	2,147	5,850	2,252	6,011	2,243	5,875	2,256
Val-des-Monts, M	10,420	4,082	11,582	4,564	11,220	4,475	11,490	4,544
Denholm, M	572	247	505	224	577	255	574	256
Notre-Dame-de-la-Salette, M	757	332	727	328	776	345	769	348
Mayo, M	572	242	601	259	635	265	628	270
Bowman, M	677	302	658	312	683	311	656	312
Val-des-Bois, M	938	469	865	452	961	477	914	477
Lochaber, CT	409	155	415	162	301	153	391	153
Lochaber-Ouest, CT	646	240	856	324	750	280	748	283
Thurso, V	2,455	1,042	2,818	1,228	2,849	1,204	2,814	1,225
GREATER OTTAWA-GATINEAU AREA	**1,338,138**	**529,754**	**1,415,349**	**572,025**	**1,457,464**	**612,510**	**1,476,008**	**621,699**
Ottawa-Gatineau CMA	1,236,324	498,636	1,323,783	535,499	1,365,775	575,398	1,381,964	584,054
Ontario portion of the CMA	921,823	367,170	991,726	395,397	1,026,988	431,621	1,038,603	438,703
Québec portion of the CMA	310,991	130,029	332,057	140,102	338,787	143,777	343,361	145,351
OMATO	140,246	45,044	149,049	58,167	150,097	59,090	153,474	60,129

Sources: Statistics Canada, Census; estimates based on CMHC starts and municipal building permits **2016-17 City Estimates are year-end.**

City of Ottawa (2016 and 2017 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, 2013-2017

SUB-AREA	POPULATION							HOUSEHOLDS						
						Growth							Growth	
	2013	2014	2015	2016	2017	16-17	*% 16-17*	2013	2014	2015	2016	2017	16-17	*% 16-17*
Downtown*														
Central Area	10,637	11,012	12,026	12,570	12,544	-26	*-0.2%*	6,511	6,813	7,473	7,906	7,979	73	*0.9%*
Inner Area	87,114	88,006	89,605	90,122	91,380	1,258	*1.4%*	46,165	46,869	48,014	48,484	49,444	960	*2.0%*
Other Areas Inside Greenbelt														
Ottawa East	51,641	51,421	51,117	51,164	51,755	591	*1.2%*	25,542	25,614	25,641	25,885	26,457	572	*2.2%*
Beacon Hill	30,831	30,730	30,275	30,650	30,771	121	*0.4%*	14,100	14,149	14,001	14,343	14,496	153	*1.1%*
Alta Vista	75,430	75,385	74,998	75,059	75,027	-32	*0.0%*	32,459	32,569	32,500	32,726	32,857	131	*0.4%*
Hunt Club	65,768	65,669	65,555	65,595	65,694	99	*0.2%*	26,353	26,397	26,451	26,577	26,748	171	*0.6%*
Merivale	77,303	77,431	77,531	77,769	77,953	184	*0.2%*	33,231	33,500	33,780	34,152	34,493	341	*1.0%*
Ottawa West	43,669	43,795	44,598	45,380	45,524	144	*0.3%*	20,585	20,671	21,191	21,685	21,789	104	*0.5%*
Bayshore	38,677	38,657	38,477	38,397	38,497	100	*0.3%*	17,660	17,729	17,698	17,732	17,865	133	*0.8%*
Cedarview	46,890	46,478	46,162	45,822	45,619	-203	*-0.4%*	18,562	18,589	18,634	18,699	18,843	144	*0.8%*
Urban Areas Outside Greenbelt														
Kanata-Stittsville	111,529	114,020	116,777	118,949	121,730	2,781	*2.3%*	40,832	41,963	43,174	44,266	45,475	1,209	*2.7%*
South Nepean	78,455	81,273	83,252	84,925	87,115	2,190	*2.6%*	28,717	29,845	30,674	31,438	32,369	931	*3.0%*
Riverside South	12,715	13,537	14,145	14,590	15,425	835	*5.7%*	4,595	4,903	5,126	5,273	5,542	269	*5.1%*
Leitrim	7,281	7,846	8,527	8,808	9,284	476	*5.4%*	2,344	2,560	2,806	2,907	3,073	166	*5.7%*
Orléans	112,152	112,628	113,595	114,473	115,971	1,498	*1.3%*	42,321	42,856	43,490	44,149	45,086	937	*2.1%*
Rural														
Rural Northeast	11,834	11,868	11,937	11,952	12,012	60	*0.5%*	4,248	4,267	4,296	4,309	4,339	30	*0.7%*
Rural Southeast	27,873	28,148	28,316	28,415	28,610	195	*0.7%*	9,725	9,828	9,892	9,940	10,016	76	*0.8%*
Rural Southwest	27,990	28,275	28,296	28,395	28,660	265	*0.9%*	9,779	9,969	10,014	10,088	10,214	126	*1.2%*
Rural Northwest	25,471	25,546	25,568	25,545	25,602	57	*0.2%*	8,975	9,028	9,063	9,086	9,134	48	*0.5%*
City of Ottawa	**943,260**	**951,725**	**960,757**	**968,580**	**979,173**	**10,593**	**1.1%**	**392,704**	**398,119**	**403,918**	**409,645**	**416,219**	**6,574**	**1.6%**
Downtown*	97,751	99,018	101,631	102,692	103,924	1,232	*1.2%*	52,676	53,682	55,487	56,390	57,423	1,033	*1.8%*
Other Inside Greenbelt	430,209	429,566	428,713	429,836	430,840	1,004	*0.2%*	188,492	189,218	189,896	191,799	193,548	1,749	*0.9%*
Total Inside GB	*527,960*	*528,584*	*530,344*	*532,528*	*534,764*	*2,236*	*0.4%*	*241,168*	*242,900*	*245,383*	*248,189*	*250,971*	*2,782*	*1.1%*
Urban Areas Outside GB	322,132	329,304	336,296	341,745	349,525	7,780	*2.3%*	118,809	122,127	125,270	128,033	131,545	3,512	*2.7%*
Rural	93,168	93,837	94,117	94,307	94,884	577	*0.6%*	32,727	33,092	33,265	33,423	33,703	280	*0.8%*
Downtown*	10.4%	10.4%	10.6%	10.6%	10.6%			13.4%	13.5%	13.7%	13.8%	13.8%		
Other Inside Greenbelt	45.6%	45.1%	44.6%	44.4%	44.0%			48.0%	47.5%	47.0%	46.8%	46.5%		
Total Inside GB	*56.0%*	*55.5%*	*55.2%*	*55.0%*	*54.6%*			*61.4%*	*61.0%*	*60.8%*	*60.6%*	*60.3%*		
Urban Areas Outside GB	34.2%	34.6%	35.0%	35.3%	35.7%			30.3%	30.7%	31.0%	31.3%	31.6%		
Rural	9.9%	9.9%	9.8%	9.7%	9.7%			8.3%	8.3%	8.2%	8.2%	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

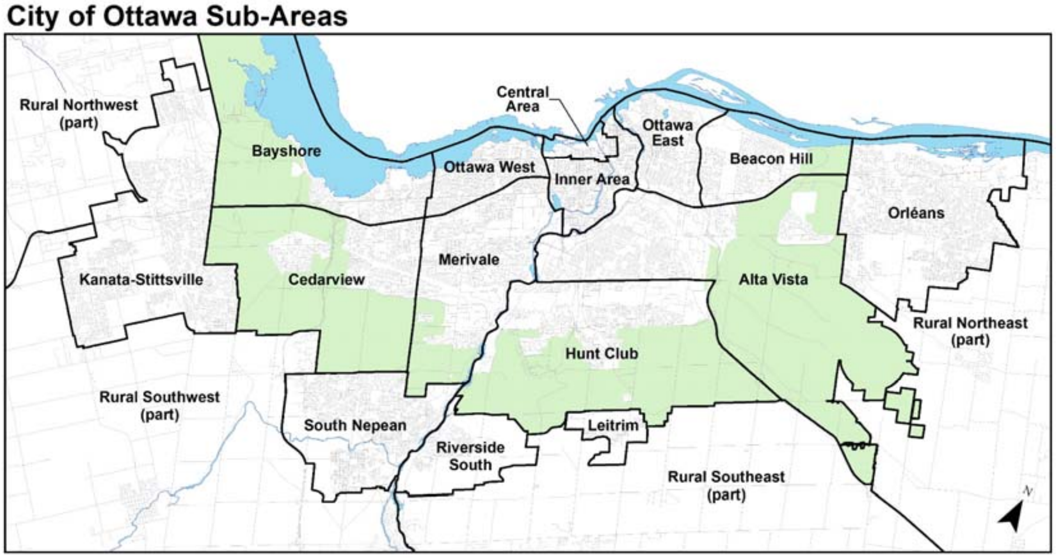


TABLE 4
NET MIGRATION TO THE CITY OF OTTAWA, 2011-2016

BY AGE GROUP

YEAR	AGE GROUP 0 - 17	18 - 24	25 - 44	45 - 64	65+	TOTAL
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 (R)	1,117	1,819	2,511	-499	400	5,348
2014-15 (P)	1,230	1,688	3,237	-415	87	5,827
2015-16 (P)	**2,467**	**2,210**	**4,621**	**110**	**480**	**9,888**
5-year total	**7,793**	**9,599**	**15,878**	**-1,928**	**1,222**	**32,564**
5 year %	**23.9%**	**29.5%**	**48.8%**	**-5.9%**	**3.8%**	**100.0%**

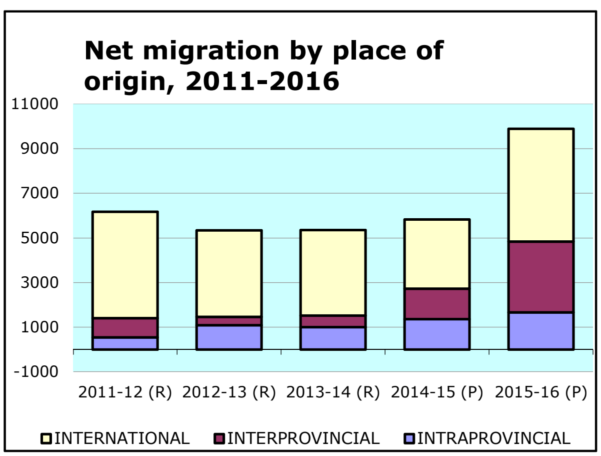
Source: Statistics Canada, Migration Estimates for Census Division 3506 (R) = revised

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

BY PLACE OF ORIGIN

	INTRAPROVINCIAL	INTERPROVINCIAL	INTERNATIONAL	TOTAL
In-Migrants				
2011-12 (R)	15,509	11,154	7,124	33,787
2012-13 (R)	13,704	9,774	6,604	30,082
2013-14 (R)	14,090	10,258	6,626	30,974
2014-15 (P)	15,004	11,132	5,969	32,105
2015-16 (P)	**15,645**	**12,104**	**7,958**	**35,707**
Out-Migrants				
2011-12 (R)	14,968	10,286	2,367	27,621
2012-13 (R)	12,620	9,400	2,727	24,747
2013-14 (R)	13,081	9,742	2,803	25,626
2014-15 (P)	13,649	9,756	2,873	26,278
2015-16 (P)	**13,985**	**8,922**	**2,912**	**25,819**
Net Migration				
2011-12 (R)	541	868	4,757	6,166
2012-13 (R)	1,084	374	3,877	5,335
2013-14 (R)	1,009	516	3,823	5,348
2014-15 (P)	1,355	1,376	3,096	5,827
2015-16 (P)	**1,660**	**3,182**	**5,046**	**9,888**

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



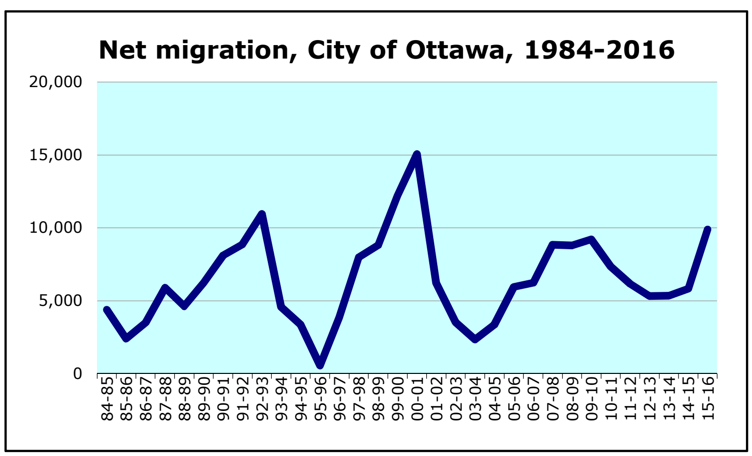


TABLE 5
NET MIGRATION IN-FLOWS AND OUT-FLOWS, CITY OF OTTAWA

2006-2016			
IN-FLOWS*		**OUT-FLOWS***	
Greater Montréal	9,326	British Columbia	-2,063
Rest of Ontario***	8,059	Alberta	-3,507
Northern Ontario	6,251	OMATO and QMAG	-4,354
Atlantic provinces	4,793		
Eastern Ontario	4,578		
Rest of Québec**	2,701		
Manitoba & Saskatchewan	2,620		
Gatineau	1,624		
Canadian North	362		
Greater Toronto Area	349		
TOTAL IN-FLOWS	**40,663**	**TOTAL OUT-FLOWS**	**-9,924**
		Net Canadian Migration 2006-2016	30,739
		Net International Migration	**42,103**
		Net Migration 2006-2016	**72,842**

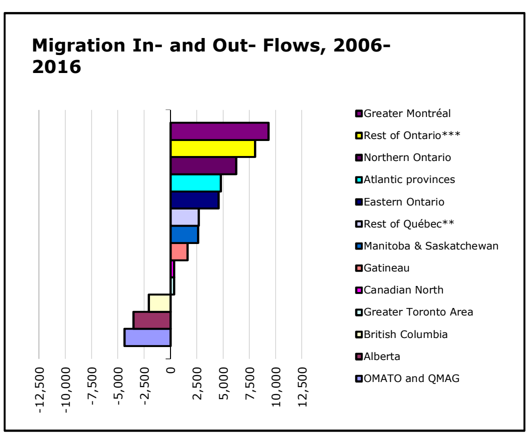
2015-2016			
IN-FLOWS*		**OUT-FLOWS***	
Greater Montréal	1,269	OMATO and QMAG	-157
Atlantic provinces	793	British Columbia	-446
Rest of Ontario***	685		
Northern Ontario	665		
Gatineau	472		
Eastern Ontario	454		
Rest of Québec**	386		
Manitoba & Saskatchewan	317		
Alberta	300		
Canadian North	89		
Greater Toronto Area	15		
TOTAL IN-FLOWS	**5,445**	**TOTAL OUT-FLOWS**	**-603**
		Net Canadian Migration 2015-2016	4,842
		Net International Migration *(Table 4)*	**5,046**
		Net Migration 2015-2016	**9,888**

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



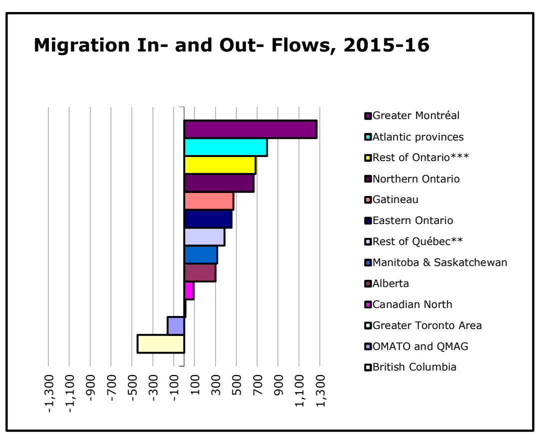


TABLE 6
MIGRATION BETWEEN OTTAWA AND ADJACENT MUNICIPALITIES, 2011-16

	2011-2012 (R)	2012-2013 (R)	2013-2014 (R)	2014-2015 (R)	2015-2016 (P)	TOTAL 2011-2016
PRESCOTT-RUSSELL TO OTTAWA	*1,744*	*1,630*	*1,780*	*1,789*	*1,795*	*8,738*
OTTAWA TO PRESCOTT-RUSSELL	*2,082*	*1,712*	*1,782*	*1,828*	*1,654*	*9,058*
PRESCOTT-RUSSELL - NET MIGRATION	**-338**	**-82**	**-2**	**-39**	**141**	**-320**
*S.D.&G.** TO OTTAWA*	*940*	*779*	*883*	*889*	*925*	*4,416*
OTTAWA TO S.D.&G.	*816*	*779*	*714*	*697*	*663*	*3,669*
S.D.&G. - NET MIGRATION	**124**	**0**	**169**	**192**	**262**	**747**
LEEDS-GRENVILLE TO OTTAWA	*903*	*843*	*841*	*878*	*862*	*4,327*
OTTAWA TO LEEDS-GRENVILLE	*1,225*	*1,005*	*1,046*	*1,084*	*1,052*	*5,412*
LEEDS-GRENVILLE - NET MIGRATION	**-322**	**-162**	**-205**	**-206**	**-190**	**-1,085**
LANARK TO OTTAWA	*1,051*	*959*	*953*	*1,002*	*1,038*	*5,003*
OTTAWA TO LANARK	*1,349*	*1,210*	*1,367*	*1,326*	*1,530*	*6,782*
LANARK - NET MIGRATION	**-298**	**-251**	**-414**	**-324**	**-492**	**-1,779**
RENFREW TO OTTAWA	*1,037*	*969*	*939*	*1,078*	*1,036*	*5,059*
OTTAWA TO RENFREW	*1,125*	*923*	*935*	*979*	*916*	*4,878*
RENFREW - NET MIGRATION	**-88**	**46**	**4**	**99**	**120**	**181**
GATINEAU TO OTTAWA*	*2,505*	*2,238*	*2,402*	*2,448*	*2,320*	*11,913*
OTTAWA TO GATINEAU	*2,263*	*1,886*	*1,800*	*1,729*	*1,848*	*9,526*
GATINEAU - NET MIGRATION	**242**	**352**	**602**	**719**	**472**	**2,387**
LES-COLLINES-DE-L'OUTAOUAIS TO OTTAWA	*237*	*273*	*284*	*268*	*247*	*1,309*
OTTAWA TO LES-COLLINES-DE-L'OUTAOUAIS	*326*	*270*	*220*	*233*	*256*	*1,305*
LES-COLLINES - NET MIGRATION	**-89**	**3**	**64**	**35**	**-9**	**4**
PAPINEAU TO OTTAWA	*21*	*23*	*18*	*18*	*15*	*95*
OTTAWA TO PAPINEAU	*17*	*16*	*27*	*23*	*28*	*111*
PAPINEAU - NET MIGRATION	**4**	**7**	**-9**	**-5**	**-13**	**-16**
LA-VALLÉE-DE-LA-GATINEAU TO OTTAWA	*41*	*39*	*15*	*20*	*29*	*144*
OTTAWA TO LA-VALLÉE-DE-LA-GATINEAU	*42*	*49*	*41*	*40*	*18*	*190*
LA-VALLÉE - NET MIGRATION	**-1**	**-10**	**-26**	**-20**	**11**	**-46**
PONTIAC TO OTTAWA	*64*	*41*	*69*	*39*	*41*	*254*
OTTAWA TO PONTIAC	*58*	*41*	*30*	*41*	*28*	*198*
PONTIAC - NET MIGRATION	**6**	**0**	**39**	**-2**	**13**	**56**
TOTAL	**-760**	**-97**	**222**	**449**	**315**	**129**
Gatineau	**242**	**352**	**602**	**719**	**472**	**2,387**
OMATO Counties*	**-922**	**-449**	**-448**	**-278**	**-159**	**-2,256**
QMAG Counties*	**-80**	**0**	**68**	**8**	**2**	**-2**

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	2012-2013 (F)	2013-2014 (F)	2014-2015 (U)	2015-2016 (U)	2016-2017 (P)	% chg. 15-16/16-	2012-2017 TOTAL
Toronto	62,472	50,610	33,409	75,197	89,769	19.4%	311,457
Montréal	23,795	19,995	13,786	27,020	33,549	24.2%	118,145
Vancouver	24,362	28,502	17,138	23,474	26,342	12.2%	119,818
Calgary	37,990	35,388	18,563	18,542	13,716	-26.0%	124,199
Edmonton	34,308	36,306	21,112	18,638	15,409	-17.3%	125,773
Ottawa-Gatineau	**7,988**	**7,261**	**6,985**	**15,341**	**19,973**	**30.2%**	**57,548**
TOTAL 6 CMA's	**190,915**	**178,062**	**110,993**	**178,212**	**198,758**	**11.5%**	**856,940**
Ottawa-Gatineau % of 6 largest CMA's	4.2%	4.1%	6.3%	8.6%	10.0%		6.7%

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 2015-2016. The second dataset is CANSIM Table 051-0057, which is used for Table 7 and has data up to 2016-2017.

TABLE 8
LABOUR FORCE INDICATORS, OTTAWA*, 2000-2017

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%**
% change:									
2016-17	1.7	-0.2	0.6	-12.0	5.9	-1.3%	-0.7%	-0.5%	-0.7%
2013-17	6.0	3.4	4.4	-10.8	11.8	-1.7%	-0.9%	-1.5%	-0.8%

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)

* 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, 2011-2017

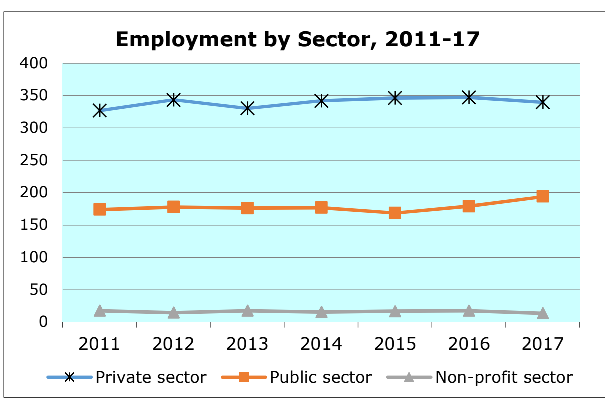
By Major Clusters	2011	2012	2013	2014	2015	2016	2017
Industrial & Resource Cluster	**46.0**	**49.6**	**39.0**	**40.4**	**48.5**	**42.1**	**46.6**
Primary	2.3	3.5	1.5	1.7	0.0	0.0	0.0
Utilities	0.0	0.0	0.0	1.6	0.0	0.0	0.0
Construction	23.4	27.0	20.5	19.6	31.8	25.2	28.9
Manufacturing	20.3	19.1	17.0	17.5	16.7	16.9	17.7
Retail Cluster	**80.7**	**83.9**	**77.6**	**83.8**	**82.2**	**81.6**	**82.4**
Wholesale Trade	11.1	11.0	11.7	16.4	11.5	16.6	13.3
Retail Trade	53.0	56.5	51.7	52.6	55.4	48.7	53.2
Transportation and Warehousing	16.6	16.4	14.2	14.8	15.3	16.3	15.9
Office Cluster	**70.6**	**67.3**	**74.7**	**69.3**	**71.8**	**71.2**	**69.9**
Administrative and Support Services	21.4	19.8	23.0	21.3	25.1	25.2	18.1
F.I.R.E.*	24.8	26.5	28.1	24.4	27.2	25.2	28.4
Other Services	24.4	21.0	23.6	23.6	19.5	20.8	23.4
Culture and Tourism Cluster	**51.7**	**61.7**	**54.6**	**63.0**	**58.9**	**58.7**	**51.5**
Accommodation and Food Services	28.6	30.4	31.7	35.8	33.2	31.3	28.2
Information and Cultural Industries	12.9	17.3	13.2	14.8	13.0	12.5	11.2
Arts, Entertainment and Recreation	10.2	14.0	9.7	12.4	12.7	14.9	12.1
Knowledge Cluster	**155.0**	**155.4**	**168.6**	**166.6**	**165.6**	**181.7**	**171.1**
Health and Education	97.5	96.2	103.4	106.1	110.7	119.6	110.3
Professional, Sci. & Tech. Services	57.5	59.2	65.2	60.5	54.9	62.1	60.8
Government Cluster	**110.1**	**115.2**	**108.2**	**108.6**	**101.1**	**104.8**	**123.4**
Public Administration	110.1	115.2	108.2	108.6	101.1	104.8	123.4
Total Employed Residents	**517.4**	**535.4**	**523.5**	**533.8**	**531.1**	**543.4**	**546.7**
By Primary, Secondary and Tertiary Sector							
Primary	2.3	3.5	1.5	1.7	0.0	0.0	0.0
Secondary	43.7	46.1	37.5	38.7	48.5	42.1	46.6
Tertiary	471.4	485.8	484.5	493.4	482.6	501.3	500.1
Total	**517.4**	**535.4**	**523.5**	**533.8**	**531.1**	**543.4**	**546.7**
By Type of Sector							
Private sector	326.7	343.4	330.4	342.0	346.2	347.2	339.7
Public sector	173.4	177.6	175.8	176.6	168.4	178.8	193.7
Non-profit sector	17.3	14.4	17.3	15.2	16.5	17.4	13.3
Total	**517.4**	**535.4**	**523.5**	**533.8**	**531.1**	**543.4**	**546.7**
% private	63.1%	64.1%	63.1%	64.1%	65.2%	63.9%	62.1%
By High-Tech Cluster							
Telecommunications equipment	4.1	3.1	2.4	1.5	1.5	0.0	2.3
Microelectronics	4.1	3.1	2.4	3.0	1.5	0.0	2.3
Software and Telecommunications	44.4	46.0	51.6	50.2	40.6	43.3	47.8
Health Sciences	2.5	1.5	0.0	1.5	1.9	1.8	2.4
Tourism	36.7	42.3	41.4	48.2	45.9	46.2	40.3
Total, all clusters	**91.8**	**96.0**	**97.8**	**104.4**	**91.4**	**91.3**	**95.1**
Advanced Technology	***55.1***	***53.7***	***56.4***	***56.2***	***45.5***	***45.1***	***54.8***

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)



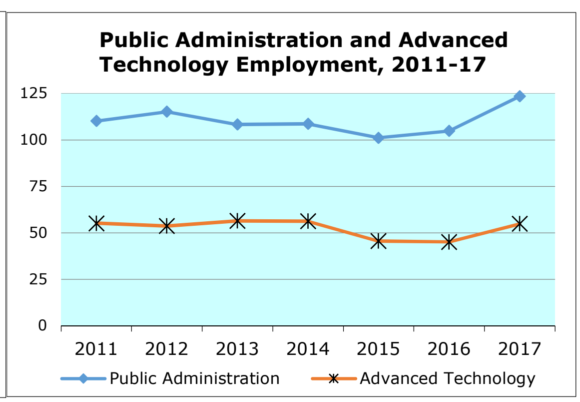
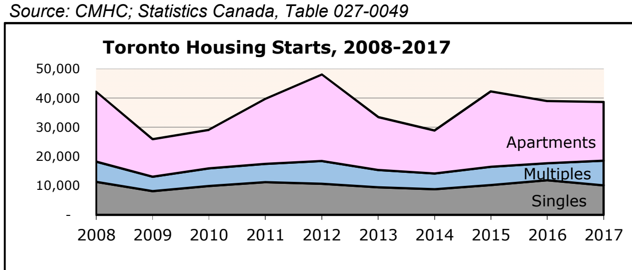


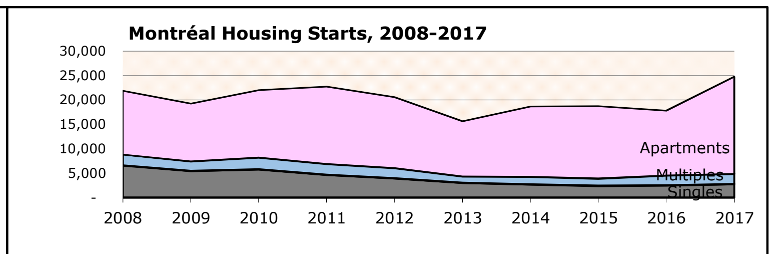
TABLE 10
HOUSING STARTS IN CANADA'S SIX LARGEST CMA's, 2008-2017

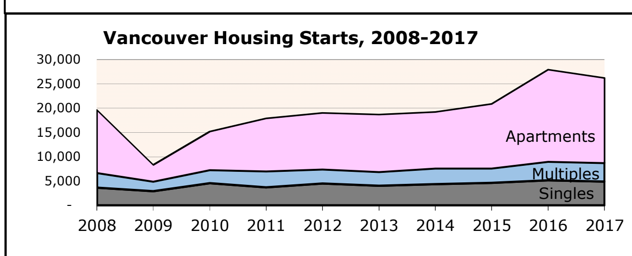
CMA	Dwg. Type	HOUSING STARTS 2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	% change 2016-17	2008-17
Toronto	Singles	11,308	8,130	9,936	11,247	10,699	9,421	8,830	10,223	11,884	10,172	-14.4%	-10.0%
	Multiples	6,974	4,950	6,019	6,241	7,789	5,977	5,391	6,239	5,823	8,392	44.1%	20.3%
	Apartments	23,930	12,869	13,240	22,257	29,617	18,149	14,708	25,825	21,320	20,174	-5.4%	-15.7%
	Total	**42,212**	**25,949**	**29,195**	**39,745**	**48,105**	**33,547**	**28,929**	**42,287**	**39,027**	**38,738**	**-0.7%**	**-8.2%**
Vancouver	Singles	3,634	2,929	4,533	3,686	4,516	4,004	4,374	4,622	5,169	4,911	-5.0%	35.1%
	Multiples	3,018	1,985	2,738	3,338	2,869	2,883	3,227	2,998	3,828	3,795	-0.9%	25.7%
	Apartments	12,939	3,425	7,946	10,843	11,642	11,809	11,611	13,243	18,917	17,498	-7.5%	35.2%
	Total	**19,591**	**8,339**	**15,217**	**17,867**	**19,027**	**18,696**	**19,212**	**20,863**	**27,914**	**26,204**	**-6.1%**	**33.8%**
Montréal	Singles	6,602	5,446	5,789	4,653	3,959	3,039	2,677	2,402	2,499	2,771	10.9%	-58.0%
	Multiples	2,241	2,005	2,452	2,233	2,084	1,289	1,608	1,511	2,018	2,130	5.6%	-5.0%
	Apartments	13,084	11,800	13,760	15,833	14,548	11,304	14,387	14,831	13,317	19,855	49.1%	51.8%
	Total	**21,927**	**19,251**	**22,001**	**22,719**	**20,591**	**15,632**	**18,672**	**18,744**	**17,834**	**24,756**	**38.8%**	**12.9%**
Edmonton	Singles	2,613	3,897	6,062	5,017	5,658	5,970	6,832	5,683	4,335	5,028	16.0%	92.4%
	Multiples	1,421	1,674	2,149	2,110	3,252	3,555	3,880	4,442	3,278	3,273	-0.2%	130.3%
	Apartments	2,581	746	1,748	2,205	3,927	5,164	3,160	6,925	2,423	3,134	29.3%	21.4%
	Total	**6,615**	**6,317**	**9,959**	**9,332**	**12,837**	**14,689**	**13,872**	**17,050**	**10,036**	**11,435**	**13.9%**	**72.9%**
Calgary	Singles	4,387	4,775	5,782	5,084	5,961	6,402	6,494	4,138	3,489	4,423	26.8%	0.8%
	Multiples	1,348	1,155	2,131	2,102	2,886	3,207	3,903	3,150	2,055	2,885	40.4%	114.0%
	Apartments	5,703	388	1,349	2,106	3,994	2,975	6,734	5,745	3,701	4,226	14.2%	-25.9%
	Total	**11,438**	**6,318**	**9,262**	**9,292**	**12,841**	**12,584**	**17,131**	**13,033**	**9,245**	**11,534**	**24.8%**	**0.8%**
Ottawa-Gatineau	Singles	4,076	3,527	3,212	2,918	2,280	2,262	2,254	2,414	2,365	2,703	14.3%	-33.7%
	Multiples	3,300	3,177	3,259	2,846	2,307	2,424	2,450	1,961	2,364	2,508	6.1%	-24.0%
	Apartments	2,926	2,226	2,662	2,450	4,192	3,798	2,961	2,181	2,388	4,116	72.4%	40.7%
	Total	**10,302**	**8,930**	**9,133**	**8,214**	**8,779**	**8,484**	**7,665**	**6,556**	**7,117**	**9,327**	**31.1%**	**-9.5%**

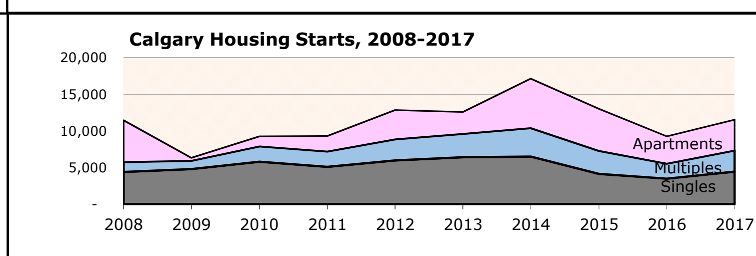
Multiples = Semi-detached and Row units

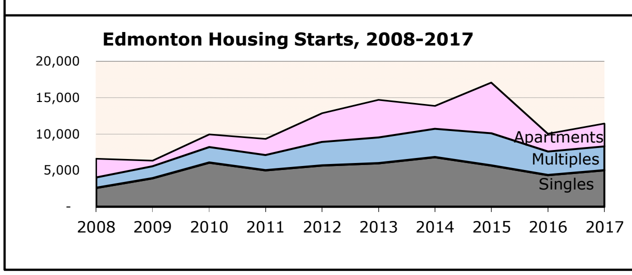
Source: CMHC; Statistics Canada, Table 027-0049











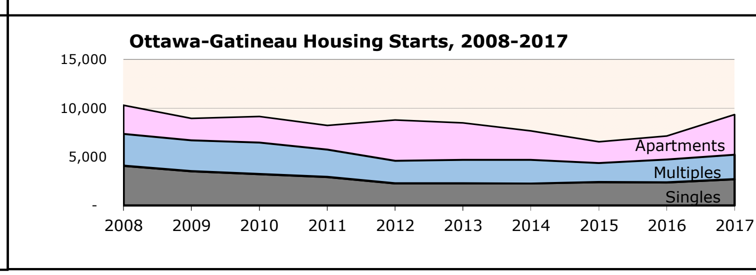


TABLE 11
NEW HOUSING IN MUNICIPALITIES IN GREATER OTTAWA-GATINEAU AREA, 2009-17

	2009	2010	2011	2012	2013	2014	2015	2016	2017	% chng. 2016-17
OTTAWA	**5,522**	**6,046**	**5,521**	**5,730**	**6,284**	**5,537**	**4,696**	**5,019**	**6,849**	**36.5%**
Ottawa, Vanier, Rockcliffe (former)	1,086	1,280	952	2,057	2,262	1,244	1,406	979	2,363	141.4%
Nepean (former)	1,369	1,525	1,541	1,093	965	1,292	900	1,116	958	-14.2%
Gloucester (former)	698	685	752	660	959	797	770	736	1,092	48.4%
Kanata (former)	727	974	588	761	1,124	1,225	860	944	649	-31.3%
Cumberland (former)	901	783	896	685	440	549	311	611	760	24.4%
Goulbourn (former)	365	409	428	214	253	75	315	413	811	96.4%
Osgoode (former)	122	177	183	89	73	104	60	69	57	-17.4%
Rideau (former)	34	42	43	23	37	36	33	102	263	157.8%
West Carleton (former)	220	171	138	148	171	215	41	49	56	14.3%
Inside the Greenbelt	1,192	1,518	1,130	2,224	2,336	1,488	1,447	1,052	2,776	163.9%
Outside the Greenbelt	4,330	4,528	4,391	3,506	3,948	4,049	3,249	3,967	4,073	2.7%
Prescott & Russell (part)	**492**	**724**	**532**	**502**	**392**	**299**	**335**	**391**	**560**	**43.2%**
Alfred and Plantagenet, TP†	64	73	99	91	55	29	28	7	35	400.0%
Casselman, Vlg.†	42	26	10	2	2	1	5	20	14	-30.0%
Clarence-Rockland, C (part of ON CMA)	193	323	213	190	153	112	93	112	230	105.4%
Russell, TP (part of ON CMA)	99	77	60	100	123	113	183	167	218	30.5%
The Nation Municipality	94	225	150	119	59	44	26	85	63	-25.9%
Leeds & Grenville (part)	**109**	**182**	**183**	**262**	**116**	**103**	**93**	**169**	**175**	**3.6%**
Merrickville-Wolford, Vlg.*	8	6	7	13	11	1	6	19	15	-21.1%
North Grenville, TP	101	176	176	249	105	102	87	150	160	6.7%
Stormont, Dundas & Glengarry (part)	**36**	**56**	**59**	**26**	**47**	**24**	**23**	**24**	**31**	**29.2%**
North Dundas, TP†	36	56	59	26	47	24	23	24	31	29.2%
Lanark (part)	**177**	**252**	**265**	**220**	**260**	**230**	**294**	**275**	**370**	**34.5%**
Beckwith, TP *	48	59	66	64	71	66	69	71	79	11.3%
Carleton Place, Tn.	54	73	61	77	51	66	105	60	123	105.0%
Mississippi Mills, Tn.	61	98	114	60	115	68	107	125	151	20.8%
Montague, TP*	14	22	24	19	23	30	13	19	17	-10.5%
Renfrew (part)	**62**	**99**	**117**	**114**	**188**	**82**	**95**	**72**	**92**	**27.8%**
Arnprior, Tn.	43	71	92	73	173	66	76	58	70	20.7%
McNab/Braeside, TP	19	28	25	41	15	16	19	14	22	57.1%
GATINEAU	**2,797**	**2,287**	**2,103**	**2,354**	**1,571**	**1,572**	**1,312**	**1,390**	**1,610**	**15.8%**
Hull (former)	146	186	208	545	275	246	106	263	247	-6.1%
Aylmer (former)	1,441	1,064	1,069	808	745	768	581	802	891	11.1%
Gatineau (former)	962	648	618	728	467	520	464	325	377	16.0%
Buckingham (former)	78	193	84	174	42	22	127	0	39	0.0%
Masson-Angers (former)	170	196	124	99	42	16	34	0	56	0.0%
Qué. part CMA Outside of Gatineau	**346**	**419**	**370**	**502**	**423**	**331**	**272**	**323**	**340**	**5.3%**
Cantley	98	132	93	107	96	87	60	64	70	9.4%
Chelsea	23	20	23	21	23	21	19	33	53	60.6%
La Pêche	36	56	54	62	31	40	35	48	60	25.0%
L'Ange-Gardien	54	45	26	56	36	45	35	39	37	-5.1%
Pontiac	21	41	16	36	16	24	19	15	16	6.7%
Val-des-Monts	87	105	105	102	134	98	95	101	96	-5.0%
Denholm	0	1	1	8	6	0	0	3	1	-66.7%
N.-D.-de-la-Salette (part of CMA in 2011)	5	1	2	0	3	9	0	7	2	-71.4%
Mayo (part of CMA in 2011)	4	9	11	6	4	1	7	8	5	-37.5%
Bowman (part of CMA in 2011)	n.d.	n.d.	3	3	2	2	2	5	0	-100.0%
Val-des-Bois (part of CMA in 2011)	10	5	3	4	4	4	0	0	0	0.0%
Lochaber (part of CMA in 2016)	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	0	0	0.0%
Lochaber-Ouest (part of CMA in 2016)	8	3	15	17	8	n.d.	n.d.	4	3	-25.0%
Thurso (part of CMA in 2016)	0	1	18	80	60	n.d.	n.d.	19	25	31.6%
GREATER OTTAWA-GATINEAU AREA	**9,541**	**10,065**	**9,150**	**9,710**	**9,281**	**8,178**	**7,120**	**7,663**	**10,027**	**30.8%**
Ottawa-Gatineau CMA	**8,938**	**9,137**	**8,267**	**8,876**	**8,554**	**7,665**	**6,556**	**7,161**	**9,407**	**31.4%**
Ontario portion of the CMA	**5,814**	**6,446**	**5,794**	**6,020**	**6,560**	**5,762**	**4,972**	**5,448**	**7,457**	**36.9%**
Quebec portion of the CMA	**3,124**	**2,691**	**2,473**	**2,856**	**1,994**	**1,903**	**1,584**	**1,713**	**1,950**	**13.8%**
OMATO	**876**	**1,313**	**1,156**	**1,124**	**1,003**	**738**	**840**	**931**	**1,228**	**31.9%**

*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

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 201

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, 2013-2017

OP Target Area (Designation)	2013				2014				2015				2016				2017			
	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	338	**338**	0	0	237	**237**	0	0	311	**311**	0	0	211	**211**	0	0	7	**7**
Mixed-Use Centres																				
Inside Greenbelt	0	0	70	70	0	0	451	451	9	0	338	347	0	0	562	562	0	3	237	240
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	70	**70**	0	0	451	**451**	9	0	338	**347**	0	0	562	**562**	0	3	237	**240**
Town Centres	0	0	173	**173**	0	0	268	**268**	0	18	0	**18**	0	8	105	**113**	0	18	1	**19**
Mainstreets																				
Inside Greenbelt	0	0	266	266	0	0	677	677	-1	0	888	887	1	6	281	288	2	0	362	364
Outside Greenbelt	0	0	4	4	0	0	0	0	0	0	48	48	0	0	0	0	0	0	1	1
Total	0	0	270	**270**	0	0	677	**677**	-1	0	936	**935**	1	6	281	**288**	2	0	363	**365**
Rapid Transit Stations																				
Inside Greenbelt	45	8	748	801	43	20	1422	1,485	55	3	1328	1,386	47	5	1141	1,193	57	14	432	503
Outside Greenbelt	55	162	233	450	25	39	306	370	8	27	36	71	0	58	184	242	0	22	34	56
Total	100	170	981	**1,251**	68	59	1,728	**1,855**	63	30	1,364	**1,457**	47	63	1,325	**1,435**	57	36	466	**559**
Future Rapid Transit Stations																				
Inside Greenbelt	4	0	5	9	3	20	4	27	8	0	32	40	4	0	3	7	6	3	4	13
Outside Greenbelt	0	2	1	3	0	0	0	0	6	18	0	24	0	8	0	8	0	18	1	19
Total	4	2	6	**12**	3	20	4	**27**	14	18	32	**64**	4	8	3	**15**	6	21	5	**32**
Total Units in Designated Areas**	106	170	1,228	**1,504**	71	98	2,328	**2,497**	77	48	1,743	**1,868**	52	77	1,609	**1,738**	65	57	826	**948**
Total New Units	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	2,231	1,917	2,277	6,425
Demolitions	227	7	48	282	209	30	67	306	235	3	50	288	223	84	114	421	238	32	60	330
Total Net New Units	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	1,993	1,885	2,217	**6,095**
% Share in Designated Areas	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%**	3.3%	3.0%	37.3%	**15.6%**
Total New Units Urban	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	1,919	1,911	2,265	6,095
Demolitions -Urban	193	7	48	248	180	30	67	277	180	3	50	233	176	84	114	374	201	32	60	293
Total Net New Units Urban	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	1,718	1,879	2,205	**5,802**
% Share of Urban in Designated Areas	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%**	3.8%	3.0%	37.5%	**16.3%**

** 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	1,104	1,104
Mixed-Use Centres	9	3	1,658	1,670
Town Centres	0	44	547	591
Mainstreets	2	6	2,527	2,535
Rapid Transit Stations	335	358	5,864	6,557
Future Rapid Transit Stations	31	69	50	150
TOTAL Units in OP Target Areas**	**371**	**450**	**7,734**	**8,555**
TOTAL Urban Units - City of Ottawa	**8,048**	**8,051**	**13,259**	**29,358**
% Share in OP Target Areas	**4.6%**	**5.6%**	**58.3%**	**29.1%**

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

OP Target Areas: Last 10 Years	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	TOTAL
Central Area	246	166	47	258	374	338	237	311	211	7	2,195
Mixed-Use Centres	205	35	110	183	326	70	451	347	562	240	2,529
Town Centres	0	0	146	165	221	173	268	18	113	19	1,123
Mainstreets	399	286	483	467	287	270	677	935	288	365	4,457
Rapid Transit Stations	623	345	891	1,190	1,291	1,275	1,835	1,457	1,435	559	10,901
Future Rapid Transit Stations	n/a	n/a	26	81	224	12	27	64	15	32	481
TOTAL	**1,473**	**832**	**1,703**	**2,344**	**2,723**	**2,138**	**3,495**	**3,132**	**2,624**	**1,222**	**21,686**

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, 2013-2017

Ward		Intensification Units						2013-2017 Share of Intensification
No.	Name	2013	2014	2015	2016	2017	2013-2017	
12	Rideau-Vanier	315	481	419	287	277	1,779	12%
13	Rideau-Rockcliffe	45	240	326	340	181	1,132	8%
14	Somerset	716	360	829	481	47	2,433	17%
15	Kitchissippi	208	600	401	639	150	1,998	14%
17	Capital	155	250	87	151	191	834	6%
	TOTAL - CENTRAL	**1,439**	**1,931**	**2,062**	**1,898**	**846**	**8,176**	**56%**
7	Bay	11	26	36	16	43	132	1%
8	College	30	261	55	46	46	438	3%
9	Knoxdale-Merivale	5	396	6	9	147	563	4%
10	Gloucester-Southgate	70	29	128	20	16	263	2%
11	Beacon Hill-Cyrville	39	50	10	57	231	387	3%
16	River	42	41	17	54	62	216	1%
18	Alta Vista	115	21	22	26	220	404	3%
	TOTAL - INNER URBAN	**312**	**824**	**274**	**228**	**765**	**2,403**	**17%**
1	Orléans	90	106	30	23	38	287	2%
2	Innes	194	66	90	41	44	435	3%
3	Barrhaven	299	636	101	297	124	1,457	10%
4	Kanata North	189	269	47	105	144	754	5%
6	Stittsville	21	13	3	0	242	279	2%
19	Cumberland	22	16	8	196	30	272	2%
22	Gloucester-South Nepean	23	55	72	15	4	169	1%
23	Kanata South	63	81	66	65	28	303	2%
	TOTAL - SUBURBAN	**901**	**1,242**	**417**	**742**	**654**	**3,956**	**27%**
Intensification Units Inside Greenbelt		**1,751**	**2,755**	**2,336**	**2,126**	**1,611**	**10,579**	**73%**
Intensification Units Outside Greenbelt		**901**	**1,242**	**417**	**742**	**654**	**3,956**	**27%**
Total Intensification Units		**2,652**	**3,997**	**2,753**	**2,868**	**2,265**	**14,535**	**100%**
Total Urban Units		**5,337**	**7,393**	**4,760**	**6,304**	**5,799**	**29,593**	
% Intensification		**49.7%**	**54.1%**	**57.8%**	**45.5%**	**39.1%**	**49.1%**	
Official Plan 5 year Target		**38%**	**38%**	**38%**	**38%**	**40%**	**38%**	

Source: City of Ottawa, Building Permits

TABLE 14
NON-RESIDENTIAL INTENSIFICATION, 2013-2017

	Intensification Gross Floor Area (m^2)						2013-2017 Share of Intensification
Area	**2013**	**2014**	**2015**	**2016**	**2017**	**2013-2017**	
Inside Greenbelt	198,126	136,730	169,151	146,994	129,614	780,614	83%
Outside Greenbelt	39,407	48,726	14,571	44,474	14,529	161,707	17%
Total Urban Intensification GFA	237,533	185,456	183,722	191,468	144,143	942,322	
Total Urban GFA	297,147	216,270	303,054	248,944	170,033	1,235,447	
% Intensification of Urban GFA	**80%**	**86%**	**61%**	**77%**	**85%**	**76%**	
Transitway Stations	27,539	32,244	93,451	93,820	42,842	289,896	
% Intensification at Transitway Stations of Urban GFA	**9%**	**15%**	**31%**	**38%**	**25%**	**23%**	

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, 1998-2017

YEAR	SINGLE	SEMI	ROW	APT.	TOTAL	SINGLE	SEMI	ROW	APT.
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%
2017	**1,970**	**225**	**1,859**	**2,795**	**6,849**	**28.8%**	**3.3%**	**27.1%**	**40.8%**

Source: CMHC, Starts and Completions Survey

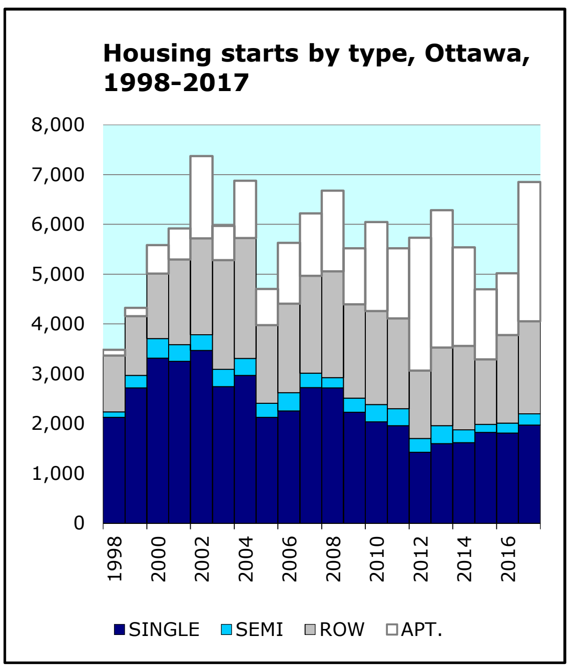


TABLE 16
HOUSING COMPLETIONS, CITY OF OTTAWA, 2009-2017, BY TYPE AND INTENDED MARKET

YEAR	FREEHOLD				CONDOMINIUM			PRIVATE RENTAL			ASSISTED RENTAL			ANNUAL
	SINGLE	SEMI	ROW	TOTAL	ROW	APT.	TOTAL	ROW	APT.	TOTAL	ROW	APT.	TOTAL	TOTAL
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**
2017	**2,283**	**262**	**1,921**	**4,466**	**50**	**1,431**	**1,481**	**9**	**1,501**	**1,510**	**0**	**0**	**0**	**7,457**

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, 2004-17

YEAR	AVERAGE PRICE OF ABSORBED NEW	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
2004	$335,251	104.5	0.804	$416,738	7.5%	2.0%
2005	$365,551	106.8	0.822	$444,617	6.7%	2.2%
2006	$396,677	108.6	0.836	$474,478	6.7%	1.7%
2007	$407,749	110.7	0.852	$478,470	0.8%	1.9%
2008	$417,683	113.1	0.871	$479,726	0.3%	2.2%
2009	$414,696	113.7	0.875	$473,782	-1.2%	0.5%
2010	$444,185	116.6	0.898	$494,851	4.4%	2.6%
2011	$492,380	120.1	0.925	$532,558	7.6%	3.0%
2012	$492,356	121.7	0.937	$525,530	-1.3%	1.3%
2013	$509,931	122.9	0.946	$538,975	2.6%	1.0%
2014	$523,271	125.3	0.965	$542,481	0.7%	2.0%
2015	$513,173	126.5	0.974	$526,966	-2.9%	1.0%
2016	$527,609	128.1	0.986	$535,023	1.5%	1.3%
2017	**$536,000**	**129.9**	**1.000**	**$536,000**	**0.2%**	**1.4%**

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, 2011-17

CMA		2011	2012	2013	2014	2015	2016	2017	2016-17 % change
Toronto	Sales	91,760	88,157	88,946	93,278	101,846	108,500	92,335	-14.9%
	Avg Price	$466,352	$498,973	$524,089	$566,491	$622,046	$719,750	$822,603	14.3%
Montréal	Sales	40,403	40,089	36,491	35,764	37,935	39,750	44,448	11.8%
	Avg Price	$314,038	$321,083	$323,967	$331,036	$337,487	$347,000	$364,510	5.0%
Vancouver	Sales	32,936	25,445	28,985	33,693	43,145	40,000	35,994	-10.0%
	Avg Price	$779,730	$730,063	$767,765	$812,653	$902,801	$1,007,000	$1,032,635	2.5%
Ottawa-Gatineau	Sales	18,410	18,362	17,594	17,429	18,373	19,000	21,292	12.1%
	Avg Price	$321,624	$328,656	$335,595	$339,726	$345,413	$345,445	$365,258	5.7%
Ottawa*	Sales	14,551	14,497	14,049	14,094	14,842	15,100	17,083	13.1%
	Avg Price	$344,791	$352,610	$358,876	$363,161	$369,477	$371,000	$392,474	5.8%
Calgary	Sales	22,466	26,634	29,954	33,615	23,994	22,000	23,869	8.5%
	Avg Price	$402,851	$412,315	$437,036	$460,584	$453,814	$457,000	$466,259	2.0%
Edmonton	Sales	16,963	17,641	19,552	19,857	18,227	16,700	16,441	-1.6%
	Avg Price	$328,595	$334,318	$344,977	$362,657	$369,536	$365,000	$374,397	2.6%

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

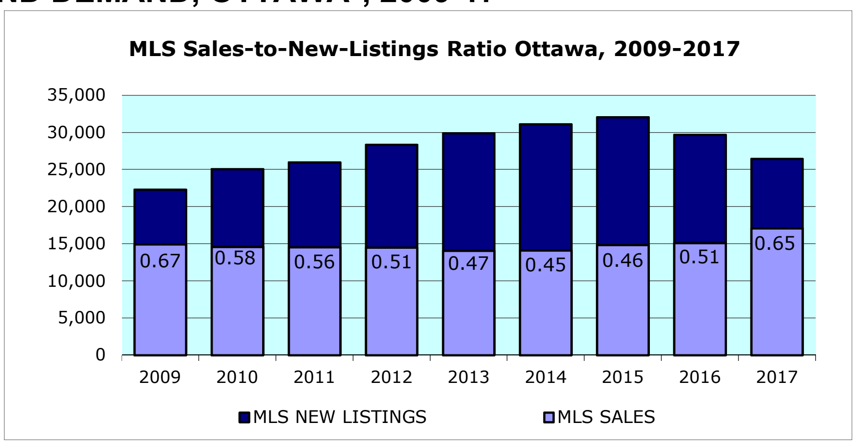
NOTE: CMHC data are derived from local Real Estate Boards; the area of each may not match municipal or CMA boundaries.

* 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*, 2009-17

YEAR	MLS SALES	MLS NEW LISTINGS	SALES-TO-NEW-LISTINGS RATIO
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
2017	**17,083**	**26,422**	**0.65**

Source: CMHC, 2017 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.

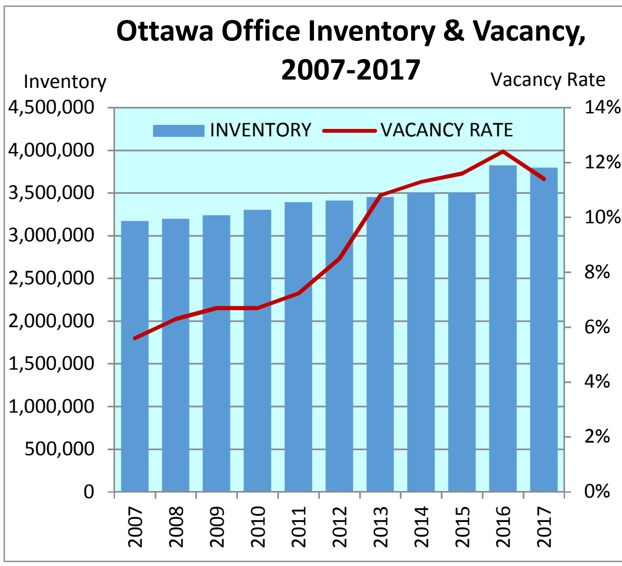
SUPPLY AND DEMAND

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, 2007-2017

YEAR	INVENTORY		VACANCY RATE	NET ABSORPTION		NET NEW SUPPLY	
	sq.ft.	sq.m.	(%)	sq.ft.	sq.m.	sq.ft.	sq.m.
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
2017	**40,868,167**	**3,796,776**	**11.4%**	**231,883**	**21,543**	**0**	**0**

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



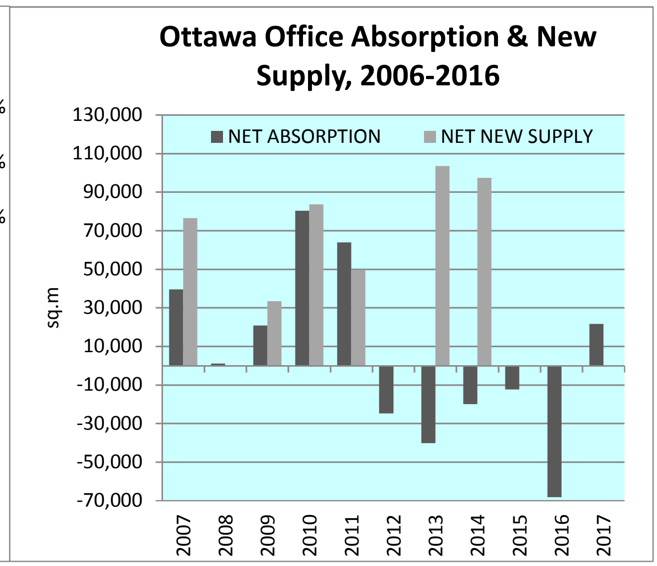


TABLE 21
INDUSTRIAL MARKET OVERVIEW, OTTAWA, 2007-2017

YEAR	INVENTORY		VACANCY	ABSORPTION		NEW SUPPLY	
	sq.ft.	sq.m.	RATE (%)	sq.ft.	sq.m.	sq.ft.	sq.m.
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
2017	**22,682,094**	**2,107,235**	**6.3%**	**245,905**	**22,845**	**0**	**0**

Source: Cushman & Wakefield, Marketbeat Industrial Q4 2017, Ottawa

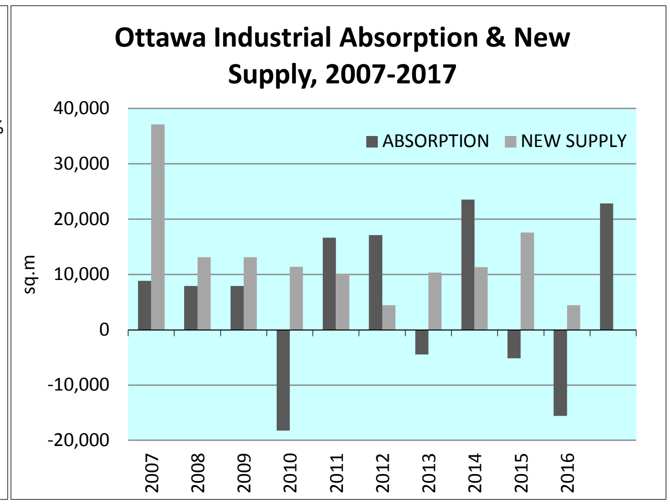


TABLE 22
OTTAWA RETAIL SPACE SUMMARY

FORMAT	Total Space, 2016			Total Space, 2017			Vacancy Rate	
	m^2	sq.ft.	Share	m^2	sq.ft.	Share	2016	2017
Power Centres	959,275	10,325,547	27.0%	979,449	10,542,700	27.3%	3.7%	3.6%
Other *	575,865	6,198,562	16.2%	590,003	6,350,739	16.4%	n/a	n/a
Traditional Mainstreets	481,490	5,182,718	13.6%	481,888	5,186,997	13.4%	n/a	n/a
Regional SC	383,009	4,122,678	10.8%	383,960	4,132,914	10.7%	3.7%	3.6%
Community SC	436,182	4,695,021	12.3%	439,283	4,728,406	12.2%	7.2%	7.9%
Neighbourhood SC	437,823	4,712,688	12.3%	440,561	4,742,157	12.3%	5.2%	5.8%
Mini-Plazas	225,627	2,428,626	6.4%	225,627	2,428,626	6.3%	5.2%	5.8%
Office Concourses	48,466	521,680	1.4%	48,466	521,680	1.4%	4.9%	3.0%
TOTAL	**3,547,737**	**38,187,520**	**100%**	**3,589,236**	**38,634,219**	**100%**	**5.3%**	**5.5%**

Source: City of Ottawa Building Permits; vacancy data from Cushman & Wakefield Ottawa Retail Report Q4 2017

* **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.