PLANNING FOR PROSPERITY

A TRANSFORMING REGIONAL ECONOMY AND THE GROWTH PLAN

A presentation to the Clean Air Council
by
Pamela Blais, PhD RPP MCIP, Principal, **METROPOLE** Consultants

February 26, 2016

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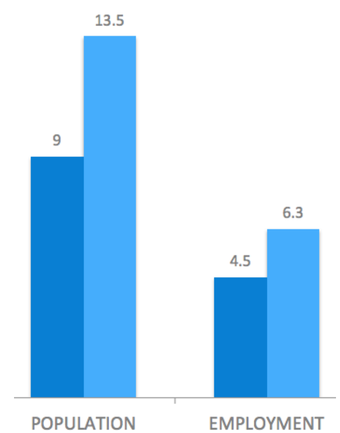
RESEARCH QUESTIONS

1. Are the policies and spatial concept of the Growth Plan grounded in the reality of a transforming regional economy?

2. Can the Growth Plan support the economic competitiveness of the GGH?

PROJECTED GGH GROWTH
2011-2041
(millions)



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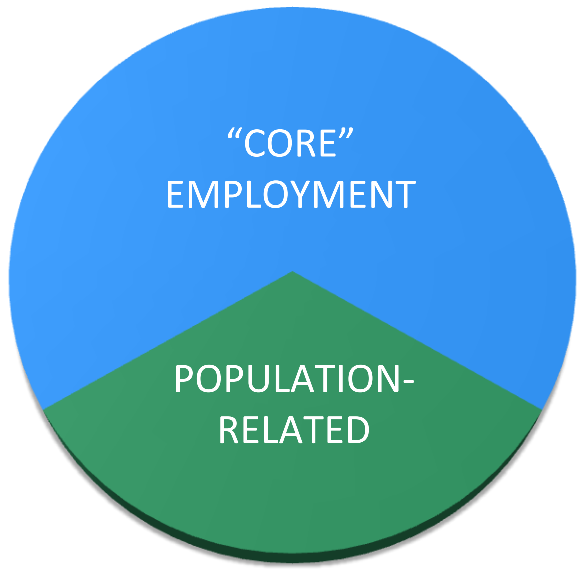
"CORE" EMPLOYMENT DRIVES THE REGIONAL ECONOMY

Manufacturing
Finance & business services
Tourism, arts
Wholesale
Major hospitals
Higher education



Retail
Local schools
Personal Services

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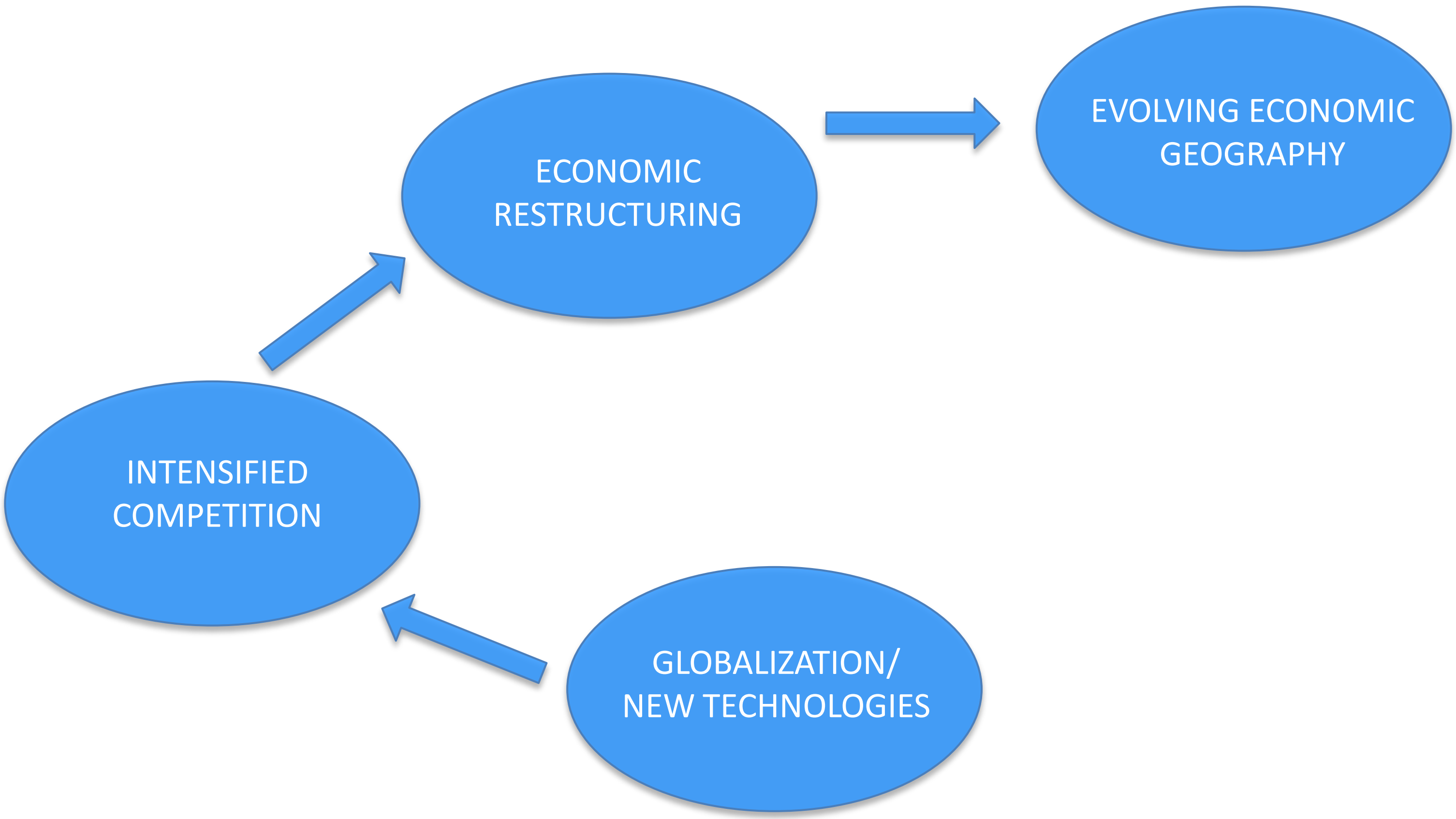
DYNAMICS OF ECONOMIC TRANSFORMATION



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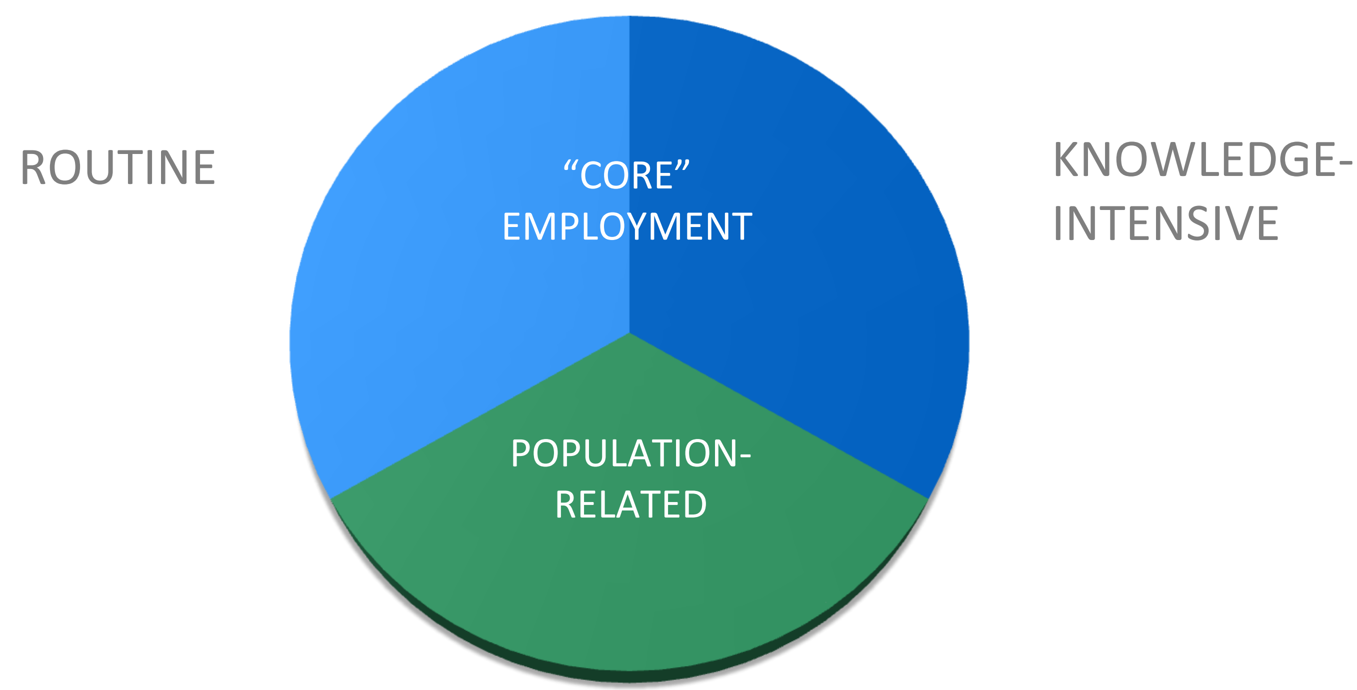
THREE KINDS OF ECONOMIC ACTIVITY RELATED TO THE DYNAMICS OF RESTRUCTURING



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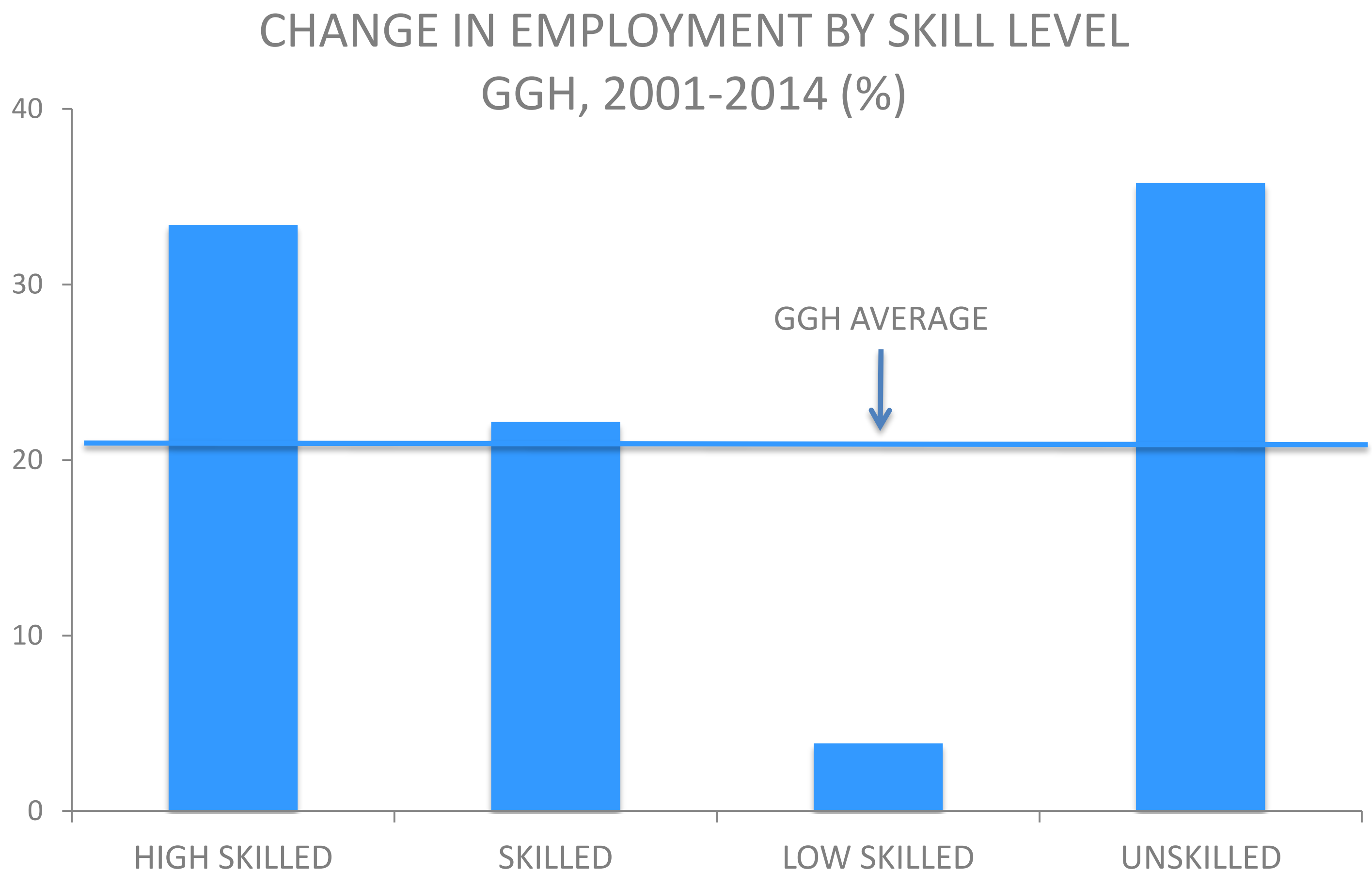
THE FUNDAMENTAL DYNAMIC IS A SHIFT FROM ROUTINE TO KNOWLEDGE-INTENSIVE ACTIVITIES



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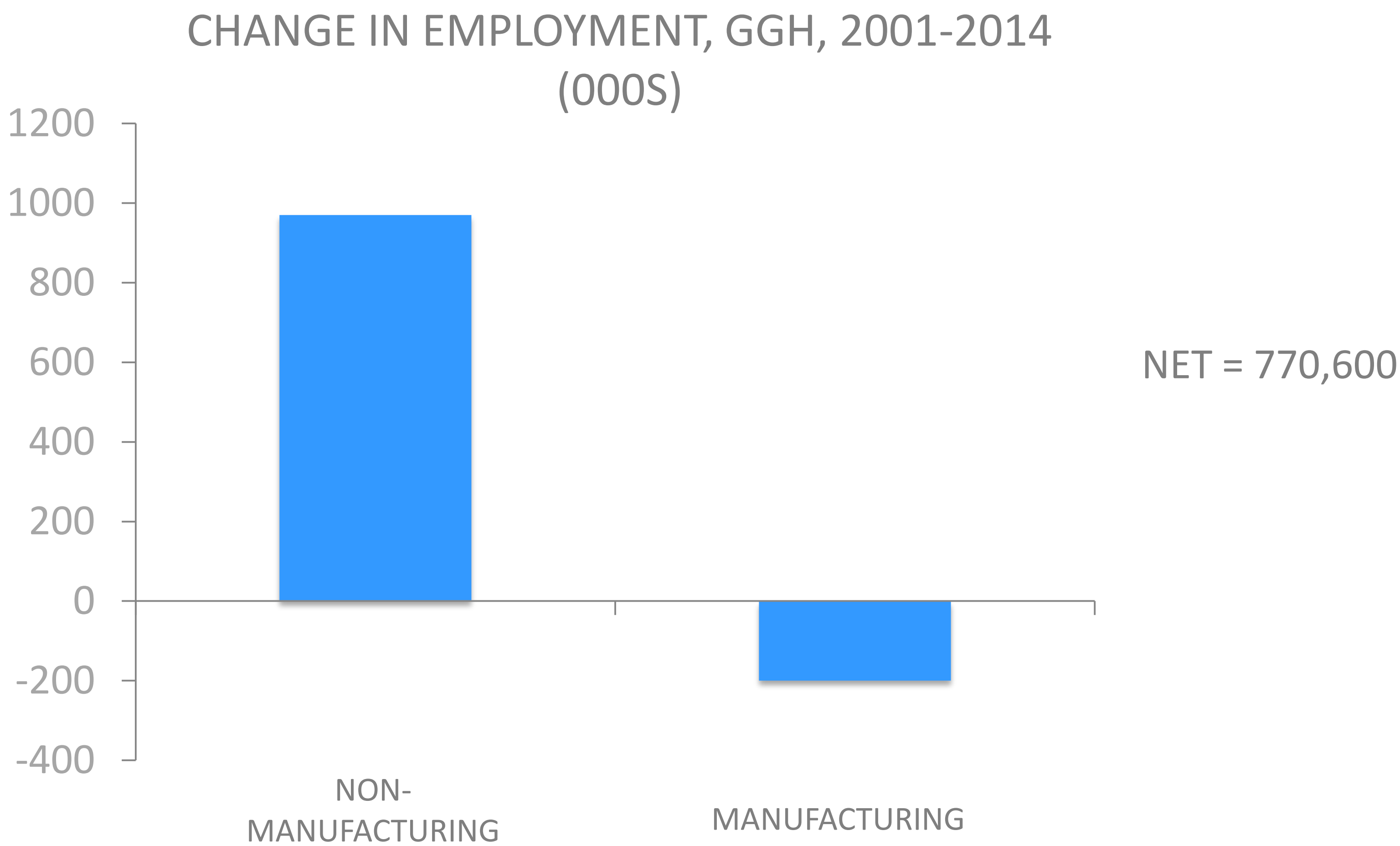
A DRAMATIC ECONOMIC RESTRUCTURING IS UNDERWAY



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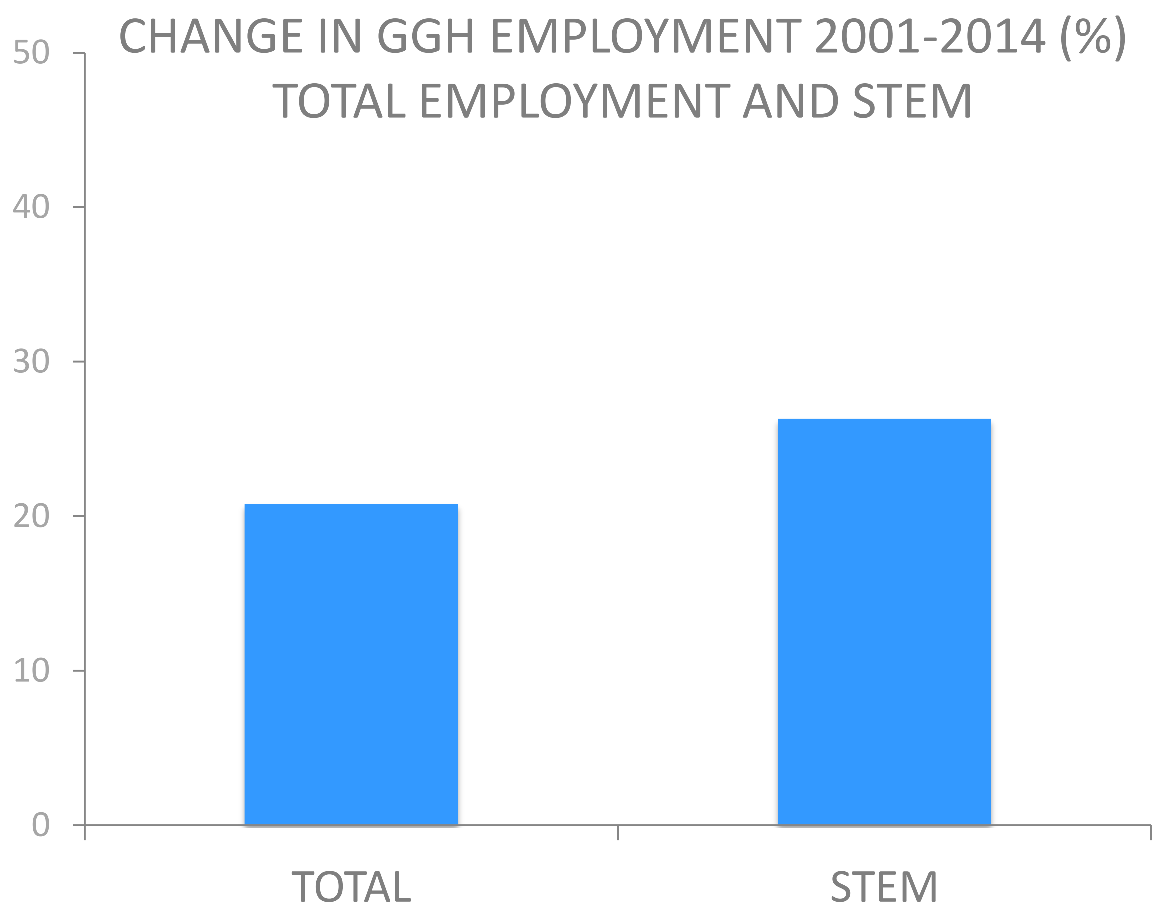
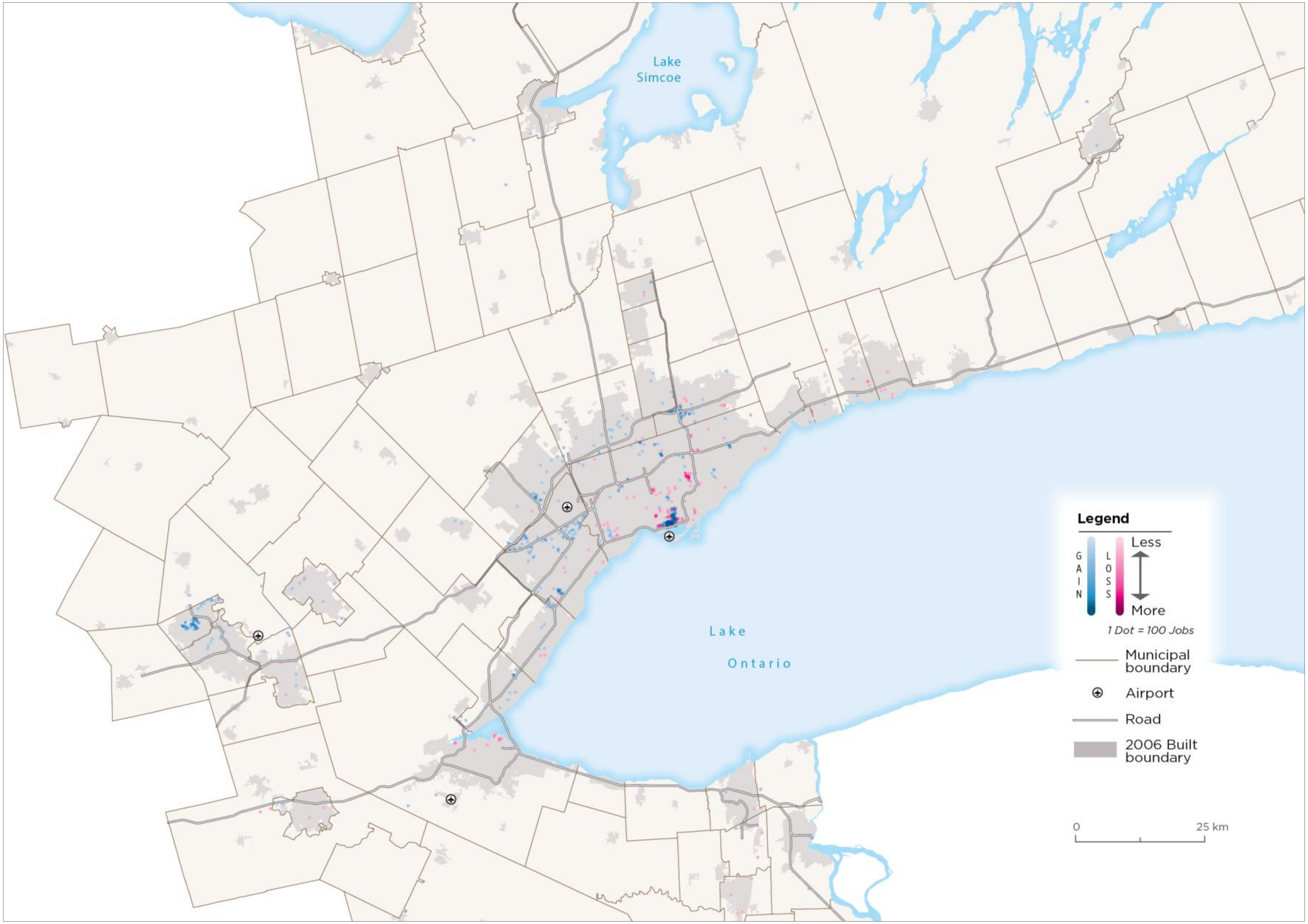
THE GEOGRAPHY OF ECONOMIC RESTRUCTURING

GROWTH IN SOME ACTIVITIES



STEM EMPLOYMENT CHANGE 2001-2011



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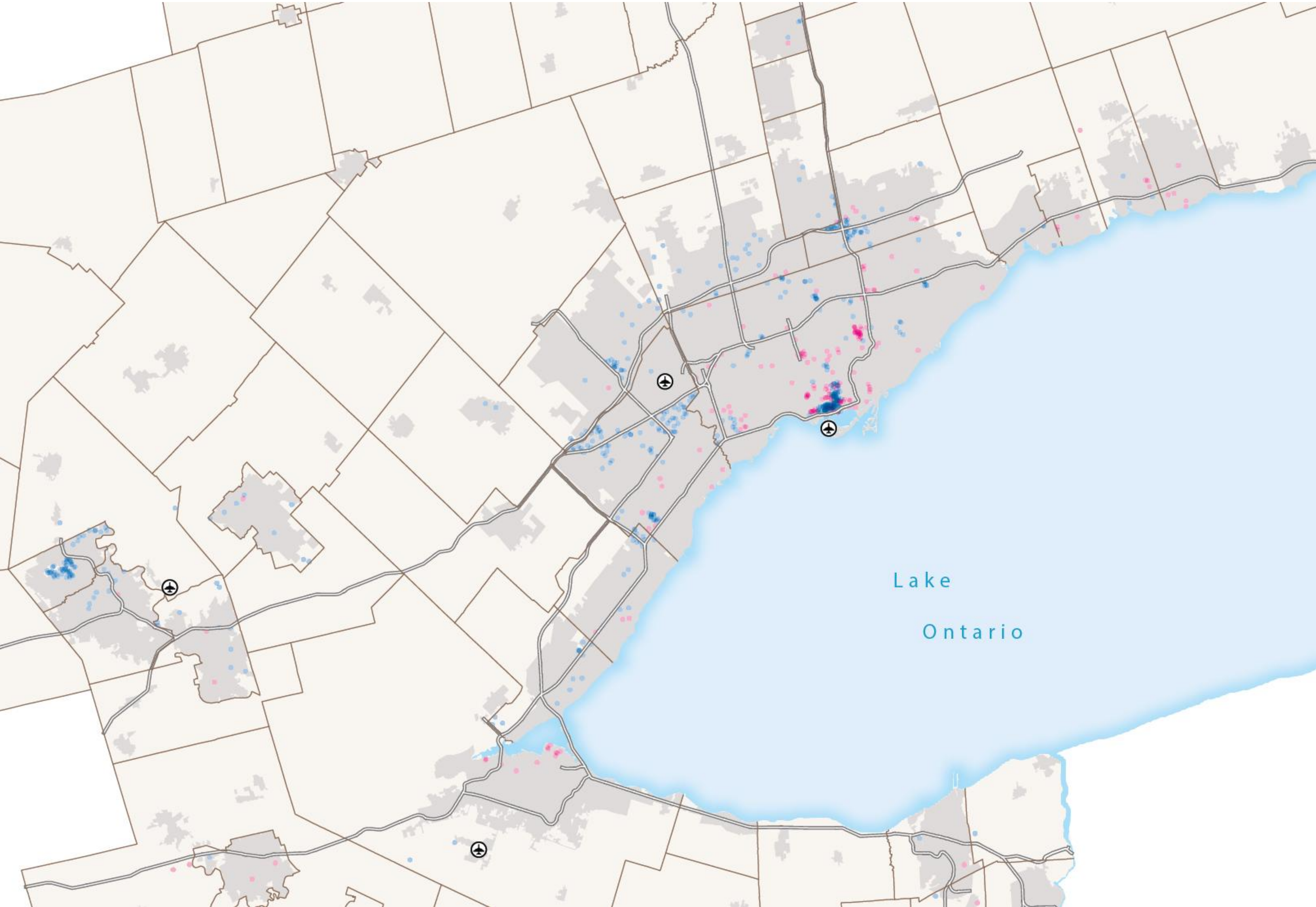
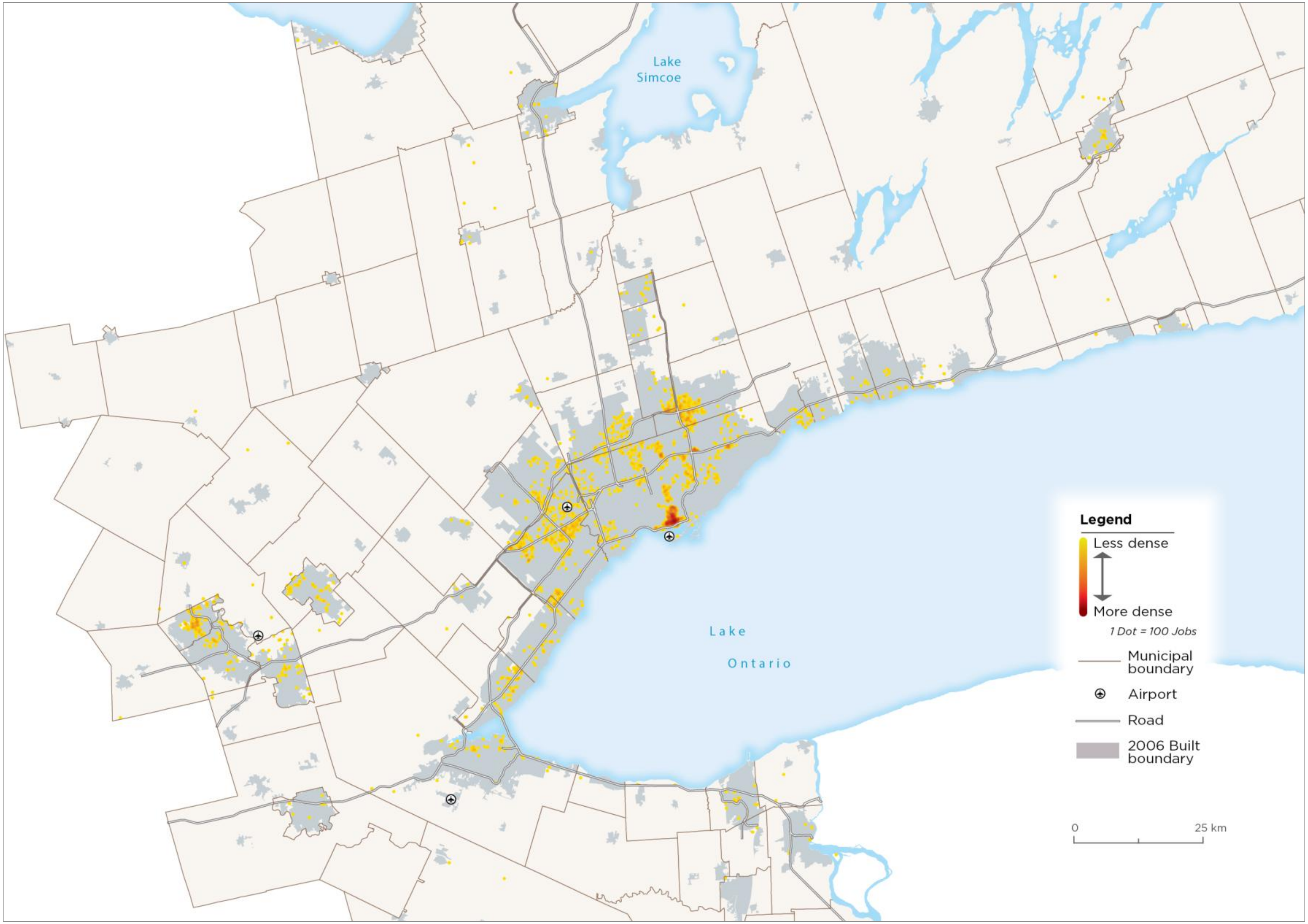


STEM EMPLOYMENT 2011



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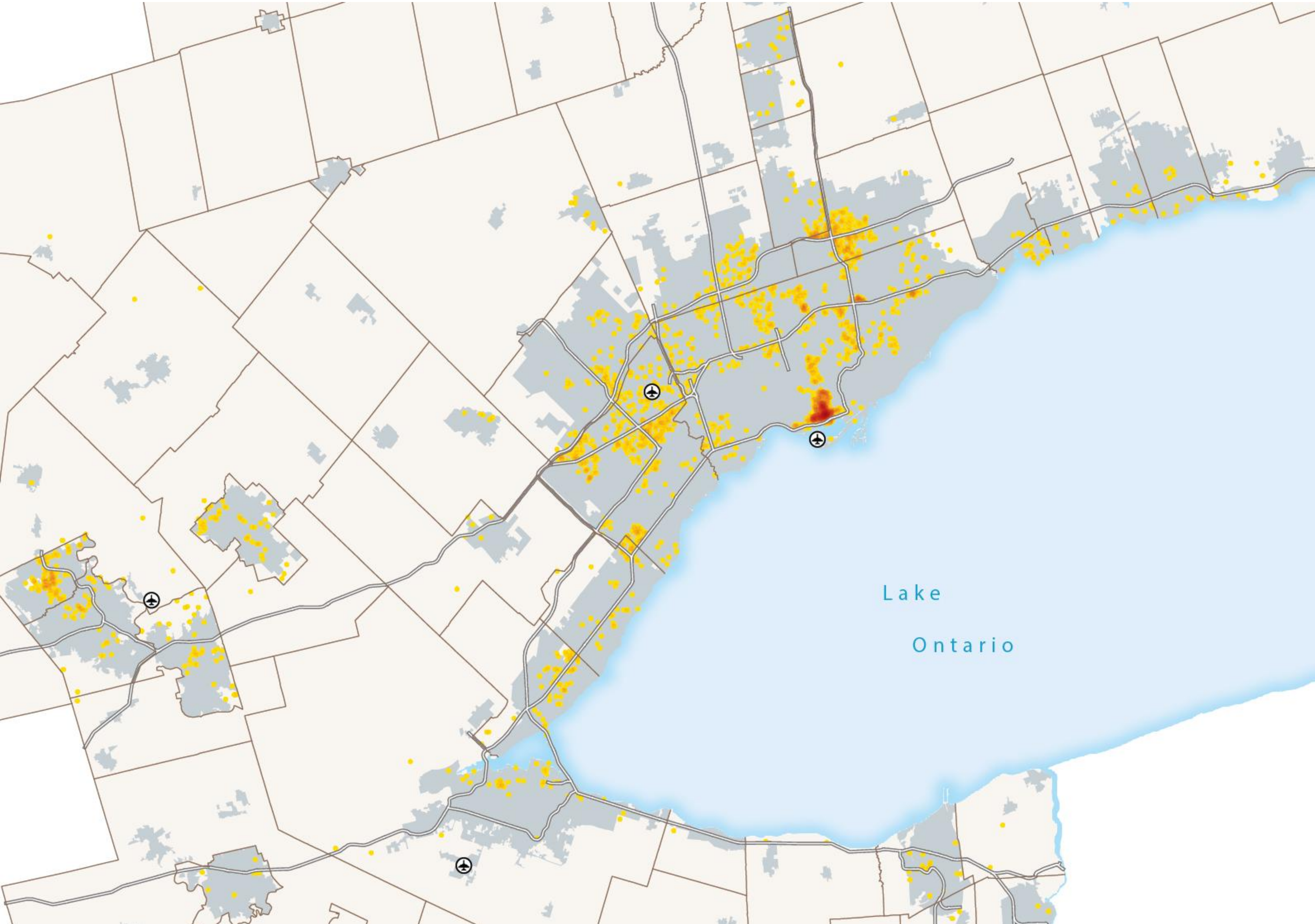
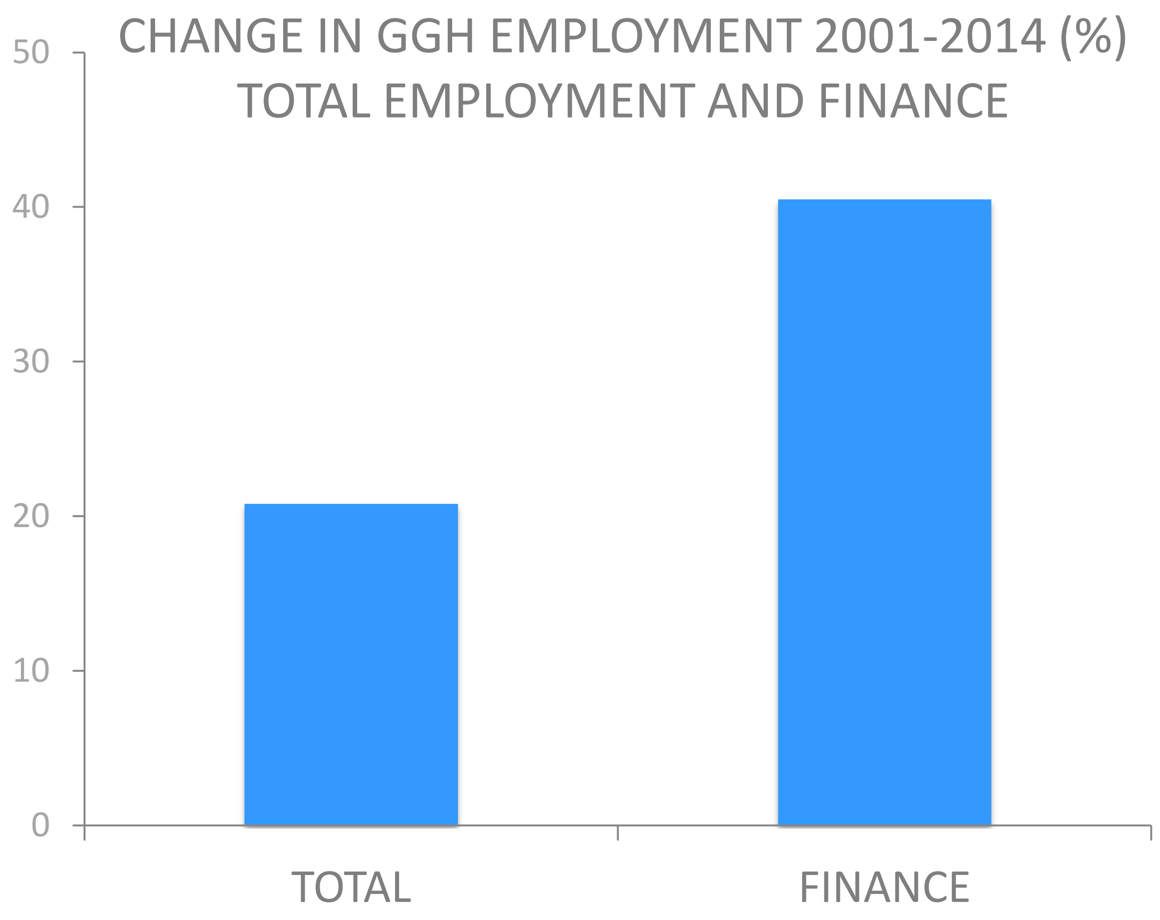
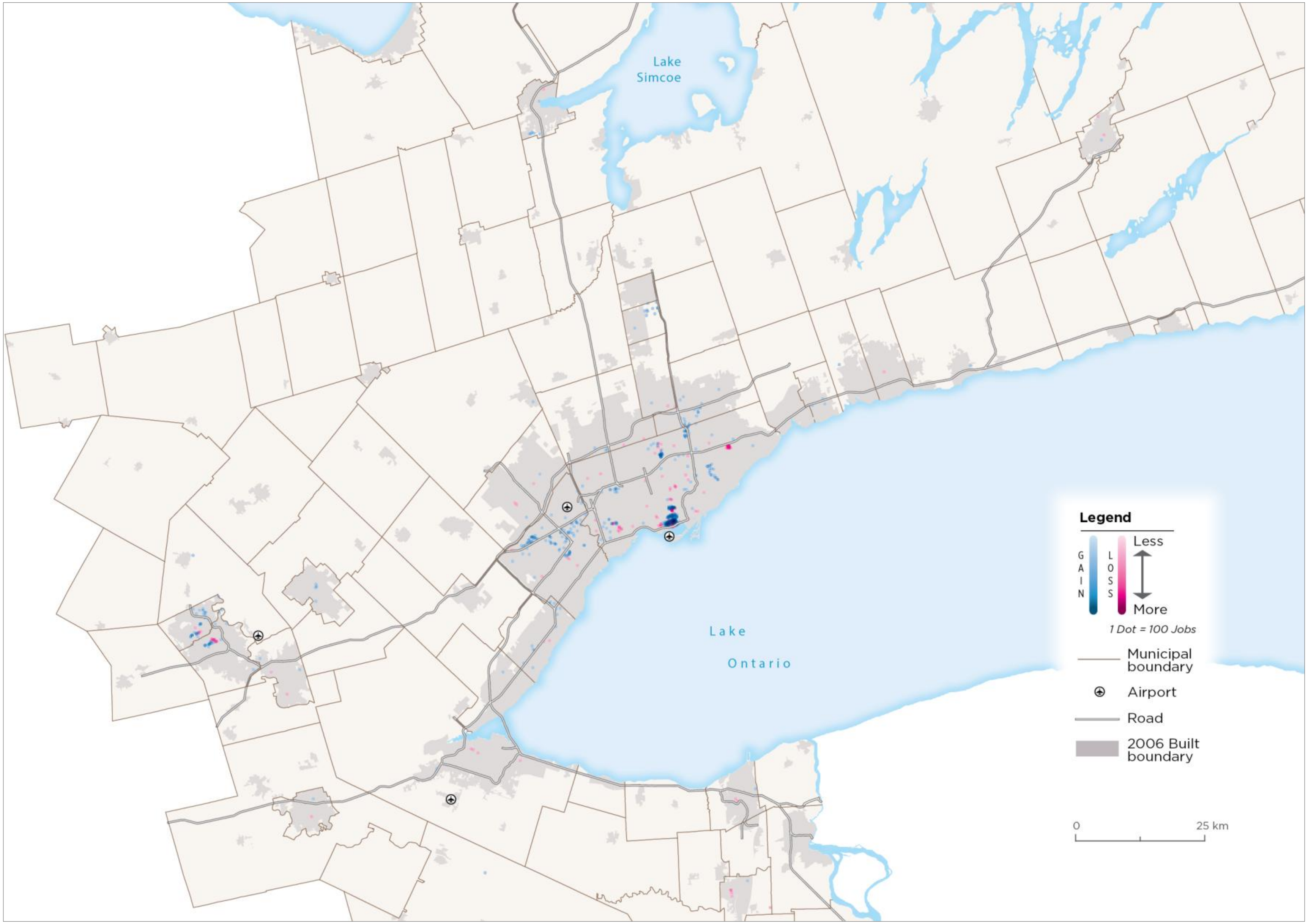
STEM EMPLOYMENT 2011



AND GROWTH IN SOME SECTORS



FINANCE EMPLOYMENT CHANGE 2001-2011



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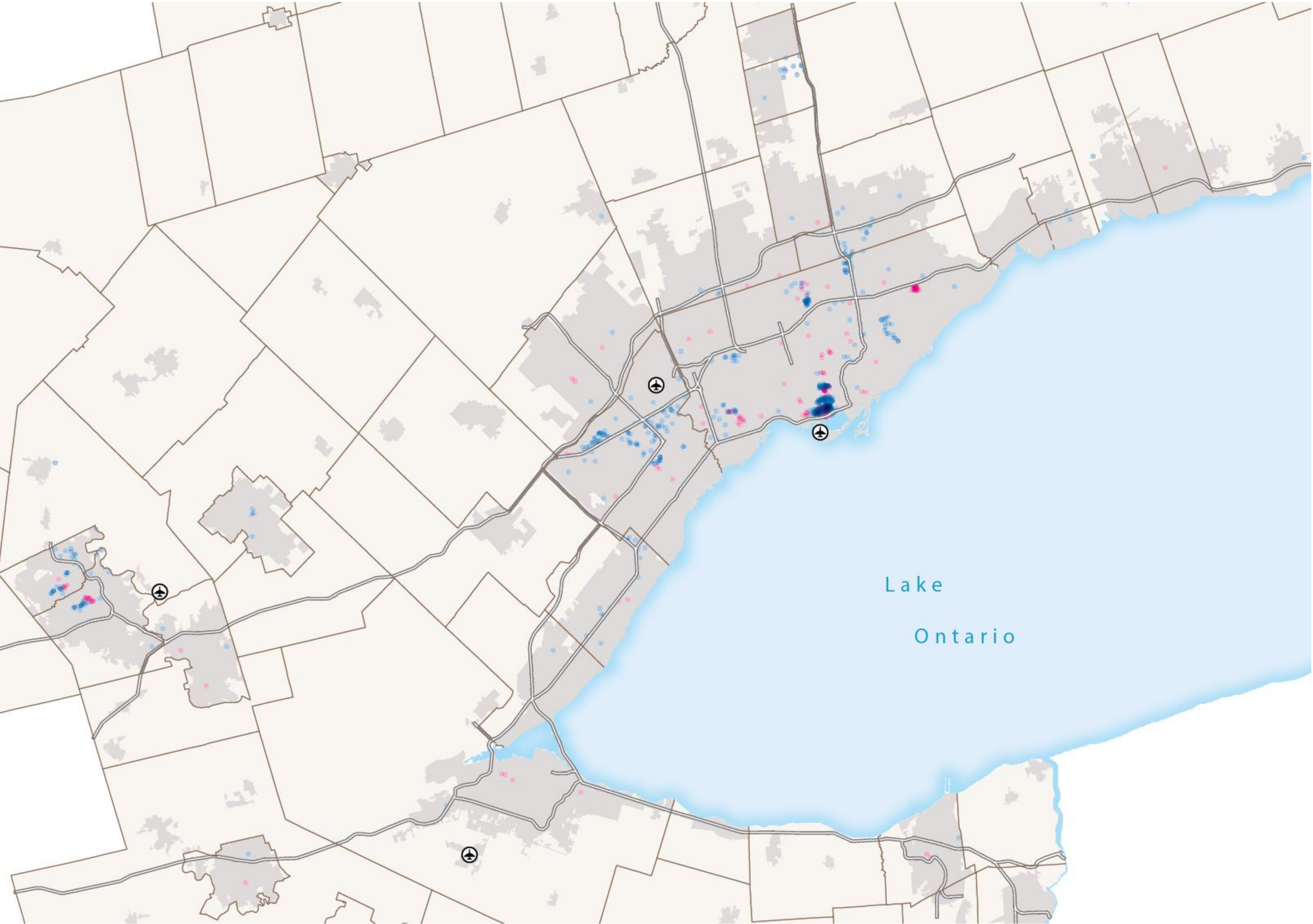

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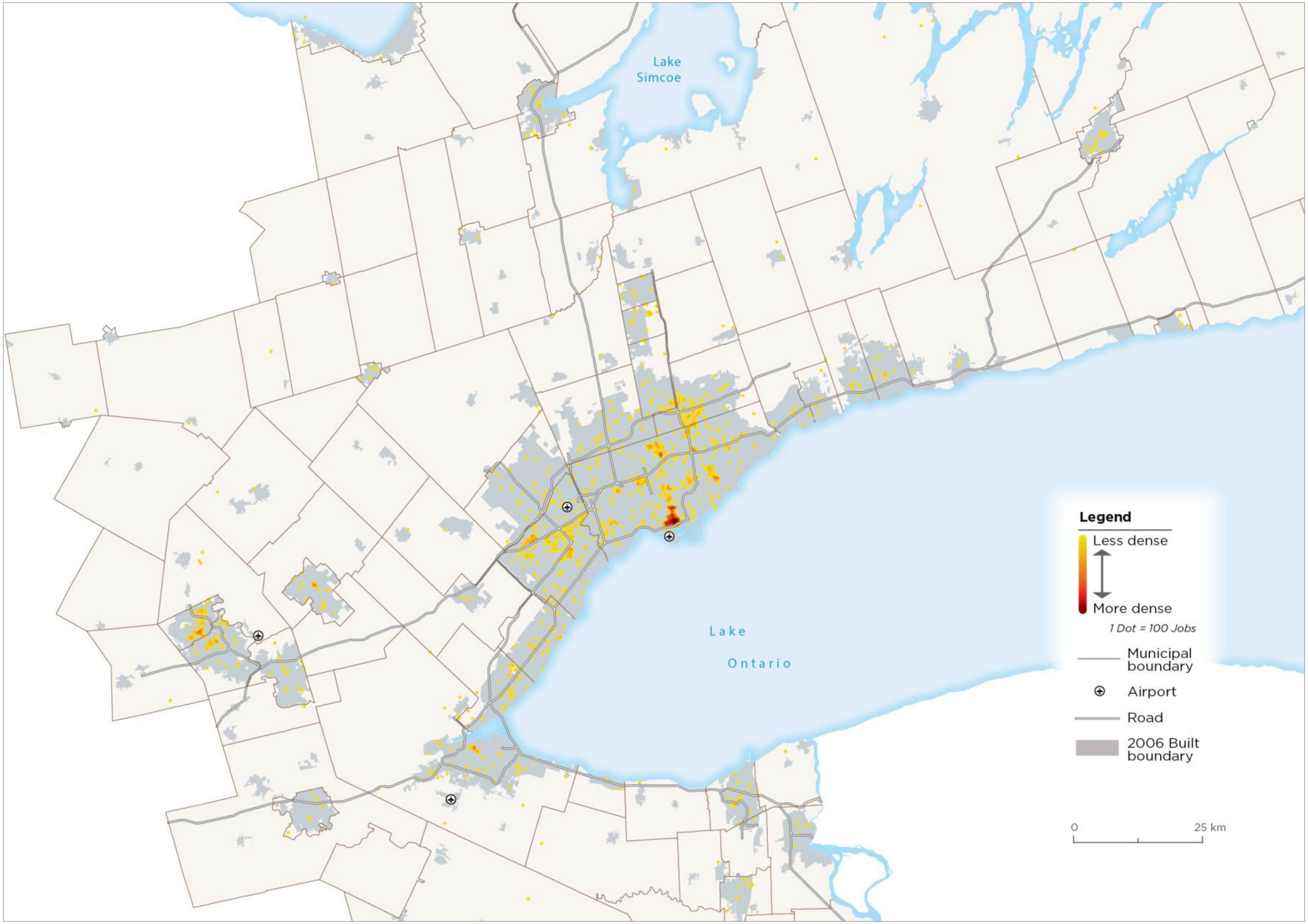

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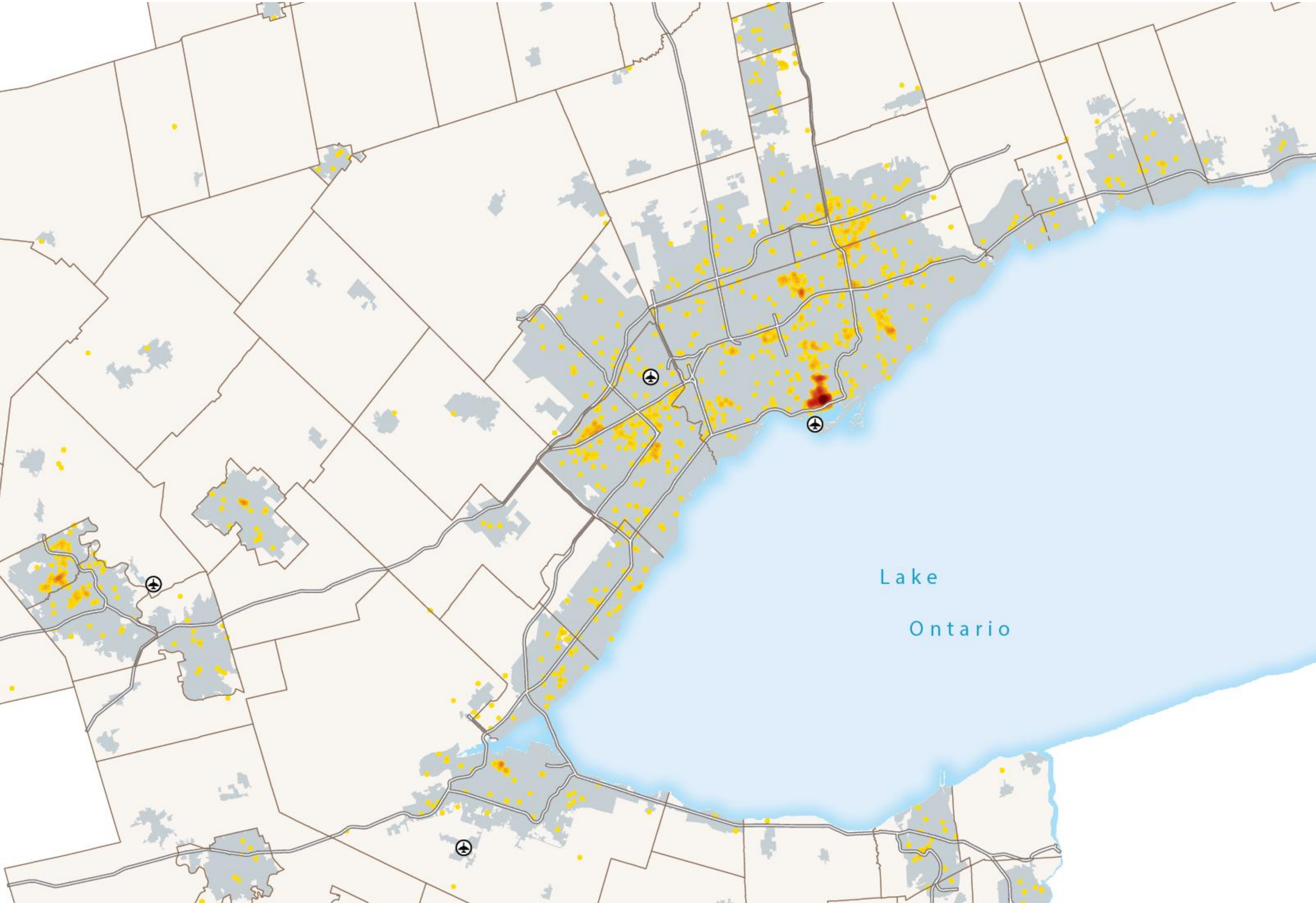
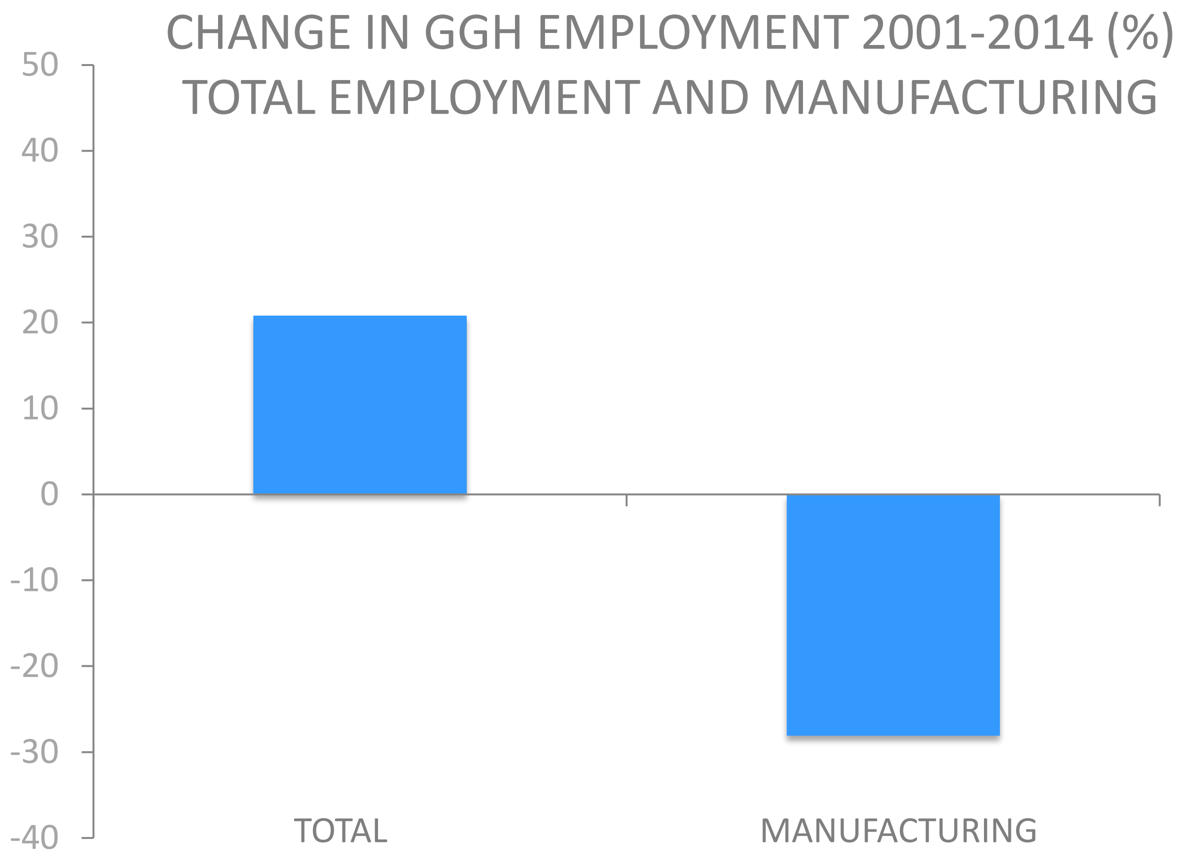


LOSS IN SOME SECTORS



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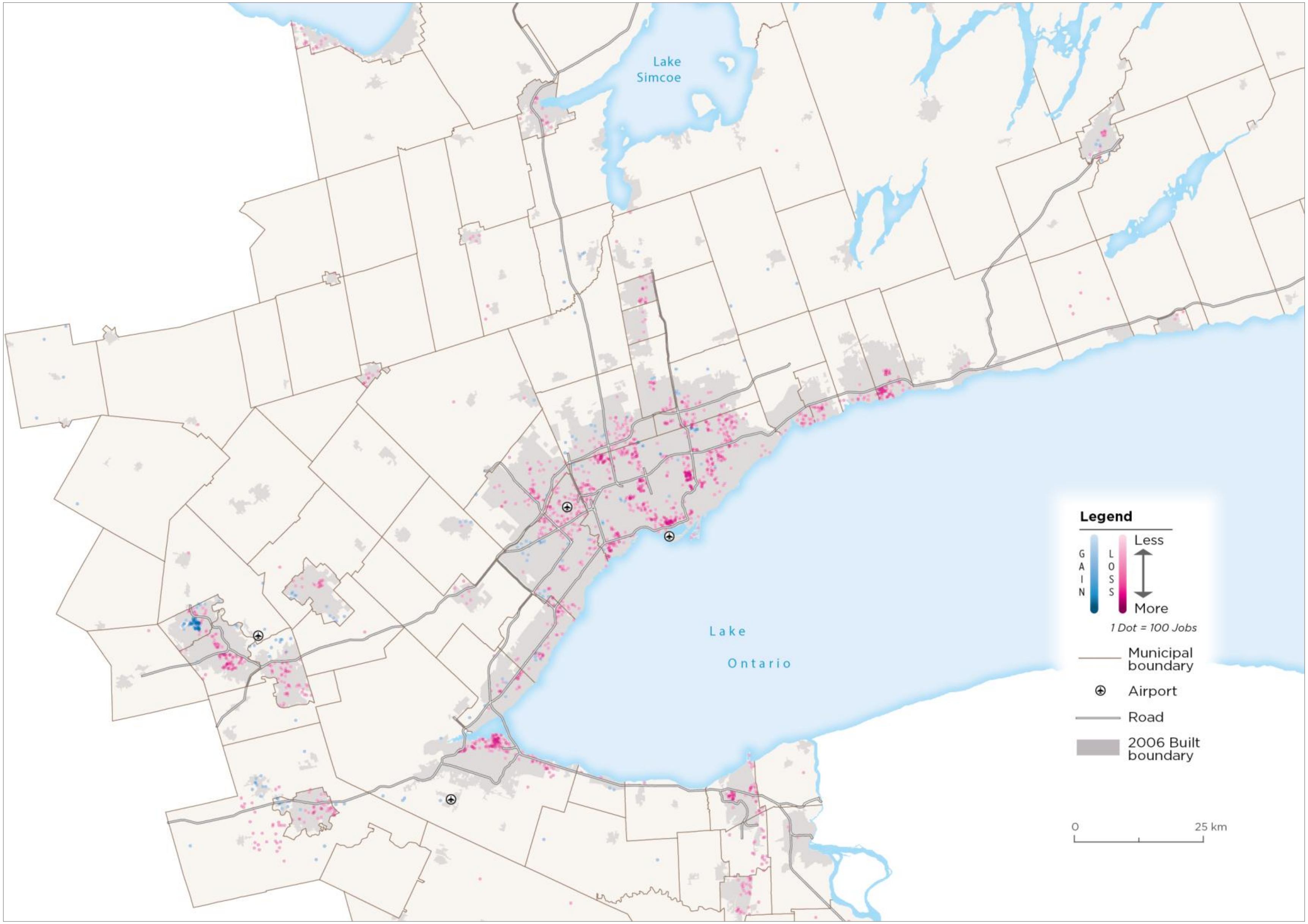
MANUFACTURING EMPLOYMENT CHANGE 2001-2011



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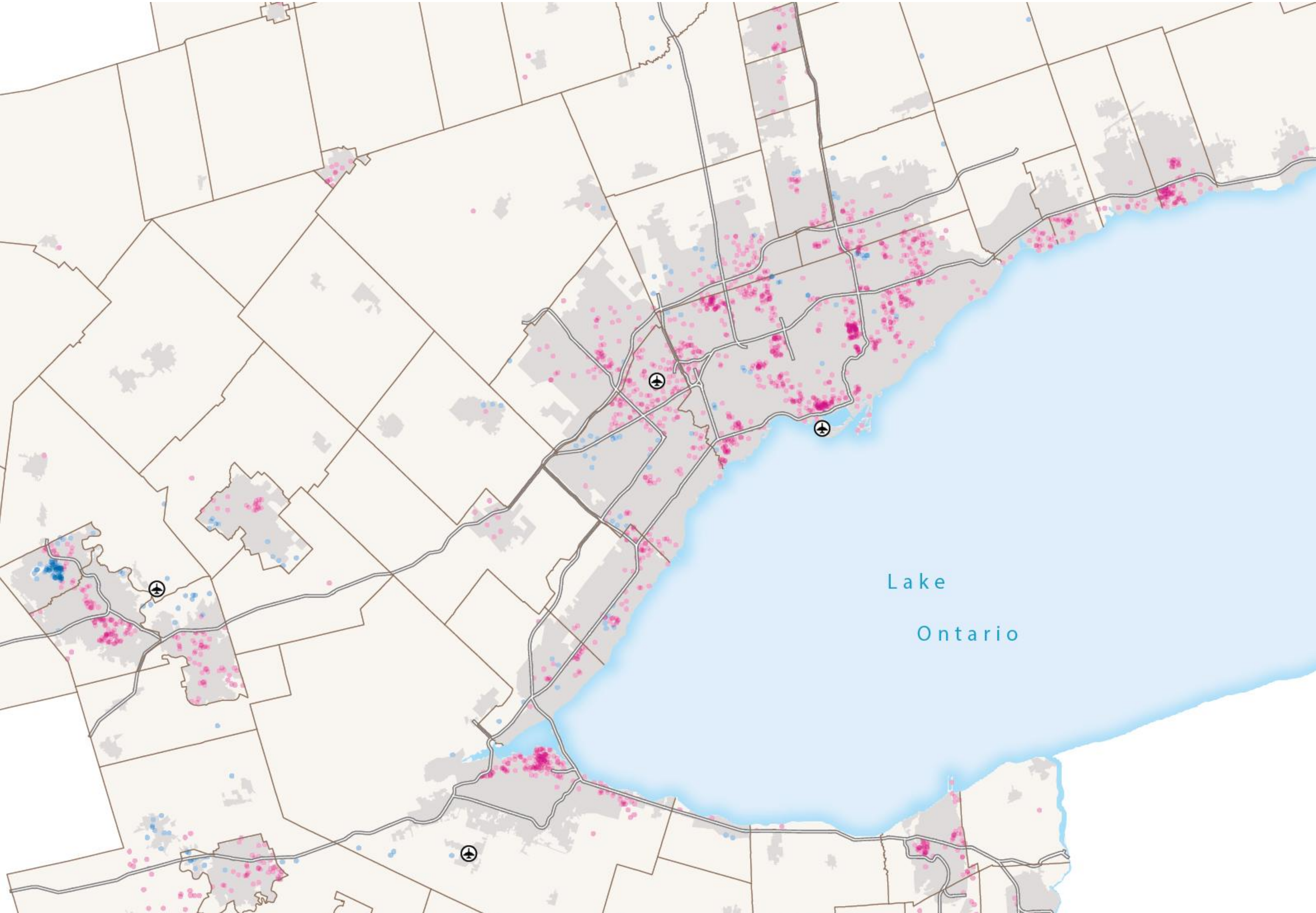

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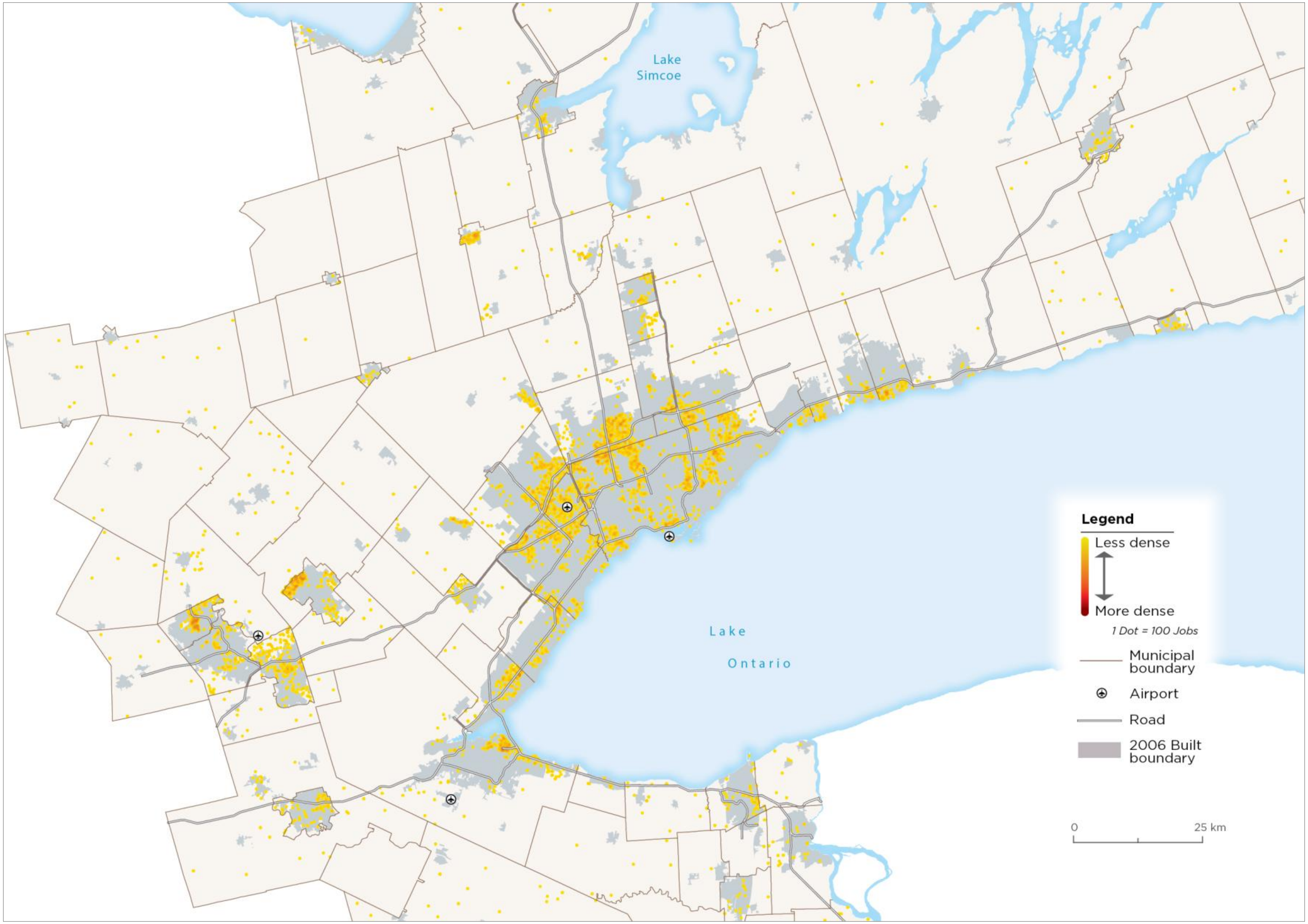

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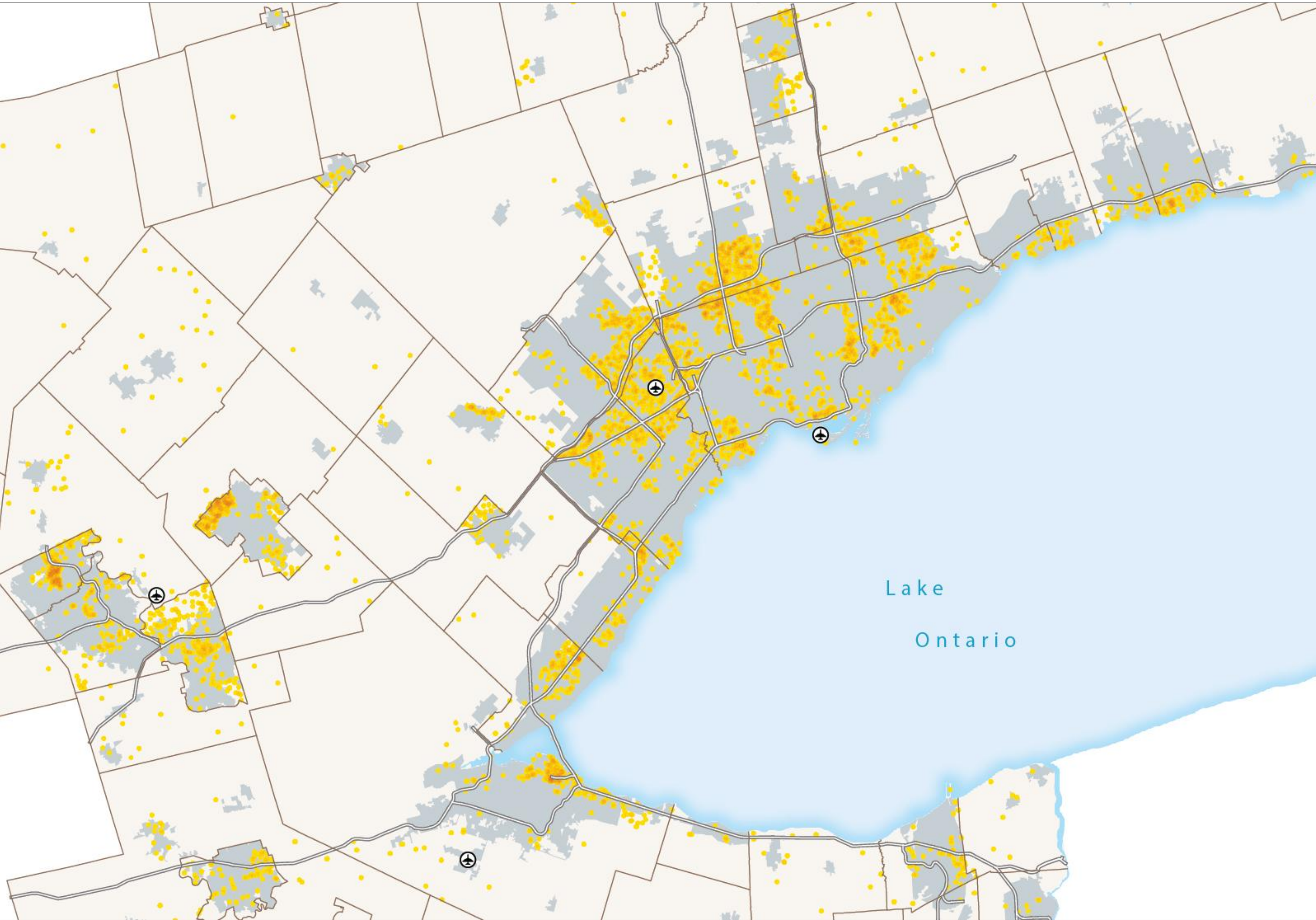
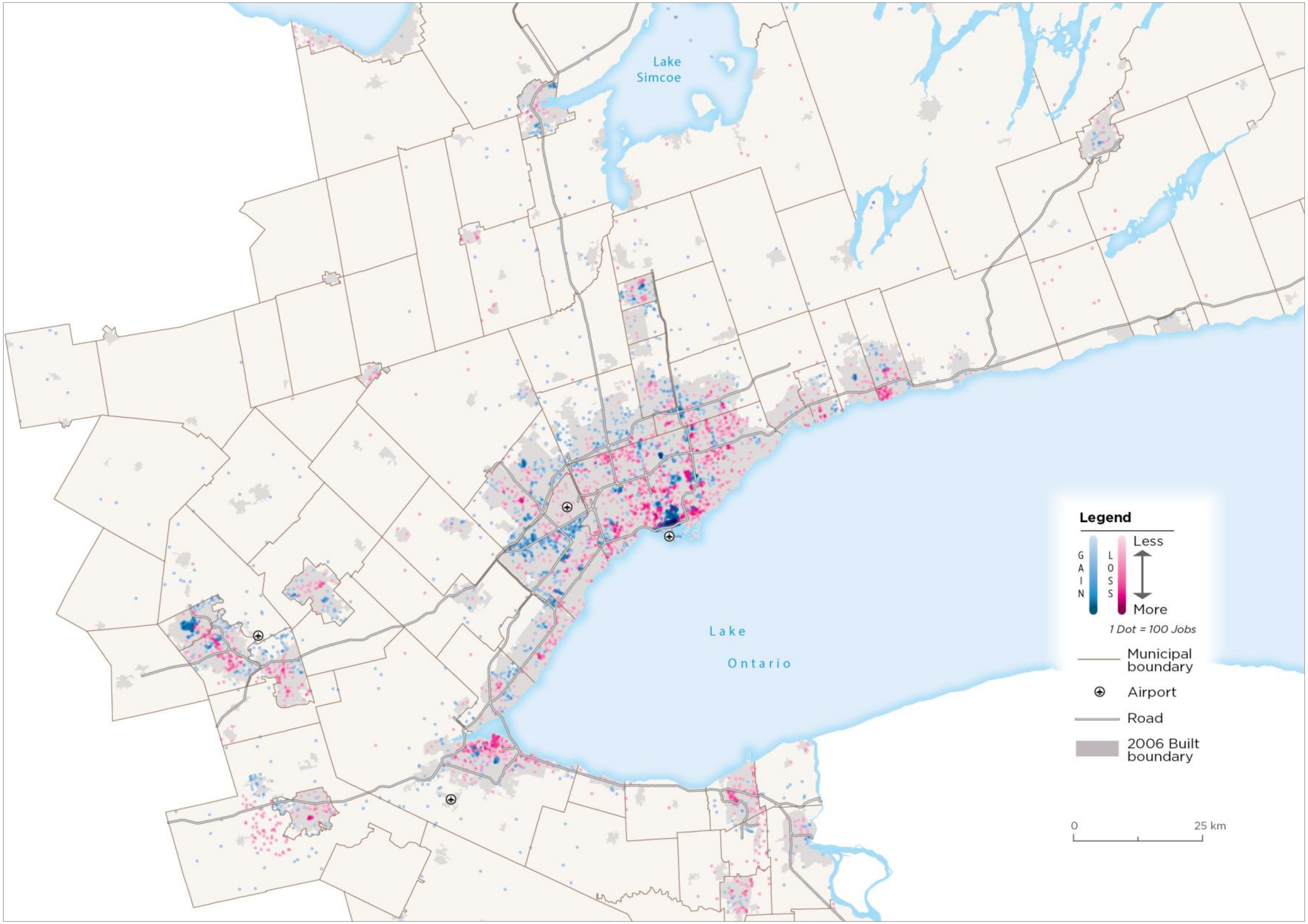


CORE EMPLOYMENT CHANGE 2001-2011



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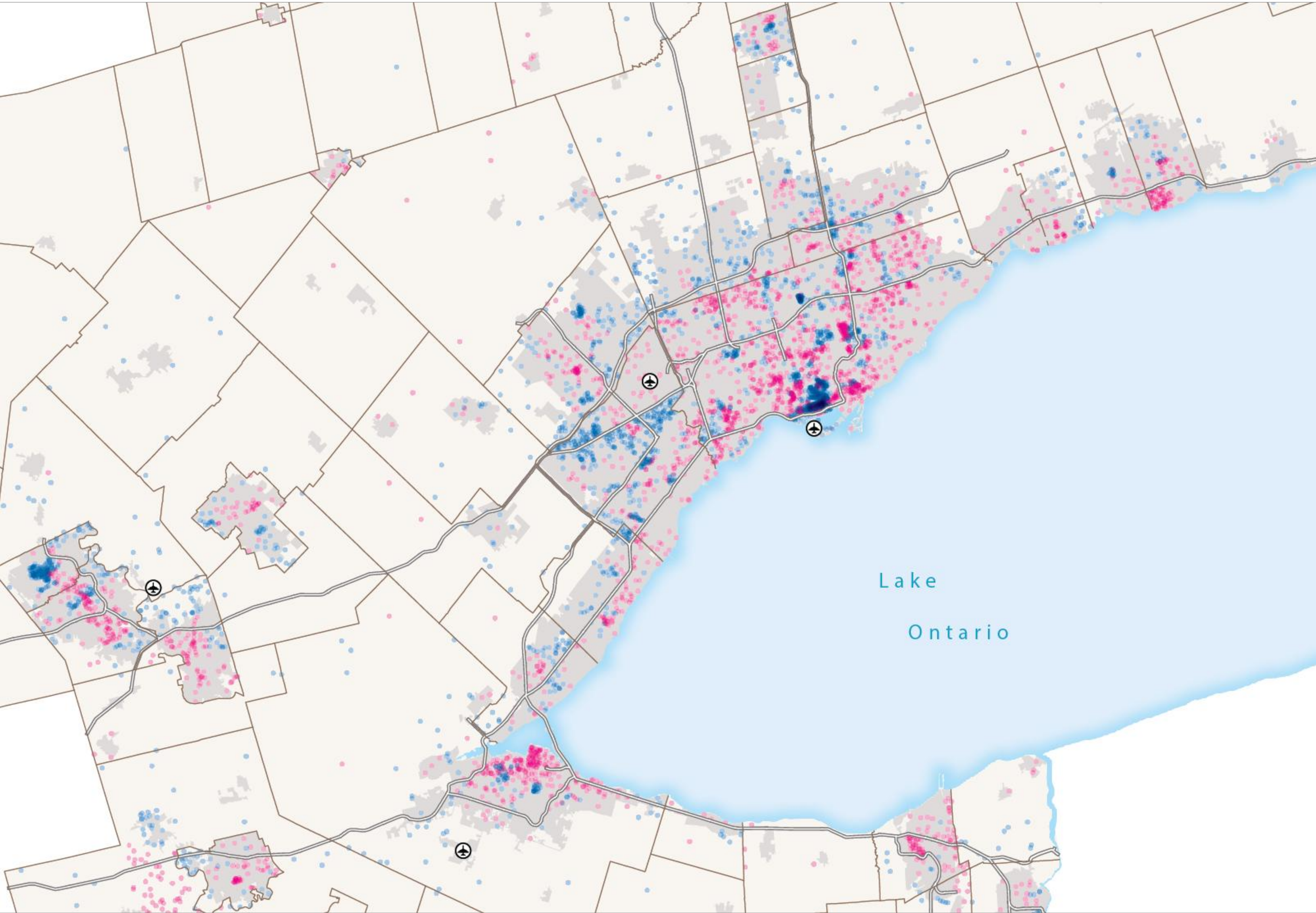
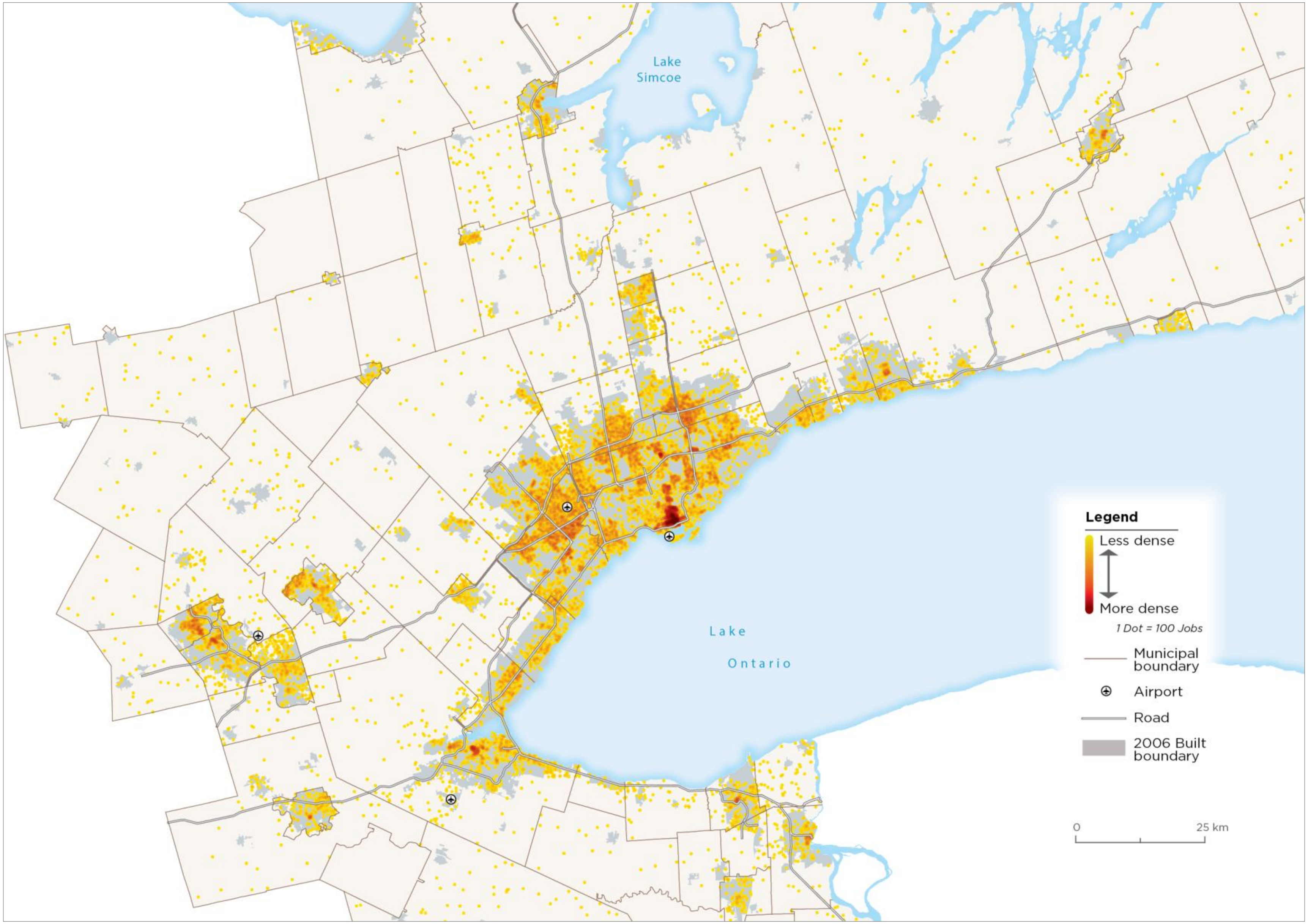


WHERE ARE WE NOW IN THE GGH?

CORE EMPLOYMENT 2011



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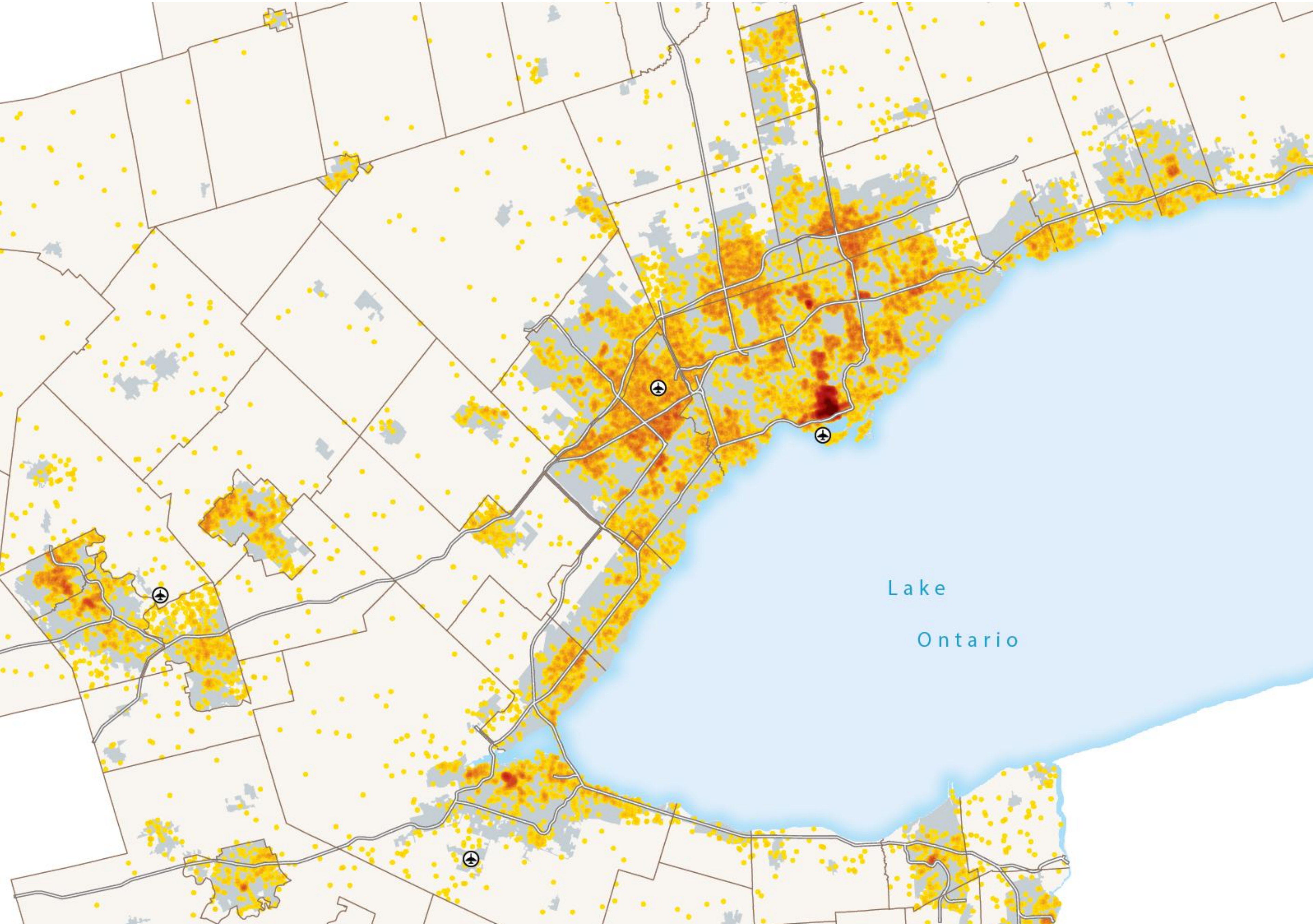
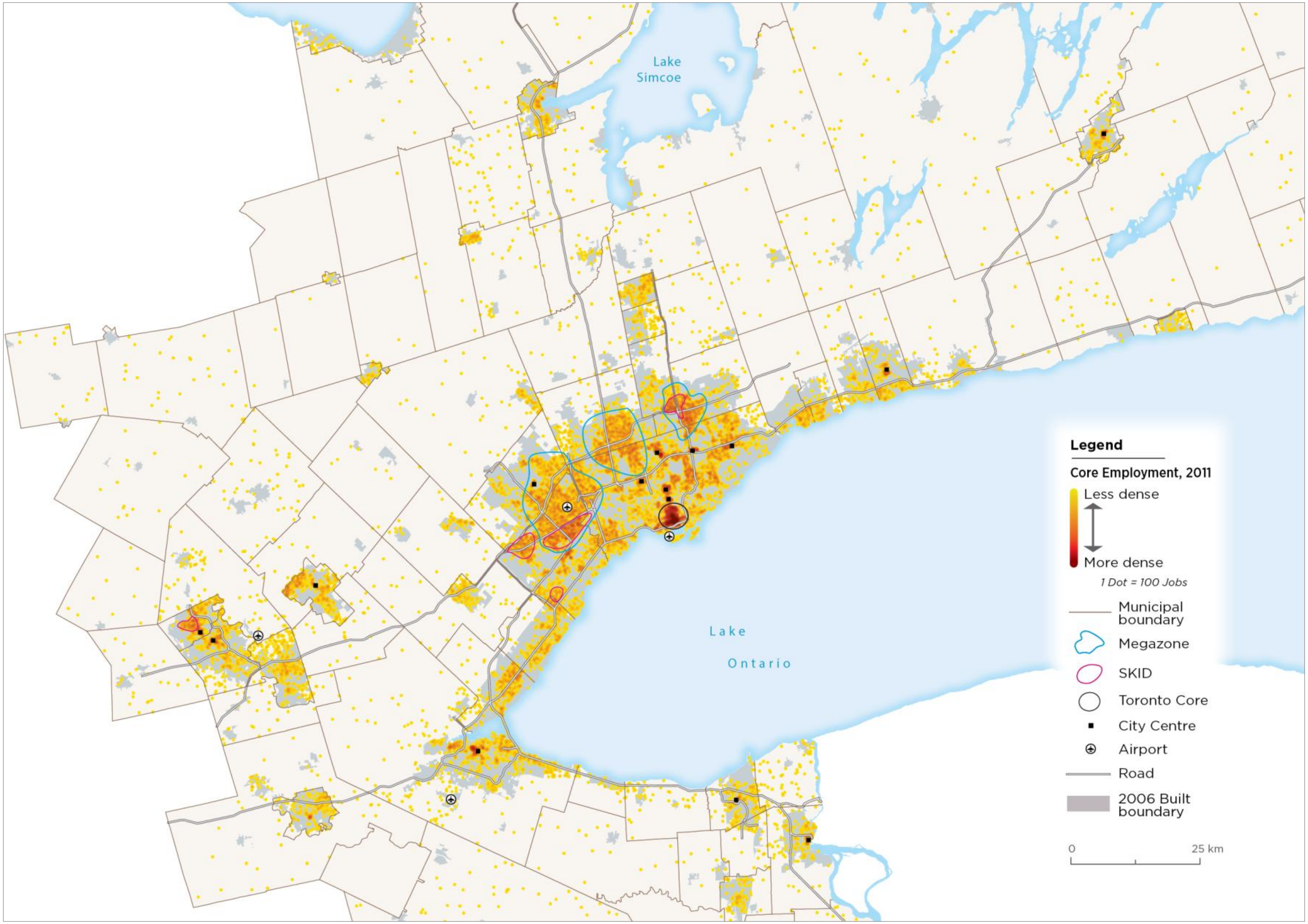
CORE EMPLOYMENT 2011



SPATIAL ECONOMIC STRUCTURE OF THE GGH



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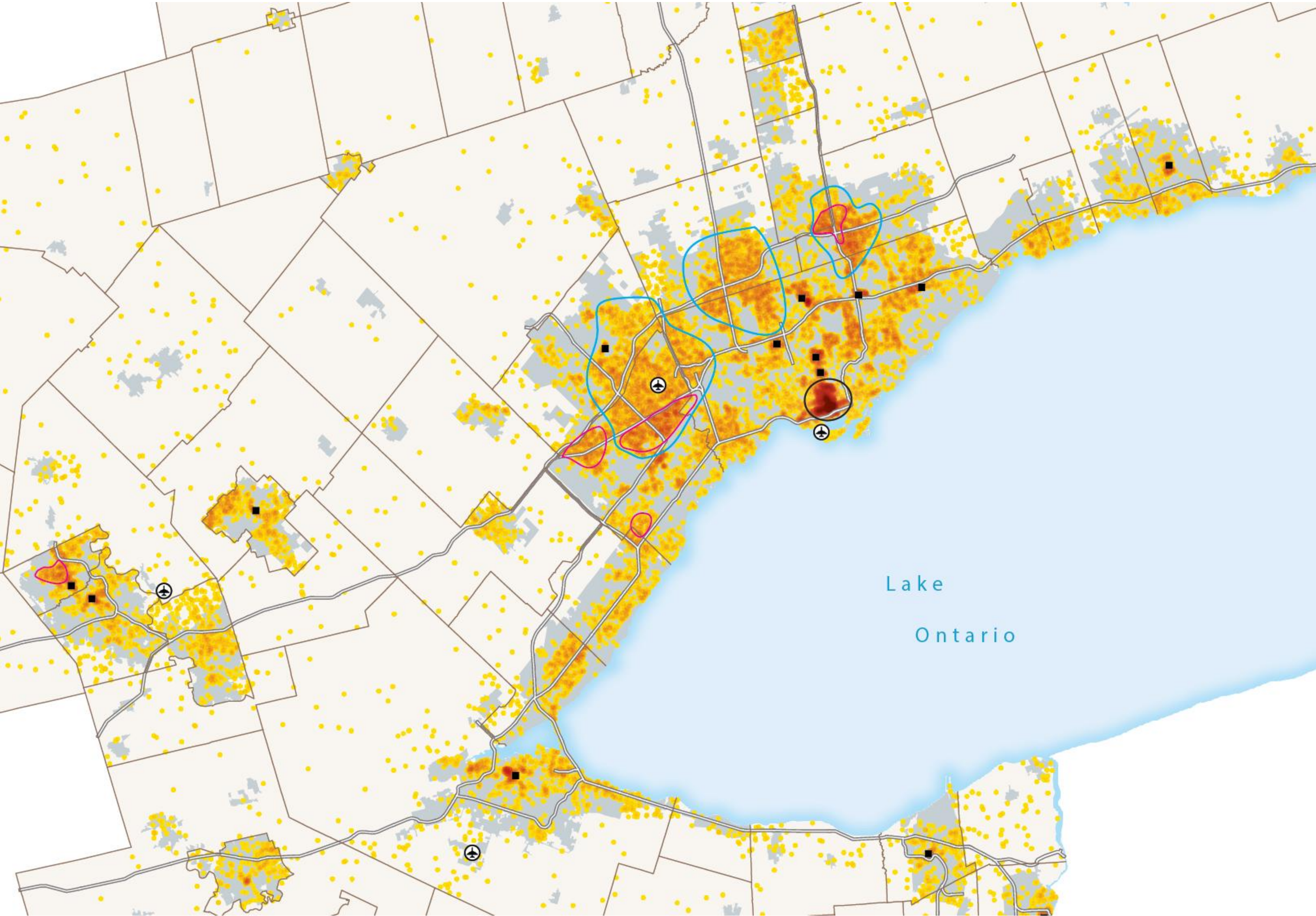

KEY STATS: CORE EMPLOYMENT

WITH A USUAL PLACE OF WORK

	Change 2001-2011	Change 2006-2011	2011
Megazones*	17,525	-20,305	447,825
SKIDs*	35,485	12,440	167,445
Megazones + SKIDs	38,560	-9,415	507,820
Toronto Core	42,290	39,335	385,485
Rest of GGH	-83,960	-140,070	1,305,250
GGH Total	-3,110	-110,150	2,198,555

* Employment for the 2 SKIDs found in megazones are included in both categories

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KEY STATS: ALL EMPLOYMENT

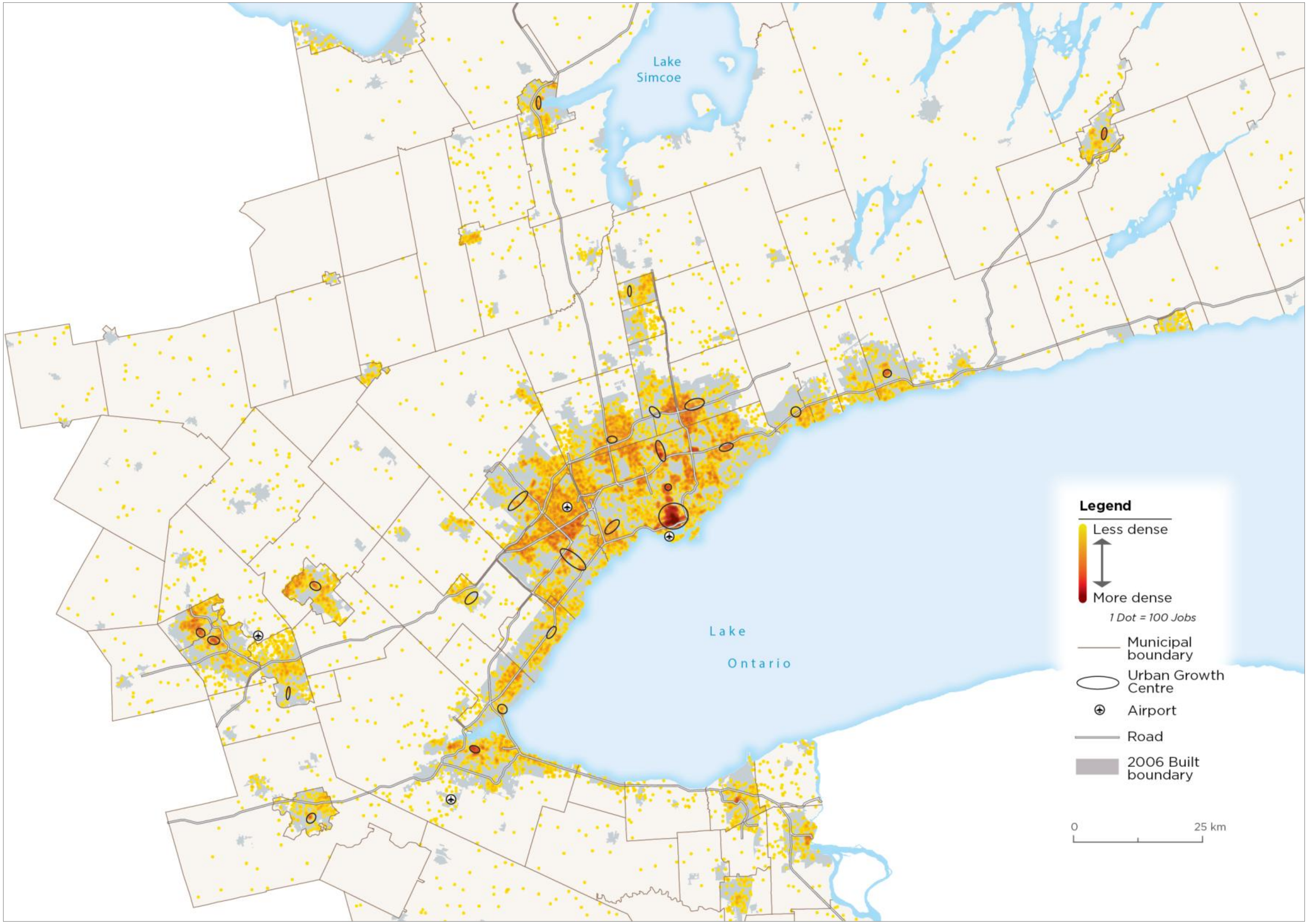
WITH A USUAL PLACE OF WORK

	Change 2001-2011	Change 2006-2011	2011
Megazones*	38,595	-9,985	543,135
SKIDs*	42,805	16,810	196,830
Megazones + SKIDs	62,360	2,320	613,425
Toronto Core	48,115	46,245	464,650
Rest of GGH	197,040	44,160	2,460,820
GGH Total	307,515	92,725	3,538,895

* Employment for the 2 SKIDs found in megazones are included in both categories

THE GROWTH PLAN AND A TRANSFORMING REGION

CORE EMPLOYMENT 2011 AND THE UGCS



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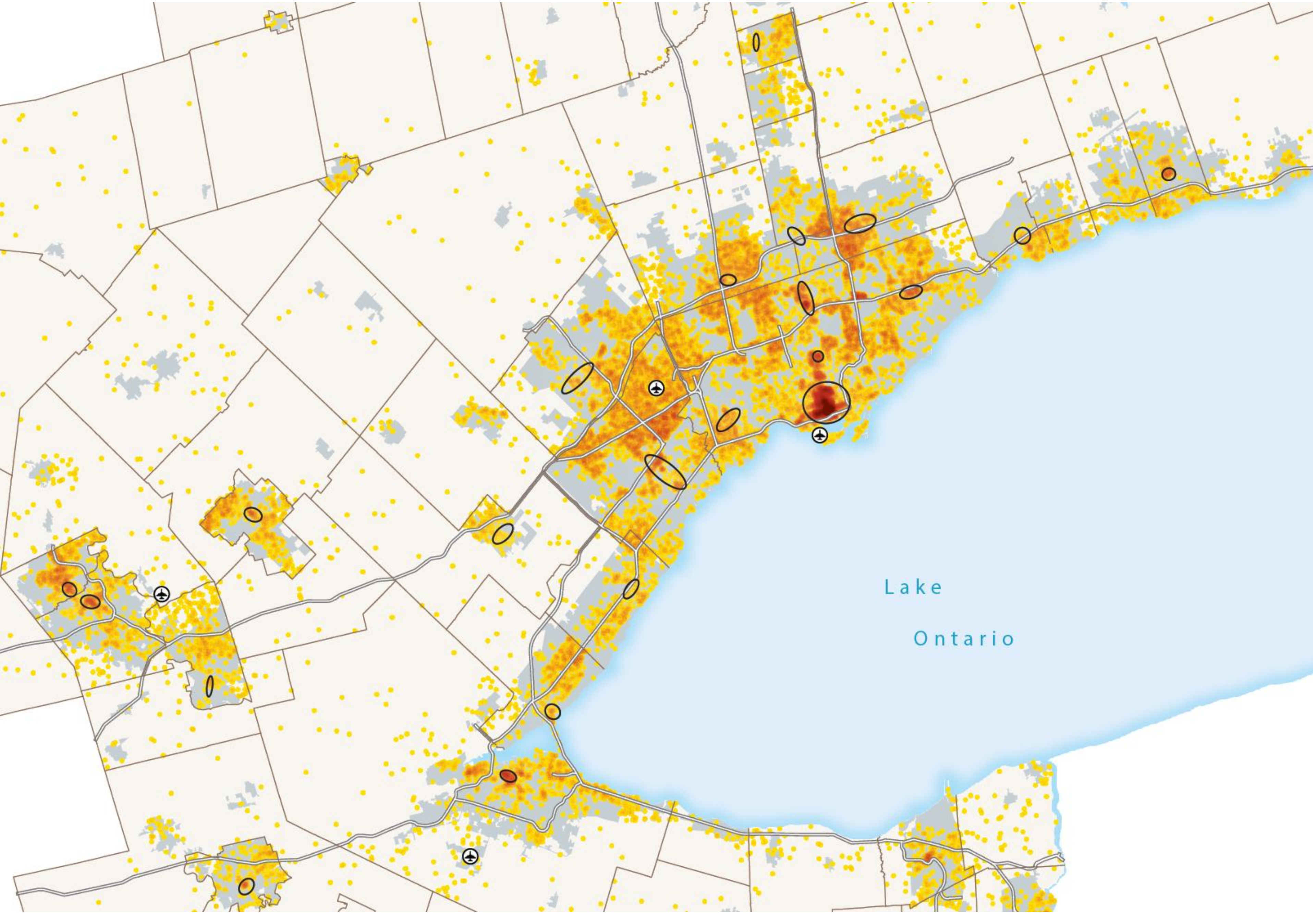
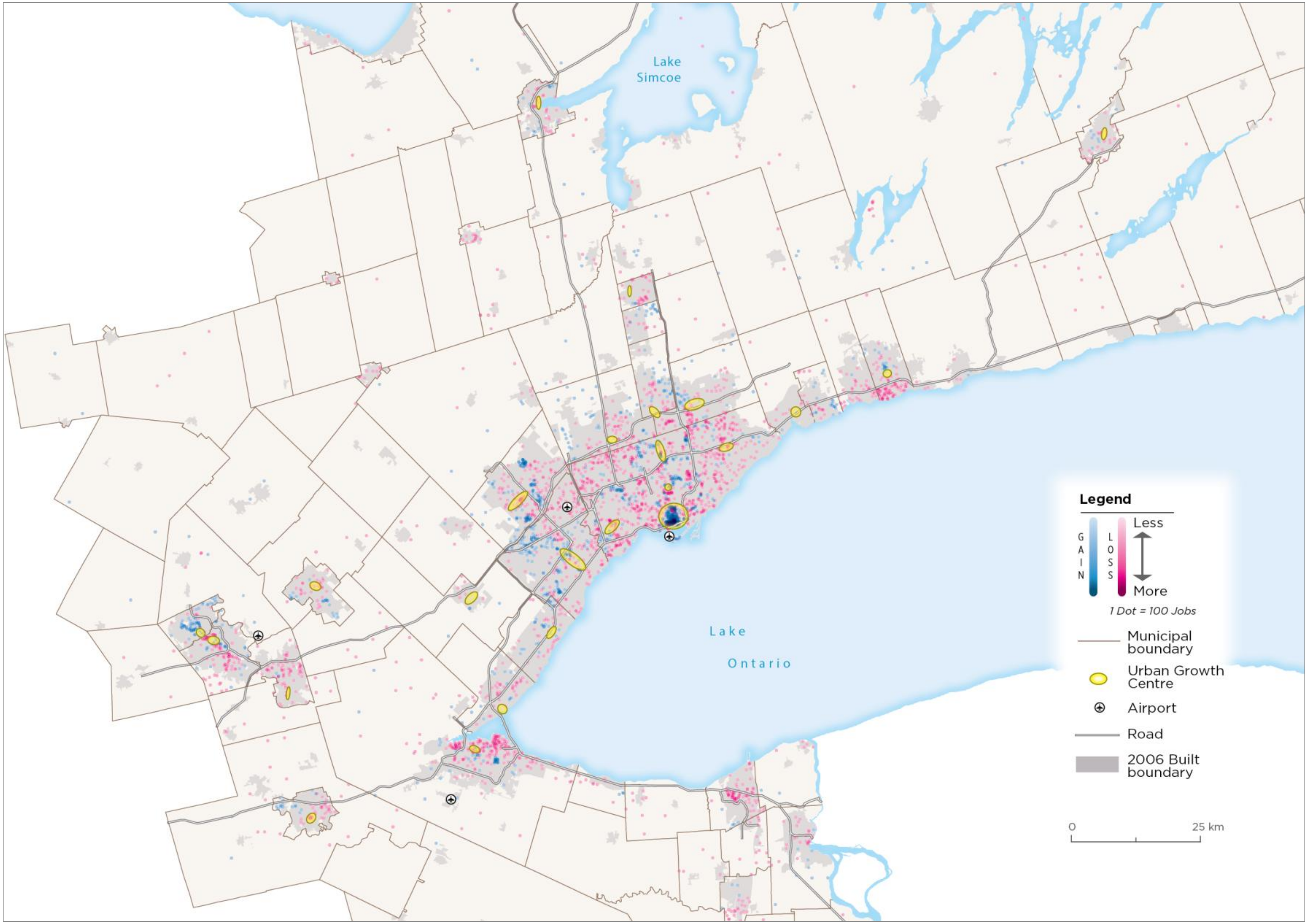
CORE EMPLOYMENT 2011 AND THE UGCS



CORE EMPLOYMENT CHANGE AND THE UGCS 2006-2011



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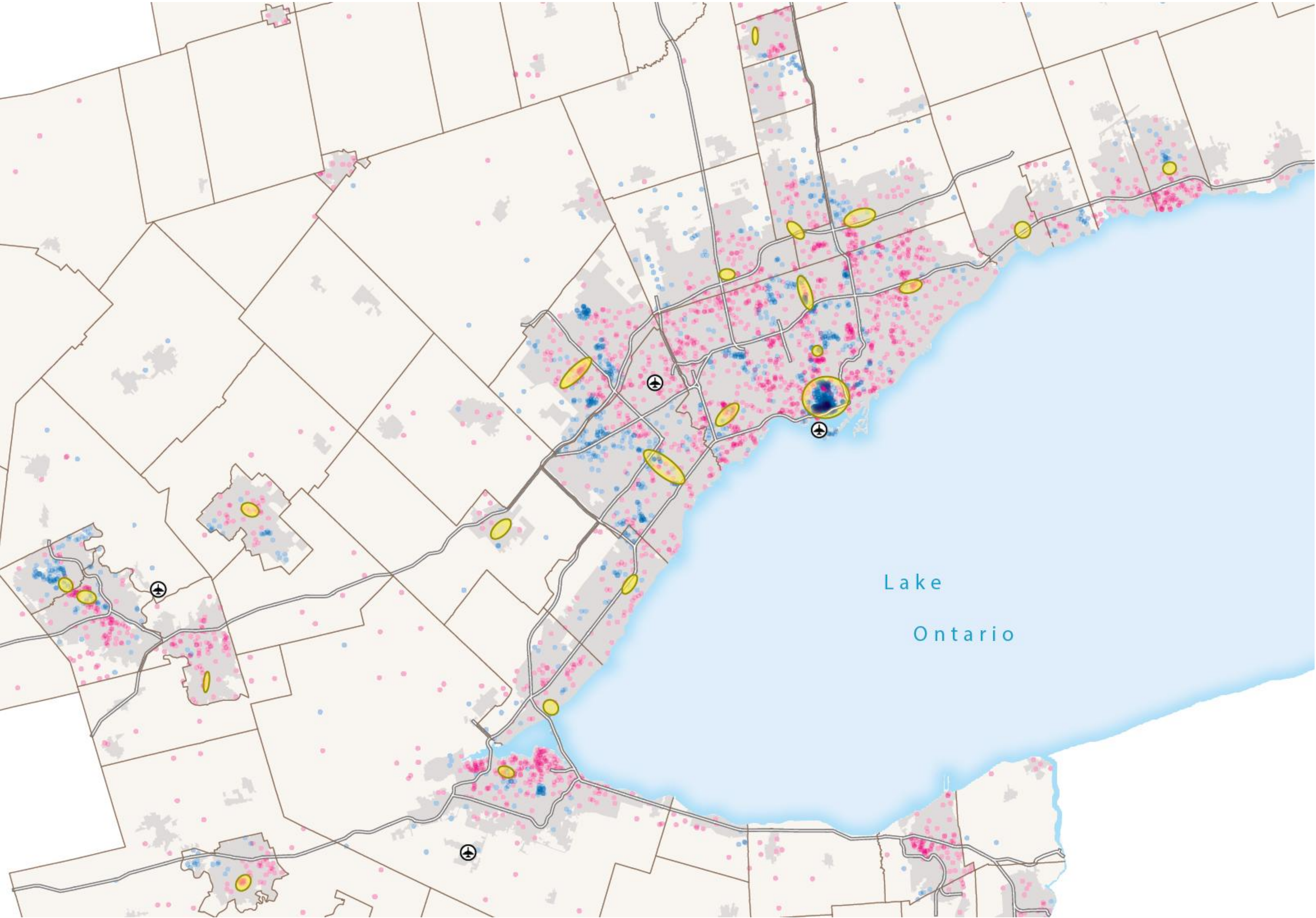
CORE EMPLOYMENT CHANGE AND THE UGCS 2006-2011



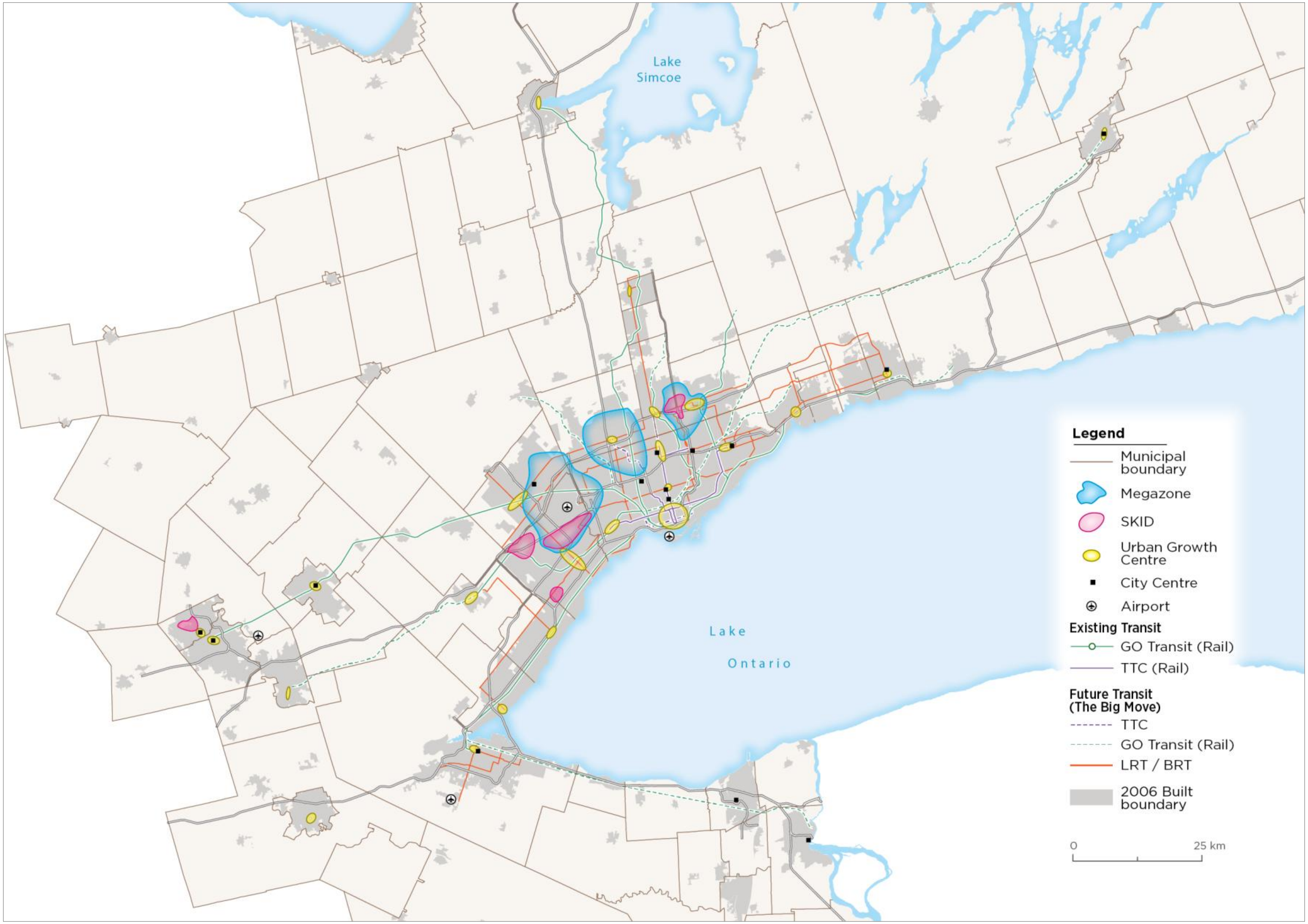
KEY STATS: ALL EMPLOYMENT

WITH A USUAL PLACE OF WORK

	Change 2001-2011	Change 2006-2011	2011
Megazones	38,595	-9,985	543,135
SKIDs	42,805	16,810	196,830
Toronto Core	48,115	46,245	464,650
UGCs*			
Downtown Toronto		48,000	470,400
Other Toronto		4,020	78,125
905 planned centres		5,085	59,425
Older city centres		-8,960	92,110
GGH Total	307,515	92,725	3,538,895

* Source: OGS

SPATIAL ECONOMIC STRUCTURE AND THE BIG MOVE



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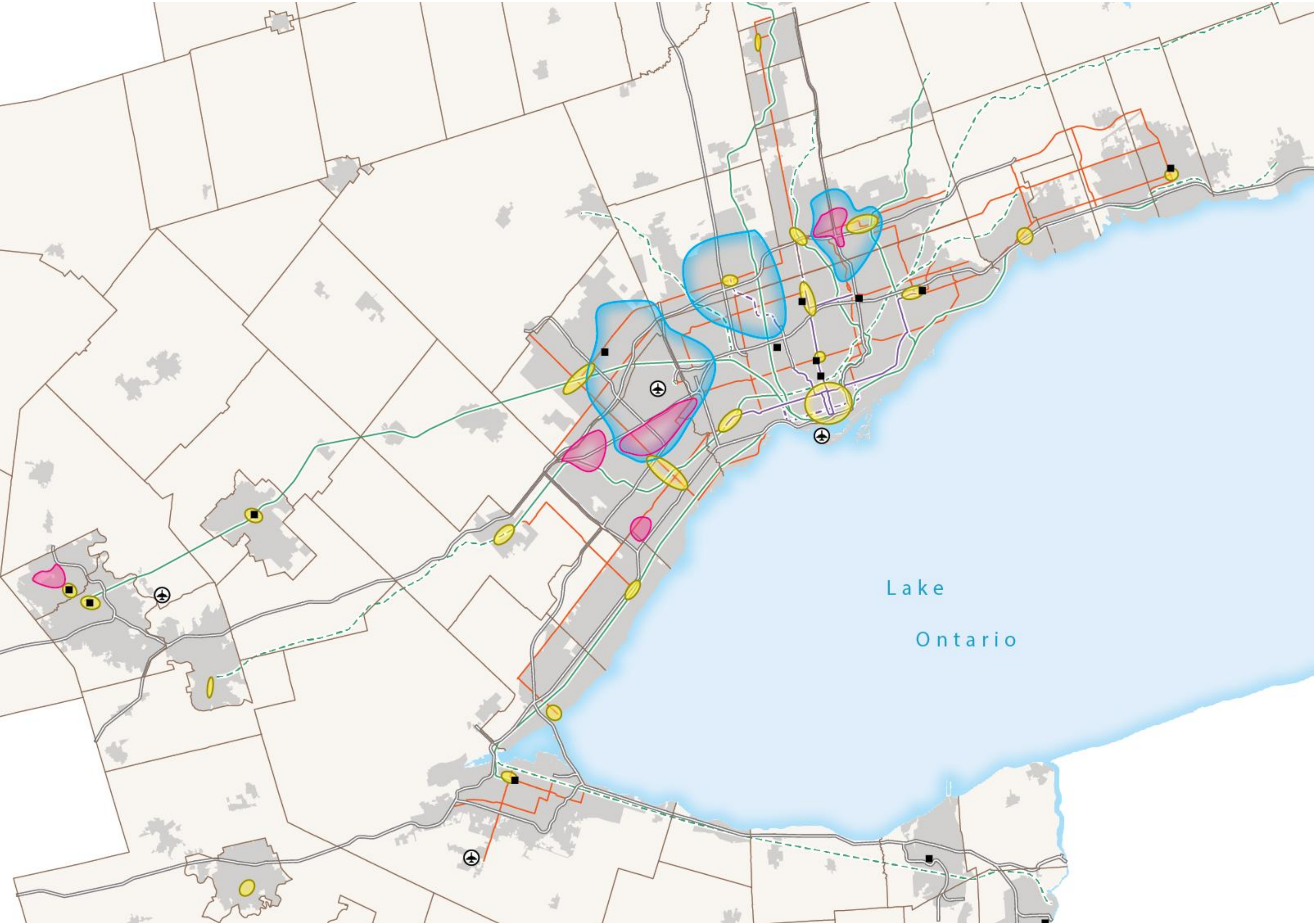
SPATIAL ECONOMIC STRUCTURE AND THE BIG MOVE



KEY STATS: **TRAVEL** TO MEGAZONES

	Airport	Tor-York West	Tor-York East	MEGAZONES TOTAL	DOWNTOWN TORONTO
All Employment (2011)	297,990	138,890	106,260	543,140	464,650
% trips by car	93	89	94	93	29
% trips > 10 km	61	58	53	59	54
# daily auto work trips to	251,000	117,000	92,000	476,000	133,000

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KEY STATS: TRAVEL TO SKIDs

	Markham	Airport South	Meadowvale	Sheridan	Waterloo	SKIDs Total
All Employment (2011)	44,095	82,445	41,640	7,880	20,770	196,830
% trips by car	95	93	95	97	87	94
% trips > 10 km	57	60	58	64	26	56
# daily auto work trips to	39,432	70,548	35,448	7,245	12,709	165,382

KEY FINDINGS

- A changing mix of employment uses with different demands of urban environments & locational preferences
- A new GGH economic landscape emerging
- Areas of change and loss, not just growth
- The current & evolving regional employment geography is not aligning with the GP spatial concept
- Current employment forecasts and allocation do not capture the evolving economic landscape

KEY GROWTH PLAN IMPLICATIONS

- Reconsider the GP Spatial Concept
  - Identify & address regionally significant employment nodes
  - Review the role of and approaches to UGCs
- A focus on proactive, integrated reurbanization strategies
  - Areas of loss & change
  - Regionally significant employment nodes
- Better employment projections and municipal allocations
- Explore new planning strategies and frameworks to maximize flexibility

RESHAPING THE REGION: WHAT WILL DRIVE CHANGE?

- Planning policies
- Transit investment
- Public buildings investment
- Public sector price signals

A STRATEGIC, GGH-WIDE PERSPECTIVE

- On where transit investments are the most productive
- Key criteria
  - Economically significant areas
  - Most significant sources of congestion
  - Most amenable to transitification/intensification
  - Greatest potential to shift from auto to transit
- Regional transit network focus on regional employment nodes

THANK YOU

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