PLANNING THE NEXT GGH
What kinds of employment uses might realistically be attracted to Mt Dennis?

Planning the NEXT GGH research questions

Q: What kinds of economic activities are growing/declining?
A: Restructuring of the regional economy

Q: In what locations?
A: Changing locational and urban environment requirements of business

Q: Within what kinds of urban environments?
Key drivers

Transition to a knowledge economy

Change in employment by skill level
GGH, 2001-2014 (000s)
Globalization
Acceleration and diffusion of new technologies
Growing, knowledge-intensive activities cluster
Routine, dispersed activities are slow-growth or in decline
Drivers cut across industries

Key drivers
The shift
Core Employment

2,375,465 jobs in 2016
Core Employment with Megazones & Suburban Knowledge-Intensive Districts
Core Employment Change

+75,450 jobs
2006 - 2016
The shift

Core Employment Change
Downtown Toronto vs. SKIDs

Downtown Toronto
All SKIDs

2001-2011
2006-2016

0
20,000
40,000
60,000
80,000

Downtown Toronto
All SKIDs
Archetypes
Introducing Archetypes

- Archetypes specifically designed to better inform land use planning and economic development
- Identifies groups of industries with similar economic AND spatial characteristics
- Make clearer connections between economic change and spatial change
Introducing Archetypes

Each Archetype has a distinct spatial pattern within the GGH
112,665 jobs in 2016
Finance

275,300 jobs in 2016
High Order Business Services

123,345 jobs in 2016
Soft Tech

91,270 jobs in 2016
Back Office

51,715 jobs in 2016
Science-based

64,980 jobs in 2016
Hard Tech

51,225 jobs in 2016
Logistics

32,635 jobs in 2016
Other Wholesaling

121,750 jobs in 2016
Other Manufacturing

386,480 jobs in 2016
The shift in detail

Q: What kinds of economic activities are growing/declining?
Q: In what locations?
Q: Within what kinds of urban environments?
Knowledge-intensive Archetypes benefit from spatial clustering

Finance

+ 47,150 jobs
2006 - 2016
Knowledge-intensive Archetypes benefit from spatial clustering

High Order Business Services

+ 25,130 jobs
2006 - 2016
Knowledge-intensive Archetypes benefit from spatial clustering

Soft Tech

+ 19,310 jobs
2006 - 2016
Knowledge-intensive Archetypes benefit from spatial clustering

Arts & Design

+ 10,020 jobs
2006 - 2016
Some Archetypes focused on routine activities are suburbanizing

**Back Office**

-2,995 jobs
2006 - 2016
Some Archetypes focused on routine activities are suburbanizing

Special: Telecoms

+ 6,635 jobs
2006 - 2016
There is some limited growth of knowledge-intensive activities in a few suburban areas

Science-based

+ 12,030 jobs
2006 - 2016
There is some limited growth of knowledge-intensive activities in a few suburban areas

Special: Pharma

+ 2,215 jobs
2006 - 2016
Logistics focuses in suburban areas, near transportation facilities

Logistics

+ 7,456 jobs
2006 - 2016
Some routine-oriented, dispersed activities are declining

Other Wholesaling

-18,170 jobs
2006 - 2016
Some high-order, spatially concentrated manufacturing is declining

**Hard Tech**

-21,585 jobs
2006 - 2016
Some routine-oriented, dispersed activities are declining

Other Manufacturing

-129,775 jobs
2006 - 2016
Applying the Analysis
What is the envisioned role of Mt Dennis within the region?

- Compete with downtown?
  - attract Finance, Soft tech etc.
- Complement downtown?
  - eg Back Office, secondary sites for Finance, HOBS
- Accommodate future growth of constrained Archetypes
  - eg Arts & Design, Soft Tech
- Create independent role/cluster
  - new manufacturing, emerging industries - ?
What Archetypes might be attracted?

<table>
<thead>
<tr>
<th>Locational factors</th>
<th>Local assets</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Knowledge-intensive, central, eg Finance, HOBS, A&amp;D, Soft Tech</strong></td>
<td>• Access to regional labour market by transit</td>
</tr>
<tr>
<td>- Access to skilled regional labour market by transit, walk, cycle</td>
<td>- what skills can be accessed re 30 min transit – the skillshed</td>
</tr>
<tr>
<td>- Agglomeration economies</td>
<td>• Local skillshed – walk/cycle</td>
</tr>
<tr>
<td>- Urban environment</td>
<td>• Kitchener GO connectivity</td>
</tr>
<tr>
<td><strong>Knowledge-intensive, suburban 1 eg HOBS, Soft Tech</strong></td>
<td>• Existing agglomeration economies</td>
</tr>
<tr>
<td>- Access to skilled labour</td>
<td>– base of businesses, other assets (eg institutions)</td>
</tr>
<tr>
<td>- Office park setting</td>
<td>• Urban environment – character, services, amenities</td>
</tr>
<tr>
<td><strong>Knowledge-intensive, suburban 2 eg Sci-based, Pharma</strong></td>
<td>• Unique building types</td>
</tr>
<tr>
<td>- Intra-corporate focus</td>
<td>• Price point</td>
</tr>
<tr>
<td>- Access to skilled labour</td>
<td>• Etc…..</td>
</tr>
<tr>
<td><strong>Routine, suburban eg Back Office, Telecoms</strong></td>
<td></td>
</tr>
<tr>
<td>- Access to low skilled labour</td>
<td></td>
</tr>
<tr>
<td>- Cheaper space</td>
<td></td>
</tr>
<tr>
<td><strong>Urban manufacturing, last-mile distribution</strong></td>
<td></td>
</tr>
<tr>
<td>- Access to local/regional markets</td>
<td></td>
</tr>
<tr>
<td>- Appropriate buildings</td>
<td></td>
</tr>
</tbody>
</table>
Strategies – depending on Archetypes could include

- Skillshed/transit accessibility a significant asset
  - quantify and qualify skillshed
- Role of new transit
  - Crosstown Phase 2 Weston – Dixon - Pearson
- Close integration of development with transit
- Flexible and mixed-use buildings and areas
- Updated planning frameworks
- Improved public realm
- Worker amenities, “third spaces”
- Build agglomeration economies
  - attract an institution
- Keep space cheap

Brooklyn Navy Yards
Mixed heavy and light industrial, offices, creative spaces
Proposed Growth Plan changes
Proposed Growth Plan changes to Employment Areas

- Employment Areas not designated Provincially Significant Employment Zone are opened up for one-time conversion to residential, retail uses
  - before next Municipal Comprehensive Review
  - without having to consider potential need for the land to accommodate future employment uses/need
  - provided a significant number of jobs is maintained.
- Employment Areas defined in GP as areas designated in Official Plans for clusters of business and economic activities, incl. manufacturing, warehousing, offices, and associated retail and ancillary facilities
- Black Creek business park currently designated Employment Area in City’s OP

**Policies**

1. Employment Areas are places of business and economic activity. Uses that support this function consist of: offices, manufacturing, warehousing, distribution, research and development facilities, utilities, media facilities, parks, hotels, retail outlets ancillary to the preceding uses, and restaurants and small scale stores and services that serve area businesses and workers.
RECOMMENDATIONS

The Chief Planner and Executive Director, City Planning recommends that:

1. City Council request the Province to include additional Employment Areas within the City of Toronto as Provincially Significant Employment Zones as identified in Attachments 1 through 6 of the report (dated February 25, 2019) from the Chief Planner and Executive Director, City Planning.

2. City Council request the Province to enact a Regulation to permit the use of conditional zoning, pursuant to Section 113 of the City of Toronto Act, 2006 that would enable the City to require and secure employment space to be provided prior to, or concurrent with any non-employment uses, including residential.
Proposed PSEZs
City Council decision February 26, 2019
Thank you

http://www.neptis.org/publications/planning-next-ggh