

PLANNING THE NEXT GGH

URBAN LAND INSTITUTE

THURSDAY, FEBRUARY 28, 2019

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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?

Q: In what locations?

Q: Within what kinds of urban environments?

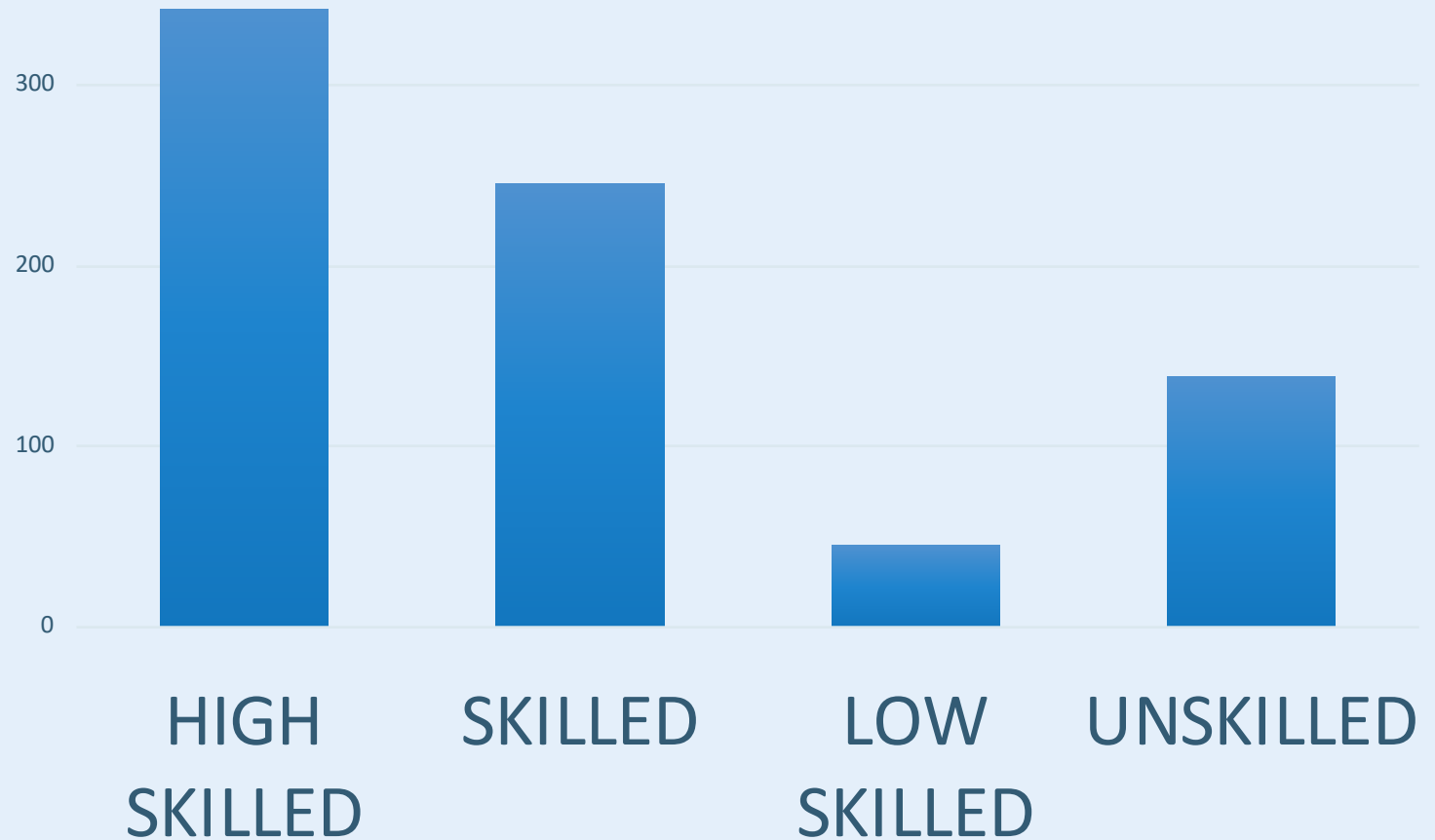
A: Restructuring of the regional economy

A: Changing locational and urban environment requirements of business

Change in employment by skill level GGH, 2001-2014 (000s)

Key drivers

Transition
to a
knowledge
economy



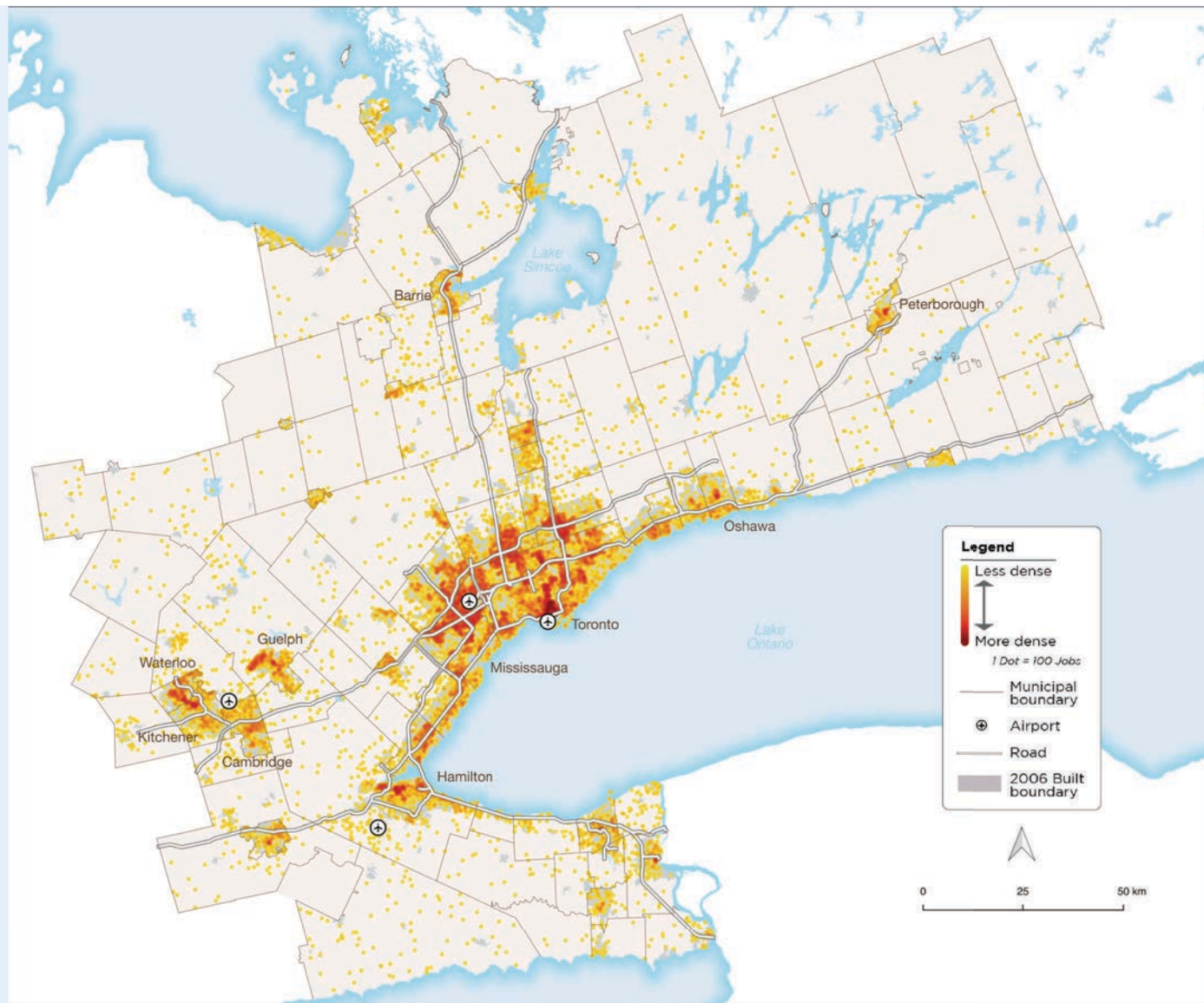
Key drivers

- 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

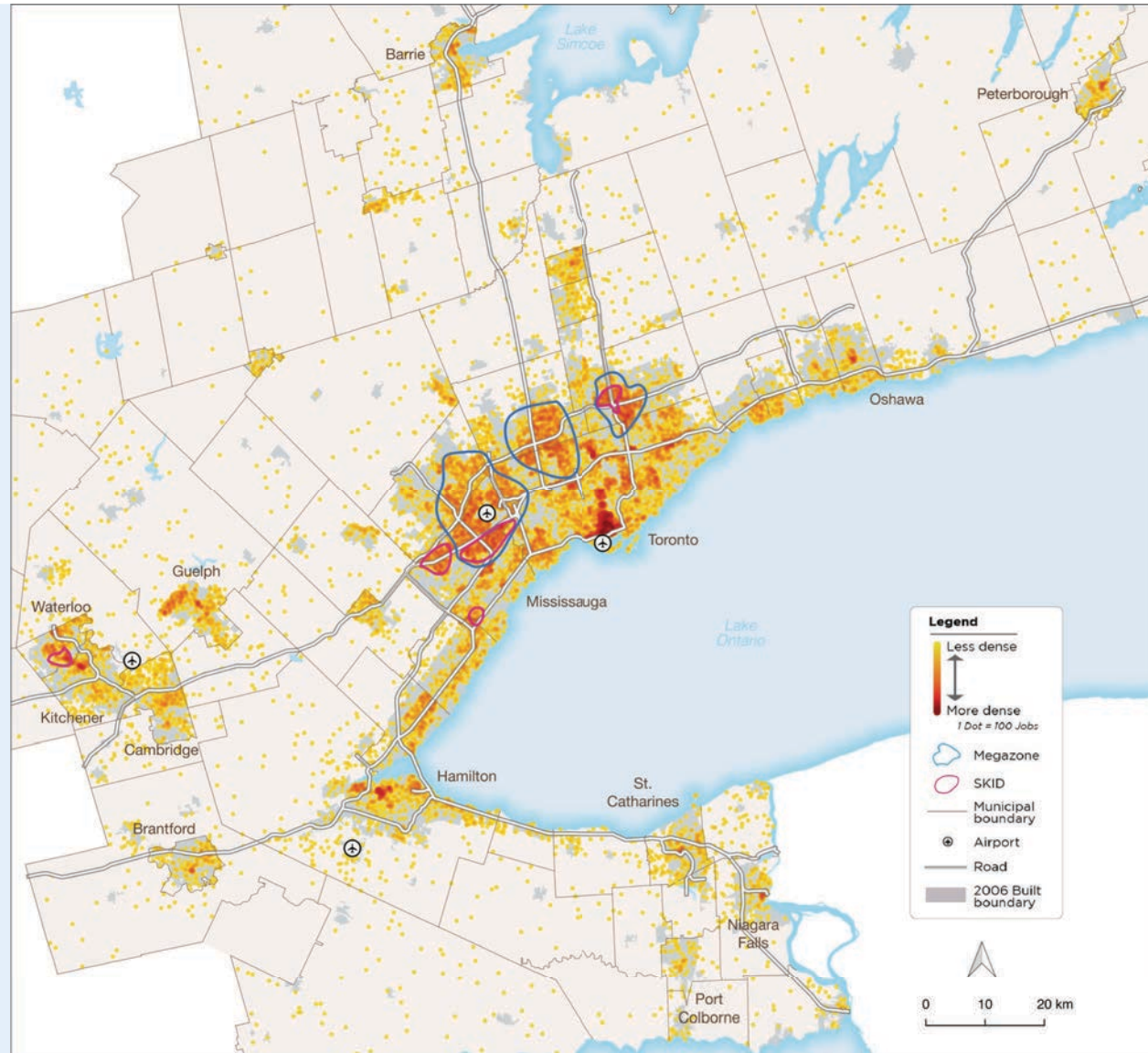
The shift

Core Employment

2,375,465 jobs
in 2016

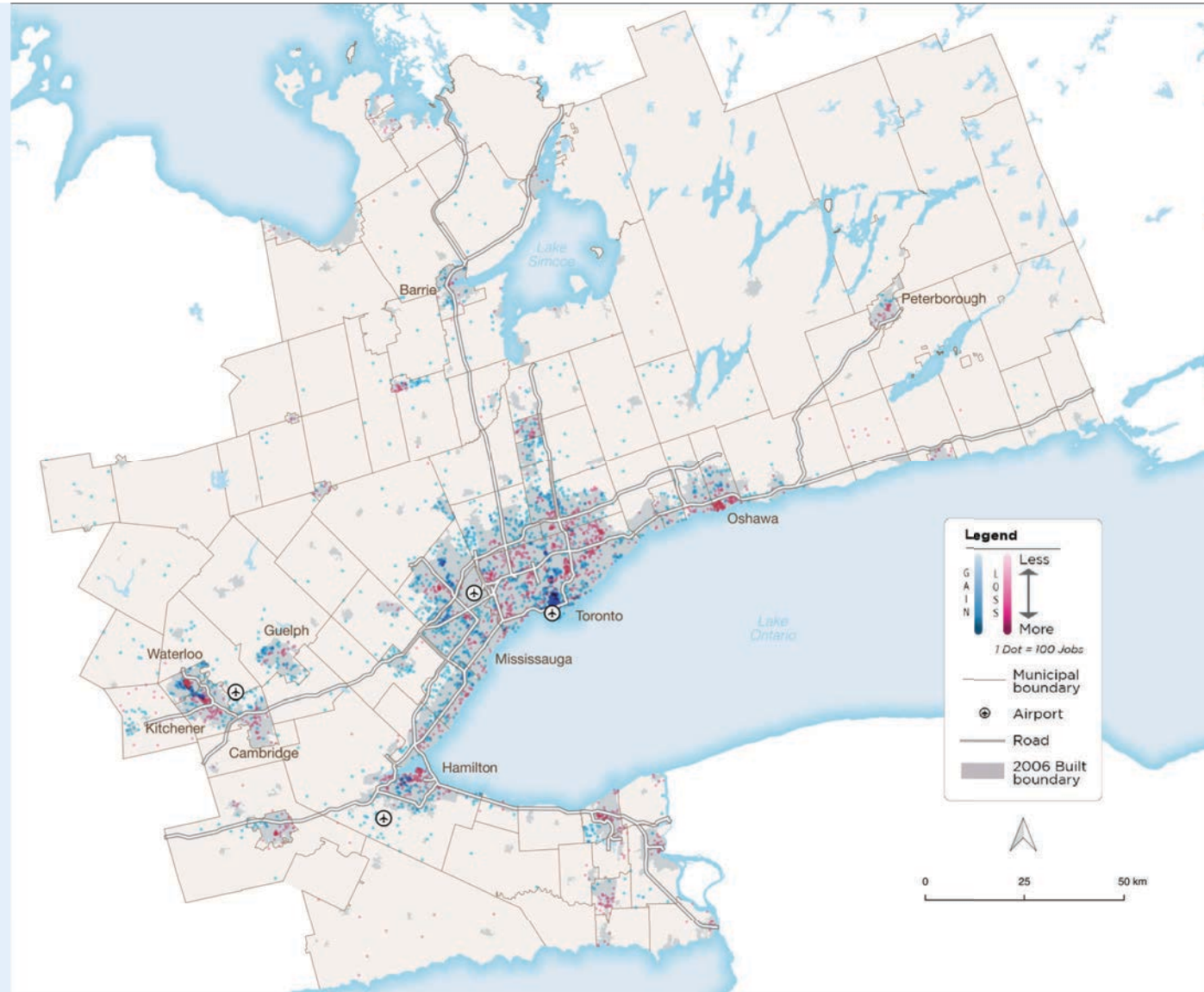


Core Employment with Megazones & Suburban Knowledge- Intensive Districts



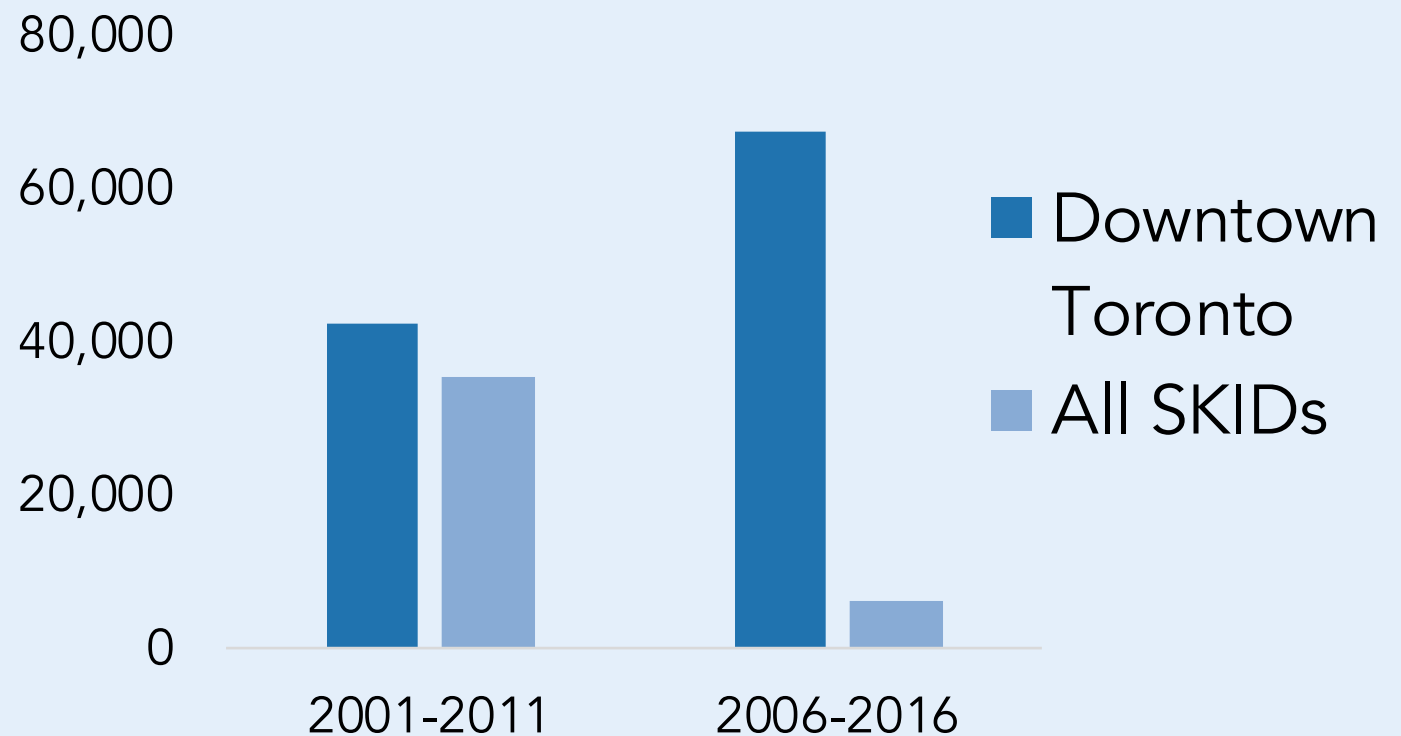
Core Employment Change

+75,450 jobs
2006 - 2016



The shift

Core Employment Change Downtown Toronto vs. SKIDs



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

Arts & Design

112,665 jobs
in 2016



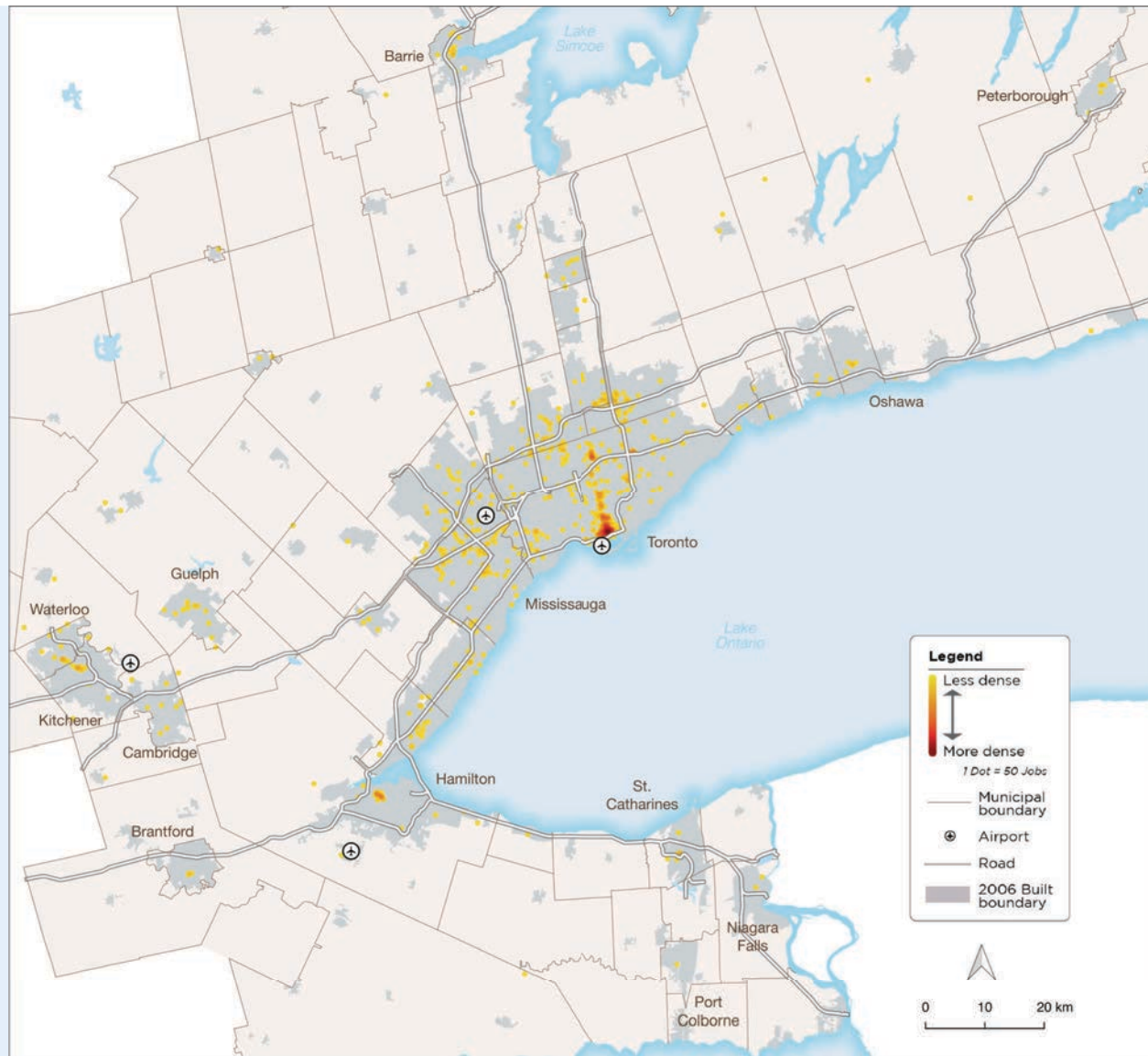
Finance

275,300 jobs
in 2016



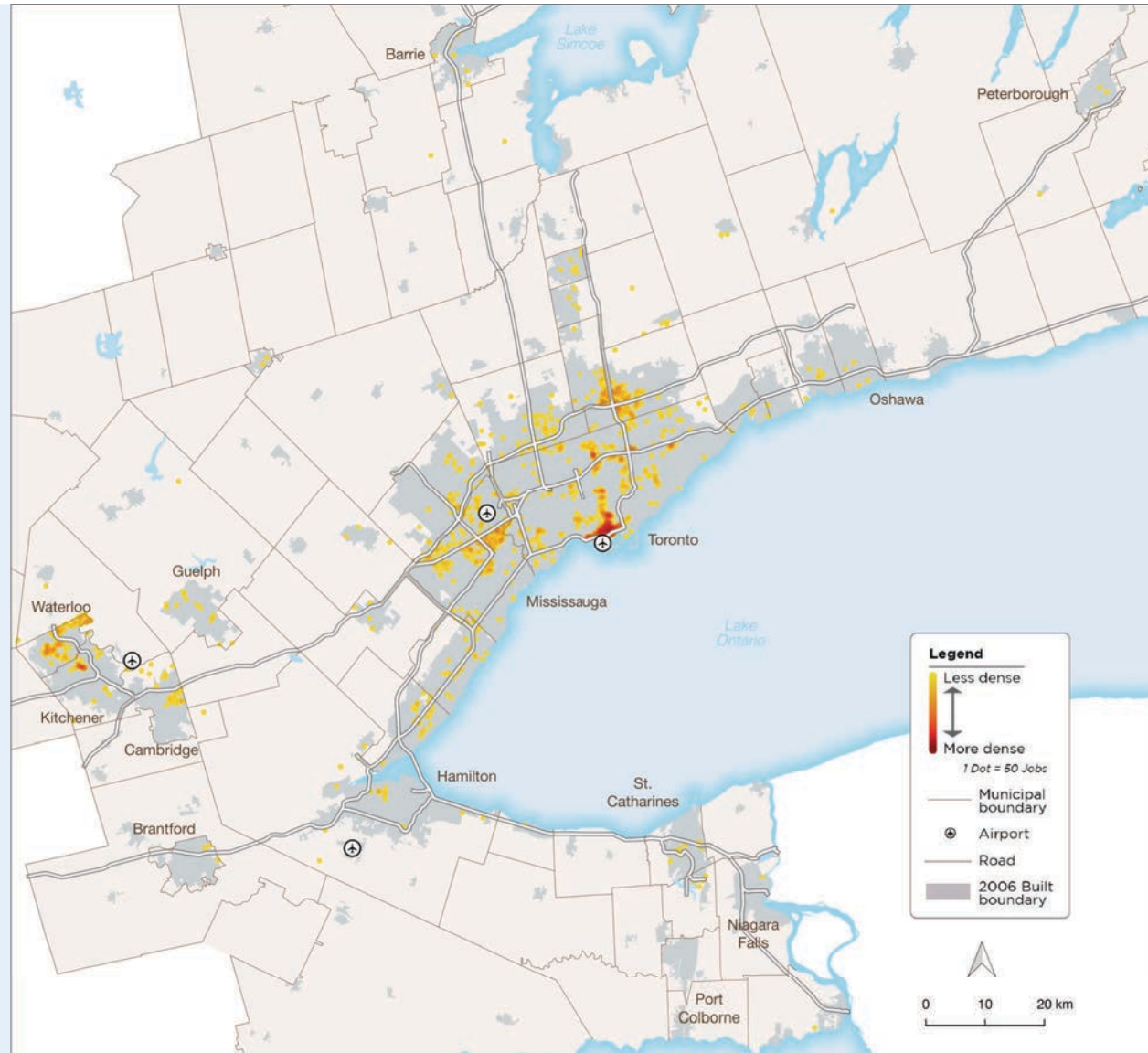
High Order Business Services

123,345 jobs
in 2016



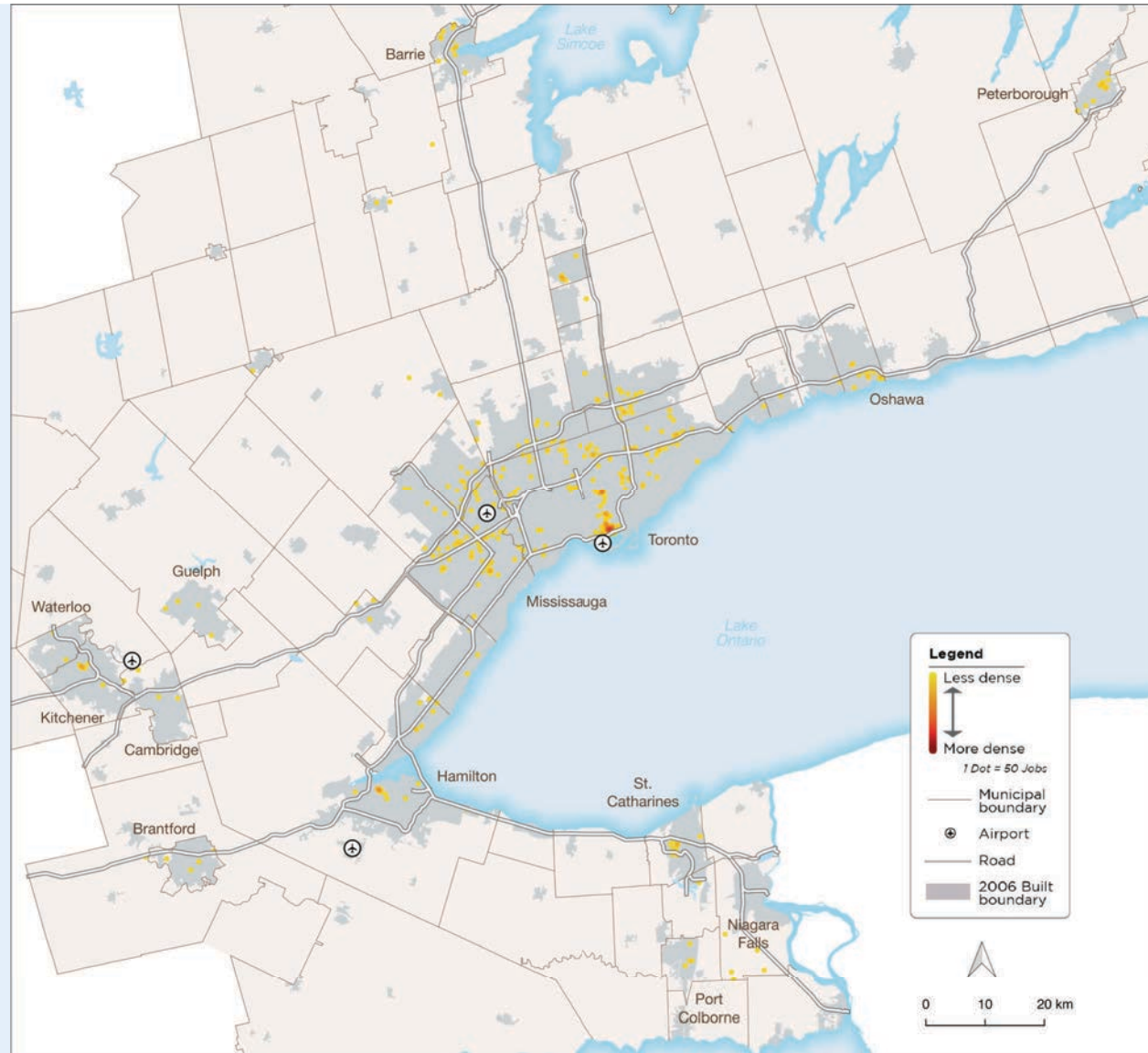
Soft Tech

91,270 jobs
in 2016



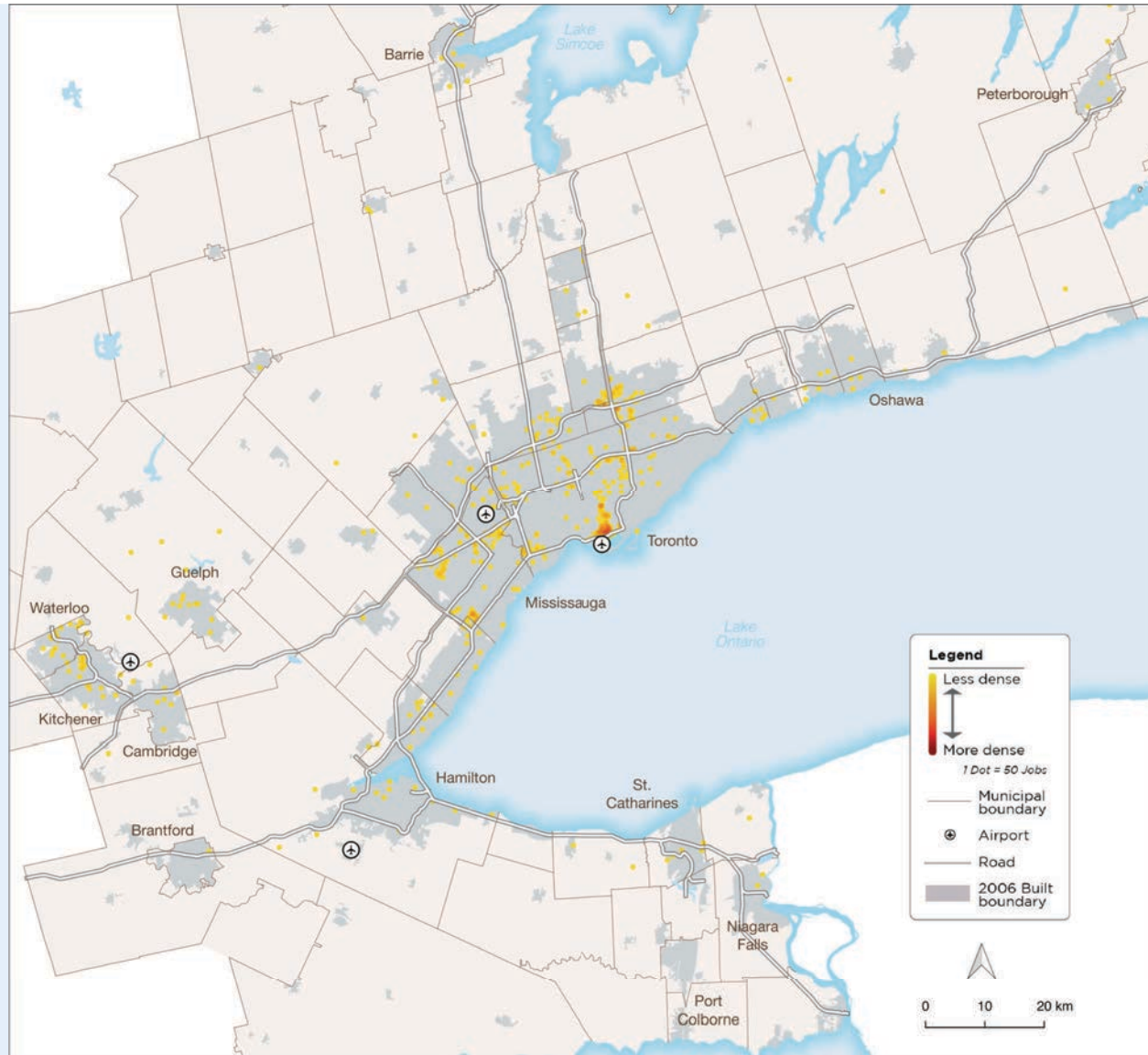
Back Office

51,715 jobs
in 2016



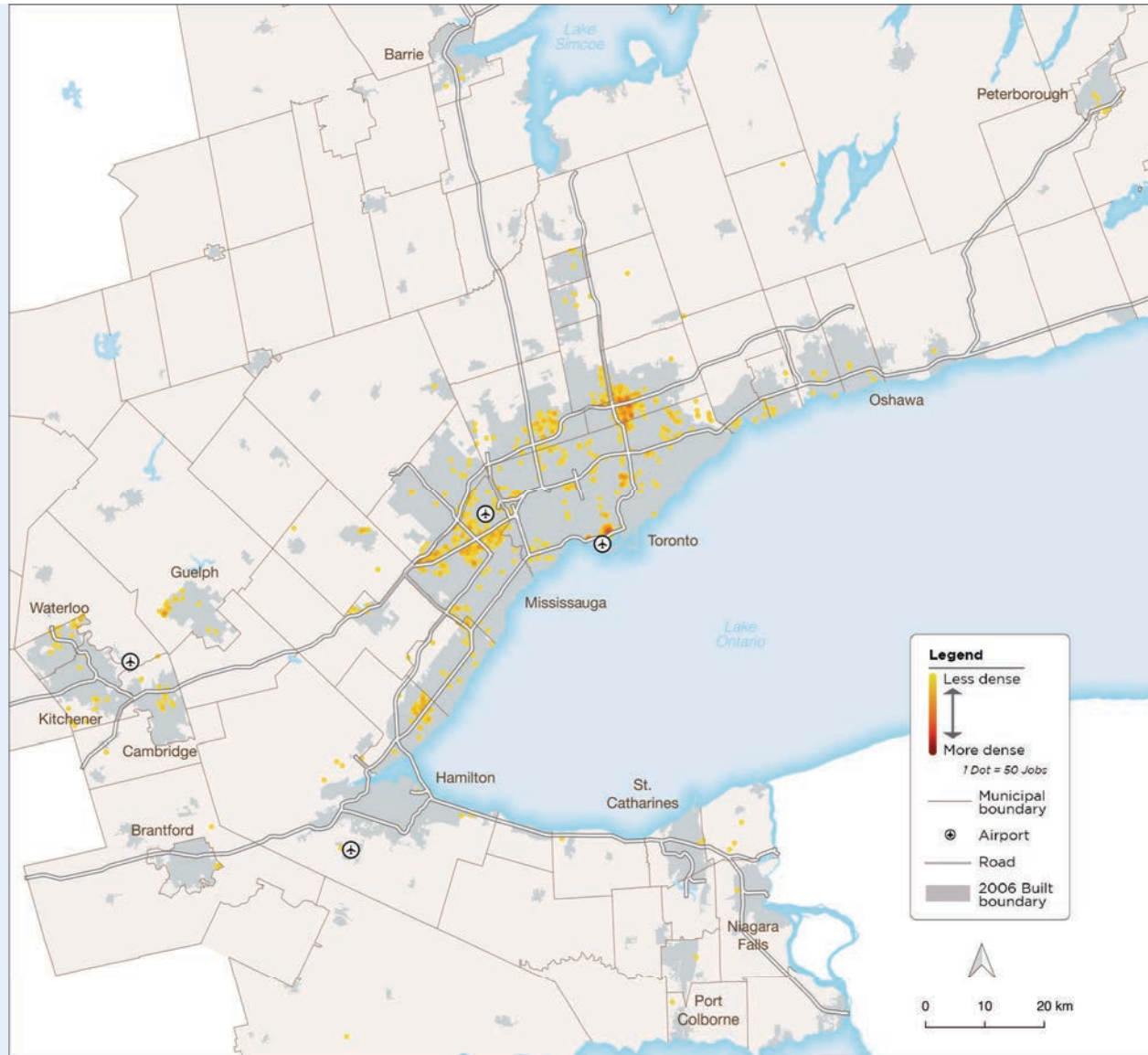
Science-based

64,980 jobs
in 2016



Hard Tech

51,225 jobs in
2016



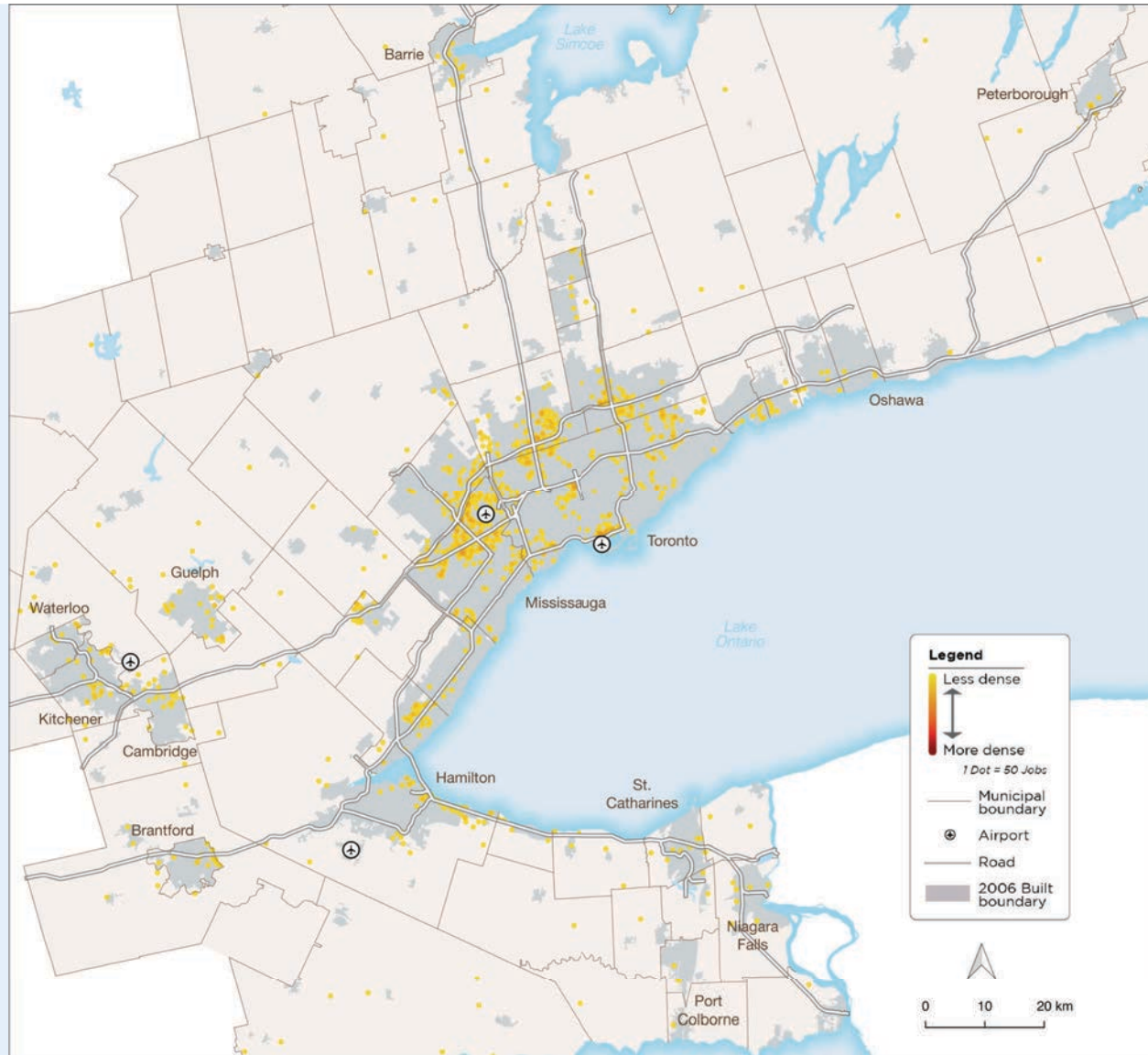
Logisitics

32,635 jobs
in 2016



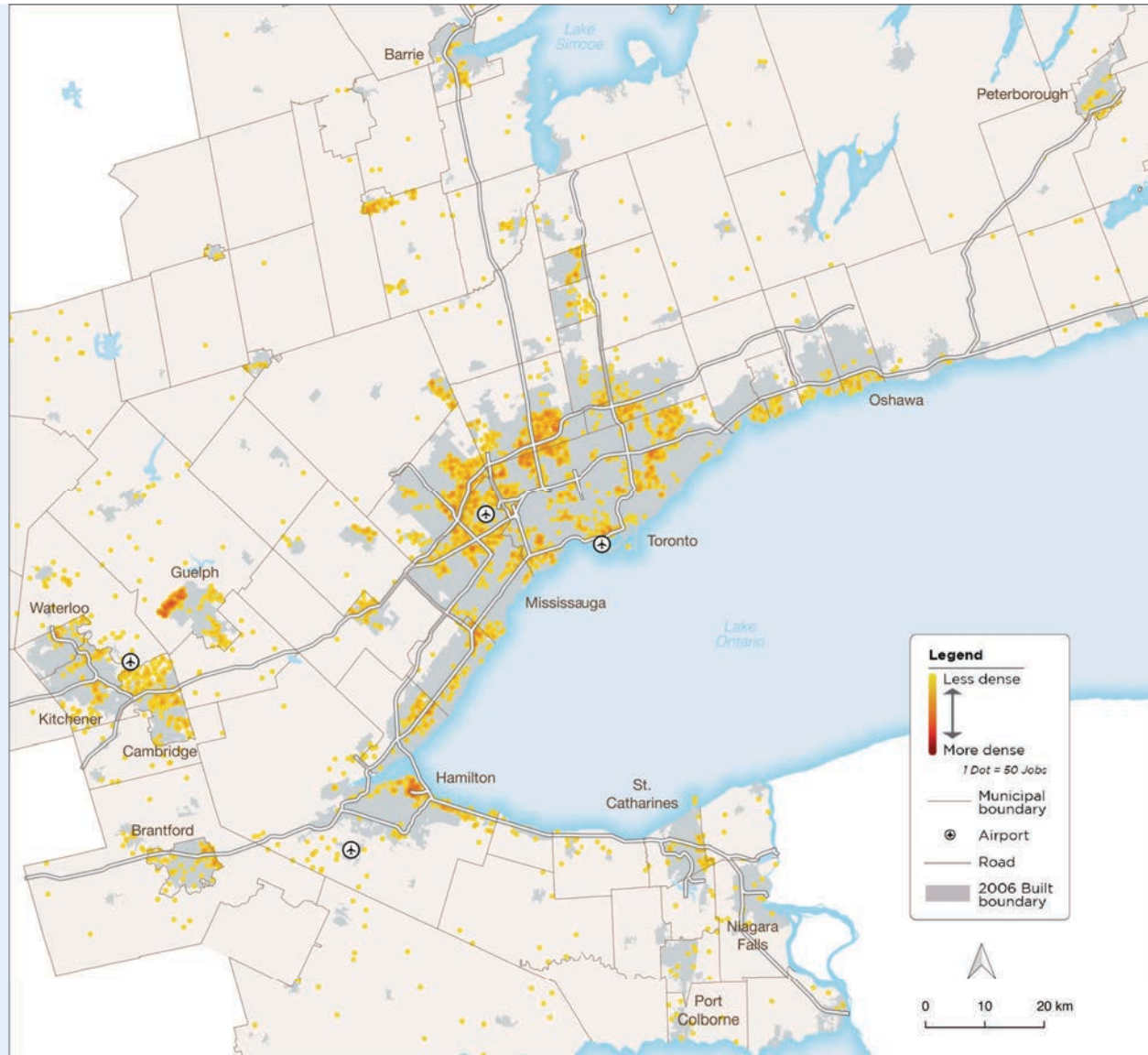
Other Wholesaling

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?

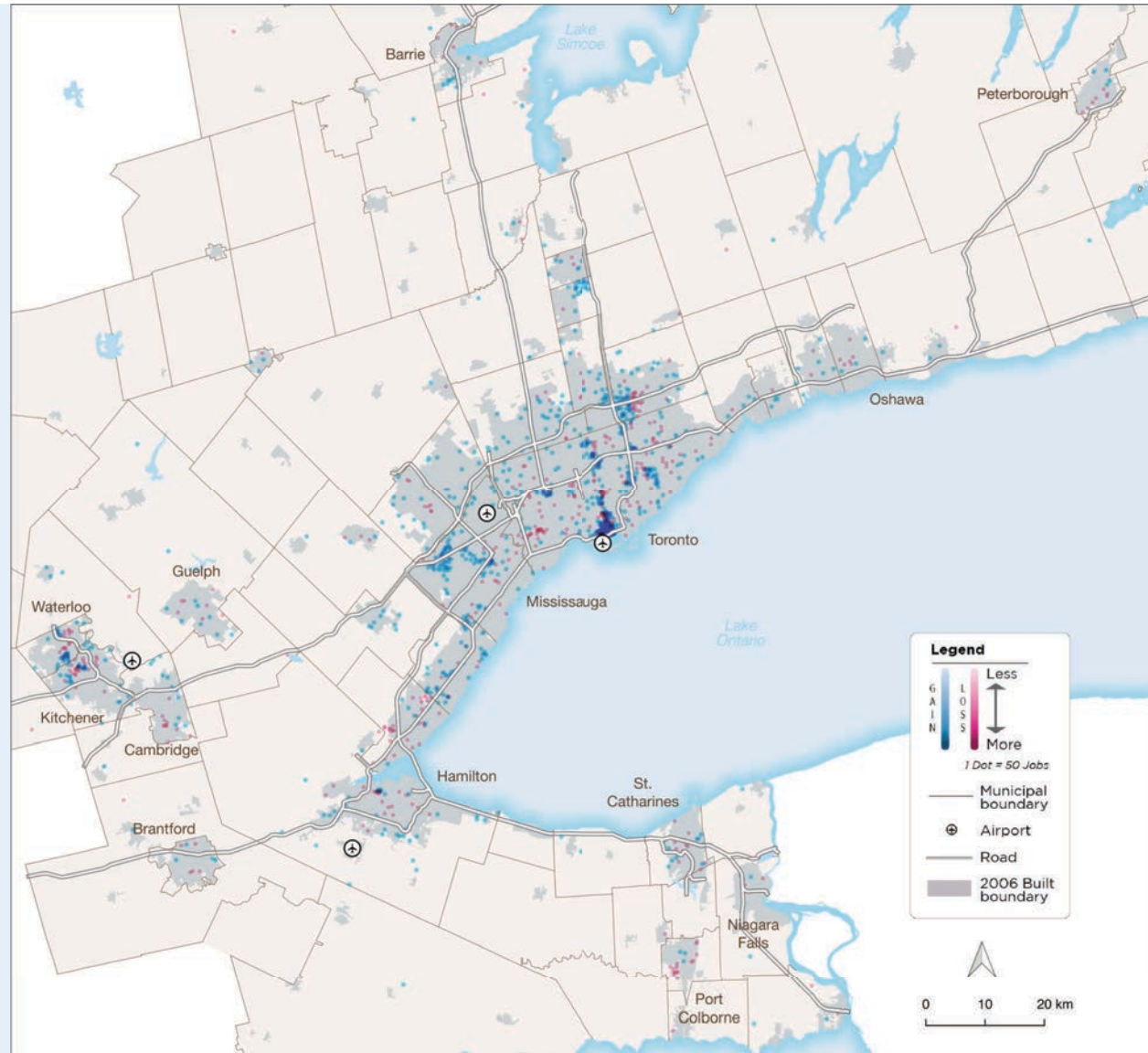
Q: In what locations?

Q: Within what kinds of urban environments?

Knowledge-intensive
Archetypes
benefit from
spatial clustering

Finance

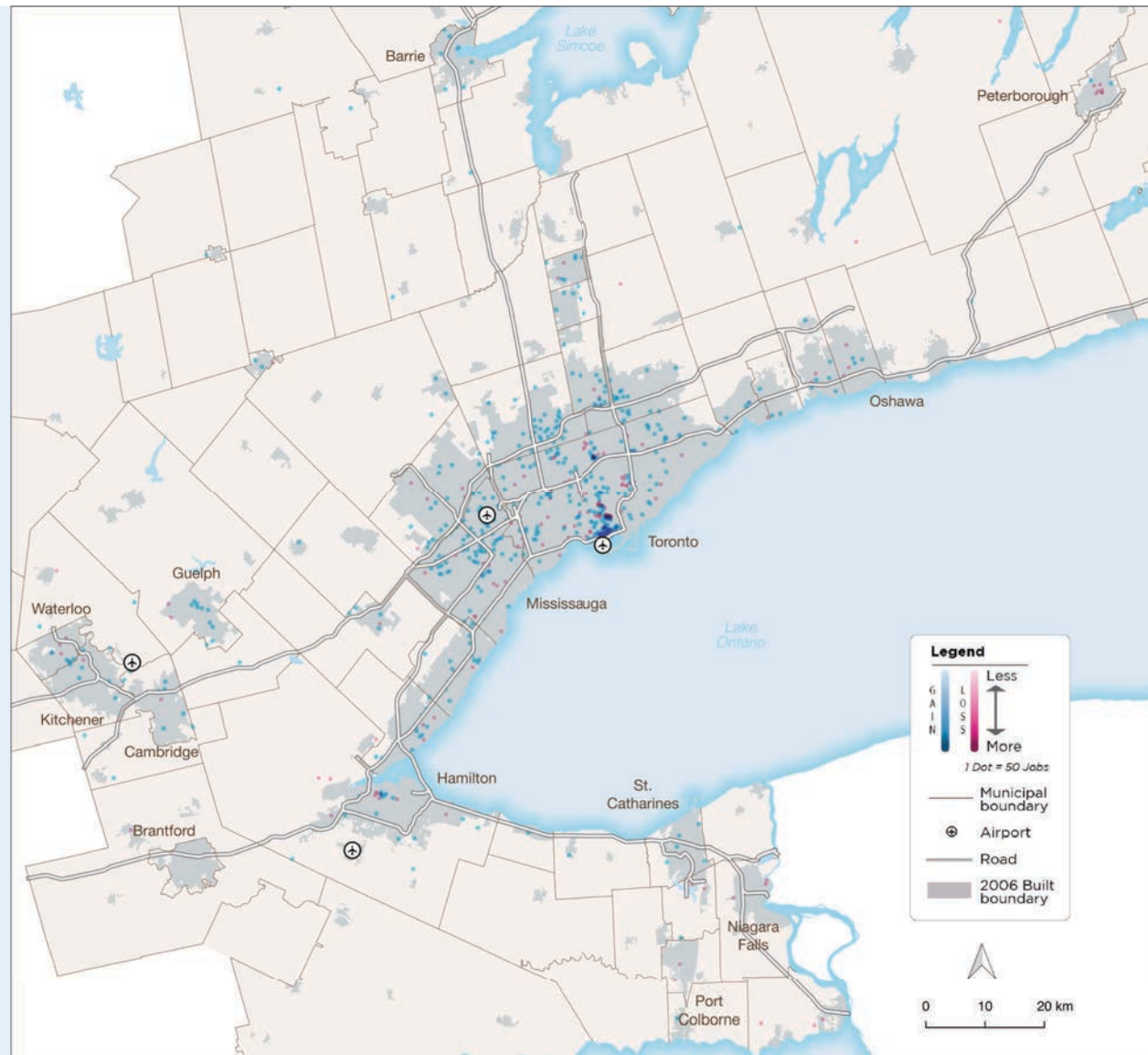
+ 47,150 jobs
2006 - 2016



Knowledge-intensive
Archetypes
benefit from
spatial clustering

High Order Business Services

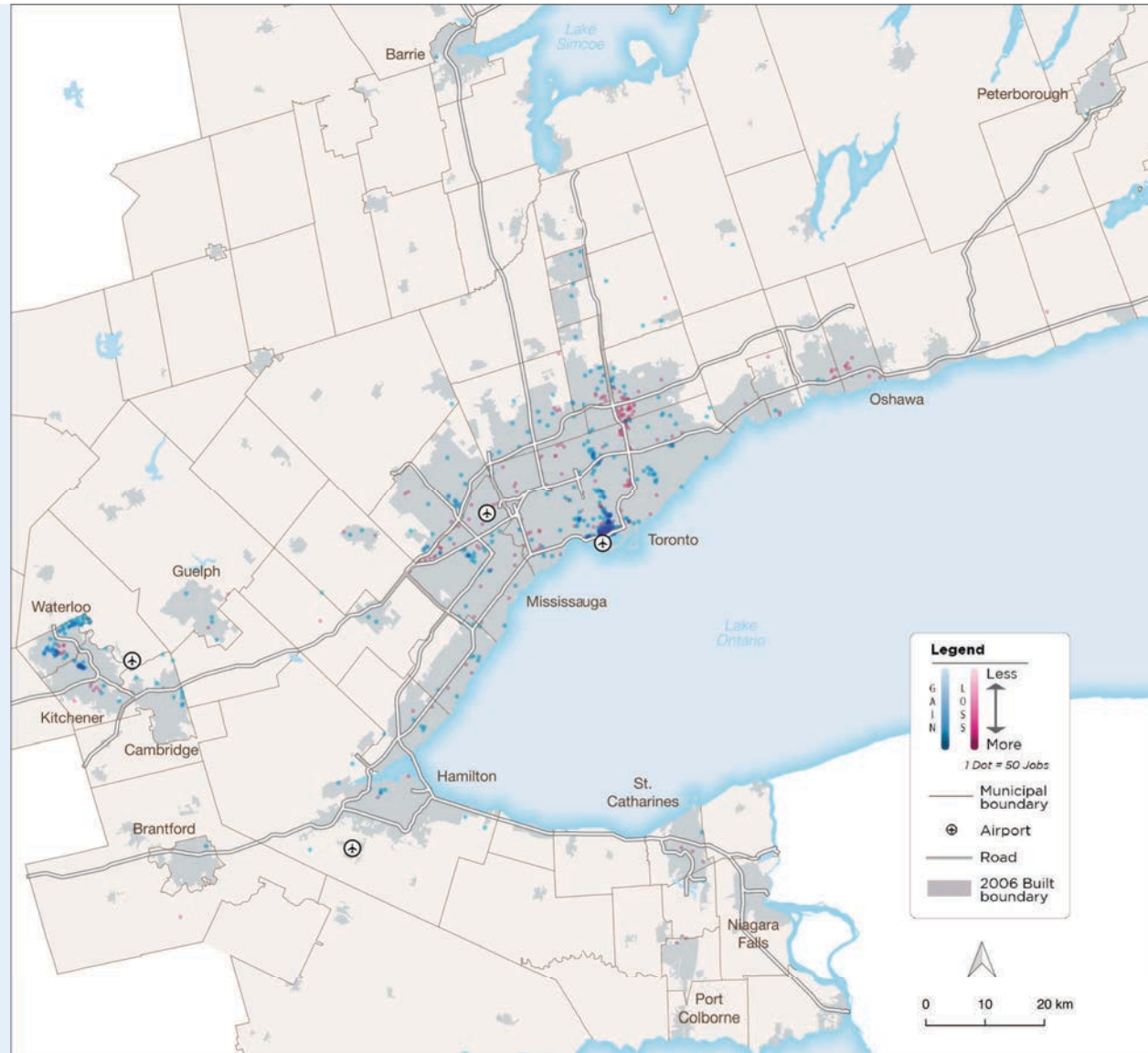
+ 25,130 jobs
2006 - 2016



Knowledge-intensive
Archetypes
benefit from
spatial clustering

Soft Tech

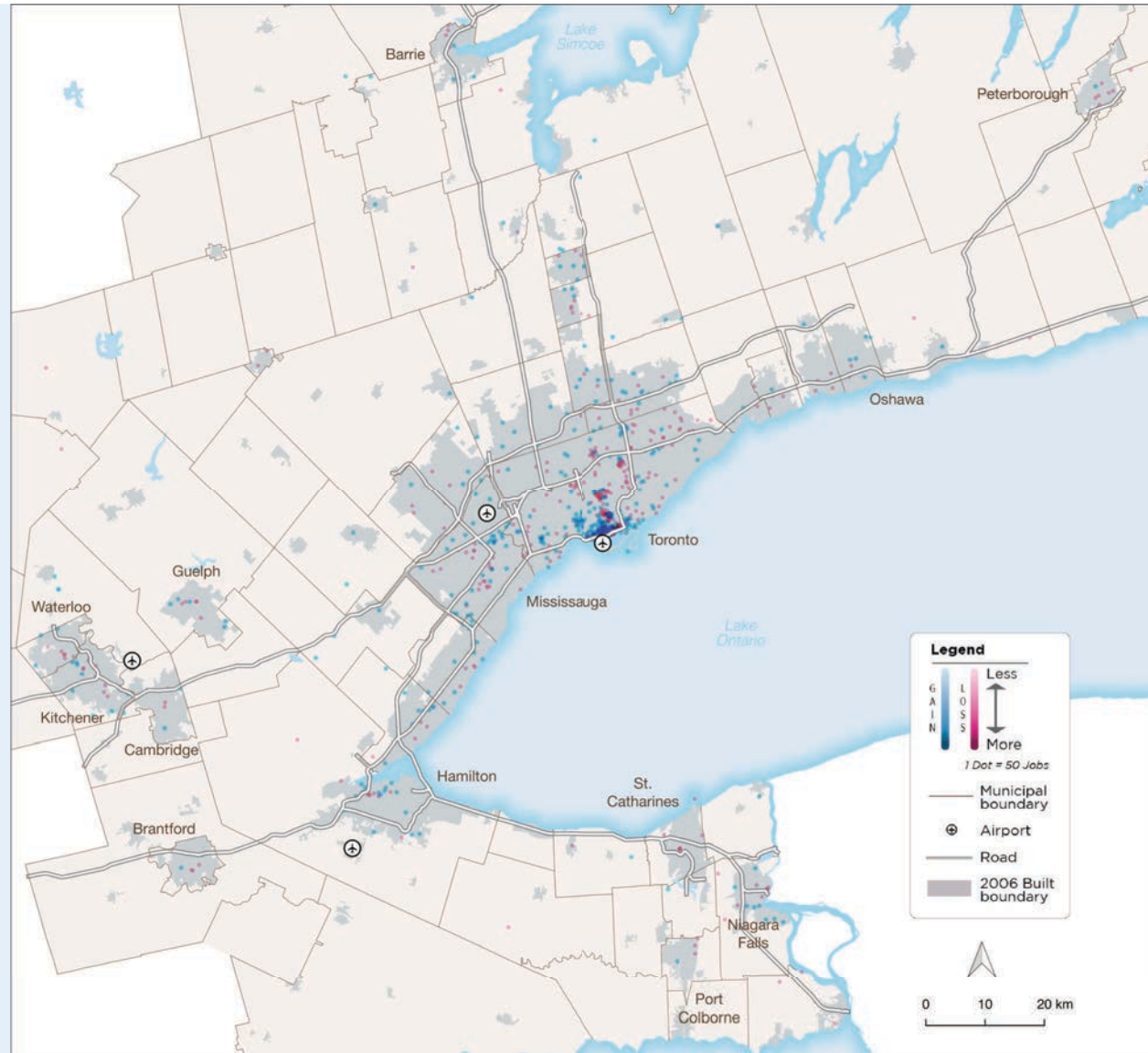
+ 19,310 jobs
2006 - 2016



Knowledge-intensive
Archetypes
benefit from
spatial clustering

Arts & Design

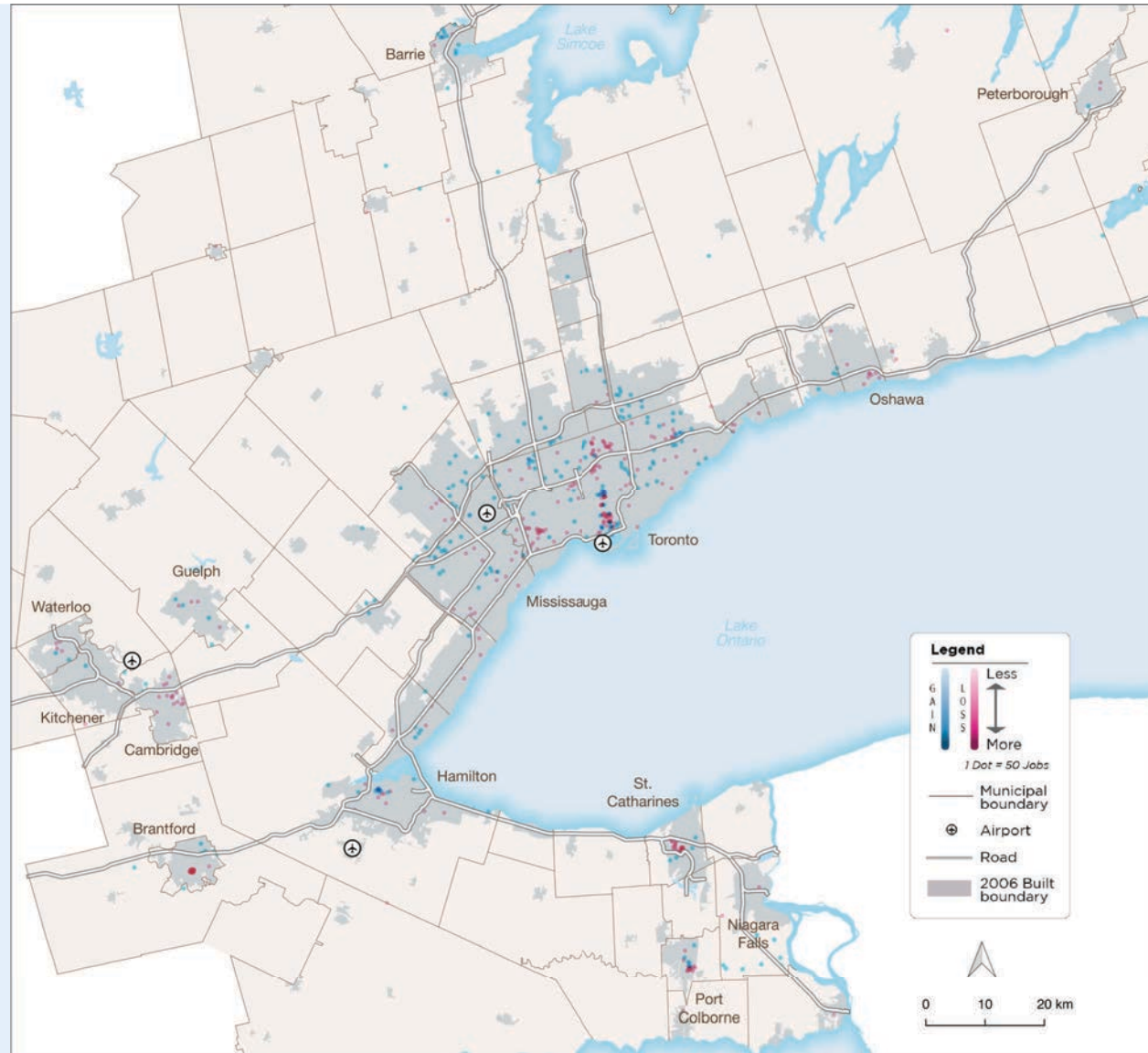
+ 10,020 jobs
2006 - 2016



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**

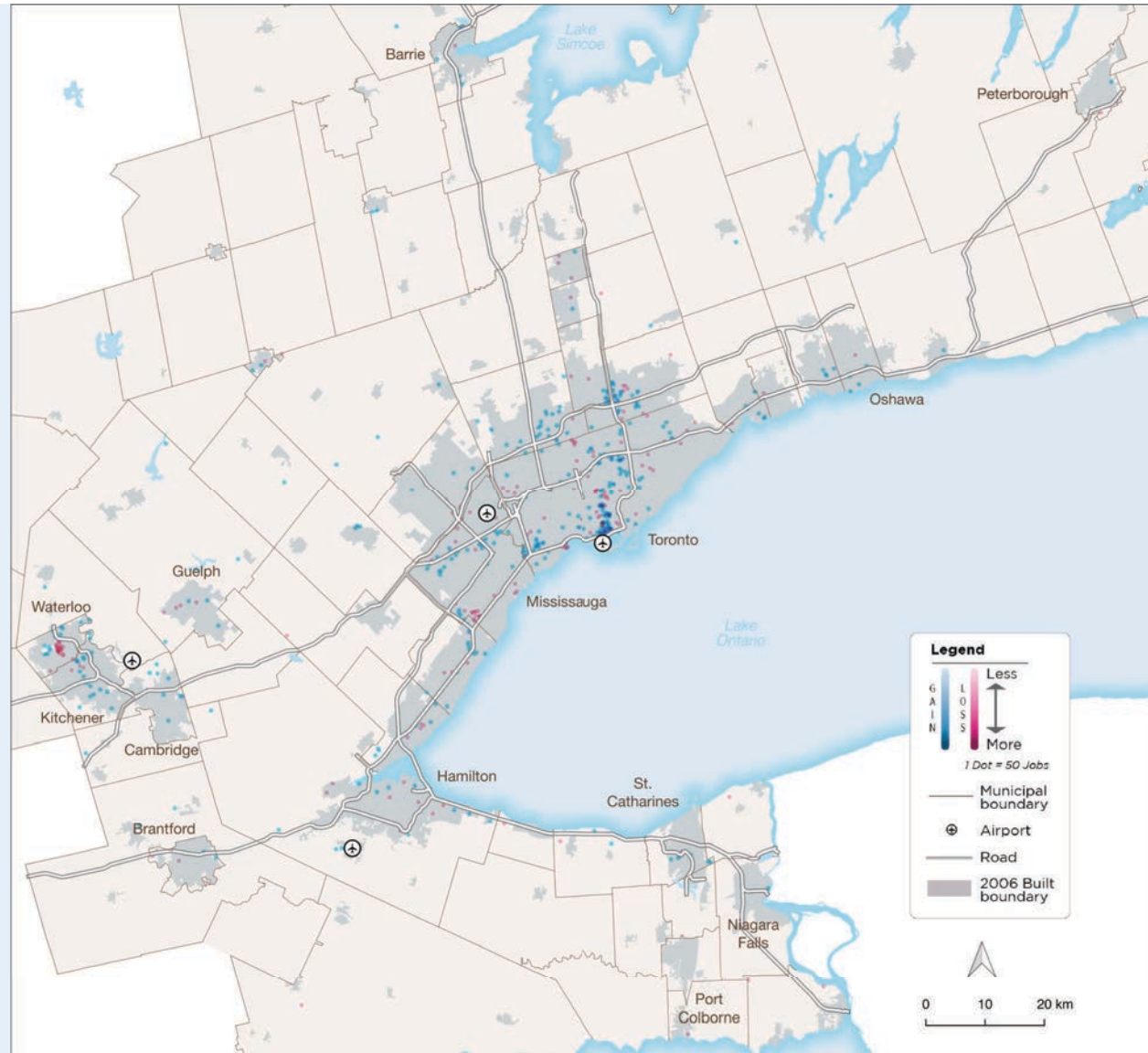
+ 6,635 jobs
2006 - 2016



There is some limited growth of knowledge-intensive activities in a few suburban areas

Science-based

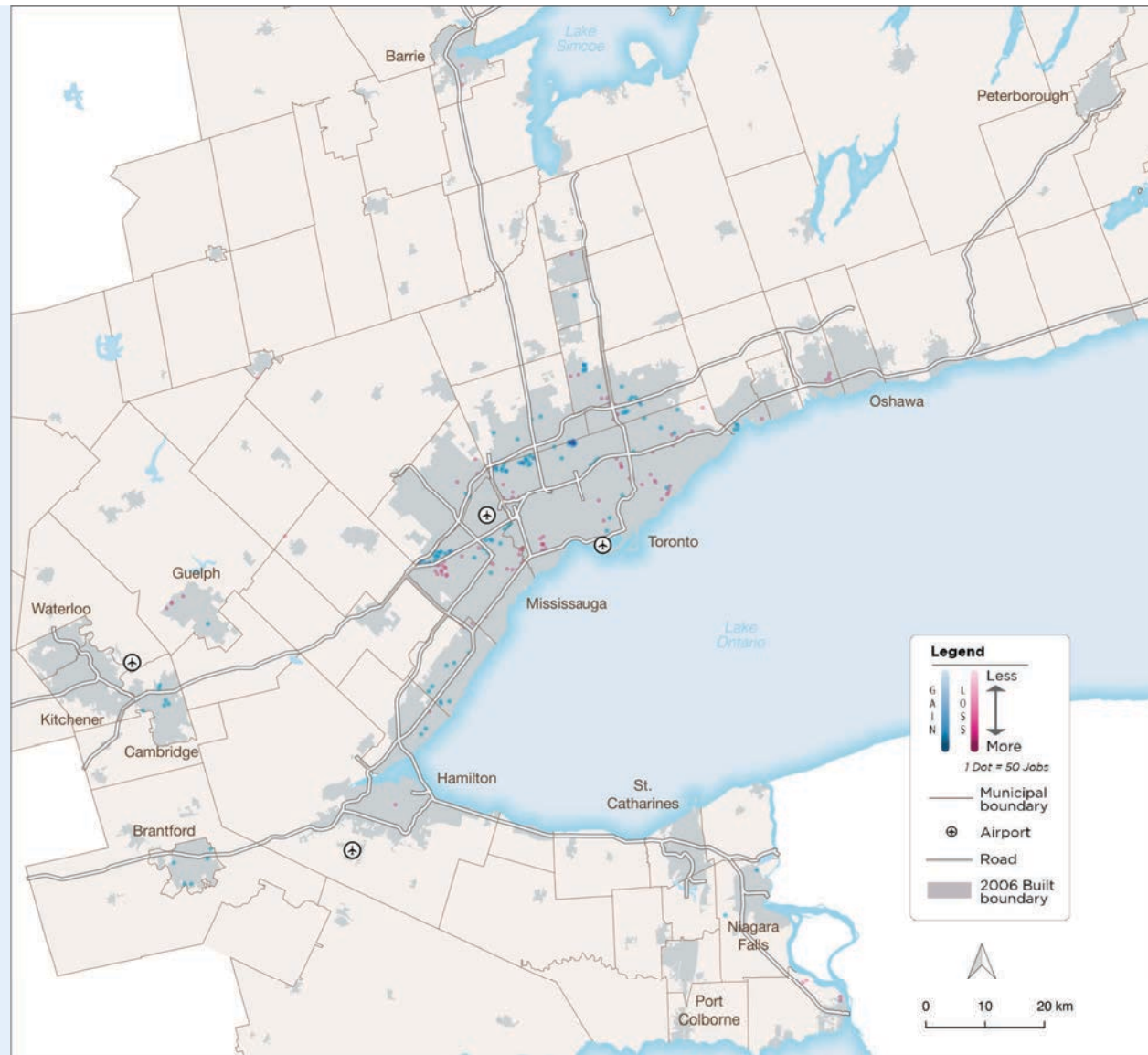
+ 12,030 jobs
2006 - 2016



There is some
limited growth of
knowledge-
intensive activities
in a few suburban
areas

Special: Pharma

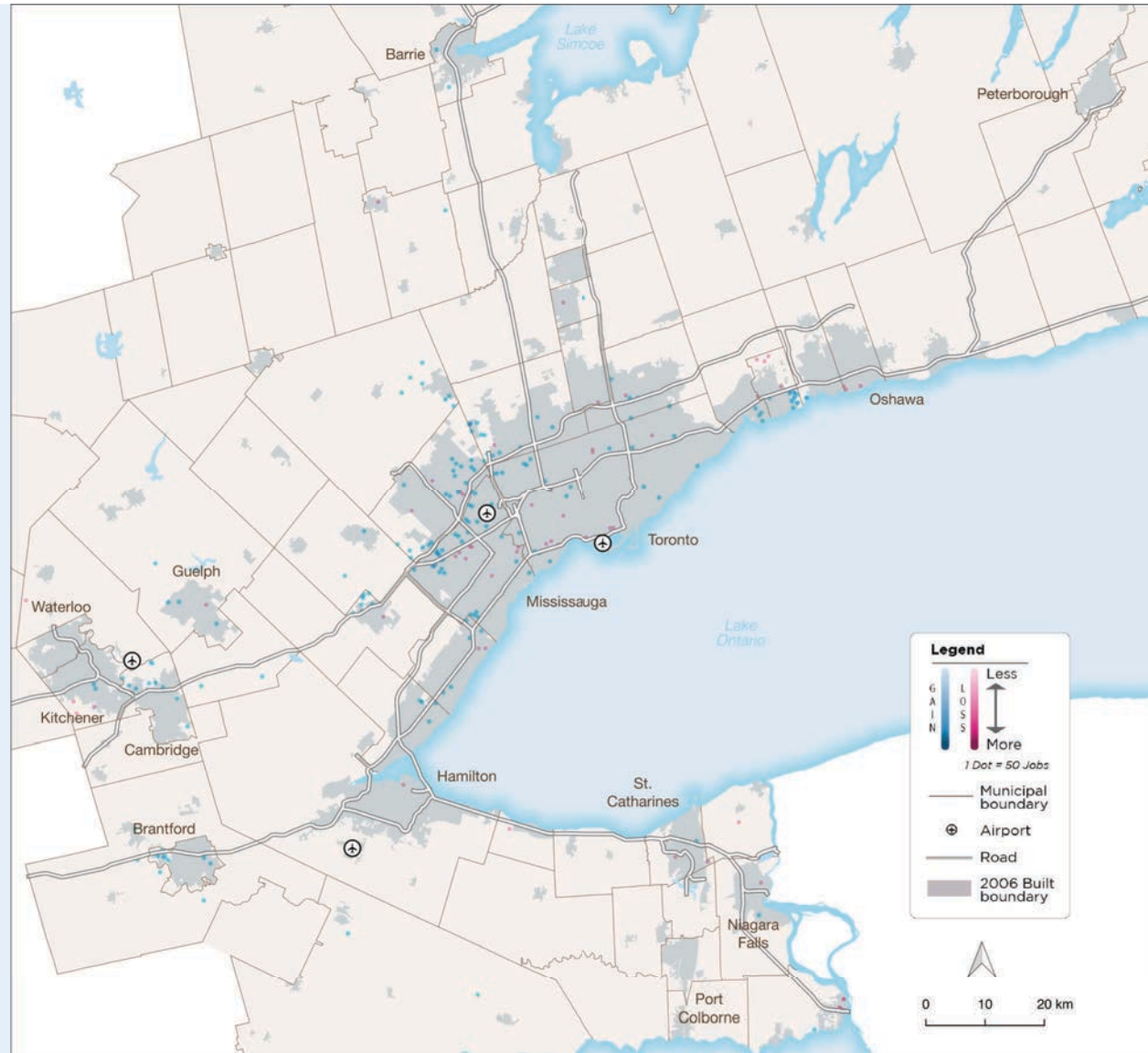
+ 2,215 jobs
2006 - 2016



Logistics focuses in
suburban areas,
near transportation
facilities

Logistics

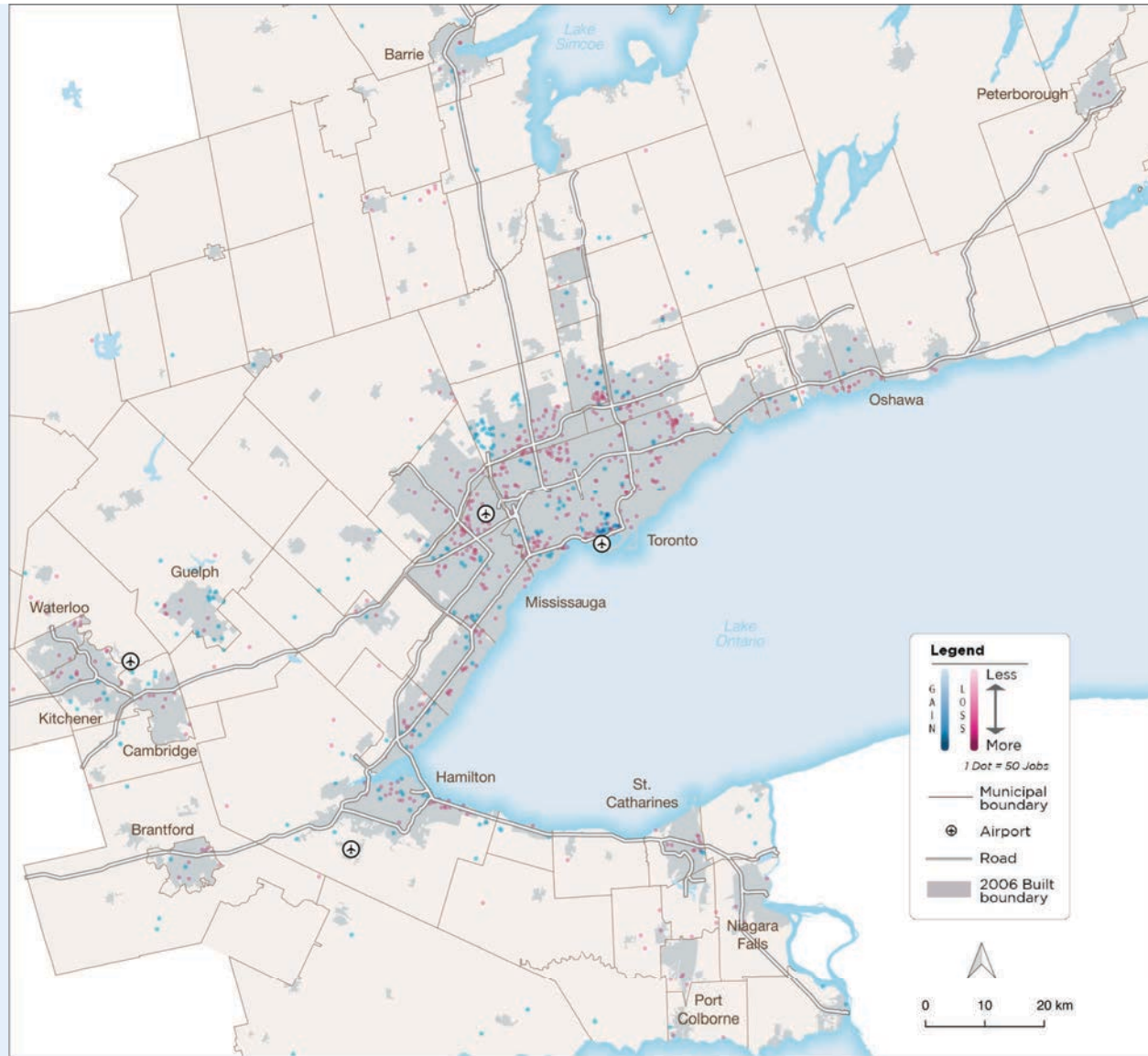
+ 7,456 jobs
2006 - 2016



Some routine-oriented, dispersed activities are declining

Other Wholesaling

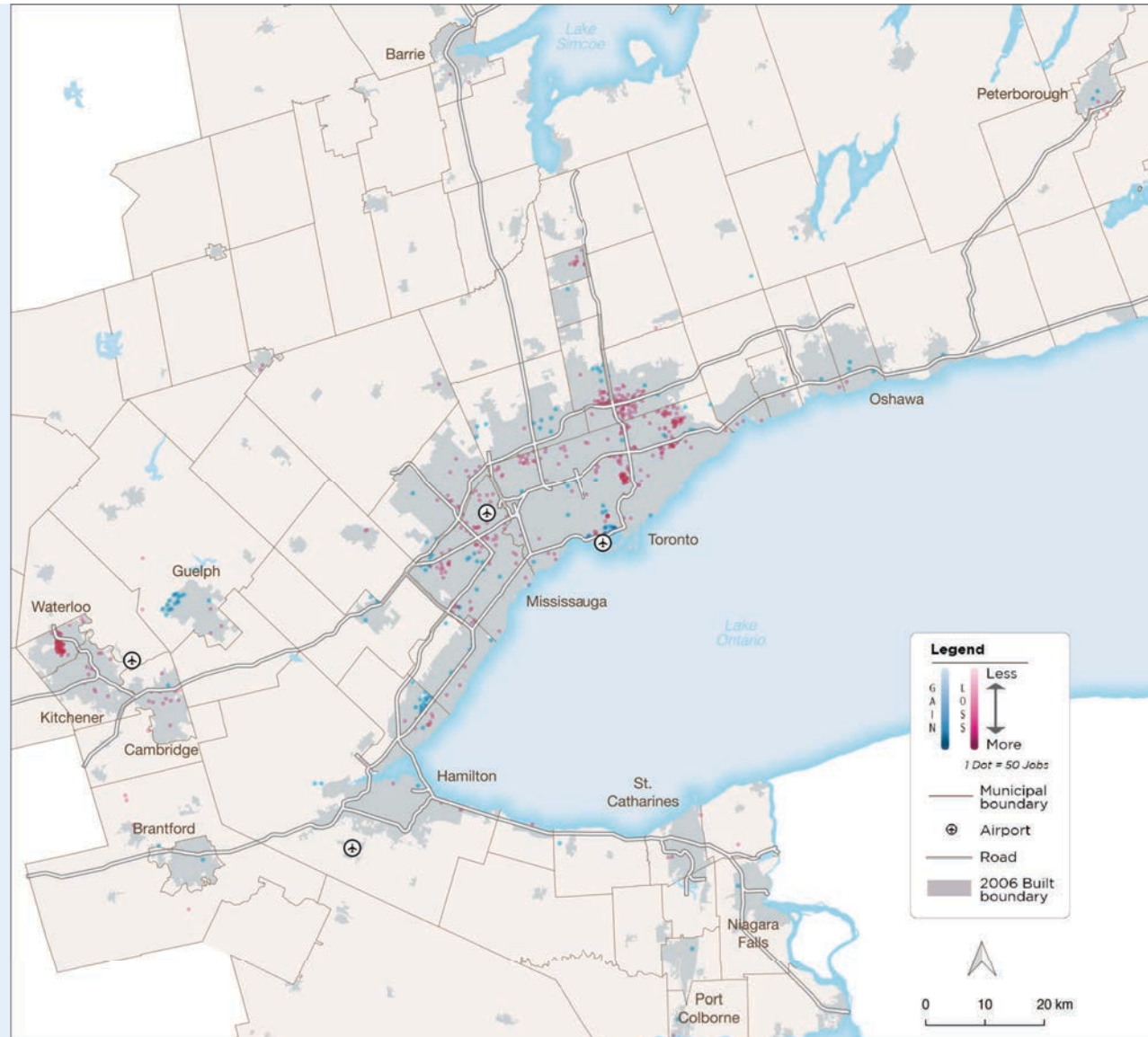
-18,170 jobs
2006 - 2016



Some high-order,
spatially
concentrated
manufacturing is
declining

Hard Tech

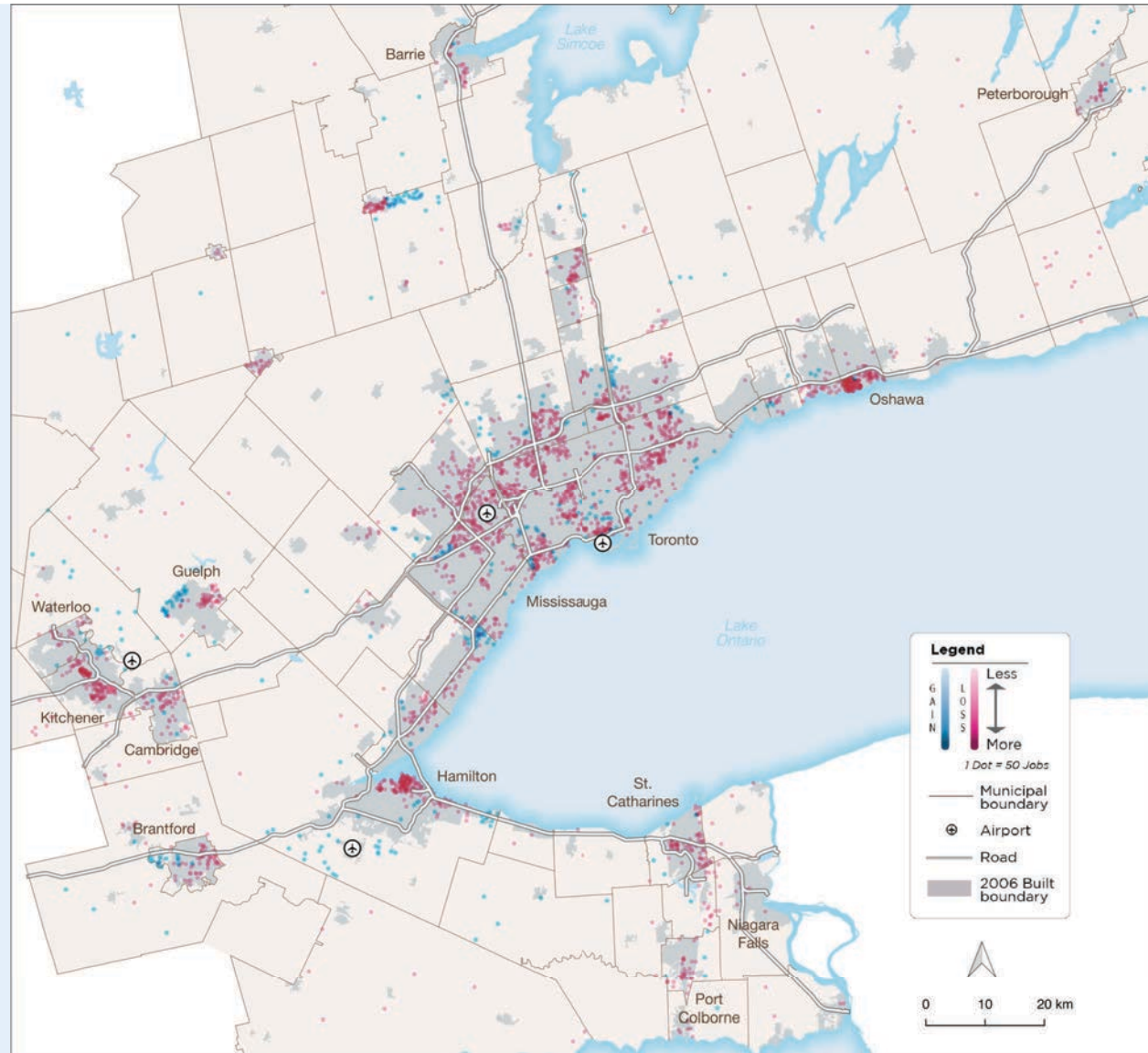
-21,585 jobs
2006 - 2016



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?

Locational factors

Knowledge-intensive, central, eg Finance, HOBS, A&D, Soft Tech

- Access to skilled regional labour market by transit, walk, cycle
- Agglomeration economies
- Urban environment

Knowledge-intensive, suburban 1 eg HOBS, Soft Tech

- Access to skilled labour
- Office park setting

Knowledge-intensive, suburban 2 eg Sci-based, Pharma

- Intra-corporate focus
- Access to skilled labour

Routine, suburban eg Back Office, Telecoms

- Access to low skilled labour
- Cheaper space

Urban manufacturing, last-mile distribution

- Access to local/regional markets
- Appropriate buildings

Local assets

- Access to regional labour market by transit
 - what skills can be accessed re 30 min transit – the skillshed
- Local skillshed – walk/cycle
- Kitchener GO connectivity
- Existing agglomeration economies
 - base of businesses, other assets (eg institutions)
- Urban environment – character, services, amenities
- Unique building types
- Price point
- Etc.....

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.

City Council decision February 26, 2019

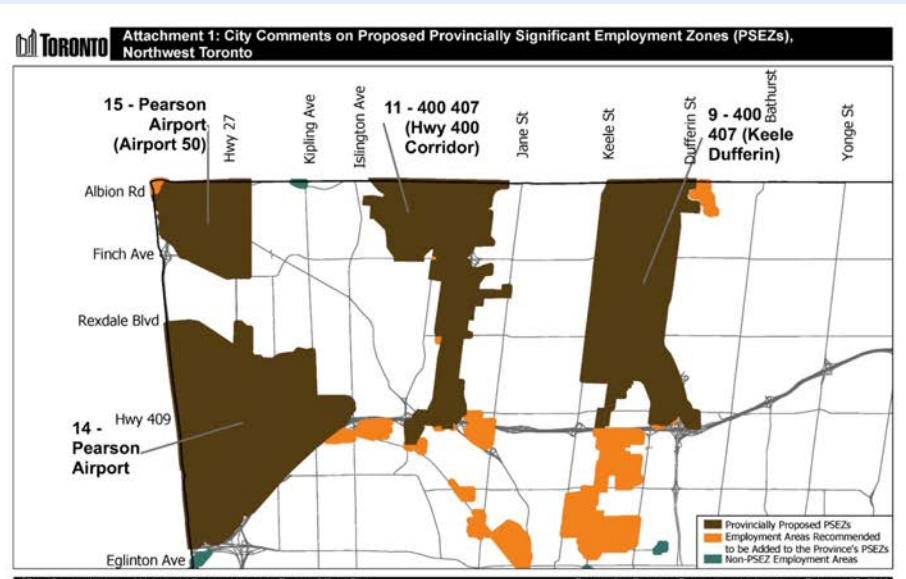
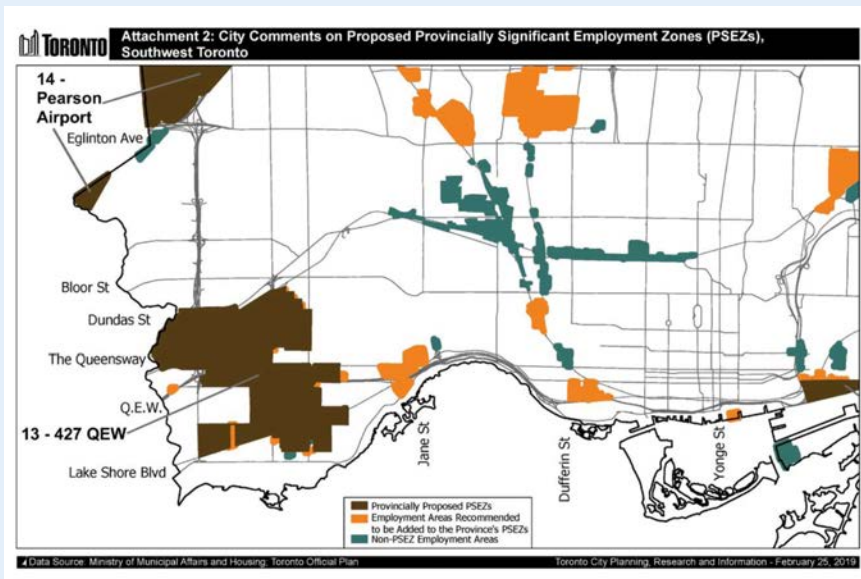
RECOMMENDATIONS

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>

