

**Report to
Rapport au:**

**Joint meeting of /
Réunion conjointe du**

**Planning Committee
Comité de l'urbanisme**

and / et

**Agriculture and Rural Affairs Committee
Comité de l'agriculture et des affaires rurales
25 January 2021 / 25 janvier 2021**

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**Submitted by
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Ward: CITY WIDE / À L'ÉCHELLE DE LA VILLE File Number: ACS2021-PIE-EDP-0003

SUBJECT: Ottawa Employment Survey, 2016

OBJET: Enquête sur l'emploi effectuée par la Ville en 2016

REPORT RECOMMENDATION

That the Planning and Agriculture and Rural Affairs Committee receive this report as the basis of the existing jobs as part of the industrial and logistics land strategy for the new Official Plan.

RECOMMANDATIONS DU RAPPORT

Que le Comité de l'urbanisme et le Comité de l'agriculture et des affaires rurales prennent connaissance de ce rapport, dans le cadre de la Stratégie en matière de biens-fonds destinés aux secteurs industriel et logistique relative au nouveau Plan officiel.

BACKGROUND

Every five years since 1976, the Planning, Infrastructure and Economic Development Department conducts a comprehensive survey of businesses in the city of Ottawa. The 2016 survey reports data for the end of 2016 which are summarized in the Discussion section of this report. This survey provides detailed information for planning transportation, infrastructure and land use, in addition to painting a detailed picture of the city's economy.

DISCUSSION

In 2016 there were 27,979 employment locations enumerated accounting for 575,005 jobs. This was an increase of over 13,600 jobs between 2012 and 2016 and represented a 1.7 per cent growth in employment, the lowest growth rate in 20 years. Employment growth was also slower than Census household and population growth which rose by a rate of 5.8 per cent for both variables.

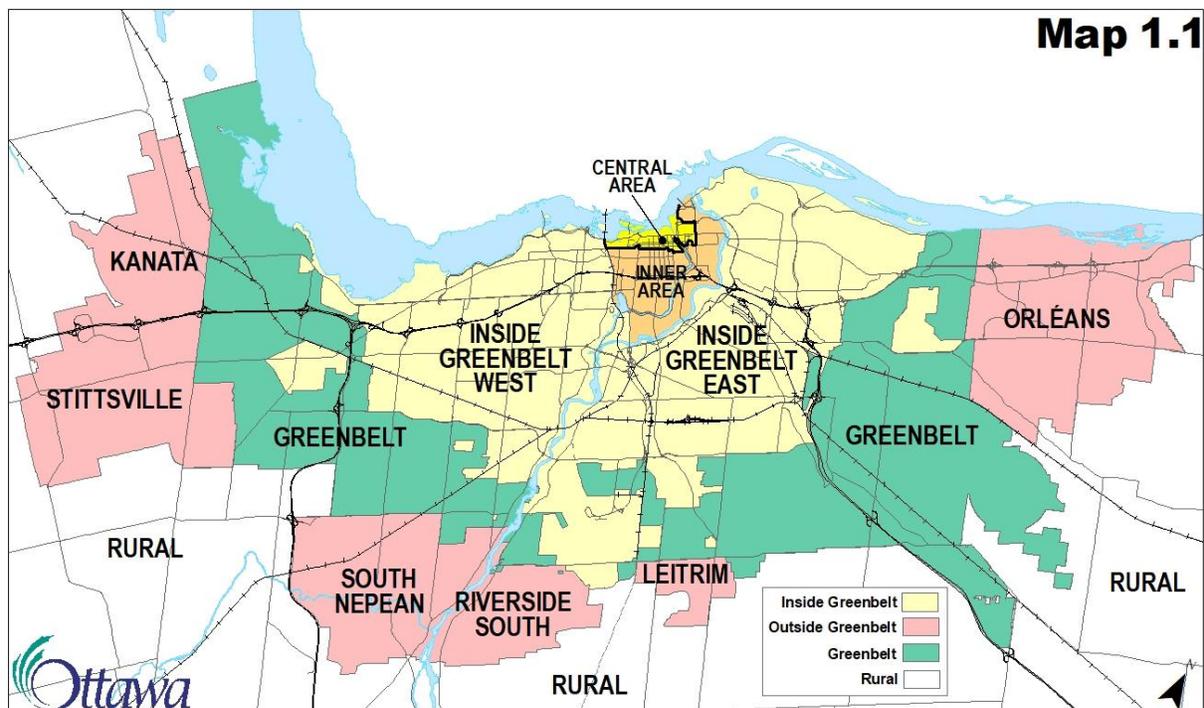
Employment sectors posting gains yielded an overall increase of 21,900 jobs, concentrated in education (+4,100), local administration (+4,900), information and cultural (+3,000), accommodation and food services (+2,200), finance and insurance (+1,800), arts, entertainment and recreation (+1,550) and real estate and rental leasing (+1,500).

With over 128,000 employees in all sectors, the Federal Government was Ottawa's largest employer in 2016. This employment total was however a decrease of over 6,400 Federal jobs in 2012. The Federal share of total jobs also decreased from 23.8 per cent in 2012 to 22.7 per cent in 2016. Federal jobs are centrally located, with 98 per cent inside the outer limit of the Greenbelt. Nearly half of Federal jobs are located in the Central Area.

Between 2012 and 2016, high-technology employment increased by over 1,900 jobs. The distribution of high-technology jobs continued to be dominated by the western parts of the urban area. The share of high-tech jobs located in the Kanata area had increased in every employment survey since 1991 but experienced a slight drop from 40 per cent in 2012 to 38 per cent in 2016. Although jobs in urban areas within the Greenbelt continued to decline in share, the majority (57 per cent) of technology jobs, continues to be inside the Greenbelt. Orléans maintained its share of jobs despite a small decline in job numbers while the rural area dropped in both share and number.

There were over 442,000 full-time and over 132,900 part-time jobs in Ottawa in 2016. Full-time jobs accounted for 76.9 per cent of all jobs in 2016, down from 80.3 per cent in 2012 and 80.6 per cent in 2006.

Employment grew in every major geographic area of Ottawa except inside the eastern portion of the Greenbelt, Orléans and the rural area. Employment gains were not evenly distributed across the city. While the Central Area remains the largest single job concentration, its share of employment has fallen from 23.5 per cent in 1981 to 19.0 per cent in 2016. The Inner Area and areas inside the Greenbelt west of the Rideau River also dropped from a peak 44 per cent share in 1986 to 34.4 per cent in 2016. East areas inside the Greenbelt, also decreased in share, from 27 per cent in 1981 to 26.2 per cent in 2016. In contrast, urban centres outside the Greenbelt increased steadily from 4 per cent in 1981 to 16 per cent in 2016. Rural areas increased from 3.1 per cent to 4.3 per cent of jobs during the same period.



The number of new employment locations grew by 445 between 2012 and 2016. This growth was accompanied by an increase in the average number of employees. Over half (54 per cent) of 2016 business location were small employers with five or fewer employees, 155 more than 2012. Small employers accounted for nearly 39,800 jobs in 2016, an increase of 570 from 2012. Larger employers (more than 100 jobs per location), grew by 11 location between 2012 and 2016, as the number of jobs within these larger firms increased by over 9,300.

Total employment within walking distance (600 m) of a rapid transit station increased from over 227,700 to over 245,000 in 2016 and rose from 40.2 per cent to 42.6 per cent of total jobs during the same time period. Just over 70 per cent of all Federal jobs were within walking distance of rapid transit.

Based on 2016 Employment Survey results, 27 per cent of total jobs and 59 per cent of Federal jobs were within walking distance of the city's Confederation line (the first phase of the city of Ottawa Light Rail Transit (LRT)). The Trillium Line or O-Train had over 21,300 total and over 8,900 federal jobs within walking distance in 2016. Approximately 65,600 jobs were within walking distance of a bus rapid transit station. Of these, over 5,700 were Federal Government jobs.

The Official Plan (OP) designates existing and planned location of major employment concentrations. In 2016, over 128,800 jobs were located in industrial business parks, comprising nearly one quarter of all jobs in the city. Since 2012, employment in these areas fell by over 10,500 jobs, or -7.6 per cent. Inside the Greenbelt 14 per cent of the jobs in business parks were lost, while 7.4 per cent and 2.1 per cent were gained in urban areas outside the Greenbelt and in the rural area respectively.

Inside the Greenbelt, the western business parks lost over 5,300 jobs. With a few exceptions, most of the business parks inside the Greenbelt saw losses with an overall decline of over 7,900 jobs since 2012. Outside the Greenbelt, urban areas west of the Rideau River saw a gain of over 2,900 new jobs. In urban areas east of the Rideau River there were 310 fewer jobs than in 2012. With an increase of 156 new jobs, industrial parks in the rural area increased by 2.2 per cent. Between 2012 and 2016, rural areas absorbed 5.6 per cent of total new business park jobs in Ottawa, higher than the 5.0 per cent rural proportion of total city industrial jobs in 2012.

The 2016 Employment Survey is not adjusted to account for those businesses that may have been missed in the survey. The industrial and logistics land strategy for the new Official Plan uses the information contained within the 2016 Employment Survey as the basis for calculations relating to industrial land need, including an adjustment for an

under coverage. The results of the industrial and logistics land strategy then may not be directly comparable to the job summaries in the 2016 Employment Survey.

Provincial Policy Statement

The information contained within the 2016 Employment Survey assists in planning, protecting, and preserving employment areas in the new Official Plan and is consistent with the Provincial Policy Statement in this regard.

RURAL IMPLICATIONS

This report identifies the number and type of businesses that were located in the rural areas of the city of Ottawa in 2016.

CONSULTATION

This report deals with research and analysis matters, therefore public consultation was not undertaken.

COMMENTS BY THE WARD COUNCILLORS

This is a City-wide report – not applicable.

LEGAL IMPLICATIONS

There are no legal impediments to receiving this report.

RISK MANAGEMENT IMPLICATIONS

There are no risk management implications associated with this report.

ASSET MANAGEMENT IMPLICATIONS

There are no direct asset management implications associated with the recommendations of this report.

FINANCIAL IMPLICATIONS

There are no direct financial implications.

ACCESSIBILITY IMPACTS

There are no accessibility impacts associated with this report.

ENVIRONMENTAL IMPLICATIONS

There are no environmental impacts associated with this report.

TERM OF COUNCIL PRIORITIES

This project addresses the following Term of Council Priority:

- Economic Growth and Diversification

SUPPORTING DOCUMENTATION

Document 1 Ottawa Employment Survey, 2016

DISPOSITION

Information in this report will be used in a variety of applications, including for economic development and assist with planning, protecting, and preserving employment areas in the new Official Plan.