2020 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Infrastructure, and Economic Development

November 2021

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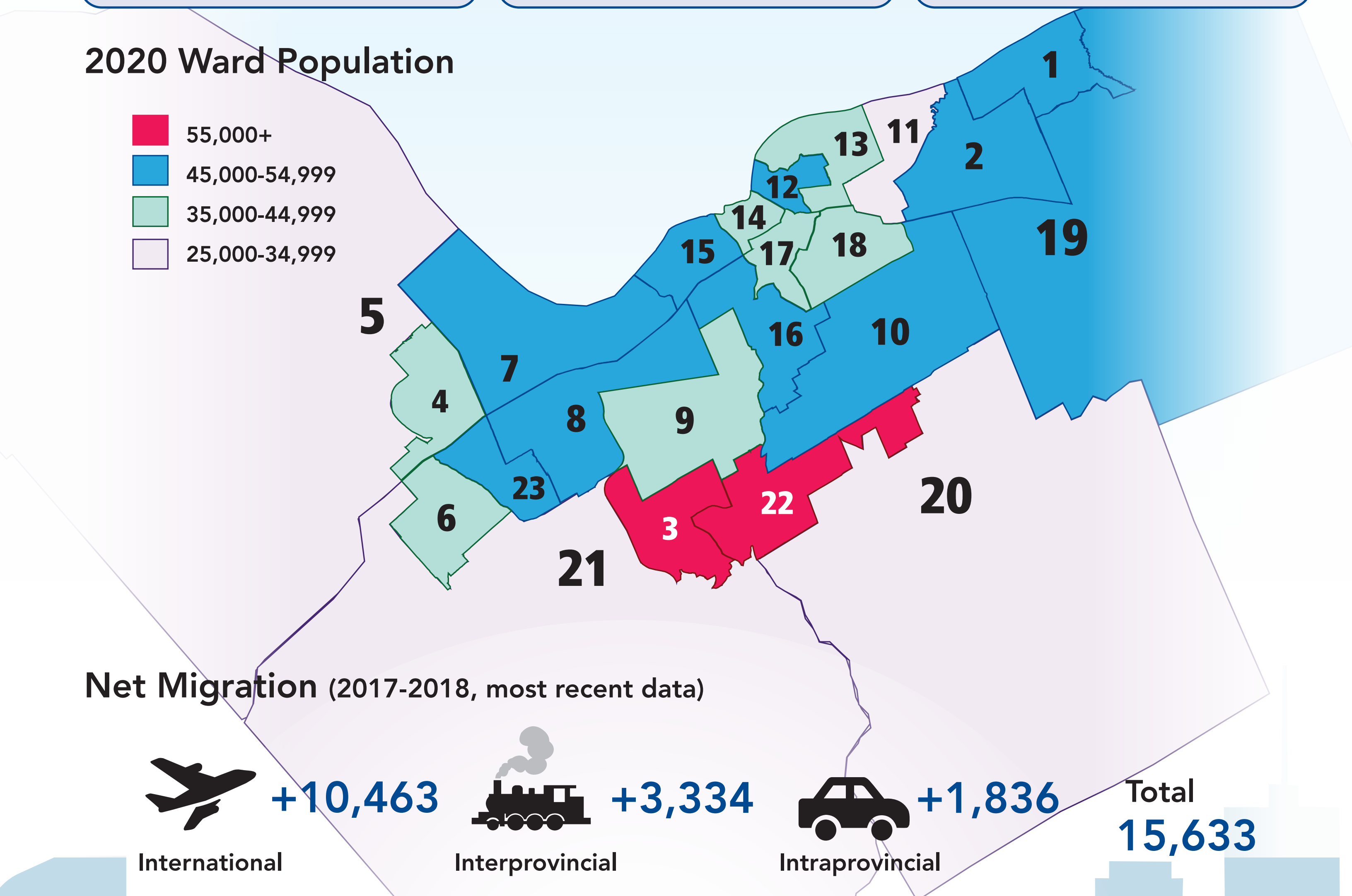
POPULATION & MIGRATION

Population (Dec 31, 2020)

1,535,973 ▲ 1.8%	1,461,494 ▲ 1.6%	1,022,604 ▲ 1.6%
Greater Ottawa-Gatineau Area	Ottawa-Gatineau CMA	City of Ottawa

2020 Ward Population



Net Migration (2017-2018, most recent data)

+10,463	+3,334	+1,836	Total 15,633
International	Interprovincial	Intraprovincial	

EMPLOYMENT AND ECONOMY

Ottawa

557,100 ↓ 5.3%
Employed residents

7.4% ↑ 2.7%
Unemployment

Employed Residents by Cluster ('000s)

Industrial & Resource
46.8

Culture & Tourism
45.4

Office
71.8

Retail
87.0

Government
131.5

Knowledge
173.8

HOUSING STARTS

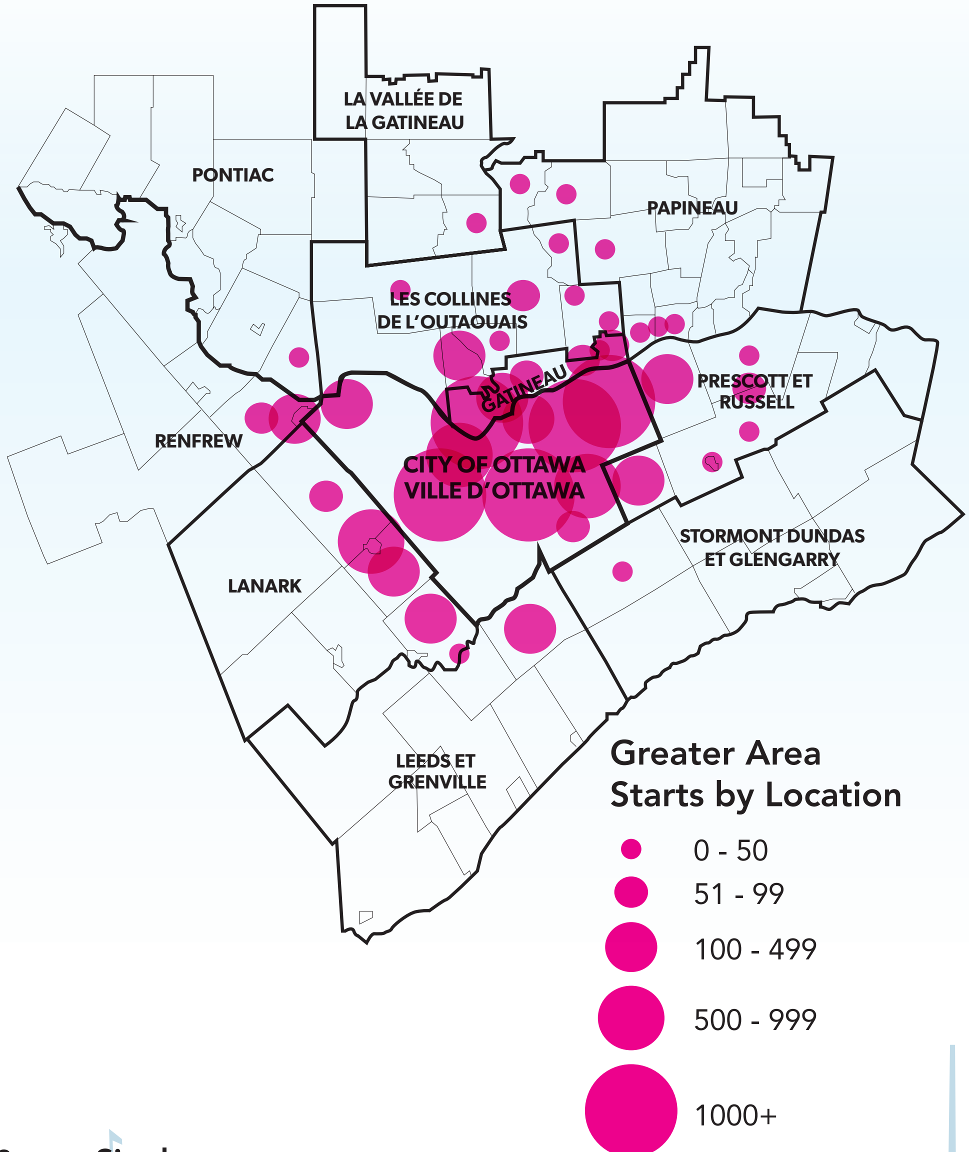
Ottawa

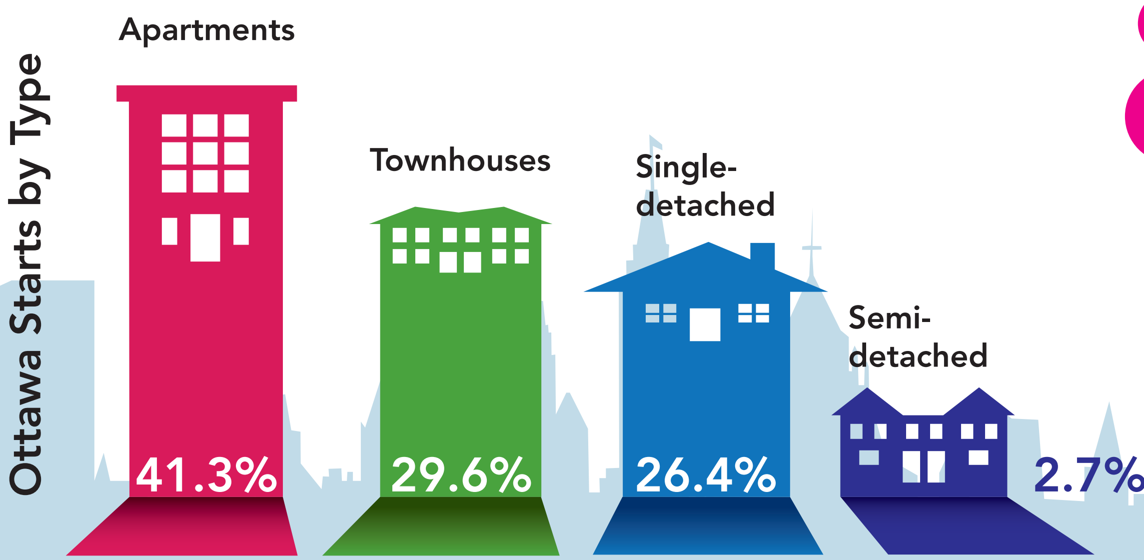
9,239 ▲30.7%
Housing starts

3.9% ▲2.1%
Rental vacancy rate

58.0% ▲13.6%
Urban intensification

$529,675 ▲19.9%
Average resale price (all units)





NON-RESIDENTIAL DEVELOPMENT

Office

Inventory

3.8 million m² ↑ 0.1%

40.6 million ft²

Vacancy
10.4%
2020

8.7%
2019

Retail

Inventory

3.7 million m² ↑ 1.1%

40.0 million ft²

Vacancy
5.2%
2020

4.5%
2019

Industrial

Inventory

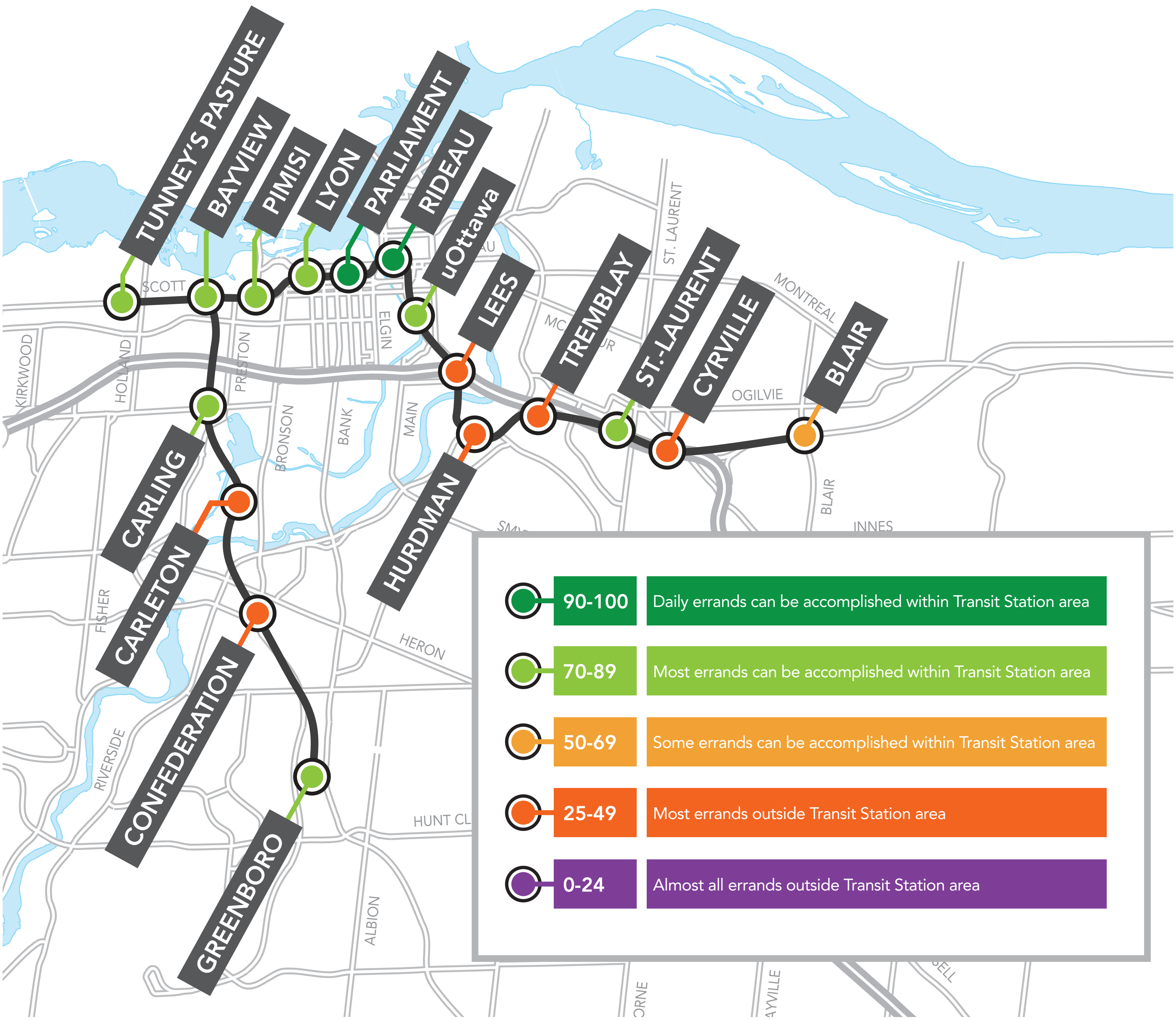
2.3 million m² ↑ 1.5%

24.3 million ft²

4.2%
2019

Vacancy
4.0%
2020

INDEX OF COMMERCIAL SERVICES AROUND TRANSIT STATIONS



2020 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Infrastructure and Economic Development
Research and Forecasting Unit
November 2021

ANNUAL DEVELOPMENT REPORT 2020
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2020 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 2020 (City estimate): 1,022,604, up 1.6% from 2019
- Greater Ottawa-Gatineau Area population, year-end 2020: 1,535,973 up 1.8% from 2019
- Net migration to Ottawa-Gatineau decreased 14.4% from the year before

1.1 Population Growth

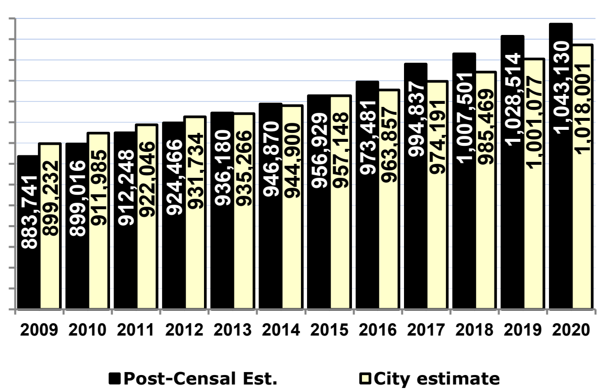
Major Cities

In 2020, the Ottawa-Gatineau Census Metropolitan Area (CMA) was the sixth largest in Canada, with 1,461,494 persons. Population growth during 2019-20 was 1.6%, slightly above the 1.4% 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).

2019 Population based on 2016 Census

Statistics Canada prepares annual mid-year population estimates for Ottawa and other centres. The current series is based on the 2016 Census adjusted for undercounting (people missed in the Census). To this base each year births and net in-migration are added and deaths are

City of Ottawa Population, Post-Censal and City Estimates, 2009-2020 (mid-year)
Source: Statistics Canada and City of Ottawa



[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 *2020 Ontario Provincial Policy Statement*.

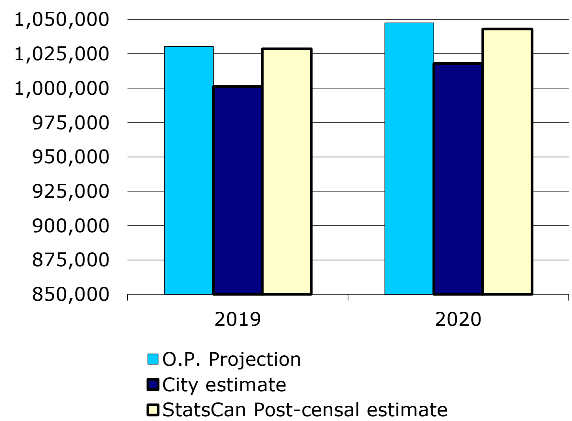
subtracted. Estimates undergo two cycles of revision before a final estimate is arrived at. Statistics Canada's preliminary mid-year 2020 post-censal population estimate for Ottawa was 1,043,130 (Table 1).

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 2020 population of 1,018,001 and a year-end 2020 population of 1,022,604, a 1.6% increase from 2019 (Table 3).

Projections Tracking 2019-2020(mid-year)
Source: Statistics Canada and City of Ottawa



Projections Tracking

Population projections in the new Official Plan[2] (OP) project Ottawa's population at 1,047,417 in mid-2020. The OP projection continues to exceed city actual estimates, being 29,416 (2.9%) more than the 2020 city estimate based on building permits. The OP mid-year 2020 projection is 4,287 (0.4%) more than Statistics Canada's 2020 post-censal estimate.

Summary

There is a range of population figures for the city of Ottawa in 2020 depending on source:

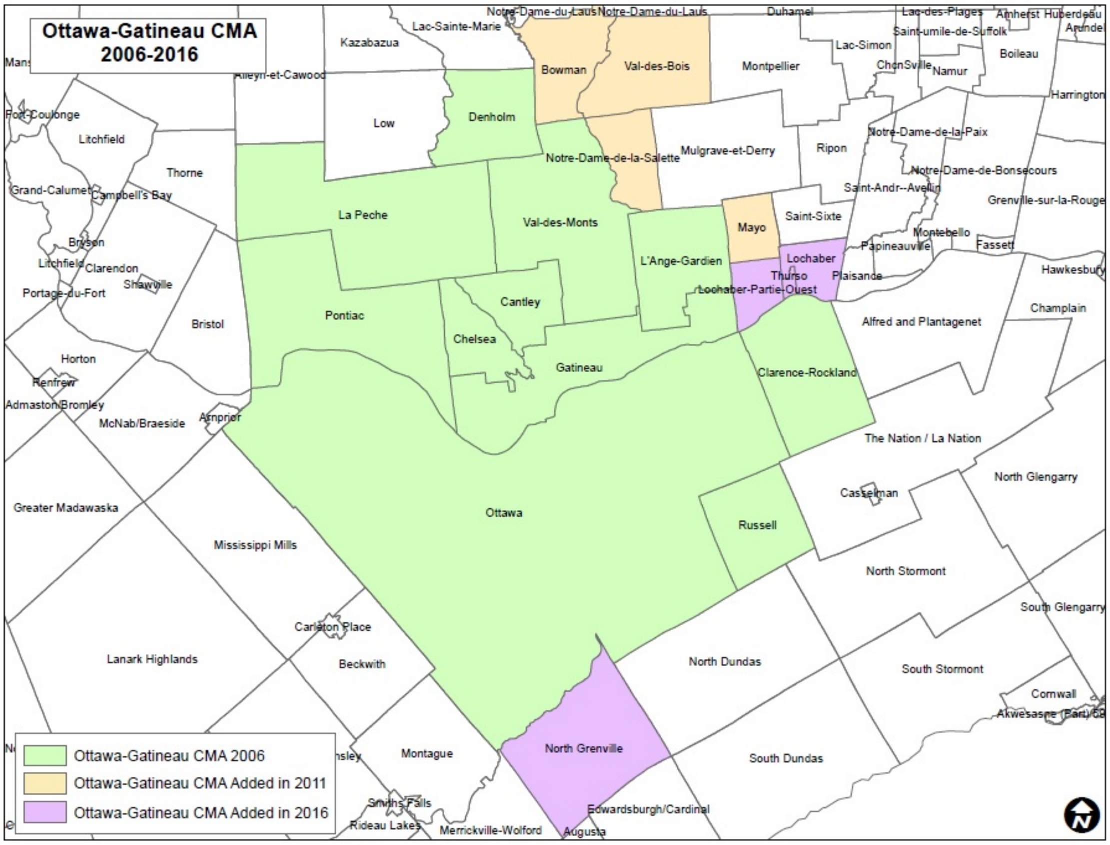
City of Ottawa Population by Source	mid-2020	year-end 2020
StatsCan Preliminary Post-censal Estimate	1,043,130	n/a
Official Plan Projection	1,047,417	1,055,781
City Estimate of actual population	1,018,001	1,022,604

Source: Statistics Canada; City of Ottawa

[2] Official Plan projection from the new Official Plan, Growth Projections for the new Official Plan 2018-2046 report.

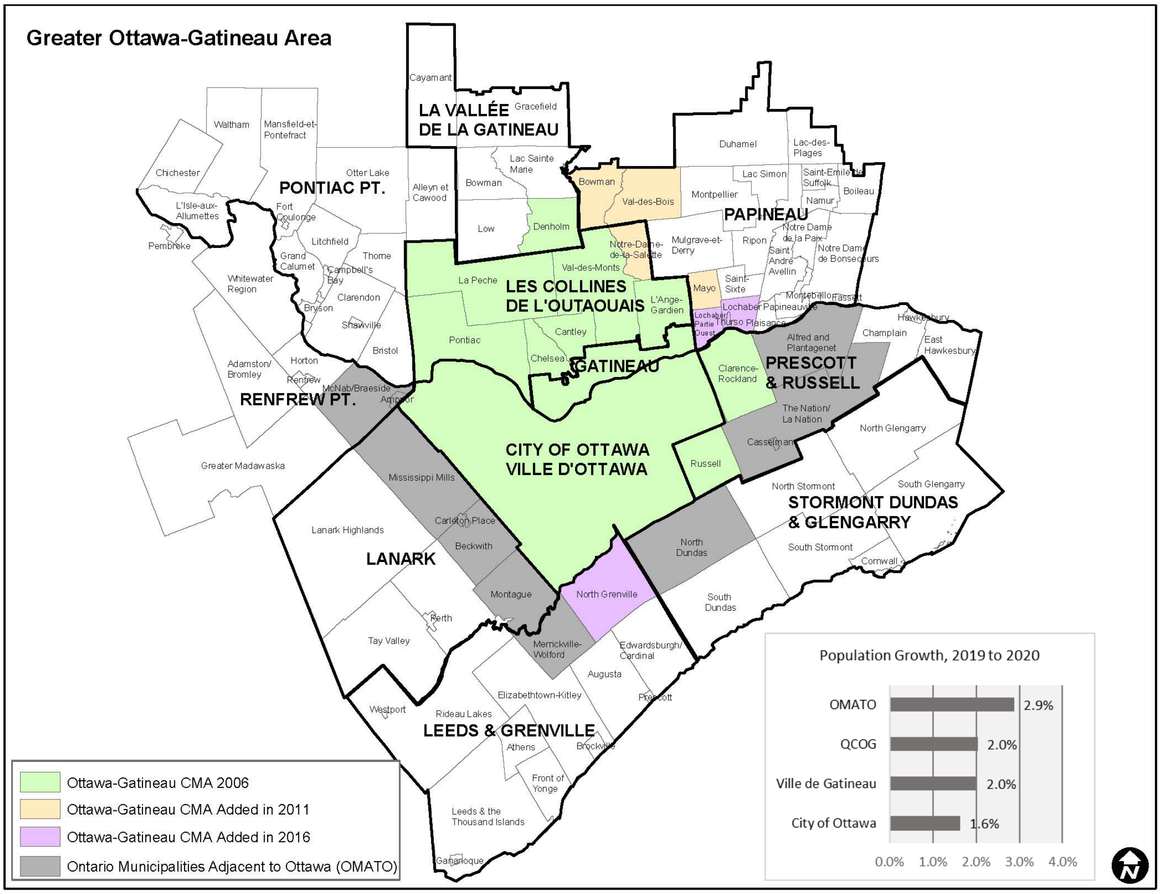
1.2 Population Distribution & Growth in the Greater Ottawa-Gatineau Area

The Greater Ottawa-Gatineau Area includes the Ottawa-Gatineau CMA, shown on Map 1, plus other municipalities adjacent to the city of Ottawa as shown on Map 2. There were 1,535,973 people in the Greater Ottawa-Gatineau Area in 2020, with the city of Ottawa having the bulk of the region's population followed by the Ville de Gatineau, OMATO, Prescott & Russell, and QMAG[3] (Table 2; Map 2).



Map 1: The Ottawa-Gatineau Census Metropolitan Area (CMA)

[3] OMATO: Ontario Municipalities Adjacent to Ottawa.
QMAG: Québec Municiaplities Adjacent to 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 Municipalities Adjacent to Gatineau (QMAG). Shaded areas not physically adjacent to Ottawa, such as Carleton Place in Lanark County, have a high-degree of their work force employed in Ottawa.

Ottawa

Within Ottawa, the strongest population growth in 2020 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 2020 the share was 52.8% compared to 53.6% a year earlier. Downtown's[4] share of the population remained steady at 10.1%, 0.3% down from 2019. The suburban centres increased to 37.7% of the population from 36.8% in 2019, while the rural area was steady at 9.6% (Table 3).

In the suburban centres, population grew 4.0% from 2019 to an estimated 385,093 people in 2020. Suburban households increased by 4.2%. The population of Downtown was estimated at 103,556, a 1.4% decrease. Downtown households decreased by 1.7%. Areas inside the Greenbelt outside of

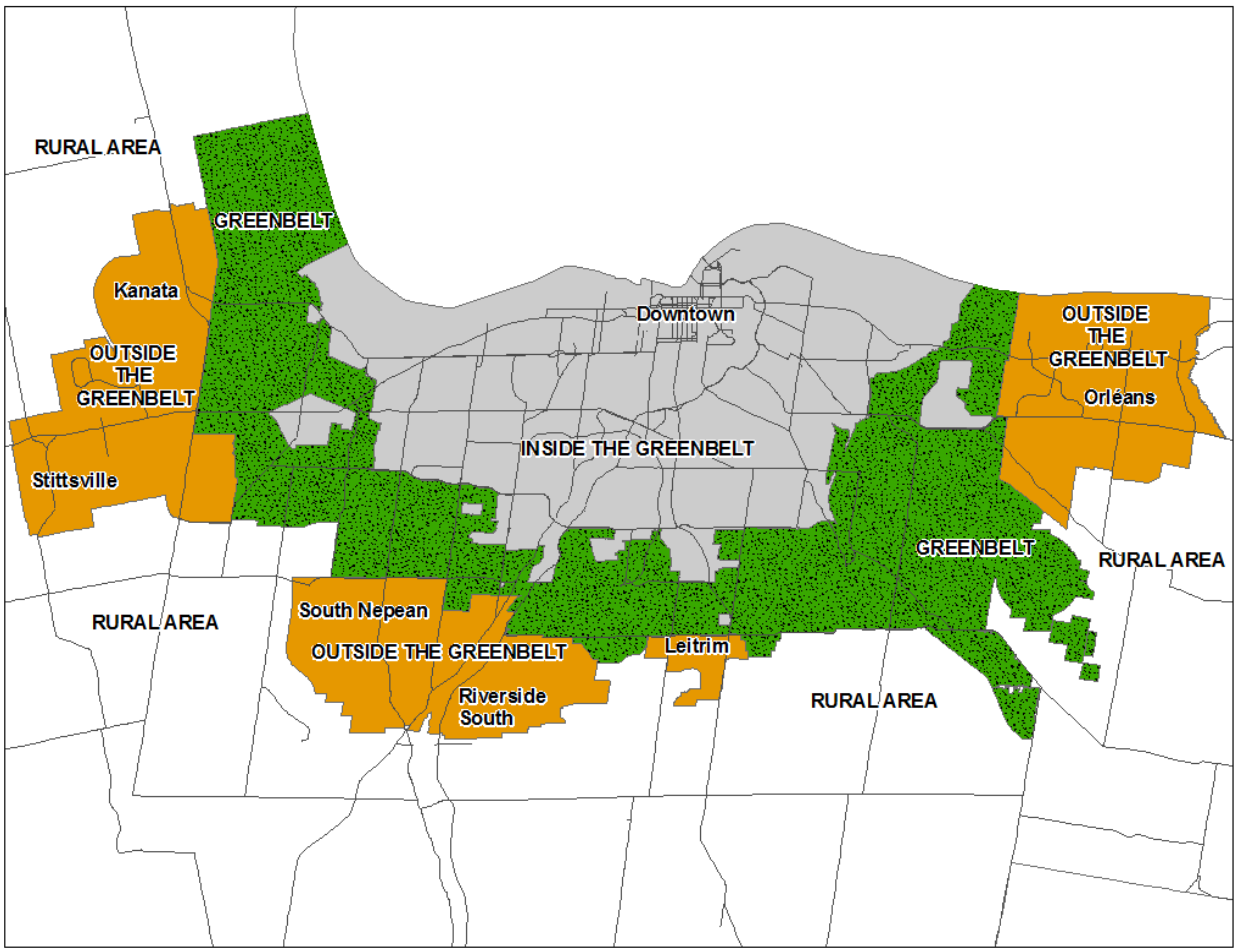
[4] **"Downtown"** refers to the Central Area and Inner Area (see map attached to Table 3).

Downtown had an estimated population of 436,090, 0.4% higher than in 2019. In the rural area the population reached 97,865, up 1.4% from 2019, while rural households increased 1.8%.

The largest portion of population growth in 2020 was in Kanata-Stittsville (27.0% of all growth), South Nepean (22.2%), Orléans (17.1%), Leitrim (12.0%), and Riverside South (11.3%). Inner Area (-1.4%), Central Area (-3.1%), Hunt Club (-0.2%), Bayshore (-0.2%), and Merivale (-0.1%) experienced a total household decrease leading to a decrease in total population for those areas (Table 3).

Distribution of population (%) 2006-2020

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 294,606 at the end of 2020, an increase of 2.0% from 2019 (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 290,283 at mid-2020. Statistics Canada's post-censal estimate for July 2020 pegs the population of the Ville de Gatineau at 290,239.

Quebec municipalities outside of Gatineau and within the CMA increased by 2.0% in 2020 to a total of 54,086. The majority of communities increased in population, except Val-des-Bois (-0.9%), Pontiac (-0.4%), and Bowman (-0.3%) which all decreased in 2020 (Table 2).

Ontario Municipalities Adjacent to Ottawa (OMATO)

The City of Ottawa estimate for OMATO's 2020 year-end population is 164,677, a 2.9% increase from 2019. The five most populous OMATO municipalities were Clarence-Rockland (24,542, up 2.4% from 2019), North Grenville (18,315, up 1.0%), Russell (17,803, up 4.6%), North Dundas (14,428, down 0.2%), and Carleton Place (13,606, up 13.4%) (Table 2).

1.3 Migration

Migration data for 2018-19 (the most recent available at the city level) shows the net number of people moving to Ottawa was 15,633, a 3.1% increase from the year before. This is the highest net migration to Ottawa since 2001. 2018-19 saw an increase in movers from the Greater Toronto Area (Tables 4 and 5).

International net migration increased to 10,463 in 2018-19, an increase of 1,683 persons from a year earlier. Intraprovincial net migration decreased to 1,836 from 2,270, while interprovincial decreased to 3,334 from 4,118 (Table 4).

In 2018-2019, more people moved to adjacent municipalities from Ottawa (-2,314 people). From 2014-2019, Ottawa had a net migration of 166 people from outlying regions, with the largest movement being 2,708 persons from Gatineau to Ottawa. At the same time, 1,846 persons moved to Lanark County, being the destination with the largest net loss over this five-year period (Table 6).

Major Cities

All six of Canada's major centres experienced a decrease in net migration in 2019-2020. Toronto continued to attract the biggest share of the migrants at 65,926 people. While all major centres decreased year-over-year, Edmonton and Ottawa-Gatineau had the lowest shares of migrants at 17,701 and 19,590 respectively (Table 7).

In terms of net migration per thousand population (table to the right), Ottawa-Gatineau and Calgary were the highest for 2019-2020, followed by Edmonton and Toronto. Vancouver and Montréal showed the lowest rates.

NET MIGRATION PER 1,000 INHABITANTS, 2019-2020 (preliminary)

Source: Statistics Canada

CMA	
Ottawa-Gatineau	**13.4**
Calgary	12.9
Edmonton	12.1
Toronto	10.1
Vancouver	8.7
Montréal	5.0

2. Housing

HIGHLIGHTS

- Housing starts were up 30.7% in the city of Ottawa in 2020
- 29.6% of Ottawa starts were row units
- 41.3% of Ottawa starts were apartments
- Residential intensification was 58.0% from mid-2019 to mid-2020
- Rental vacancy rate increased to 3.9% in 2020 from 1.8% in 2019

2.1 New Construction

There are two measures of new housing activity tracked by this report, one by CMHC (housing starts) and the other by the City of Ottawa (building permits). The two don't exactly match because CMHC housing starts do not include all new housing built in the city[5], therefore building permits (net of demolitions) are a more accurate meausre of total housing activty. 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.

City of Ottawa and Ottawa-Gatineau CMA Housing Starts, 2020

Sources: CMHC

	Starts, 2020	% chg. 2019-20
City of Ottawa	9,239	30.7%
Ott-Gat CMA	13,034	16.3%

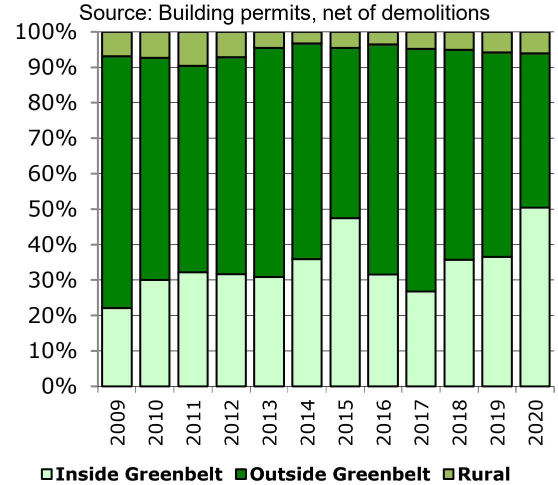
In the city of Ottawa, housing starts totaled 9,239 units, a 30.7% increase from 2019. The larger Ottawa-Gatineau Census Metropolitan Area ranked fourth in absolute housing starts among Canada's six largest metropolitan areas in 2020 with 13,034 units. Toronto had the largest year-over-year increase of 26.7%, followed by Ottawa-Gatineau with 16.3%. Montréal, and Edmonton also experienced an increase year-over-year, while Vancouver and Calgary experienced a decline in total housing starts from 2019. Apartment starts were the largest in relative terms in all major centres except Calgary (Table 10).

Ottawa Permits by Location

In 2020, there were 11,339 residential unit permits issued in the city of Ottawa, a 20.3% increase from 2019 (Table 12). This is the most permits issued in a single year since amalgamation in 2001. The percentage of housing permits inside the Greenbelt increased to 50.4% from 36.5% in 2019 (adjacent chart). This increase was due to a large number of apartment units that received building permits inside the Greenbelt in 2020.

New Housing Inside and Outside the Greenbelt, 2009-2020

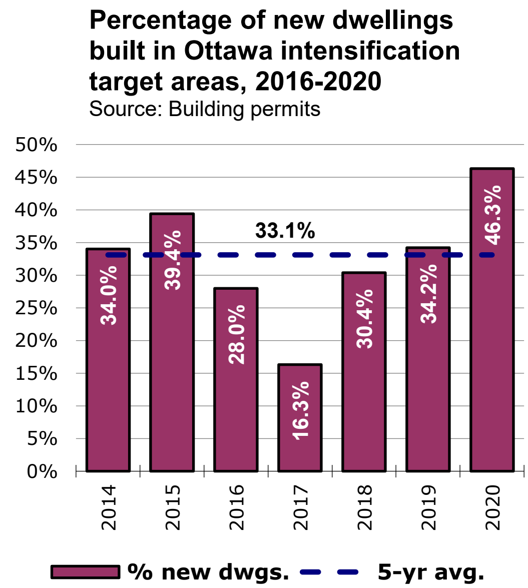
Source: Building permits, net of demolitions



[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.

New Housing by Official Plan Designation

The previous 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.



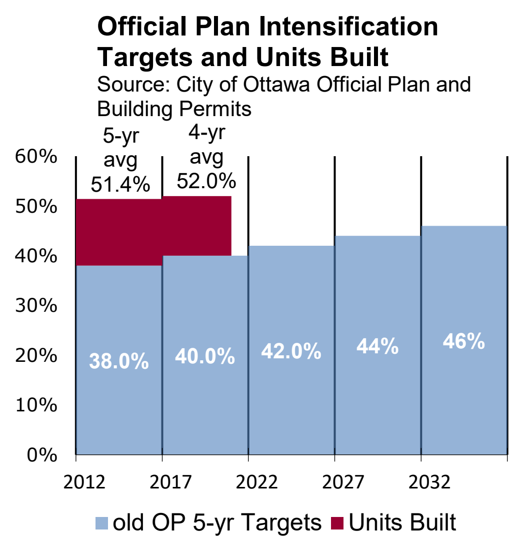
In 2020, 4,929 residential units were issued building permits in intensification target areas. This amounts to 43.5% of net new units issued permits in Ottawa. The top designated areas were existing Rapid Transit Stations (3,835), Mainstreets (1,735), and Central Area (1,409) (Table 12).

Target areas received 76.7% of all apartments, 1.8% of single and semi-detached units and 1.2% of townhouses in 2020 (Table 12). It should be noted that target areas contain only part of all intensification activity; in 2020, target areas accounted for 80.5% of total intensification, up from 65.2% in 2019.

Residential Intensification

A new Official Plan was adopted by Council on October 27, 2021. The 2020 ADR provides results of intensification tracking under the previous OP and the newly adopted OP.

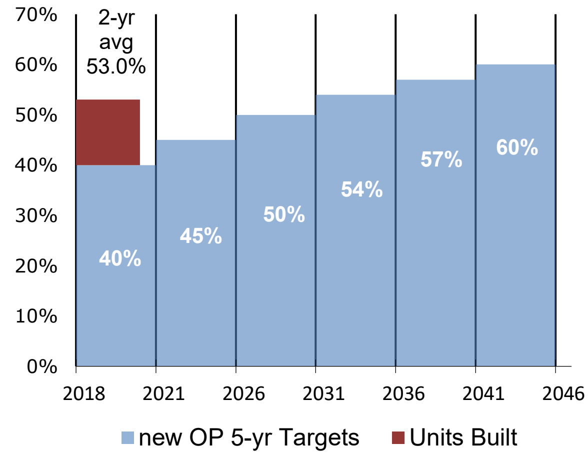
The previous Official Plan (OP) establishes an increasing residential intensification target to 2036. For the five-year period 2012-2016 the OP target was 38.0% of new units in urban and suburban areas combined, with actual achieved intensification averaging 51.4%. The next five-year period from 2017-2022 has an OP target of 40.0%. In 2020, a 57.3% intensification share was achieved (Table 13a). The four year average intensification share was 52.0%; higher than the OP target of 40.0% for the five-year period from 2017-2022.



The recently adopted new Official Plan states that for growth management purposes, the intensification rate should also be calculated to align with the growth projections. This requires shifting the measurement of intensification from a calendar year to a mid-year basis and to include only private dwellings in the built-up areas as of mid-2018. With this revised intensification method, a 58.0% intensification rate was achieved from mid-2019 to mid-2020. A large portion of these intensification units were apartment units inside the greenbelt. Since mid-2018 an intensification rate of 53.0% was achieved (Table 13b) [6].

The differences in methods between the previous and new Official Plans normally results with higher intensification rates in the previous Official Plan. However, the new Official Plan method has a slightly higher intensification rate in this reporting period as it captures construction activity in 2019 prior to COVID-19, whereas the previous Official Plan captures construction activity throughout the 2020 calendar year where COVID-19 had a larger impact.

New Official Plan Intensification Targets and Growth Allocation Intensification
Source: City of Ottawa Official Plan and Building Permits

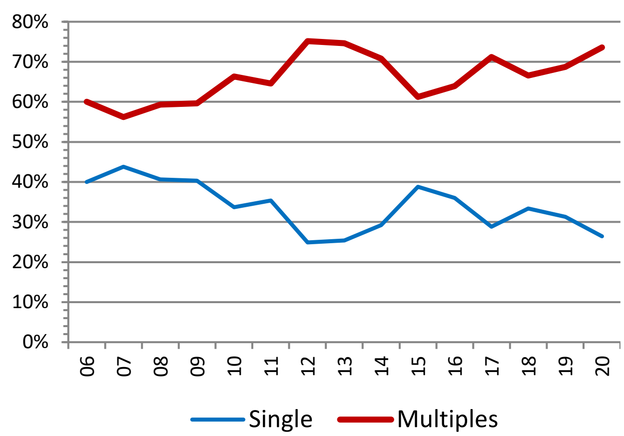


<u>Ottawa Starts and Completions by Unit Type</u>

More multiple dwellings were built than single-detached units in 2020 for the nineteenth year in a row. In 2020, there were 2,439 single-detached starts, more than the 2,211 started in 2019. The share of single-detached starts accounted for 26.4% of all new starts, down from 31.3% in 2019 (Table 15).

The most popular house form, with a 41.3% share, was apartments, with 3,816 units started in 2020, up from 2,282 units in 2019. Townhomes were behind with 2,733 units started in 2020 for a 29.6% share, down slightly from 33.6% in 2019. The freehold market completed 4,509 units and tracked above its five-year average of 3,950 annual completed units. Overall, freehold townhomes lead the way, followed by freehold singles then private rental apartments. (Table 16).

15-Year Housing Starts by Type
Source: CMHC



6 Some areas on the periphery of the built-up area were inadverntently excluded in the 2019 Annual Development Report, resulting in a lower intensification rate in that report. The revised mid-2018 to mid-2019 intensification rate was 44.4%.

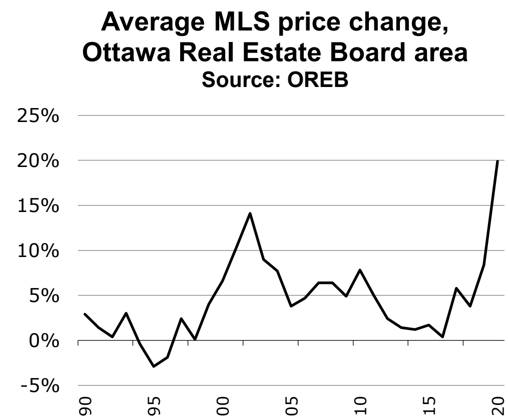
Ottawa New Single-Detached Prices

New single-detached home prices increased to $645,646 in 2020, an increase of 6.4% from last year. After factoring for inflation, the annual change was 5.0% (Table 17). Inflation is generally derived from the All-Items Consumer Price Index (CPI), which averaged 137.8 in 2020 (from a base of 100 in 2002). The annual 2020 inflation rate as measured by the CPI was 1.4%, down from 2.0% in 2019.

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 $529,675 in 2020, an annual increase of 19.9%.



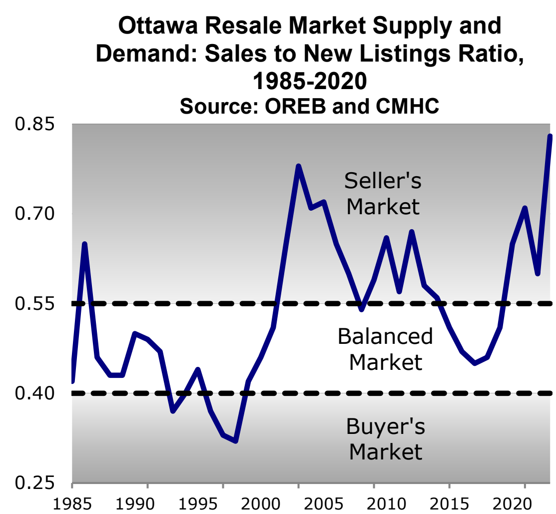
Sales Activity and Trends

2020 continued the trend of increasing MLS sales from 2019 in the larger OREB area. 2020 MLS sales of 18,971 units were up 1.9% from 2019 to 2020 (Table 19).

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.

The ratio increased from 0.60 in 2019 to 0.83 in 2020, the highest ratio in almost 40 years. Ottawa has been in a seller’s market since 2017, after maintainng a balanced market from 2012 to 2016.



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

Major Cities

Similar to 2019, price changes for the entire resale market in 2020 varied across the major cities. There were incremental increases in Calgary (+0.3%), and Edmonton (+0.8%), with larger increases in Vancouver (+8.0%), Toronto (+13.5%), and Montréal (+14.6%). Ottawa experienced the largest increase of 19.9% (Table 18).

When condominium and non-condominium average prices are seperated, Ottawa still experienced the largest increase in both condominium (+18.8%) and non-condominium (+19.7%) price changes. Condominium sales decreased (-1.5%) and non-condominium sales increased (+3.0%) (Tables to the right).

2020 AVG MLS® RESALE PRICE* & 2019-2020 % CHANGE

Major City	Price: Condominium	2019-2020 % Change	Price: Non-Condominium	2019-2020 % Change
Vancouver	$679,018	9.0%	$1,374,118	15.7%
Toronto	$629,467	7.1%	$1,024,758	13.4%
Calgary	$297,573	9.8%	$521,322	-1.8%
Ottawa	**$361,337**	**18.8%**	**$582,267**	**19.7%**
Montréal	$353,924	10.9%	$510,723	12.9%
Edmonton	$222,573	-2.1%	$414,000	-2.6%

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

2020 AVG MLS® RESALE SALES* & 2019-2020 % CHANGE

Major City	Sales: Condominium	2019-2020 % Change	Sales: Non-Condominium	2019-2020 % Change
Vancouver	14,468	-2.8%	17,389	-2.9%
Toronto	23,507	-5.4%	64,645	11.8%
Calgary	2,817	82.6%	16,110	-12.6%
Ottawa	**4,584**	**-1.5%**	**14,038**	**3.0%**
Montréal	18,784	6.9%	33,034	7.4%
Edmonton	4,125	-7.5%	10,313	24.6%

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

2.3 Rental Housing

Supply

CMHC estimates there was an increase of 3.3% in the total number of rental purpose row and apartment units to 73,547 in 2020 from 71,210 in 2019. The overall supply of condominium rental units decreased 1.0% to 10,488 in 2020 from 10,593 in 2019. The percentage of condominiums that are rental has increased from 24.2% in 2014 to 29.2% in 2020 showing that rental condominiums are becoming an increasing part of the rental supply, although largely limited to the highest rent quintile.

Vacancy Rates

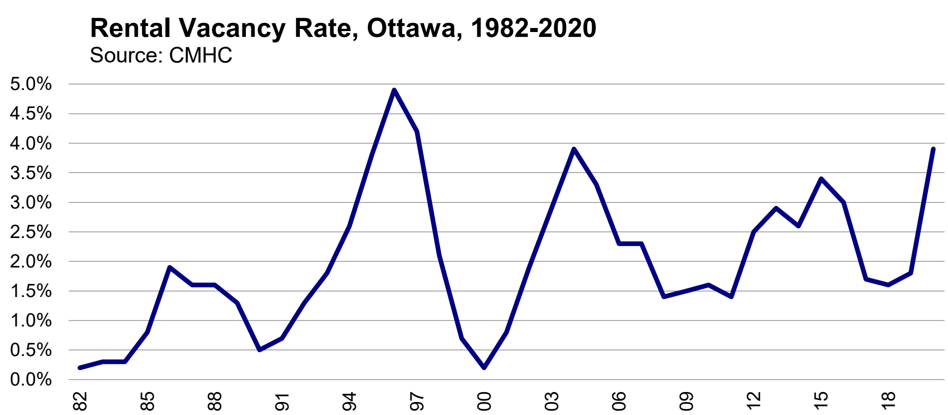
Ottawa's rental vacancy rate increased to 3.9% in 2020 from 1.8% in 2019. The vacancy rate is lower for bachelor units (3.1%) compared to two-bedroom units (3.7%) and one-bedroom units (3.9%). Strong demographic and economic fundamentals have remained supportive of housing demand benefiting the rental market and maintaining low vacancy rates.

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 last year does not permit conversions.

RENTAL VACANCY RATES BY CMHC ZONE, 2020

New Edinb./Manor Park/Overbrook	1.6%
Nepean	3.2%
Alta Vista	6.7%
City Average	**3.9%**
Chinatown/Hintonburg/Westboro N	4.6%
Downtown	5.3%
Carlington/Iris	1.7%
Gloucester North/Orleans	1.5%
Sandy Hill/Lowertown	6.7%
Western Ottawa Surrounding Areas	2.6%
Westboro S/Hampton Pk/Britannia	1.3%
Eastern Ottawa Surrounding Areas	0.4%
Glebe/Old Ottawa South	2.3%
Hunt Club/South Keys	1.3%
Vanier	**%

Source: CMHC Rental Market Report Ottawa Fall 2019, Table 1.1.1
**Data is supressed as it is not reliable



Private Rental Prices

The average rent for a two-bedroom apartment in Ottawa in 2020 was $1,517, an increase of 7.6% from 2019 and above the 2020 provincial Rent Increase Guideline of 2.2%. The average rent of a two-bedroom apartment in Gatineau in 2020 was $950. The rent gap between Ottawa and Gatineau for a two-bedroom apartment is $567 and 59.7%; slightly lower than the 61.3% gap in 2019.

3. Economy

HIGHLIGHTS

- The number of employed residents decreased by 5.3% in Ottawa from 2019 to 2020
- The Government cluster was Ottawa's only growth cluster in 2020, adding 7,600 jobs
- The Knowledge cluster had the largest employment numbers with 173,800 jobs in 2020

3.1 Labour Force

Employed Residents

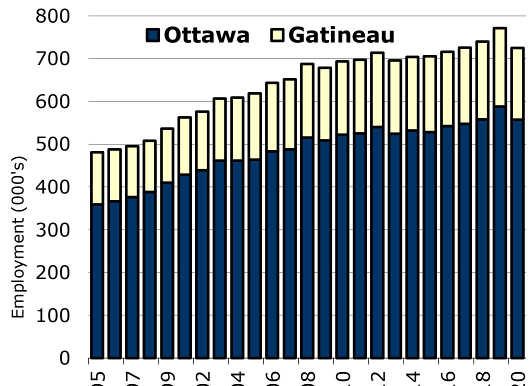
The Ottawa-Gatineau CMA saw a reduction of 47,000 employed residents in 2020. Employment losses were seen in all of the nation's six largest metro areas as a result of COVID-19, with Toronto seeing the largest decrease of 171,600 employed residents (adjacent table) and Ottawa-Gatineau seeing the smallest reduction. About 75% of the total jobs in the Ottawa-Gatineau CMA have historically been in the city of Ottawa.

Employment Changes, Major Centres, 2019-2020
Source: Statistics Canada, Labour Force Survey, Table 14-10-0098-01

CMA	Net job change
Toronto	-171,600
Vancouver	-118,600
Montréal	-85,800
Edmonton	-67,700
Calgary	-55,800
Ottawa-Gatineau	**-47,000**

Statistics Canada's sample-based Labour Force Survey (LFS) shows the number of employed residents in the Ottawa CMA averaged 557,100 in 2020, down 5.3% or 30,900 employed residents from 2019. The unemployment rate increased to 7.4% in 2020 from 4.7% in 2019. The local unemployment rate remained lower than provincial (9.6%) and national (9.5%) rates (Table 8).

Total Employment, Ottawa and Gatineau, 1995-2020
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 the only cluster to experience growth in 2020, adding 7,600 emloyed residents. While all other clusters experienced a decline, the Knowledge cluster (-13,900) and Culture and Tourism cluster (-13,300) had the greatest reduction in employed residents. Despite this, in 2020, the Knowledge cluster had the largest employment numbers with 173,800 employed residents (Table 9).

In 2020 private-sector employment also experienced a decline in employed residents representing 59.9% of all employed residents in Ottawa, down from 63.6% in 2019 (Table 9).

High-Tech

In 2020, Ottawa's Advanced Technology sector saw a reduction of about 3,700 employed residents after a a gain of 5,000 in 2019. Health Sciences gained 600 employed residents, while Tourism lost 13,700 and Software and Telecommunications lost 4,300 employed residents. Telecommunications Equipment and Microelectronics both experienced zero growth in 2019 (Table 9).

3.2 Office, Industrial and Retail Markets

Office Market

Ottawa has a commercial office space inventory of approximately 3.8 million square metres (41.0 million square feet). Ottawa's overall vacancy rate increased to 10.4% at the end of 2020 from 8.7% in 2019. Ottawa West area had the lowest vacancy rate of 6.6%, followed by South/Airport at 9.2% then Downtown at 9.7% while Ottawa East had the highest vacancy rate of 16.8% at the end of 2020 (Table 20).

Industrial Market

Ottawa is estimated to have over 2.2 million square metres (23.9 million square feet) of industrial floor area at the end of 2020. Over 60% of the industrial inventory is east of the Rideau River, which saw an increase in vacancy to 4.9% from 4.8%. West of the Rideau River, vacancies decreased to 2.6% from 3.1%. Overall, the city saw the vacancy rate decrease to 4.0% in 2020 from 4.2% in 2019 (Table 21).

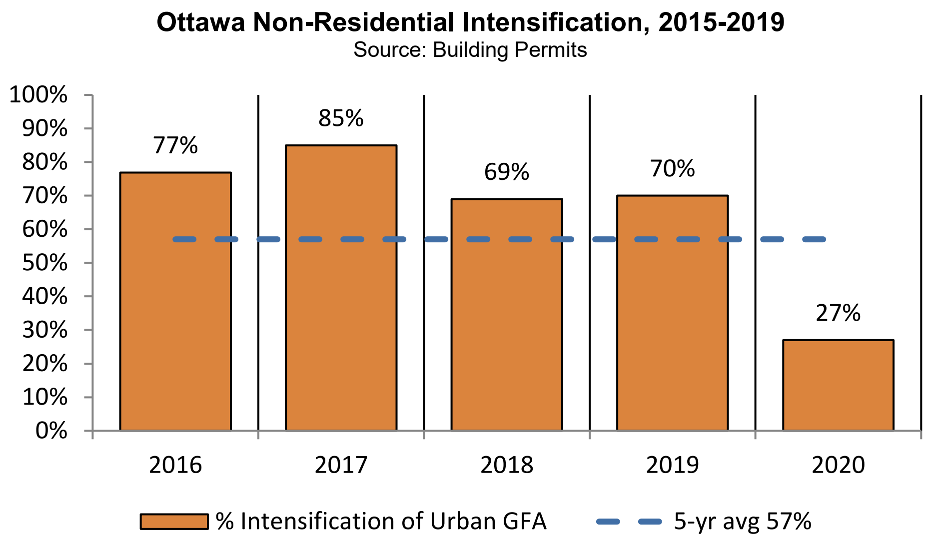
Retail Market

Retail space is categorized into several format categories. In 2020, all retail categories maintained similar shares of total floor area compared to 2019. Power Centres and standalone big box stores had the largest share of space, decreasing to 27.4% of the total in 2020 from 27.6% in 2019.

Power Centres and Regional Shopping Centres both saw a vacancy increase of 1.1 percentage points to 4.9% in 2020 from 3.8% in 2019. Office Concourses was the only format to experience a decline in vacancy rate, falling 1.3 percentage points to 1.8%. The city's overall retail vacancy rate increased to 5.2% in 2020 from 4.5% in 2019 (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 previous Official Plan, in 2020 approximately 119,445 m^2 (about 1,285,695 ft^2) had been constructed within the built-up urban area, representing an intensification rate of 27%. Over the past five-years, non-residential intensification averaged 57% of total built space *(*Table 14).



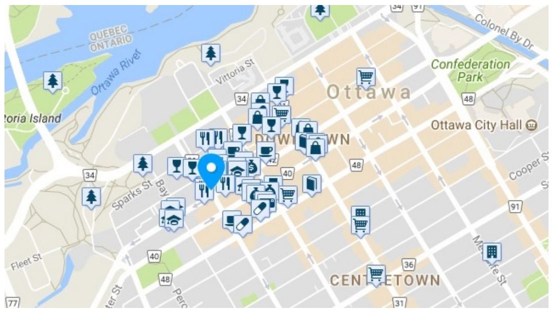
4. Transit Stations

HIGHLIGHTS

- The average commercial service index of Ottawa's O-Train stations was 64.8
- Parliament and Rideau Stations received the highest commercial service indices of 94
- Ten stations had an index where at least "most errands" can be accomplished in proximity to the station

4.0 Index of Commercial Services around Transit Stations

The growth management strategy of the new Official Plan directs growth to areas with amenities and services, including locations that are easily accessible by transit making Ottawa's rapid transit stations key areas to accommodate new development. In addition 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[8] 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.

For the 2020 ADR, the scores were provided directly from Walk Score organization. For all stations, the average commercial service index was 64.8, which means some errands can be accomplished within transit station areas. Line 1's Parliament and Rideau Stations both had indices within the 90s meaning daily errands can be accomplished within transit station areas. Line 2 Confederation Station was the only station to experience an increase, and Line 2 stations Lyon, Rideau, and Tremblay all remained steady. The remaining stations decreased scores, but unfortunately Walk Score cannot identify what amenities have changed to result in a change of score. However, a drop in scores are likey a result of a combination of Walk Score reorganizing amenity categories from previous years to improve score accurarcy, and reduction of services and amenities closing, either permanently or temproary, due to COVID-19.

Commercial Services Index Results	
Highest: Rideau and Parliament Stations	94.0 - Daily errands can be accomplished within transit station area
Average	64.8 - Some errands can be accomplished within transit station area
Lowest: Tremblay Station	29.0 - Almost all errands outside transit station area

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

Appendix: Data Tables

TABLE 1
POPULATION OF CANADA'S SIX LARGEST METROPOLITAN AREAS, 2016-2020

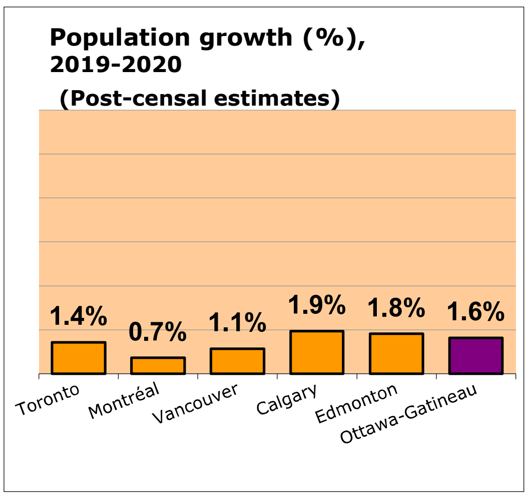
CMA *	POST-CENSAL ESTIMATES					*2019-2020*
	2016	2017	2018	2019	2020	*% chg.*
Toronto	6,125,013	6,217,328	6,337,780	6,462,770	6,555,205	*1.4%*
Montréal	4,140,425	4,193,207	4,264,846	4,333,041	4,364,189	*0.7%*
Vancouver	2,582,202	2,616,908	2,658,590	2,706,793	2,737,698	*1.1%*
Calgary	1,438,160	1,458,336	1,483,528	1,514,029	1,543,283	*1.9%*
Edmonton	1,364,394	1,390,149	1,415,351	1,442,805	1,468,926	*1.8%*
Ottawa-Gatineau	**1,358,100**	**1,384,897**	**1,411,032**	**1,438,083**	**1,461,494**	***1.6%***
City of Ottawa**	964,341	983,739	1,004,802	1,025,425	1,043,130	*1.7%*

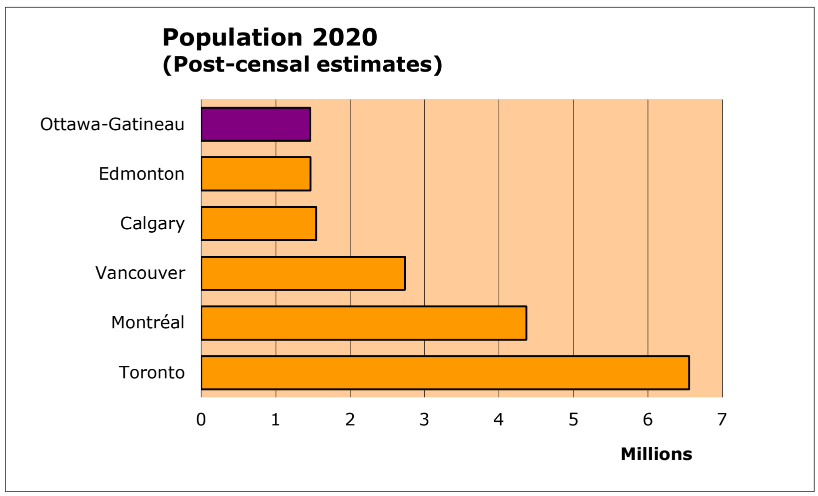
Source: Statistics Canada, Tables 17-10-0135-01 and 17-10-0139-01 ; estimates are for July 1 each year

Estimates are final postcensal for 2016 to 2018, updated postcensal for 2019, and preliminary postcensal for 2020.

* 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.





POST-CENSAL POPULATION ESTIMATES, OTTAWA-GATINEAU CMA

Statistics Canada Ottawa-Gatineau CMA	2016	2017	2018	2019	2020	*2019-2020 % chg.*
Ontario part of CMA	1,023,678	1,047,447	1,069,895	1,092,305	1,111,773	*1.8%*
(%)	75.4%	75.6%	75.8%	76.0%	76.1%	
Quebec part of CMA	334,422	337,450	341,137	345,778	349,721	*1.1%*
(%)	24.6%	24.4%	24.2%	24.0%	23.9%	
Total CMA Population	**1,358,100**	**1,384,897**	**1,411,032**	**1,438,083**	**1,461,494**	***1.6%***

Source: Table 17-10-0135-01, Statistics Canada.

Estimates are final postcensal for 2016 to 2018, updated postcensal for 2019, and preliminary postcensal for 2020.

TABLE 2
GREATER OTTAWA-GATINEAU AREA POPULATION & DWELLINGS

Municipality	2017 City Estimates Population	2017 City Estimates Occupied Dwellings	2018 City Estimates Population	2018 City Estimates Occupied Dwellings	2019 City Estimates Population	2019 City Estimates Occupied Dwellings	2020 City Estimates Population	2020 City Estimates Occupied Dwellings
Ottawa, C	**979,173**	**416,219**	**991,429**	**422,327**	**1,006,211**	**429,080**	**1,022,604**	**435,747**
Gatineau, V	**278,979**	**119,971**	**282,154**	**121,576**	**288,865**	**124,715**	**294,606**	**127,445**
Prescott & Russell (part)	**62,925**	**23,904**	**63,949**	**24,379**	**65,405**	**25,008**	**66,925**	**25,674**
Alfred and Plantagenet, TP	9,183	3,762	9,208	3,779	9,192	3,779	9,176	3,779
Casselman, Vlg.	3,572	1,452	3,621	1,478	3,603	1,478	3,586	1,478
Clarence-Rockland, C (part of ON CMA)	23,203	8,868	23,571	9,046	23,964	9,235	24,542	9,497
Russell, TP (part of ON CMA)	15,393	5,500	15,895	5,708	17,022	6,143	17,803	6,457
The Nation Municipality	11,574	4,322	11,654	4,368	11,624	4,373	11,818	4,463
Leeds & Grenville (part)	**28,699**	**11,414**	**29,069**	**11,628**	**29,157**	**11,732**	**29,373**	**11,890**
Merrickville-Wolford, Vlg.	10,999	4,437	11,004	4,457	11,024	4,484	11,058	4,517
North Grenville, TP (part of ON CMA)	17,700	6,977	18,065	7,171	18,133	7,248	18,315	7,373
Stormont, Dundas, Glengarry (pt	**14,393**	**5,729**	**14,473**	**5,770**	**14,453**	**5,772**	**14,428**	**5,772**
North Dundas, TP	14,393	5,729	14,473	5,770	14,453	5,772	14,428	5,772
Lanark (part)	**32,908**	**13,055**	**34,326**	**13,722**	**35,260**	**14,195**	**37,575**	**15,228**
Beckwith, TP	7,045	2,649	7,304	2,756	7,499	2,840	7,903	3,003
Carleton Place, Tn.	10,202	4,094	11,152	4,468	11,999	4,800	13,606	5,435
Mississippi Mills, Tn.	12,162	4,985	12,375	5,171	12,272	5,228	12,580	5,463
Montague, TP	3,499	1,327	3,495	1,327	3,490	1,327	3,486	1,327
Renfrew (part)	**15,355**	**6,550**	**15,485**	**6,629**	**15,780**	**6,781**	**16,376**	**7,063**
Arnprior, Tn.	8,353	3,709	8,514	3,774	8,793	3,891	9,268	4,094
McNab/Braeside, TP	7,002	2,841	6,971	2,855	6,987	2,890	7,108	2,969
Québec part of CMA Outside Gatineau (QCOG)	**51,632**	**20,508**	**52,349**	**20,900**	**53,003**	**21,269**	**54,086**	**21,820**
Cantley, M	9,868	3,488	10,012	3,552	10,098	3,595	10,259	3,666
Chelsea, M	6,913	2,624	7,040	2,685	7,329	2,809	7,762	2,990
La Pêche, M	7,613	3,180	7,734	3,241	7,805	3,282	7,964	3,359
L'Ange-Gardien, M	4,178	1,811	4,119	1,846	4,060	1,880	4,103	1,964
Pontiac, M	5,598	2,163	5,628	2,182	5,635	2,193	5,615	2,193
Val-des-Monts, M	10,586	4,177	10,908	4,309	11,105	4,391	11,325	4,484
Denholm, M	556	248	558	250	563	254	571	259
Notre-Dame-de-la-Salette, M	736	334	736	336	741	340	747	345
Mayo, M	571	247	580	252	585	255	594	260
Bowman, M	629	302	624	303	619	304	617	307
Val-des-Bois, M	890	469	882	469	880	472	872	472
Lochaber, CT	419	155	449	157	474	157	504	158
Lochaber-Ouest, CT	640	243	637	243	653	250	661	254
Thurso, V	2,435	1,067	2,442	1,075	2,456	1,087	2,492	1,109
GREATER OTTAWA-GATINEAU AREA	**1,464,064**	**617,350**	**1,483,234**	**626,931**	**1,508,134**	**638,552**	**1,535,973**	**650,639**
Ottawa-Gatineau CMA	1,348,380	571,066	1,365,398	579,557	1,389,065	590,442	1,413,641	600,966
Ontario portion of the CMA	1,035,469	437,564	1,048,960	444,252	1,065,330	451,706	1,083,264	459,074
Québec portion of the CMA	330,611	140,479	334,503	142,476	341,868	145,984	348,692	149,265
OMATO	154,280	60,652	157,302	62,128	160,055	63,488	164,677	65,627
National Capital Region (NCR)	1,338,244	567,101	1,355,334	575,689	1,378,642	586,496	1,403,271	597,116

Sources: Statistics Canada, Census; estimates based on CMHC starts and municipal building permits

2019-20 City Estimates are year-end.

City of Ottawa (2019 and 2020 population estimates based on building permits adjusted for demolitions, vacancies and ongoing declines in ave

Note 1: because they are derived from different sources, 2019 and 2020 population estimates should not be compared to Census population fig

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

NCR: Certain municipalities contained in the The National Capital Region have only a portion of their area in the reigon. However, for the purpose of this report, data for the entire municipality is included. The municipalites are: Ottawa, Gatineau, Russell, Beckwith, Mississippi Mills, Cantley, Chelsea, La Pêche, L'Ange-Gardien, Pontiac, Val-des-Monts, and Notre-Dame-de-la-Salette.

TABLE 3
POPULATION AND HOUSEHOLD ESTIMATES BY SUB-AREA, 2016-2020

SUB-AREA	POPULATION							HOUSEHOLDS						
						Growth							Growth	
	2016	2017	2018	2019	2020	19-20	*% 19-20*	2016	2017	2018	2019	2020	19-20	*% 20*
Downtown*														
Central Area	12,570	12,544	12,605	12,465	12,107	-358	*-2.9%*	7,906	7,979	8,058	7,954	7,705	-249	*-3.1%*
Inner Area	90,122	91,380	91,953	92,523	91,449	-1,074	*-1.2%*	48,484	49,444	49,873	50,257	49,538	-719	*-1.4%*
Other Areas Inside Greenbelt														
Ottawa East	51,164	51,755	51,805	52,728	53,138	410	*0.8%*	25,885	26,457	26,637	27,247	27,536	289	*1.1%*
Beacon Hill	30,650	30,771	31,042	31,712	32,082	370	*1.2%*	14,343	14,496	14,610	14,933	15,051	118	*0.8%*
Alta Vista	75,059	75,027	75,172	74,926	75,209	283	*0.4%*	32,726	32,857	32,979	32,859	33,068	209	*0.6%*
Hunt Club	65,595	65,694	65,792	65,772	65,664	-108	*-0.2%*	26,577	26,748	26,861	26,863	26,798	-65	*-0.2%*
Merivale	77,769	77,953	78,008	78,854	78,793	-61	*-0.1%*	34,152	34,493	34,641	35,181	35,157	-24	*-0.1%*
Ottawa West	45,380	45,524	45,901	46,398	47,380	982	*2.1%*	21,685	21,789	21,974	22,235	22,819	584	*2.6%*
Bayshore	38,397	38,497	38,559	38,602	38,504	-98	*-0.3%*	17,732	17,865	17,942	17,975	17,932	-43	*-0.2%*
Cedarview	45,822	45,619	45,315	45,327	45,320	-7	*0.0%*	18,699	18,843	18,842	18,870	18,894	24	*0.1%*
Urban Areas Outside Greenbelt														
Kanata-Stittsville	118,949	121,730	126,179	130,939	135,363	4,424	*3.4%*	44,266	45,475	47,399	49,437	51,263	1,826	*3.7%*
South Nepean	84,925	87,115	89,042	90,318	93,957	3,639	*4.0%*	31,438	32,369	33,174	33,687	35,142	1,455	*4.3%*
Riverside South	14,590	15,425	16,614	17,873	19,730	1,857	*10.4%*	5,273	5,542	5,940	6,355	7,006	651	*10.2%*
Leitrim	8,808	9,284	10,084	11,483	13,455	1,972	*17.2%*	2,907	3,073	3,335	3,773	4,427	654	*17.3%*
Orléans	114,473	115,971	117,832	119,780	122,588	2,808	*2.3%*	44,149	45,086	46,048	46,980	48,316	1,336	*2.8%*
Rural														
Rural Northeast	11,952	12,012	12,009	11,993	11,975	-18	*-0.1%*	4,309	4,339	4,354	4,378	4,408	30	*0.7%*
Rural Southeast	28,415	28,610	28,790	28,929	29,029	100	*0.3%*	9,940	10,016	10,104	10,193	10,273	80	*0.8%*
Rural Southwest	28,395	28,660	29,105	29,610	30,679	1,069	*3.6%*	10,088	10,214	10,391	10,594	11,013	419	*4.0%*
Rural Northwest	25,545	25,602	25,619	25,979	26,182	203	*0.8%*	9,086	9,134	9,164	9,309	9,402	93	*1.0%*
City of Ottawa	**968,580**	**979,173**	**991,426**	**1,006,211**	**1,022,604**	**16,393**	**1.6%**	**409,645**	**416,219**	**422,326**	**429,080**	**435,747**	**6,667**	**1.6%**
Downtown*	102,692	103,924	104,558	104,988	103,556	-1,432	*-1.4%*	56,390	57,423	57,931	58,211	57,244	-967	*-1.7%*
Other Inside Greenbelt	429,836	430,840	431,594	434,319	436,090	1,771	*0.4%*	191,799	193,548	194,486	196,163	197,253	1,090	*0.6%*
Total Inside GB	*532,528*	*534,764*	*536,152*	*539,307*	*539,646*	339	*0.1%*	*248,189*	*250,971*	*252,417*	*254,374*	*254,497*	123	*0.0%*
Urban Areas Outside GB	341,745	349,525	359,751	370,393	385,093	14,700	*4.0%*	128,033	131,545	135,896	140,232	146,154	5,922	*4.2%*
Rural	94,307	94,884	95,523	96,511	97,865	1,354	*1.4%*	33,423	33,703	34,013	34,474	35,096	622	*1.8%*
Downtown*	10.6%	10.6%	10.5%	10.4%	10.1%			13.8%	13.8%	13.7%	13.6%	13.1%		
Other Inside Greenbelt	44.4%	44.0%	43.5%	43.2%	42.6%			46.8%	46.5%	46.1%	45.7%	45.3%		
Total Inside GB	55.0%	54.6%	54.1%	53.6%	52.8%			60.6%	60.3%	59.8%	59.3%	58.4%		
Urban Areas Outside GB	35.3%	35.7%	36.3%	36.8%	37.7%			31.3%	31.6%	32.2%	32.7%	33.5%		
Rural	9.7%	9.7%	9.6%	9.6%	9.6%			8.2%	8.1%	8.1%	8.0%	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

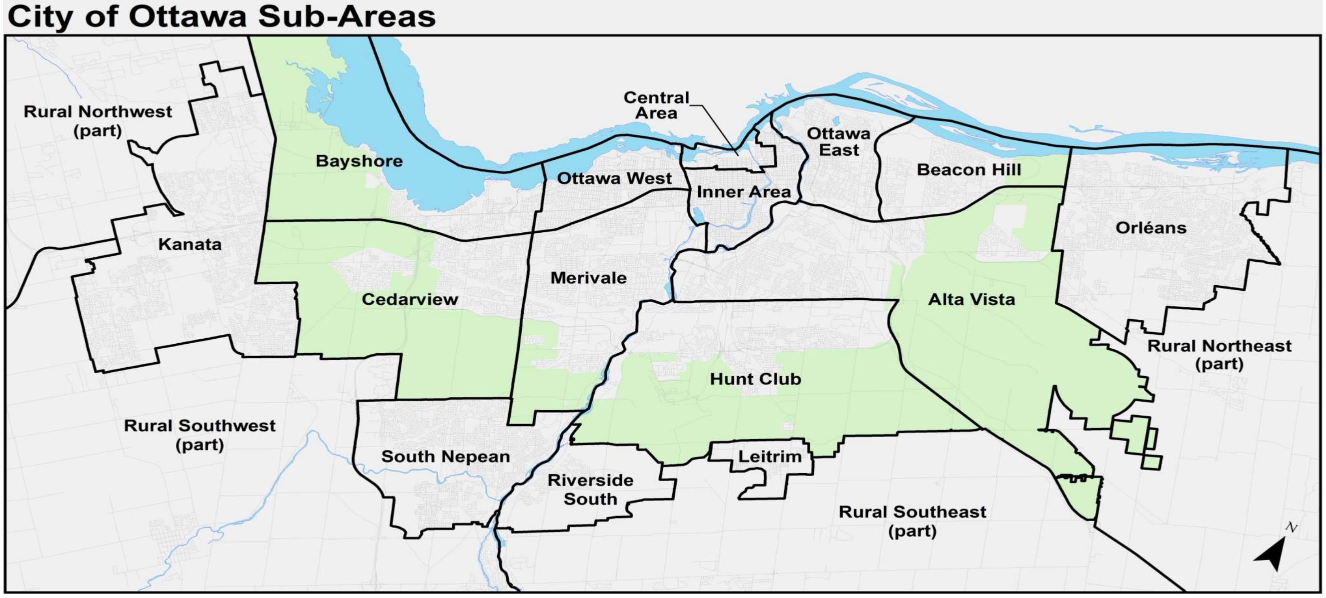


TABLE 4
NET MIGRATION TO THE CITY OF OTTAWA, 2014-2019

BY AGE GROUP

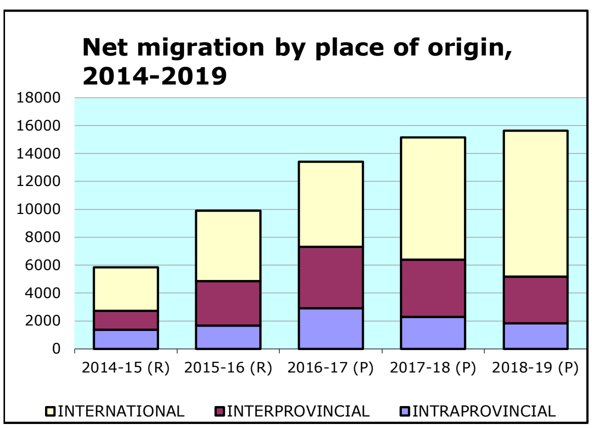
YEAR	AGE GROUP 0 - 17	18 - 24	25 - 44	45 - 64	65+	TOTAL
2014-15 (R)	1,230	1,688	3,237	-415	87	5,827
2015-16 (R)	2,467	2,210	4,621	110	480	9,888
2016-17 (P)	3,295	2,542	6,390	585	603	13,415
2017-18 (P)	3,425	3,154	7,769	310	510	15,168
2018-19 (P)	**3,617**	**3,025**	**8,442**	**542**	**7**	**15,633**
5-year total	**14,034**	**12,619**	**30,459**	**1,132**	**1,687**	**59,931**
5 year %	**23.4%**	**21.1%**	**50.8%**	**1.9%**	**2.8%**	**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				
2014-15 (R)	15,004	11,132	5,969	32,105
2015-16 (R)	15,645	12,104	7,958	35,707
2016-17 (P)	15,774	12,658	8,761	37,193
2017-18 (P)	16,510	12,705	11,654	40,869
2018-19 (P)	**16,274**	**12,203**	**13,371**	**41,848**
Out-Migrants				
2014-15 (R)	13,649	9,756	2,873	26,278
2015-16 (R)	13,985	8,922	2,912	25,819
2016-17 (P)	12,882	8,246	2,650	23,778
2017-18 (P)	14,240	8,587	2,874	25,701
2018-19 (P)	**14,438**	**8,869**	**2,908**	**26,215**
Net Migration				
2014-15 (R)	1,355	1,376	3,096	5,827
2015-16 (R)	1,660	3,182	5,046	9,888
2016-17 (P)	2,892	4,412	6,111	13,415
2017-18 (P)	2,270	4,118	8,780	15,168
2018-19 (P)	**1,836**	**3,334**	**10,463**	**15,633**

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



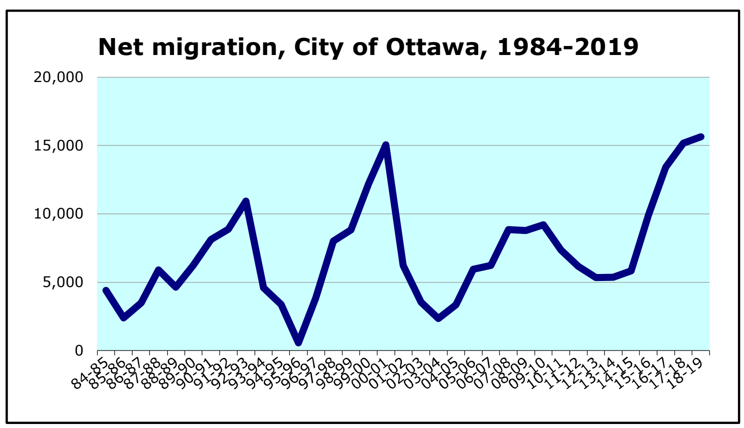


TABLE 5
NET MIGRATION IN-FLOWS AND OUT-FLOWS, CITY OF OTTAWA

2009-2019			
IN-FLOWS*		**OUT-FLOWS***	
Greater Montréal	9,783	OMATO and QMAG	-8,986
Rest of Ontario***	8,715	British Columbia	-2,048
Northern Ontario	5,631	Alberta	-592
Greater Toronto Area	5,343		
Atlantic provinces	4,834		
Eastern Ontario	4,618		
Gatineau	3,951		
Manitoba & Saskatchewan	3,387		
Rest of Québec**	2,480		
Canadian North	489		
TOTAL IN-FLOWS	**49,231**	**TOTAL OUT-FLOWS**	**-11,626**
		Net Canadian Migration 2008-2018	37,605
		Net International Migration	**48,876**
		Net Migration 2008-2018	**86,481**

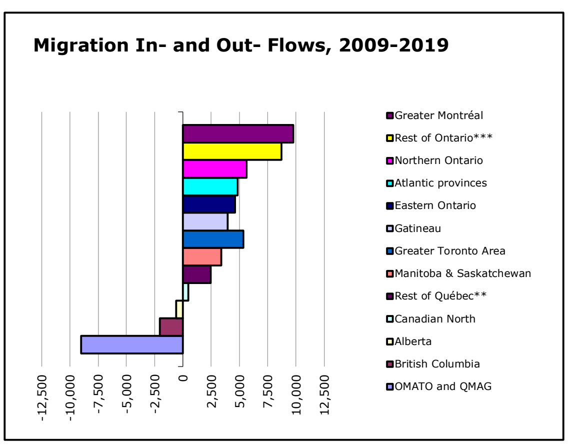
2018-2019			
IN-FLOWS*		**OUT-FLOWS***	
Greater Toronto Area	2,168	OMATO and QMAG	-2,789
Rest of Ontario***	1,184	British Columbia	-173
Greater Montréal	1,064		
Manitoba & Saskatchewan	813		
Atlantic provinces	562		
Northern Ontario	538		
Eastern Ontario	534		
Alberta	510		
Gatineau	475		
Rest of Québec**	171		
Canadian North	113		
TOTAL IN-FLOWS	**8,132**	**TOTAL OUT-FLOWS**	**-2,962**
		Net Canadian Migration 2017-2018	5,170
		Net International Migration ***(Table 4)***	**8,780**
		Net Migration 2016-2017	**13,950**

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



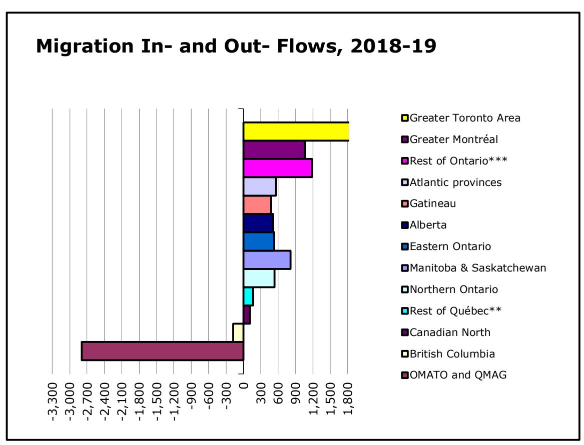


TABLE 6
MIGRATION BETWEEN OTTAWA AND ADJACENT MUNICIPALITIES, 2014-19

	2014-2015 (R)	2015- (R)	2016-2017 (R)	2017-2018 (P)	2018- (P)	TOTAL 2014-2019
PRESCOTT-RUSSELL TO OTTAWA	*1,789*	*1,795*	*1,622*	*1,755*	*1,558*	*8,519*
OTTAWA TO PRESCOTT-RUSSELL	*1,828*	*1,654*	*1,695*	*2,121*	*2,438*	*9,736*
PRESCOTT-RUSSELL - NET MIGRATION	**-39**	**141**	**-73**	**-366**	**-880**	**-337**
*S.D.&G.** TO OTTAWA*	*889*	*925*	*824*	*866*	*680*	*4,184*
OTTAWA TO S.D.&G.	*697*	*663*	*716*	*770*	*805*	*3,651*
S.D.&G. - NET MIGRATION	**192**	**262**	**108**	**96**	**-125**	**658**
LEEDS-GRENVILLE TO OTTAWA	*878*	*862*	*827*	*873*	*819*	*4,259*
OTTAWA TO LEEDS-GRENVILLE	*1,084*	*1,052*	*1,074*	*1,277*	*1,242*	*5,729*
LEEDS-GRENVILLE - NET MIGRATION	**-206**	**-190**	**-247**	**-404**	**-423**	**-1,047**
LANARK TO OTTAWA	*1,002*	*1,038*	*947*	*1,001*	*967*	*4,955*
OTTAWA TO LANARK	*1,326*	*1,530*	*1,340*	*1,638*	*1,846*	*7,680*
LANARK - NET MIGRATION	**-324**	**-492**	**-393**	**-637**	**-879**	**-1,846**
RENFREW TO OTTAWA	*1,078*	*1,036*	*924*	*976*	*884*	*4,898*
OTTAWA TO RENFREW	*979*	*916*	*967*	*1,088*	*1,165*	*5,115*
RENFREW - NET MIGRATION	**99**	**120**	**-43**	**-112**	**-281**	**64**
GATINEAU TO OTTAWA*	*2,448*	*2,320*	*2,538*	*2,431*	*2,354*	*12,091*
OTTAWA TO GATINEAU	*1,729*	*1,848*	*1,679*	*1,773*	*1,879*	*8,908*
GATINEAU - NET MIGRATION	**719**	**472**	**859**	**658**	**475**	**2,708**
LES-COLLINES-DE-L'OUTAOUAIS TO OTTAWA	*268*	*247*	*244*	*223*	*167*	*1,149*
OTTAWA TO LES-COLLINES-DE-L'OUTAOUAIS	*233*	*256*	*273*	*244*	*336*	*1,342*
LES-COLLINES - NET MIGRATION	**35**	**-9**	**-29**	**-21**	**-169**	**-24**
PAPINEAU TO OTTAWA	*18*	*15*	*17*	*25*	*10*	*85*
OTTAWA TO PAPINEAU	*23*	*28*	*16*	*22*	*16*	*105*
PAPINEAU - NET MIGRATION	**-5**	**-13**	**1**	**3**	**-6**	**-14**
LA-VALLÉE-DE-LA-GATINEAU TO OTTAWA	*20*	*29*	*34*	*10*	*22*	*115*
OTTAWA TO LA-VALLÉE-DE-LA-GATINEAU	*40*	*18*	*25*	*31*	*30*	*144*
LA-VALLÉE - NET MIGRATION	**-20**	**11**	**9**	**-21**	**-8**	**-21**
PONTIAC TO OTTAWA	*39*	*41*	*38*	*58*	*31*	*207*
OTTAWA TO PONTIAC	*41*	*28*	*33*	*49*	*49*	*200*
PONTIAC - NET MIGRATION	**-2**	**13**	**5**	**9**	**-18**	**25**
TOTAL	**449**	**315**	**197**	**-795**	**-2,314**	**166**
Gatineau	**719**	**472**	**859**	**658**	**475**	**2,708**
OMATO Counties*	**-278**	**-159**	**-648**	**-1,423**	**-2,588**	**-2,508**
QMAG Counties*	**8**	**2**	**-14**	**-30**	**-201**	**-34**

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	2015-2016 (F)	2016-2017 (F)	2017- (F)	2018-2019 (U)	2019-2020 (P)	% chg. 18-19/19-	2015-2020 TOTAL
Toronto	62,814	61,201	91,210	96,835	65,926	-31.9%	377,986
Montréal	24,059	37,863	57,499	54,368	21,674	-60.1%	195,463
Vancouver	20,274	26,422	33,990	40,512	23,717	-41.5%	144,915
Calgary	13,313	9,045	14,735	20,769	19,899	-4.2%	77,761
Edmonton	19,087	15,596	16,454	18,688	17,701	-5.3%	87,526
Ottawa-Gatineau	**16,124**	**21,881**	**21,459**	**22,894**	**19,590**	**-14.4%**	**101,948**
TOTAL 6 CMA's	**155,671**	**172,008**	**235,347**	**254,066**	**168,507**	**-33.7%**	**985,599**
Ottawa-Gatineau % of 6 largest CMA's	10.4%	12.7%	9.1%	9.0%	11.6%	42.9%	10.3%

Source: Statistics Canada, Table 17-10-0136-01

(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 2018-2019. The second dataset is CANSIM Table 17-10-0136-01, which is used for Table 7 and has data up to 2019-2020.

TABLE 8
LABOUR FORCE INDICATORS, OTTAWA*, 2000-2020

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	532.4	38.0	243.0	70.2%	6.6%	7.3%	6.9%
2015	825.3	566.9	528.6	35.8	258.3	68.7%	6.3%	6.8%	6.9%
2016	836.8	580.0	542.5	36.6	256.7	69.3%	6.3%	6.5%	7.0%
2017	850.7	578.9	547.9	32.2	271.8	68.0%	5.6%	6.0%	6.3%
2018	869.6	584.6	558.4	27.0	285.0	67.2%	4.6%	5.6%	5.8%
2019	890.4	619.5	588.0	29.4	270.9	69.6%	4.7%	5.6%	5.7%
2020	**909.6**	**601.3**	**557.1**	**44.2**	**308.3**	**66.1%**	**7.4%**	**9.6%**	**9.5%**
% change:									
2019-20	2.2	-2.9	-5.3	50.3	13.8	-3.5%	2.7%	4.0%	3.8%
2016-20	8.7	3.7	2.7	20.8	20.1	-3.2%	1.1%	3.1%	2.5%

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),

2018-19: Statistics Canada, Labour Force Survey, Table 14-10-0096-01 and Table 14-10-0090-01

2020: Statistics Canada, Labour Force Survey, 14-10-0393-01 and 14-10-0385-01 (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

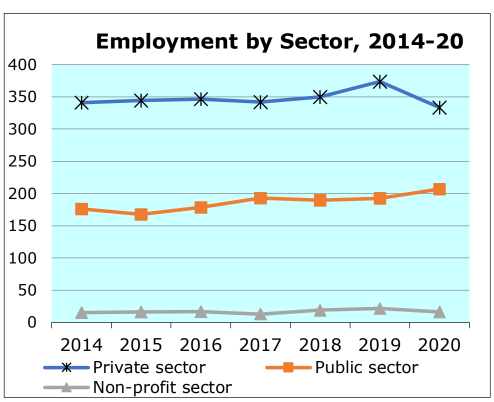
EMPLOYMENT BY SECTOR (000's), OTTAWA CMA, 2014-2020

By Major Clusters	2014	2015	2016	2017	2018	2019	2020
Industrial & Resource Cluster	**40.5**	**49.8**	**45.5**	**48.2**	**52.5**	**49.7**	**46.8**
Primary	1.7	0.0	1.8	0.0	1.9	2.4	2.4
Utilities	1.6	0.0	0.0	0.0	1.9	2.2	0.0
Construction	19.6	33.2	26.7	30.5	30.8	28.3	28.5
Manufacturing	17.6	16.6	17.0	17.7	17.9	16.8	15.9
Retail Cluster	**82.8**	**81.7**	**81.7**	**83.8**	**90.0**	**89.3**	**87.0**
Wholesale Trade	16.2	12.0	16.3	13.3	14.6	13.6	12.4
Retail Trade	51.9	54.2	48.4	54.4	54.1	55.8	55.0
Transportation and Warehousing	14.7	15.5	17.0	16.1	21.3	19.9	19.6
Office Cluster	**70.2**	**71.5**	**71.4**	**69.8**	**72.0**	**79.0**	**71.8**
Administrative and Support Services	21.1	24.6	25.0	18.0	19.3	20.7	19.2
F.I.R.E.*	25.4	27.5	26.0	28.8	26.8	29.2	26.9
Other Services	23.7	19.4	20.4	23.0	25.9	29.1	25.7
Culture and Tourism Cluster	**62.7**	**58.3**	**56.9**	**50.3**	**55.0**	**58.7**	**45.4**
Accommodation and Food Services	35.9	32.9	29.9	27.6	30.2	34.0	24.6
Information and Cultural Industries	14.4	12.7	12.3	10.9	10.8	12.4	12.8
Arts, Entertainment and Recreation	12.4	12.7	14.7	11.8	14.0	12.3	8.0
Knowledge Cluster	**167.3**	**164.0**	**182.1**	**171.0**	**176.3**	**187.7**	**173.8**
Health and Education	106.2	109.6	120.0	110.4	115.5	116.2	115.0
Professional, Sci. & Tech. Services	61.1	54.4	62.1	60.6	60.8	71.5	58.8
Government Cluster	**108.1**	**100.5**	**104.1**	**122.7**	**111.8**	**123.9**	**131.5**
Public Administration	108.1	100.5	104.1	122.7	111.8	123.9	131.5
Total Employed Residents	**532.4**	**528.6**	**542.5**	**547.9**	**558.4**	**588.0**	**557.1**
By Primary, Secondary and Tertiary Sector							
Primary	1.7	0.0	1.8	0.0	1.9	2.4	2.4
Secondary	38.8	49.8	43.7	48.2	50.6	47.3	44.4
Tertiary	491.9	478.8	497.0	499.7	505.9	538.3	510.3
Total	**532.4**	**528.6**	**542.5**	**547.9**	**558.4**	**588.0**	**557.1**
By Type of Sector							
Private sector	341.0	344.6	346.8	342.0	349.8	373.8	333.7
Public sector	176.0	167.6	178.7	192.9	189.6	192.5	206.9
Non-profit sector	15.4	16.4	17.0	13.0	19.0	21.7	16.5
Total	**532.4**	**528.6**	**542.5**	**547.9**	**558.4**	**588.0**	**557.1**
% private	64.0%	65.2%	63.9%	62.4%	62.6%	63.6%	59.9%
By High-Tech Cluster							
Telecommunications equipment	0.0	1.6	0.0	2.2	0.0	0.0	0.0
Microelectronics	1.5	1.6	0.0	2.2	0.0	0.0	0.0
Software and Telecommunications	50.2	40.1	43.0	47.2	45.4	51.6	47.3
Health Sciences	1.5	1.9	1.8	2.3	2.7	1.5	2.1
Tourism	48.3	45.6	44.6	39.4	44.2	46.3	32.6
Total, all clusters	**101.5**	**90.8**	**89.4**	**93.3**	**92.3**	**99.4**	**82.0**
Advanced Technology	***53.2***	***45.2***	***44.8***	***53.9***	***48.1***	***53.1***	***49.4***

Source: Statistics Canada, Labour Force Survey, custom tabulations

Figures may not add due to rounding & data suppression by Statistics Canada Note: "0.0" indicates estimate is less than 1,500 s than 1,500

* F.I.R.E. = Finance, Insurance and Real Estate (see footnote to Table 8 for definition of Ottawa CMA))ttawa CMA)



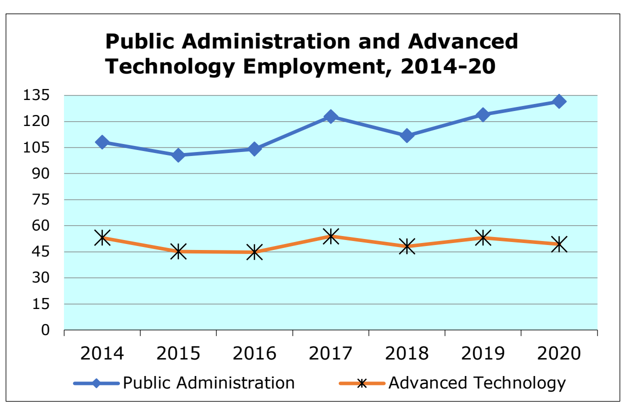
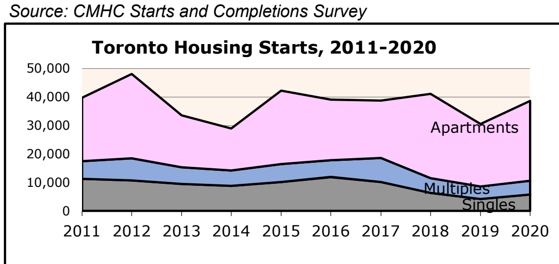


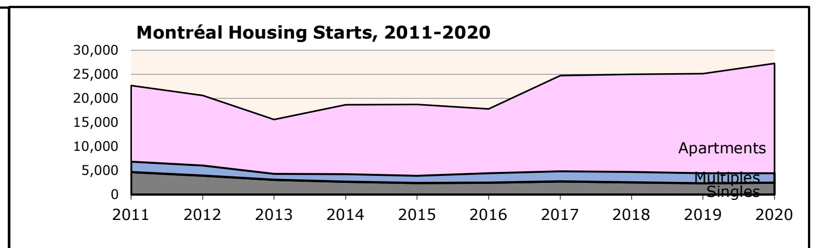
TABLE 10
HOUSING STARTS IN CANADA'S SIX LARGEST CMA's, 2011-2020

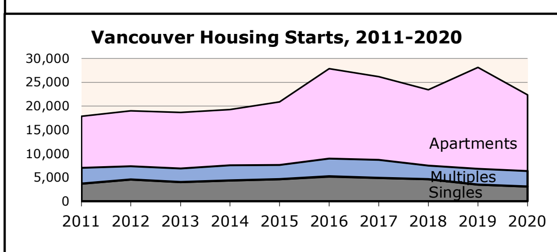
CMA	Dwg. Type	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% change 2019-20	% change 2011-20
Toronto	Singles	11,247	10,699	9,421	8,830	10,223	11,884	10,172	6,405	4,209	5,848	38.9%	-48.0%
	Multiples	6,241	7,789	5,977	5,391	6,239	5,823	8,392	5,063	4,410	4,676	6.0%	-25.1%
	Apartments	22,257	29,617	18,149	14,708	25,825	21,320	20,174	29,639	21,843	28,063	28.5%	26.1%
	Total	**39,745**	**48,105**	**33,547**	**28,929**	**42,287**	**39,027**	**38,738**	**41,107**	**30,462**	**38,587**	26.7%	-2.9%
Vancouver	Singles	3,686	4,516	4,004	4,374	4,622	5,169	4,911	4,592	3,426	3,085	-10.0%	-16.3%
	Multiples	3,338	2,869	2,883	3,227	2,998	3,828	3,795	2,924	3,394	3,264	-3.8%	-2.2%
	Apartments	10,843	11,642	11,809	11,611	13,243	18,917	17,498	15,888	21,321	16,022	-24.9%	47.8%
	Total	**17,867**	**19,027**	**18,696**	**19,212**	**20,863**	**27,914**	**26,204**	**23,404**	**28,141**	**22,371**	-20.5%	25.2%
Montréal	Singles	4,653	3,959	3,039	2,677	2,402	2,499	2,771	2,549	2,369	2,493	5.2%	-46.4%
	Multiples	2,233	2,084	1,289	1,608	1,511	2,018	2,130	2,182	2,104	1,953	-7.2%	-12.5%
	Apartments	15,833	14,548	11,304	14,387	14,831	13,317	19,855	20,269	20,639	22,828	10.6%	44.2%
	Total	**22,719**	**20,591**	**15,632**	**18,672**	**18,744**	**17,834**	**24,756**	**25,000**	**25,112**	**27,274**	8.6%	20.0%
Edmonton	Singles	5,017	5,658	5,970	6,832	5,683	4,335	5,028	4,814	4,140	4,138	0.0%	-17.5%
	Multiples	2,110	3,252	3,555	3,880	4,442	3,278	3,273	3,134	2,698	2,507	-7.1%	18.8%
	Apartments	2,205	3,927	5,164	3,160	6,925	2,423	3,134	2,090	3,882	4,867	25.4%	120.7%
	Total	**9,332**	**12,837**	**14,689**	**13,872**	**17,050**	**10,036**	**11,435**	**10,038**	**10,720**	**11,512**	7.4%	23.4%
Calgary	Singles	5,084	5,961	6,402	6,494	4,138	3,489	4,423	3,791	3,535	3,487	-1.4%	-31.4%
	Multiples	2,102	2,886	3,207	3,903	3,150	2,055	2,885	2,777	2,991	2,449	-18.1%	16.5%
	Apartments	2,106	3,994	2,975	6,734	5,745	3,701	4,226	4,403	5,383	3,299	-38.7%	56.6%
	Total	**9,292**	**12,841**	**12,584**	**17,131**	**13,033**	**9,245**	**11,534**	**10,971**	**11,909**	**9,235**	-22.5%	-0.6%
Ottawa-Gatineau	Singles	2,918	2,280	2,262	2,254	2,414	2,365	2,703	3,131	3,017	3,411	13.1%	16.9%
	Multiples	2,846	2,307	2,424	2,450	1,961	2,364	2,508	2,636	3,308	3,724	12.6%	30.9%
	Apartments	2,450	4,192	3,798	2,961	2,181	2,388	4,116	3,701	4,878	5,899	20.9%	140.8%
	Total	**8,214**	**8,779**	**8,484**	**7,665**	**6,556**	**7,117**	**9,327**	**9,468**	**11,203**	**13,034**	16.3%	58.7%

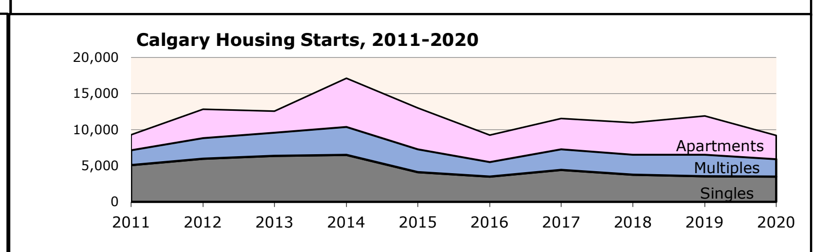
Multiples = Semi-detached and Row units

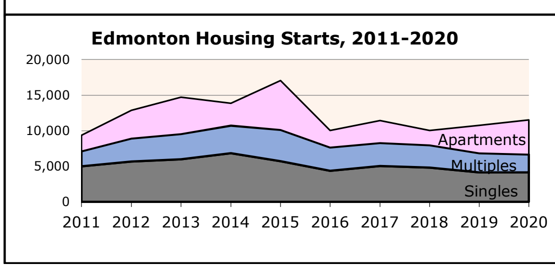
Source: CMHC Starts and Completions Survey











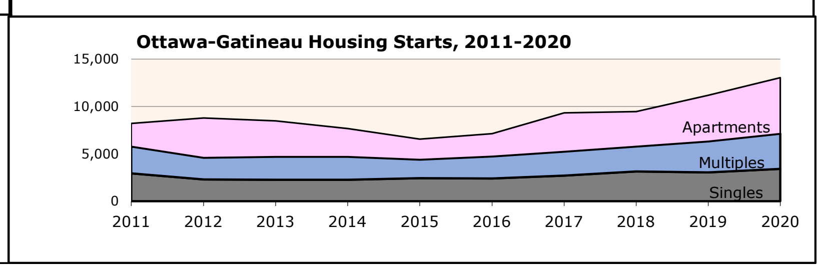


TABLE 11
NEW HOUSING IN MUNICIPALITIES IN GREATER OTTAWA-GATINEAU AREA, 2012-20

	2012	2013	2014	2015	2016	2017	2018	2019	2020	% chng. 2019-20
OTTAWA	**5,730**	**6,284**	**5,537**	**4,696**	**5,019**	**6,849**	**6,950**	**7,069**	**9,239**	**30.7%**
Ottawa, Vanier, Rockcliffe (former)	2,057	2,262	1,244	1,406	979	2,363	1,971	1,488	3,220	116.4%
Nepean (former)	1,093	965	1,292	900	1,116	958	806	1,341	1,184	-11.7%
Gloucester (former)	660	959	797	770	736	1,092	1,173	1,259	1,905	51.3%
Kanata (former)	761	1,124	1,225	860	944	649	902	734	926	26.2%
Cumberland (former)	685	440	549	311	611	760	731	612	631	3.1%
Goulbourn (former)	214	253	75	315	413	811	1,079	1,084	983	-9.3%
Osgoode (former)	89	73	104	60	69	57	85	71	83	16.9%
Rideau (former)	23	37	36	33	102	263	293	104	204	96.2%
West Carleton (former)	148	171	215	41	49	56	107	129	103	-20.2%
Inside the Greenbelt	2,224	2,336	1,488	1,447	1,052	2,776	2,069	1,709	3,246	89.9%
Outside the Greenbelt	3,506	3,948	4,049	3,249	3,967	4,073	4,881	5,360	5,993	11.8%
Prescott & Russell (part)	**502**	**392**	**299**	**335**	**391**	**560**	**483**	**639**	**676**	**5.8%**
Alfred and Plantagenet, TP†	91	55	29	28	7	35	17	0	0	0.0%
Casselman, Vlg.†	2	2	1	5	20	14	27	0	0	0.0%
Clarence-Rockland, C (part of ON CMA)	190	153	112	93	112	230	181	192	266	38.5%
Russell, TP (part of ON CMA)	100	123	113	183	167	218	211	442	319	-27.8%
The Nation Municipality	119	59	44	26	85	63	47	5	91	1720.0%
Leeds & Grenville (part)	**262**	**116**	**103**	**93**	**169**	**175**	**218**	**106**	**159**	**50.0%**
Merrickville-Wolford, Vlg.*	13	11	1	6	19	15	21	27	33	22.2%
North Grenville, TP	249	105	102	87	150	160	197	79	126	59.5%
Stormont, Dundas & Glengarry (part)	**26**	**47**	**24**	**23**	**24**	**31**	**42**	**2**	**0**	**-100.0%**
North Dundas, TP†	26	47	24	23	24	31	42	2	0	-100.0%
Lanark (part)	**220**	**260**	**230**	**294**	**275**	**370**	**678**	**480**	**1,049**	**118.5%**
Beckwith, TP	64	71	66	69	71	79	109	85	166	95.3%
Carleton Place, Tn.	77	51	66	105	60	123	380	337	644	91.1%
Mississippi Mills, Tn.	60	115	68	107	125	151	189	58	239	312.1%
Montague, TP†	19	23	30	13	19	17	0	0	0	0.0%
Renfrew (part)	**114**	**188**	**82**	**95**	**72**	**92**	**81**	**154**	**286**	**85.7%**
Arnprior, Tn.	73	173	66	76	58	70	66	119	206	73.1%
McNab/Braeside, TP	41	15	16	19	14	22	15	35	80	128.6%
GATINEAU	**2,354**	**1,571**	**1,572**	**1,312**	**1,390**	**1,610**	**1,630**	**3,186**	**2,772**	**-13.0%**
Hull (former)	545	275	246	106	263	247	325	813	441	-45.8%
Aylmer (former)	808	745	768	581	802	891	930	1,837	1,252	-31.8%
Gatineau (former)	728	467	520	464	325	377	275	396	833	110.4%
Buckingham (former)	174	42	22	127	0	39	72	89	155	74.2%
Masson-Angers (former)	99	42	16	34	0	56	28	51	91	78.4%
Qué. part CMA Outside of Gatineau	**502**	**423**	**331**	**272**	**346**	**368**	**399**	**375**	**558**	**48.8%**
Cantley	107	96	87	60	64	70	65	44	72	63.6%
Chelsea	21	23	21	19	33	53	62	126	183	45.2%
La Pêche	62	31	40	35	48	60	62	41	79	92.7%
L'Ange-Gardien	56	36	45	35	39	37	35	35	85	142.9%
Pontiac	36	16	24	19	15	16	20	11	0	-100.0%
Val-des-Monts	102	134	98	95	101	96	134	84	94	11.9%
Denholm	8	6	0	0	3	1	2	4	5	25.0%
N.-D.-de-la-Salette (part of CMA in 2011)	0	3	9	0	7	2	2	4	5	25.0%
Mayo (part of CMA in 2011)	6	4	1	7	8	5	5	3	5	66.7%
Bowman (part of CMA in 2011)	3	2	2	2	5	0	1	1	3	200.0%
Val-des-Bois (part of CMA in 2011)	4	4	4	0	0	0	0	3	0	-100.0%
Lochaber (part of CMA in 2016)	n.d.	n.d.	0	0	0	0	2	0	1	0.0%
Lochaber-Ouest (part of CMA in 2016)	17	8	n.d.	n.d.	4	3	0	7	4	-42.9%
Thurso (part of CMA in 2016)	80	60	n.d.	n.d.	19	25	9	12	22	83.3%
GREATER OTTAWA-GATINEAU AREA	**9,710**	**9,281**	**8,178**	**7,120**	**7,686**	**10,055**	**10,481**	**12,011**	**14,739**	**22.7%**
Ottawa-Gatineau CMA	**8,876**	**8,554**	**7,665**	**6,556**	**7,184**	**9,435**	**9,568**	**11,343**	**13,280**	**17.1%**
Ontario portion of the CMA	**6,020**	**6,560**	**5,762**	**4,972**	**5,448**	**7,457**	**7,539**	**7,782**	**9,950**	**27.9%**
Quebec portion of the CMA	**2,856**	**1,994**	**1,903**	**1,584**	**1,736**	**1,978**	**2,029**	**3,561**	**3,330**	**-6.5%**
OMATO	**1,124**	**1,003**	**738**	**840**	**931**	**1,228**	**1,502**	**1,381**	**2,170**	**57.1%**

*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 CMA. 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 2011.

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, 2016-2020

OP Target Area (Designation)	2016				2017				2018				2019				2020			
	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	211	**211**	0	0	7	**7**	0	0	72	**72**	0	0	276	**276**	0	-1	1410	**1,409**
Mixed-Use Centres																				
Inside Greenbelt	0	0	562	562	0	3	237	240	3	0	304	307	0	0	210	210	0	0	404	404
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	562	**562**	0	3	237	**240**	3	0	304	**307**	0	0	210	**210**	0	0	404	**404**
Town Centres	0	8	105	**113**	0	18	1	**19**	0	0	649	**649**	0	118	496	**614**	0	0	0	**0**
Mainstreets																				
Inside Greenbelt	1	6	281	288	2	0	362	364	0	0	663	663	1	0	1145	1,146	-1	0	1690	1,689
Outside Greenbelt	0	0	0	0	0	0	1	1	0	0	0	0	0	0	120	120	0	0	46	46
Total	1	6	281	**288**	2	0	363	**365**	0	0	663	**663**	1	0	1,265	**1,266**	-1	0	1,736	**1,735**
Rapid Transit Stations																				
Inside Greenbelt	47	5	1141	1,193	57	14	432	503	49	0	1494	1,543	50	5	1467	1,522	45	31	3755	3,831
Outside Greenbelt	0	58	184	242	0	22	34	56	0	4	560	564	0	8	499	507	0	0	4	4
Total	47	63	1,325	**1,435**	57	36	466	**559**	49	4	2,054	**2,107**	50	13	1,966	**2,029**	45	31	3,759	**3,835**
Future Rapid Transit Stations																				
Inside Greenbelt	4	0	3	7	6	3	4	13	0	0	0	0	0	0	0	0	0	0	0	0
Outside Greenbelt	0	8	0	8	0	18	1	19	2	0	2	4	0	0	0	0	0	0	0	0
Total	4	8	3	**15**	6	21	5	**32**	2	0	2	**4**	0	0	0	**0**	0	0	0	**0**
Total Units in Designated Areas**	52	77	1,609	**1,738**	65	57	826	**948**	51	4	2,362	**2,417**	51	131	2,852	**3,034**	45	31	4,853	**4,929**
Total New Units	2,153	1,773	2,922	6,848	2,231	1,917	2,277	6,425	2,573	1,807	4,451	8,831	2,635	2,618	4,666	9,919	2,777	2,491	6,373	11,641
Demolitions	223	84	114	421	238	32	60	330	283	77	90	450	248	214	31	493	250	3	49	302
Total Net New Units	1,930	1,689	2,808	6,427	1,993	1,885	2,217	6,095	2,290	1,730	4,361	8,381	2,387	2,404	4,635	9,426	2,527	2,488	6,324	**11,339**
% Share in Designated Areas	2.7%	4.6%	57.3%	**27.0%**	3.3%	3.0%	37.3%	**15.6%**	2.2%	0.2%	54.2%	**28.8%**	2.1%	5.4%	61.5%	**32.2%**	1.8%	1.2%	76.7%	**43.5%**
Total New Units Urban	1,905	1,757	2,913	6,575	1,919	1,911	2,265	6,095	2,156	1,792	4,381	8,329	2,114	2,562	4,651	9,327	2,162	2,395	6,346	10,903
Demolitions -Urban	176	84	114	374	201	32	60	293	207	77	90	374	203	214	31	448	203	3	49	255
Total Net New Units Urban	1,729	1,673	2,799	6,201	1,718	1,879	2,205	5,802	1,949	1,715	4,291	7,955	1,911	2,348	4,620	8,879	1,959	2,392	6,297	**10,648**
% Share of Urban in Designated Areas	3.0%	4.6%	57.5%	**28.0%**	3.8%	3.0%	37.5%	**16.3%**	2.6%	0.2%	55.0%	**30.4%**	2.7%	5.6%	61.7%	**34.2%**	2.3%	1.3%	77.1%	**46.3%**

** Removes double-counting of units that are included in more than one category.

SUMMARIES: 5- AND 10-YEAR

OP Target Areas: Last 5 Years	Sing+ Semi	Row	Apt.	Total
Central Area	0	-1	1,976	1,975
Mixed-Use Centres	3	3	1,717	1,723
Town Centres	0	144	1,251	1,395
Mainstreets	3	6	4,308	4,317
Rapid Transit Stations	248	147	9,570	9,965
Future Rapid Transit Stations	12	29	10	51
TOTAL Units in OP Target Areas**	**264**	**300**	**12,502**	**13,066**
TOTAL Urban Units - City of Ottawa	**9,266**	**10,007**	**20,212**	**39,485**
% Share in OP Target Areas	**2.8%**	**3.0%**	**61.9%**	**33.1%**

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

OP Target Areas: Last 10 Years	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	TOTAL
Central Area	258	374	338	237	311	211	7	72	276	1,409	3,493
Mixed-Use Centres	183	326	70	451	347	562	240	307	210	404	3,100
Town Centres	165	221	173	268	18	113	19	649	614	0	2,240
Mainstreets	467	287	270	677	935	288	365	663	1,266	1,735	6,953
Rapid Transit Stations	1,190	1,291	1,275	1,835	1,457	1,435	559	2,107	2,029	3,835	17,013
Future Rapid Transit Stations	81	224	12	27	64	15	32	4	0	0	459
TOTAL	**2,344**	**2,723**	**2,138**	**3,495**	**3,132**	**2,624**	**1,222**	**3,802**	**4,395**	**7,383**	**33,258**

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 13a: RESIDENTIAL INTENSIFICATION, 2016-2020

Ward		Intensification Units						2016-2020 Share
No.	Name	2016	2017	2018	2019	2020	2016-2020	of Intensification
12	Rideau-Vanier	287	277	317	666	1,775	3,322	16%
13	Rideau-Rockcliffe	340	181	281	433	279	1,514	7%
14	Somerset	481	47	409	720	1,296	2,953	15%
15	Kitchissippi	639	150	973	152	836	2,750	14%
17	Capital	151	191	782	439	343	1,906	9%
	TOTAL - CENTRAL	**1,898**	**846**	**2,762**	**2,410**	**4,529**	**12,445**	**61%**
7	Bay	16	43	54	212	160	485	2%
8	College	46	46	38	219	89	438	2%
9	Knoxdale-Merivale	9	147	47	12	23	238	1%
10	Gloucester-Southgate	20	16	56	57	60	209	1%
11	Beacon Hill-Cyrville	57	231	8	217	8	521	3%
16	River	54	62	74	164	833	1,187	6%
18	Alta Vista	26	220	30	311	33	620	3%
	TOTAL - INNER URBAN	**228**	**765**	**307**	**1,192**	**1,206**	**3,698**	**18%**
1	Orléans	23	38	208	187	11	467	2%
2	Innes	41	44	18	25	13	141	1%
3	Barrhaven	297	124	246	4	46	717	4%
4	Kanata North	105	144	318	138	199	904	4%
6	Stittsville	196	242	92	45	89	664	3%
19	Cumberland	0	30	149	1	5	185	1%
22	Gloucester-South Nepean	15	4	336	498	6	859	4%
23	Kanata South	65	28	6	153	16	268	1%
	TOTAL - SUBURBAN	**742**	**654**	**1,373**	**1,051**	**385**	**4,205**	**21%**
Intensification Units Inside Greenbelt		**2,126**	**1,611**	**3,069**	**3,602**	**5,735**	**16,143**	**79%**
Intensification Units Outside Greenbelt		**742**	**654**	**1,373**	**1,051**	**385**	**4,205**	**21%**
Total Intensification Units		**2,868**	**2,265**	**4,442**	**4,653**	**6,120**	**20,348**	**100%**
Total Urban Units		**6,304**	**5,799**	**8,051**	**9,052**	**10,689**	**39,895**	
% Intensification		**45.5%**	**39.1%**	**55.2%**	**51.4%**	**57.3%**	**51.0%**	
Official Plan 5 year Target		**38%**	**40%**	**40%**	**40%**	**40%**	**40%**	

Source: City of Ottawa, Building Permits

Table 13b
Growth Allocation Intensification, mid-2012 to mid-2020

	Mid-2012 to Mid-2013	Mid-2013 to Mid-2014	Mid-2014 to Mid-2015	Mid-2015 to Mid-2016	Mid-2016 to Mid-2017	Mid-2017 to Mid-2018	Mid-2018 to Mid-2019	Mid-2019 to Mid-2020
Built-up Area	2,810	2,832	3,264	2,211	2,544	3,416	3,035	6,816
Total Urban	5,654	5,535	6,030	4,869	6,196	6,908	6,831	11,747
Intensification (% of Urban)	49.7%	51.2%	54.1%	45.4%	41.1%	49.4%	44.4%	58.0%

Source: City of Ottawa, Building Permits

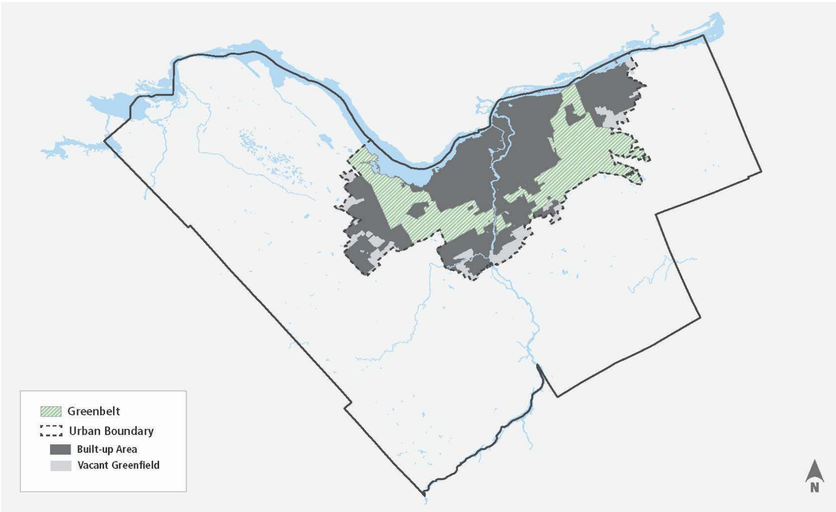


TABLE 14: NON-RESIDENTIAL INTENSIFICATION, 2016-2020

	Intensification Gross Floor Area (m^2)						2016-2020 Share of Intensification
Area	**2016**	**2017**	**2018**	**2019**	**2020**	**2016-2020**	
Inside Greenbelt	146,994	129,614	35,247	107,486	100,383	519,724	82%
Outside Greenbelt	44,474	14,529	9,904	25,863	19,062	113,832	18%
Total Urban Intensification GFA	191,468	144,143	45,151	133,349	119,445	633,556	
Total Urban GFA	248,944	170,033	65,015	191,020	440,635	1,115,647	
% Intensification of Urban GFA	**77%**	**85%**	**69%**	**70%**	**27%**	**57%**	
Transitway Stations	93,820	42,842	-8,075	39,981	48,344	216,912	
% Intensification at Transitway Stations of Urban GFA	**38%**	**25%**	**-12%**	**21%**	**11%**	**19%**	

Source: City of Ottawa, Building Permits

Notes:

1) Based on building permits issued from Jan 1 2016 to Dec 31 2020

2) Data are net of demolitions

TABLE 15
HOUSING STARTS BY TYPE, CITY OF OTTAWA, 2001-2020

YEAR	SINGLE	SEMI	ROW	APT.	TOTAL	SINGLE	SEMI	ROW	APT.
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%
2018	2,320	310	1,906	2,414	6,950	33.4%	4.5%	27.4%	34.7%
2019	2,211	200	2,376	2,282	7,069	31.3%	2.8%	33.6%	32.3%
2020	**2,439**	**251**	**2,733**	**3,816**	**9,239**	26.4%	2.7%	29.6%	41.3%

Source: CMHC, Starts and Completions Survey

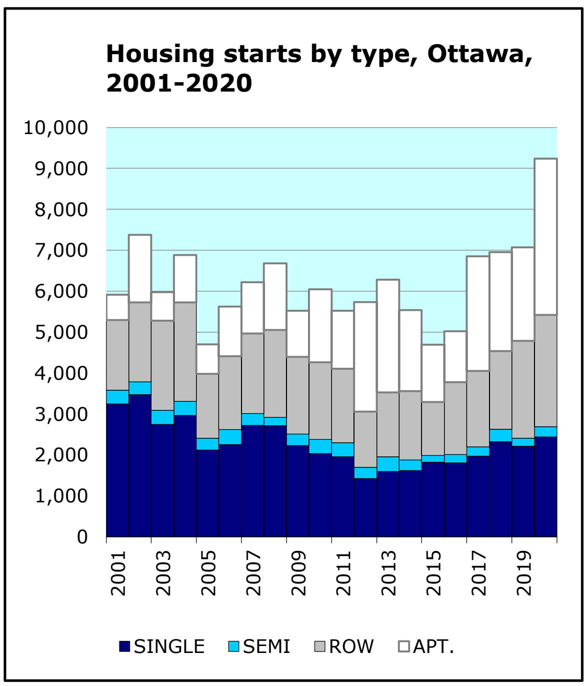


TABLE 16
HOUSING COMPLETIONS, CITY OF OTTAWA, 2012-2020, BY TYPE AND INTENDED MARKET

YEAR	FREEHOLD				CONDOMINIUM			PRIVATE RENTAL			ASSISTED RENTAL			ANNUAL
	SINGLE	SEMI	ROW	TOTAL	ROW	APT.	TOTAL	ROW	APT.	TOTAL	ROW	APT.	TOTAL	TOTAL
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	1,745	169	1,674	**3,558**	28	663	**691**	84	529	**676**	0	0	**0**	**4,955**
2018	2,179	252	1,841	**4,284**	18	965	**983**	43	855	**935**	0	0	0	**6,202**
2019	2,070	170	1,680	**3,920**	5	264	**269**	9	1,100	**1,134**	0	0	0	**5,323**
2020	**2,105**	**162**	**2,242**	**4,509**	**26**	**525**	**552**	**58**	**1,927**	**2,034**	**0**	**0**	**0**	**7,095**

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, 2007-2020

YEAR	NOMINAL AVERAGE PRICE OF ABSORBED NEW SINGLES	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
2007	$407,749	110.7	0.831	$490,625	0.8%	1.9%
2008	$417,683	113.1	0.849	$491,913	0.3%	2.2%
2009	$414,696	113.7	0.854	$485,818	-1.2%	0.5%
2010	$444,185	116.6	0.875	$507,422	4.4%	2.6%
2011	$492,380	120.1	0.902	$546,087	7.6%	3.0%
2012	$492,356	121.7	0.914	$538,881	-1.3%	1.3%
2013	$509,931	122.9	0.923	$552,667	2.6%	1.0%
2014	$523,271	125.3	0.941	$556,263	0.7%	2.0%
2015	$513,173	126.5	0.950	$540,353	-2.9%	1.0%
2016	$527,609	128.1	0.962	$548,615	1.5%	1.3%
2017	$536,000	129.9	0.975	$549,617	0.2%	1.4%
2018	$576,533	133.2	1.000	$576,533	4.9%	2.5%
2019	$606,665	135.9	1.020	$594,612	3.1%	2.0%
2020	**$645,646**	**137.8**	**1.035**	**$624,093**	**5.0%**	**1.4%**

Sources: CMHC, Housing Now Ottawa for 2005-2018; CMHC, Housing Market Information Portal for 2019; Statistics Canada, Table 18-10-0005-01, 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, 2013-20

CMA		2013	2014	2015	2016	2017	2018	2019	2020	2019-20 % change
Toronto	Sales	88,946	93,278	101,846	108,500	92,335	77,426	87,797	95,151	8.4%
	Avg Price	$524,089	$566,491	$622,046	$719,750	$822,603	$787,300	$819,382	$929,699	13.5%
Montréal	Sales	36,491	35,764	37,935	39,750	44,448	46,703	51,292	55,609	8.4%
	Avg Price	$323,967	$331,036	$337,487	$347,000	$364,510	$378,709	$395,513	$453,224	14.6%
Vancouver	Sales	28,985	33,693	43,145	40,000	35,994	24,619	25,351	30,944	22.1%
	Avg Price	$767,765	$812,653	$902,801	$1,007,000	$1,032,635	$1,050,885	$991,757	$1,071,317	8.0%
Ottawa-	Sales	17,594	17,429	18,373	19,000	21,292	21,977	23,774	24,895	4.7%
Gatineau	Avg Price	$335,595	$339,726	$345,413	$345,445	$365,258	$377,792	$404,550	$478,222	18.2%
Ottawa*	Sales	14,049	14,094	14,842	15,100	17,083	17,476	18,622	18,971	1.9%
	Avg Price	$358,876	$363,161	$369,477	$371,000	$392,474	$407,571	$441,693	$529,675	19.9%
Calgary	Sales	29,954	33,615	23,994	22,000	23,869	18,686	18,927	19,230	1.6%
	Avg Price	$437,036	$460,584	$453,814	$457,000	$466,259	$480,696	$460,083	$461,470	0.3%
Edmonton	Sales	19,552	19,857	18,227	16,700	16,441	15,519	16,657	17,036	2.3%
	Avg Price	$344,977	$362,657	$369,536	$365,000	$374,397	$369,607	$362,758	$365,638	0.8%

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.

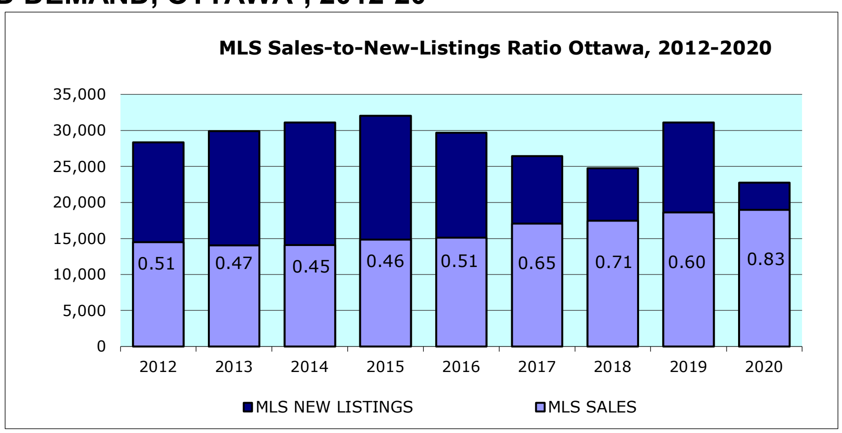
Historic sales and price data are subject to revision.

TABLE 19
RESALE MARKET - SUPPLY AND DEMAND, OTTAWA*, 2012-20

YEAR	MLS SALES	MLS NEW LISTINGS	SALES-TO-NEW-LISTINGS RATIO
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
2018	17,476	24,775	0.71
2019	18,622	31,105	0.60
2020	**18,971**	**22,738**	0.83

Source: 2018 and 2019 data from OREB.

NOTE: Due to listing cancellation and/or re-listing, MLS New Listings may not represent the acutal number of properties listed in a given year.



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.

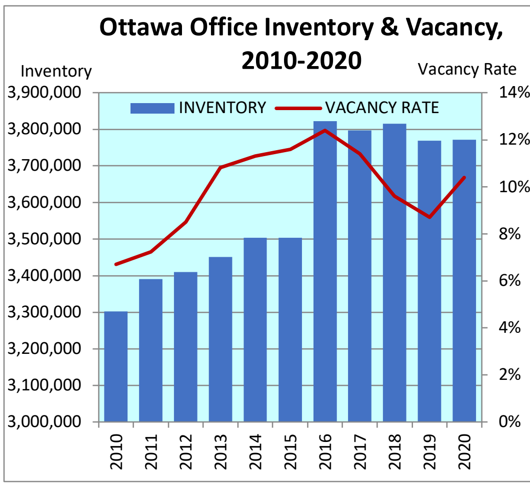
SUPPLY AND DEMAND

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, 2010-2020

YEAR	INVENTORY		VACANCY RATE	NET ABSORPTION		NET NEW SUPPLY	
	sq.ft.	sq.m.	(%)	sq.ft.	sq.m.	sq.ft.	sq.m.
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
2018	41,066,295	3,815,184	9.6%	758,855	70,500	0	0
2019	40,566,465	3,768,748	8.7%	-17,916	-1,664	n/a	n/a
2020	**40,600,423**	**3,771,903**	**10.4%**	**-219,296**	**-20,373**	**n/a**	**n/a**

Source: Colliers International - Ottawa Office Market Report, Q4 2020; Inventory numbers may not add due to ongoing revisions from Colliers
Note: Net new supply was not reported for 2019 or 2020



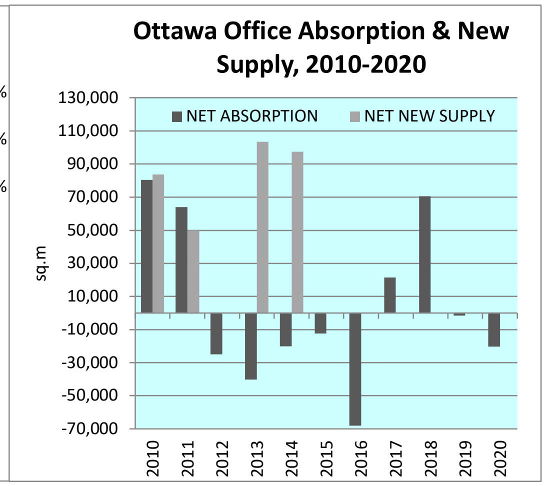
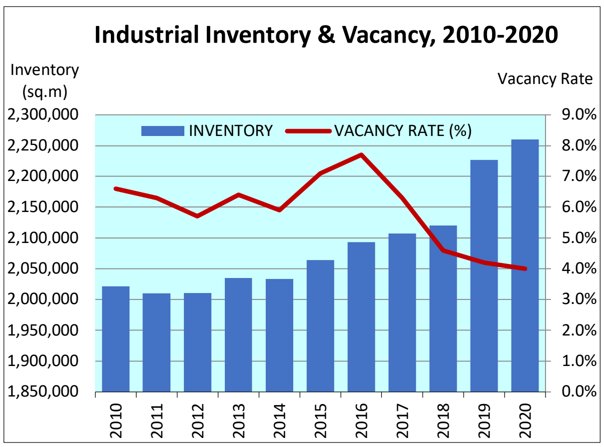


TABLE 21
INDUSTRIAL MARKET OVERVIEW, OTTAWA, 2010-2020

YEAR	INVENTORY		VACANCY	ABSORPTION		NEW SUPPLY	
	sq.ft.	sq.m.	RATE (%)	sq.ft.	sq.m.	sq.ft.	sq.m.
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
2018	22,819,764	2,120,025	4.6%	327,084	30,387	40,579	3,770
2019	23,971,102	2,226,988	4.2%	897,957	83,423	1,405,360	130,562
2020	**24,323,671**	**2,259,743**	**4.0%**	**-190,247**	**-17,675**	**0**	**0**

Source: Cushman & Wakefield, Marketbeat Industrial Q4 2020, Ottawa



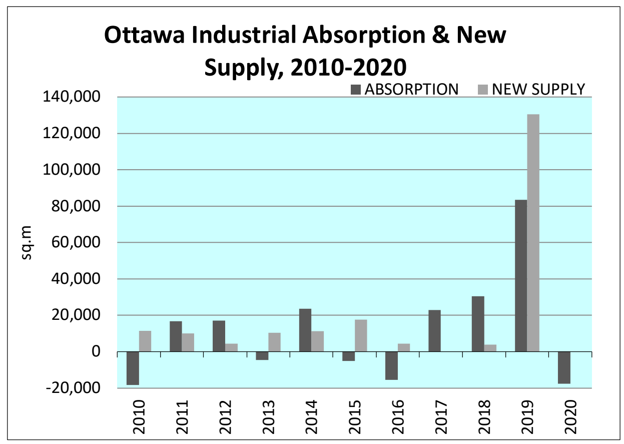


TABLE 22
OTTAWA RETAIL SPACE SUMMARY

FORMAT	Total Space, 2019			Total Space, 2020			Vacancy Rate	
	m^2	sq.ft.	Share	m^2	sq.ft.	Share	2019	2020
Power Centres	1,013,633	10,910,655	27.6%	1,018,668	10,964,855	27.4%	3.8%	4.9%
Other *	612,155	6,589,181	16.7%	628,035	6,760,111	16.9%	n/a	n/a
Traditional Mainstreets	485,822	5,229,340	13.2%	489,674	5,270,812	13.2%	n/a	n/a
Regional SC	399,753	4,302,905	10.9%	403,682	4,345,202	10.9%	3.8%	4.9%
Community SC	446,951	4,810,940	12.2%	459,420	4,945,161	12.4%	4.5%	5.2%
Neighbourhood SC	443,871	4,777,793	12.1%	443,871	4,777,793	11.9%	5.6%	6.0%
Mini-Plazas	225,627	2,428,626	6.1%	225,933	2,431,926	6.1%	5.6%	6.0%
Office Concourses	48,466	521,680	1.3%	48,466	521,680	1.3%	3.1%	1.8%
TOTAL	**3,676,277**	**39,571,120**	**100%**	**3,717,751**	**40,017,540**	**100%**	**4.5%**	**5.2%**

Source: City of Ottawa Building Permits; vacancy data from Cushman & Wakefield Ottawa Retail Report Q4 2020

* **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.