

# PLANNING THE NEXT GGH

RYERSON CENTRE FOR URBAN  
RESEARCH

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# The geography of jobs and economic activity

- 👉 Fundamental to the success of
  - regional and local planning
  - economic development
  - major investments
  - municipal finances
  - quality of life of GGH residents.

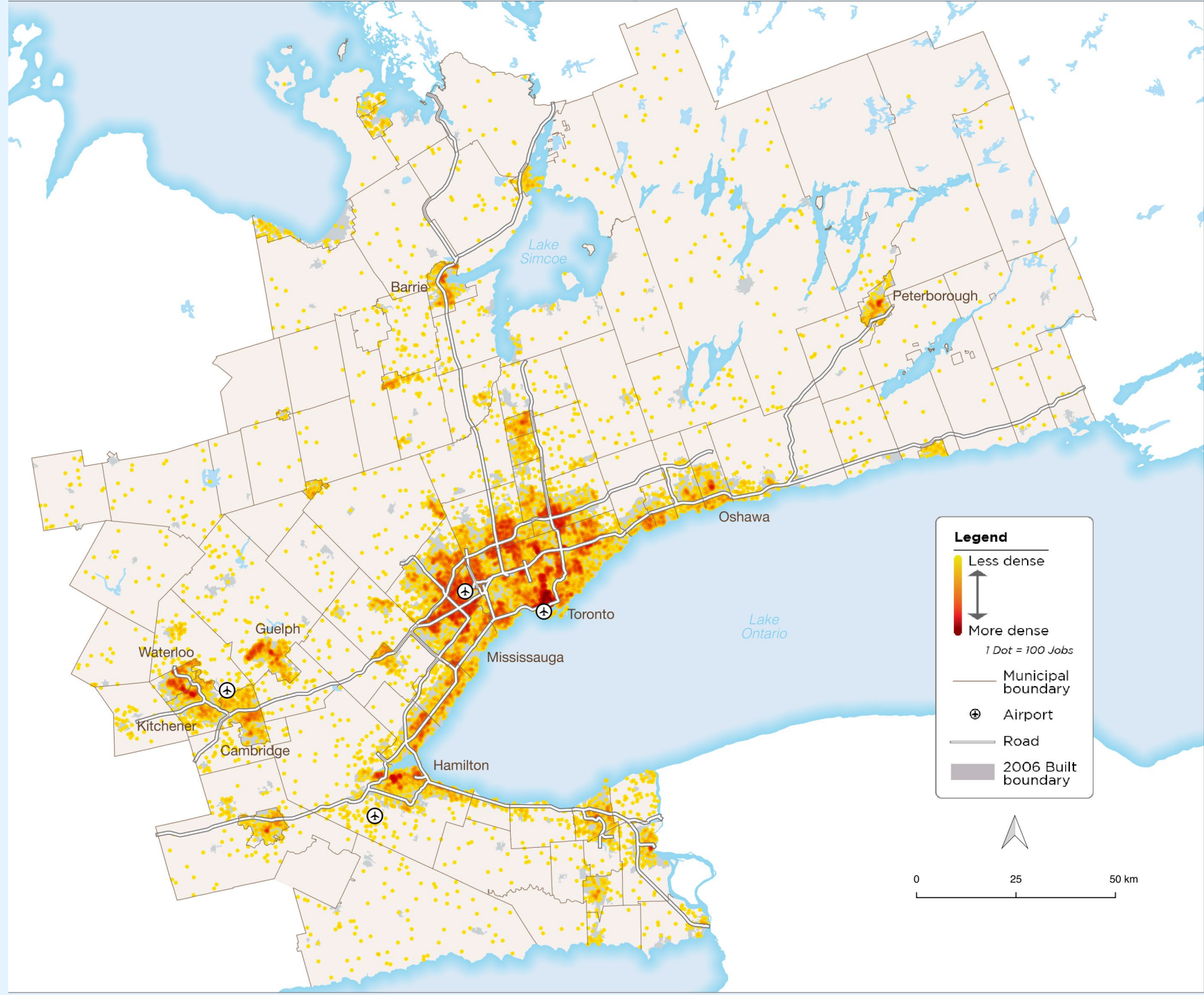
the shift  
archetypes  
uncertainty and disruption  
planning and policy  
implications

The shift



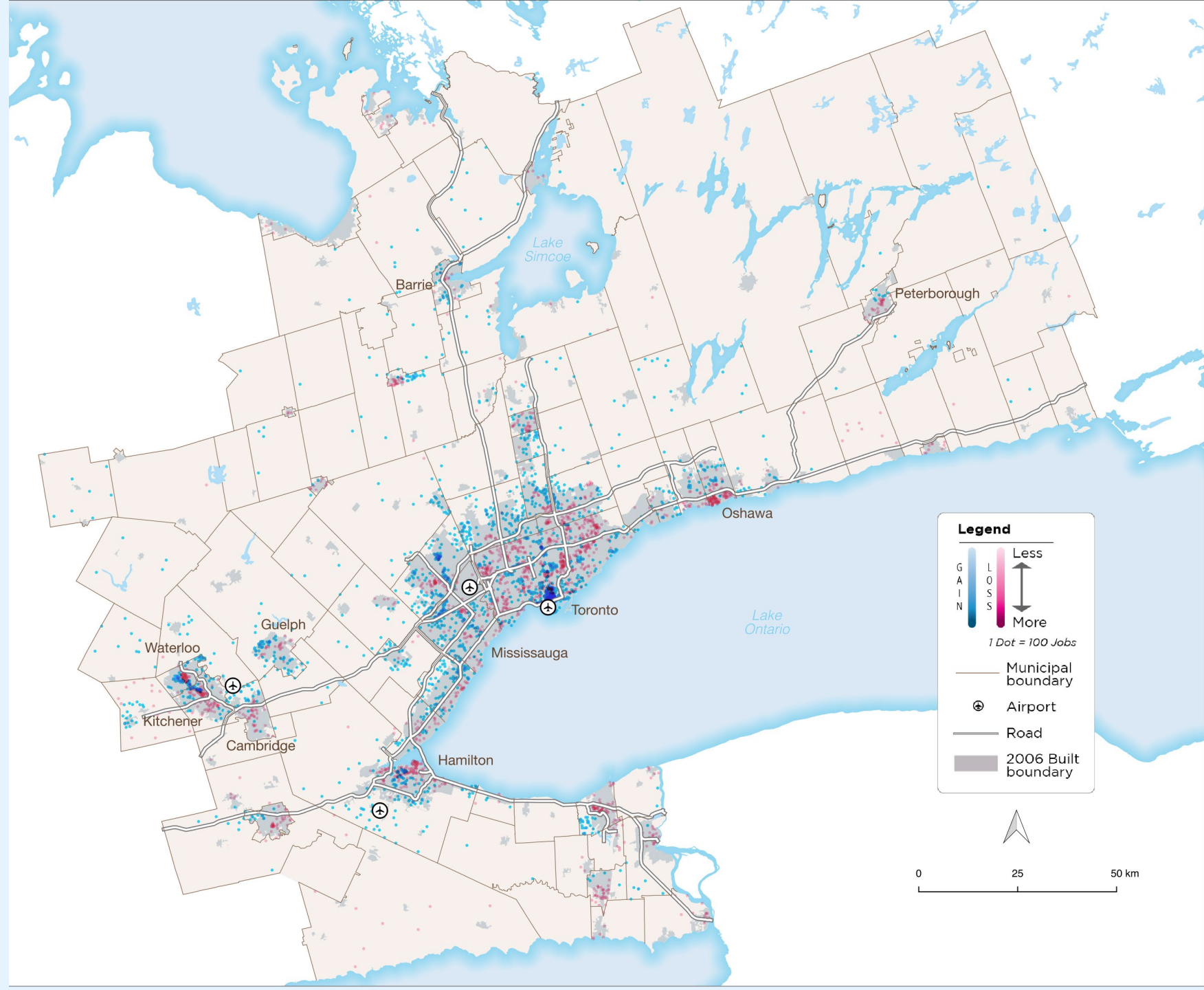
# Core Employment t

2,375,465  
jobs  
in 2016



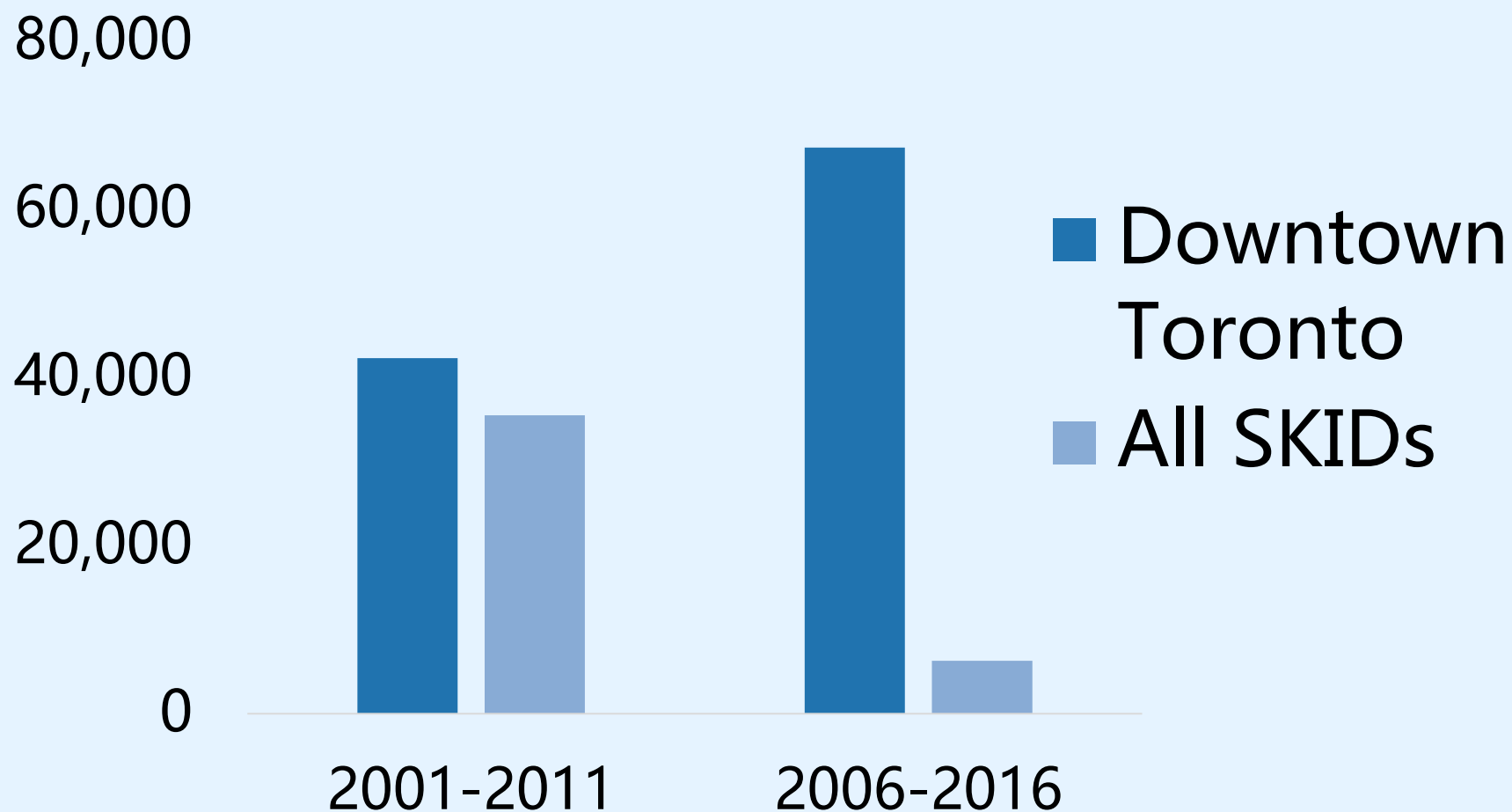
# Core Employment Change

+75,450  
jobs  
2006 - 2016



## The shift

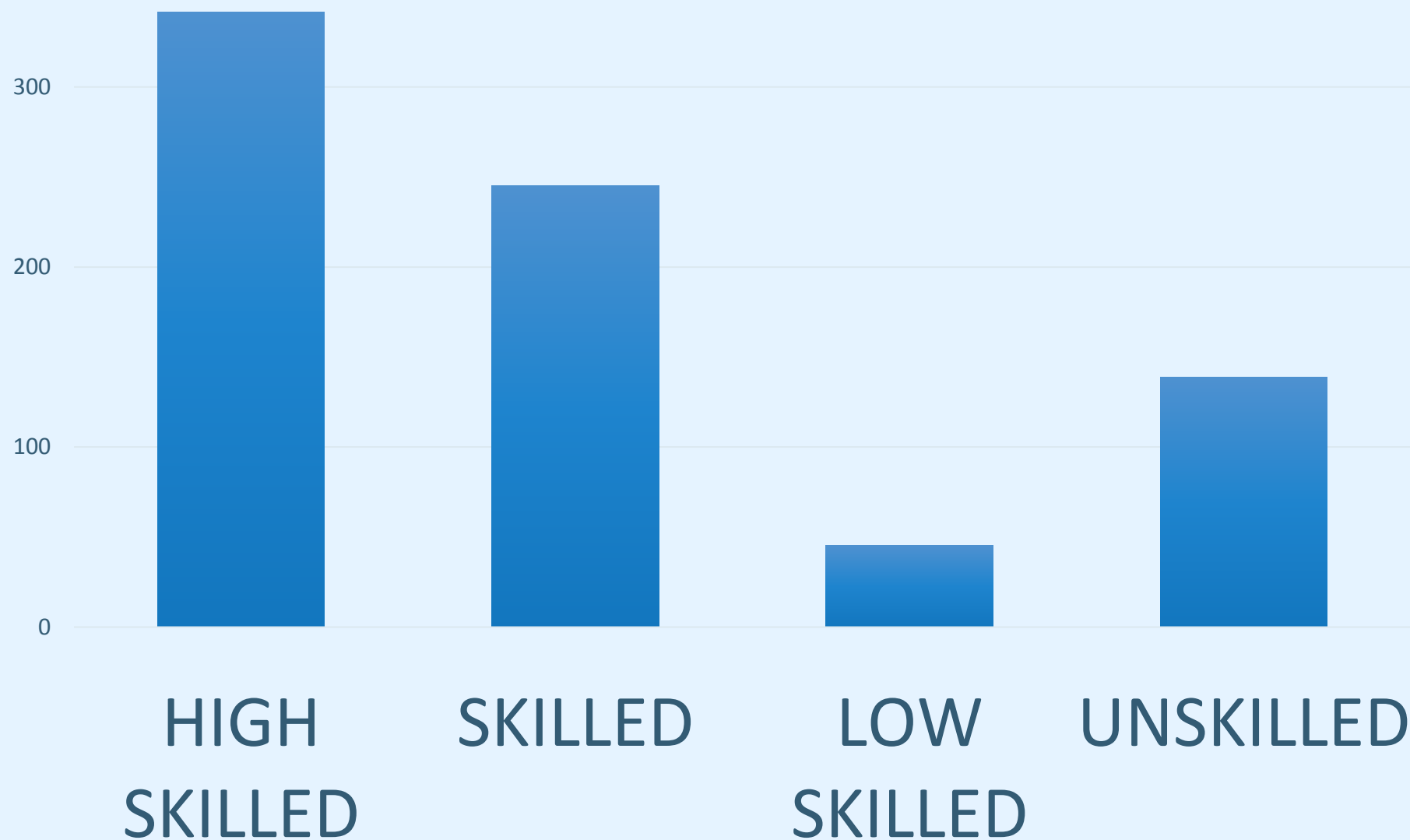
# Core Employment Change Downtown Toronto vs. SKIDs



**Whats  
driving  
the shift?**

Transition  
to a  
knowledg  
e  
economy

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



## Whats driving the shift?

- Globalization
- Acceleration and diffusion of new technologies
- Growing, knowledge-intensive activities cluster
- Routine, dispersed activities are slow-growth or in decline
- Drivers cut across industries

# Archetypes



# Introducing Archetypes

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

# Introducing Archetypes

## RESEARCH QUESTIONS:

What kinds of economic activities are growing/declining?

In what locations?

Within what kinds of urban environments?

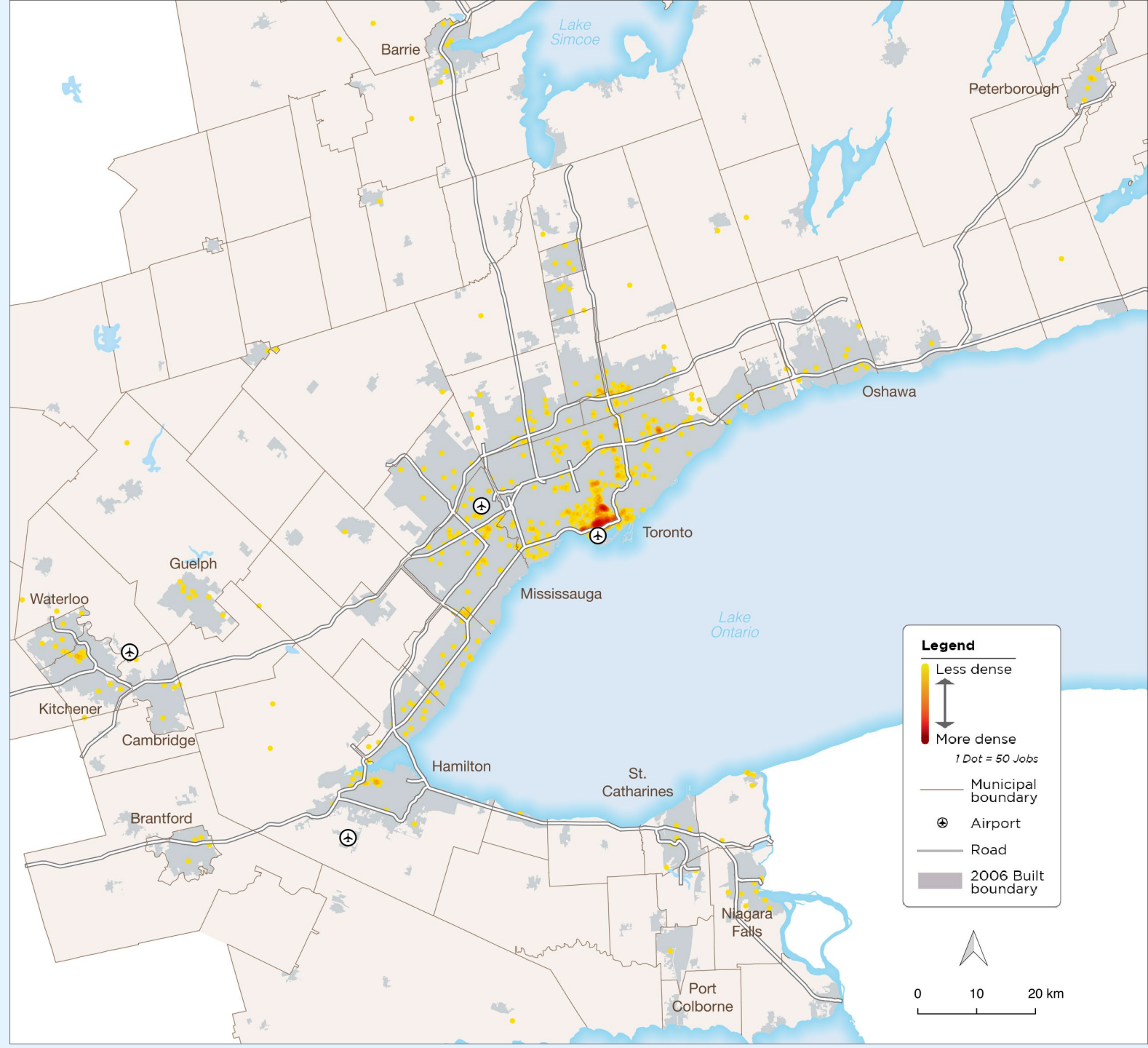


# Introducing Archetypes

Each Archetype has a distinct spatial pattern within the GGH

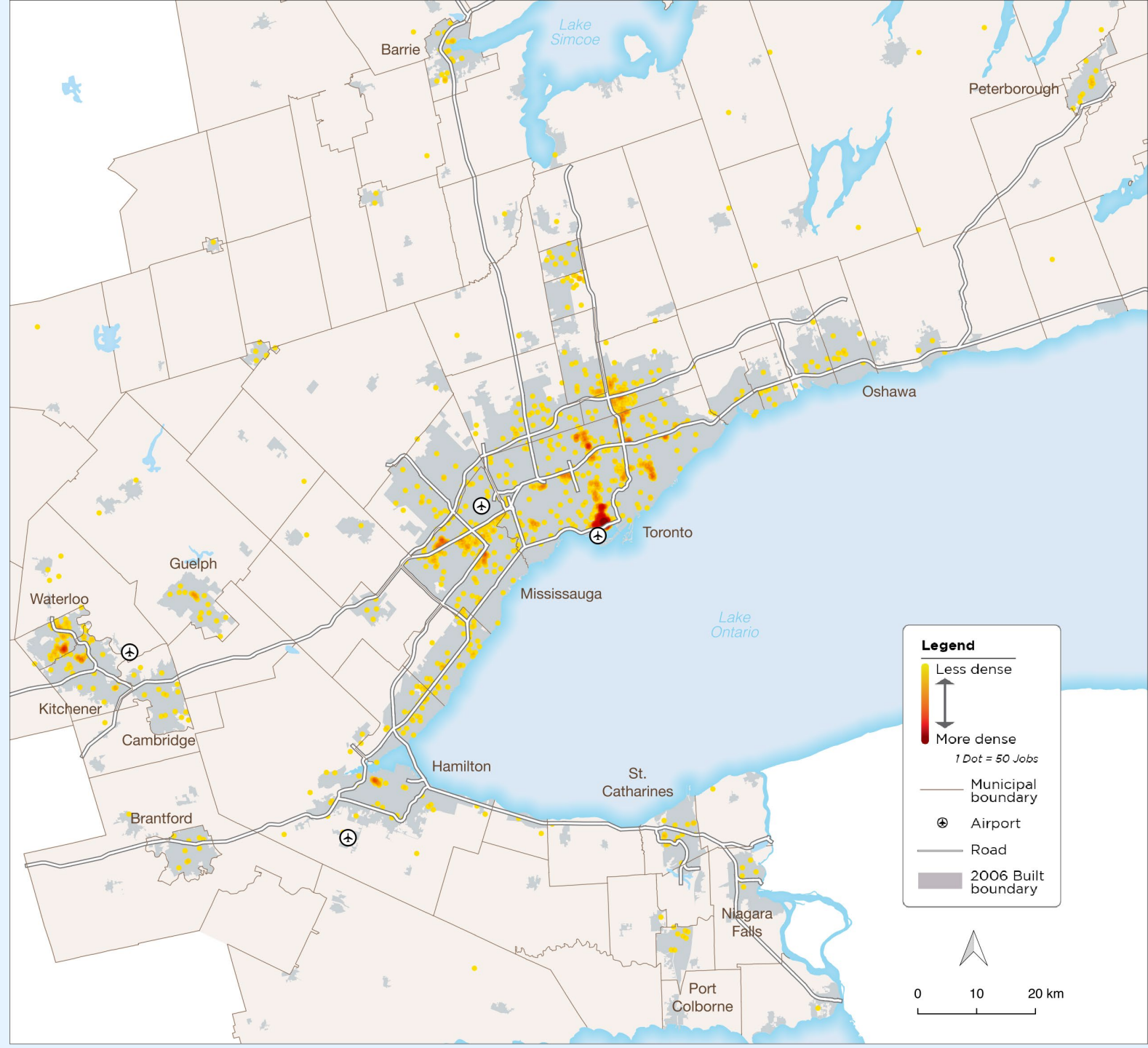
# Arts & Design

112,665 jobs  
in 2016



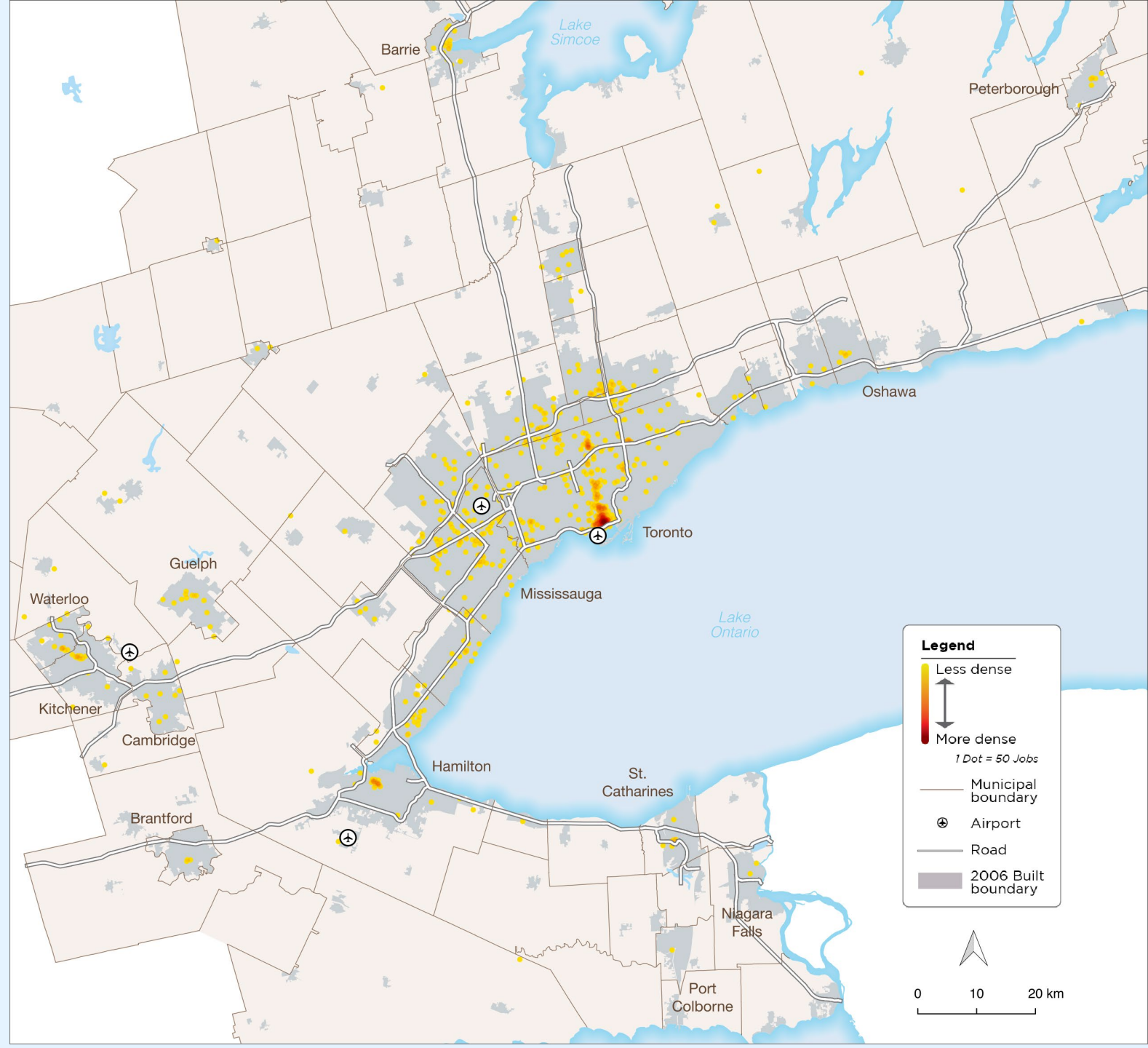
# Finance

275,300 jobs  
in 2016



# High Order Business Services

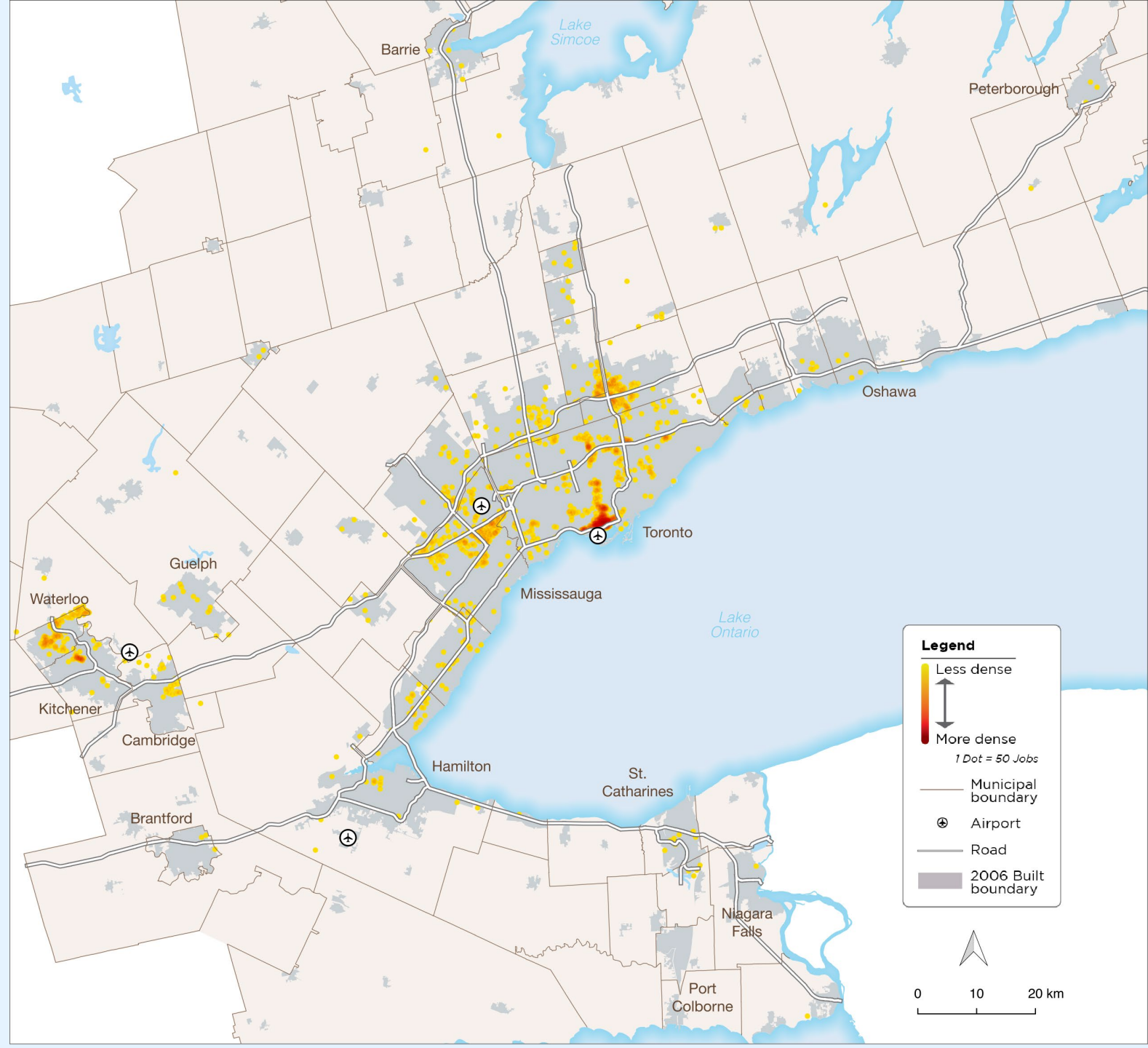
123,345 jobs  
in 2016





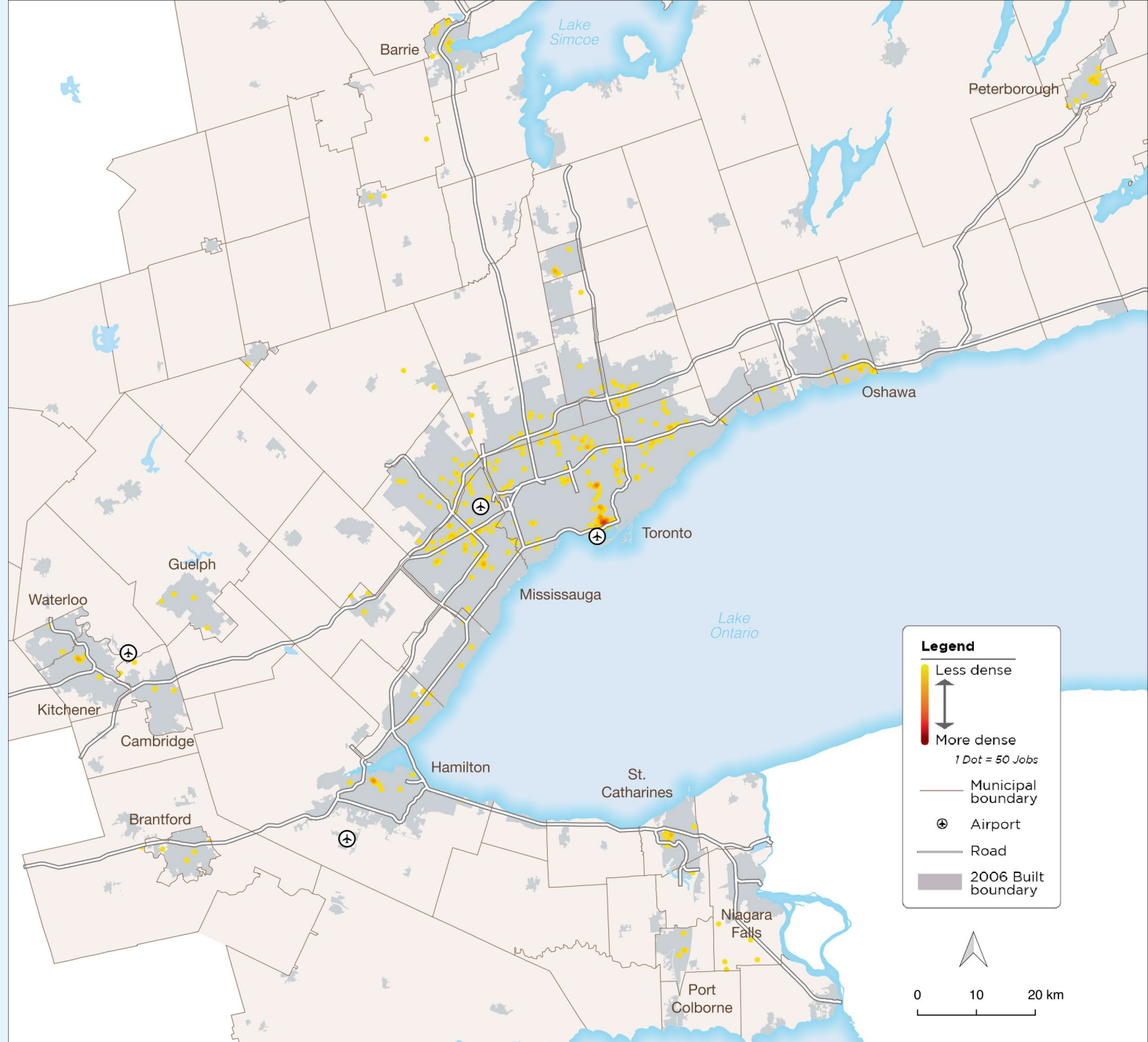
# Soft Tech

91,270 jobs  
in 2016



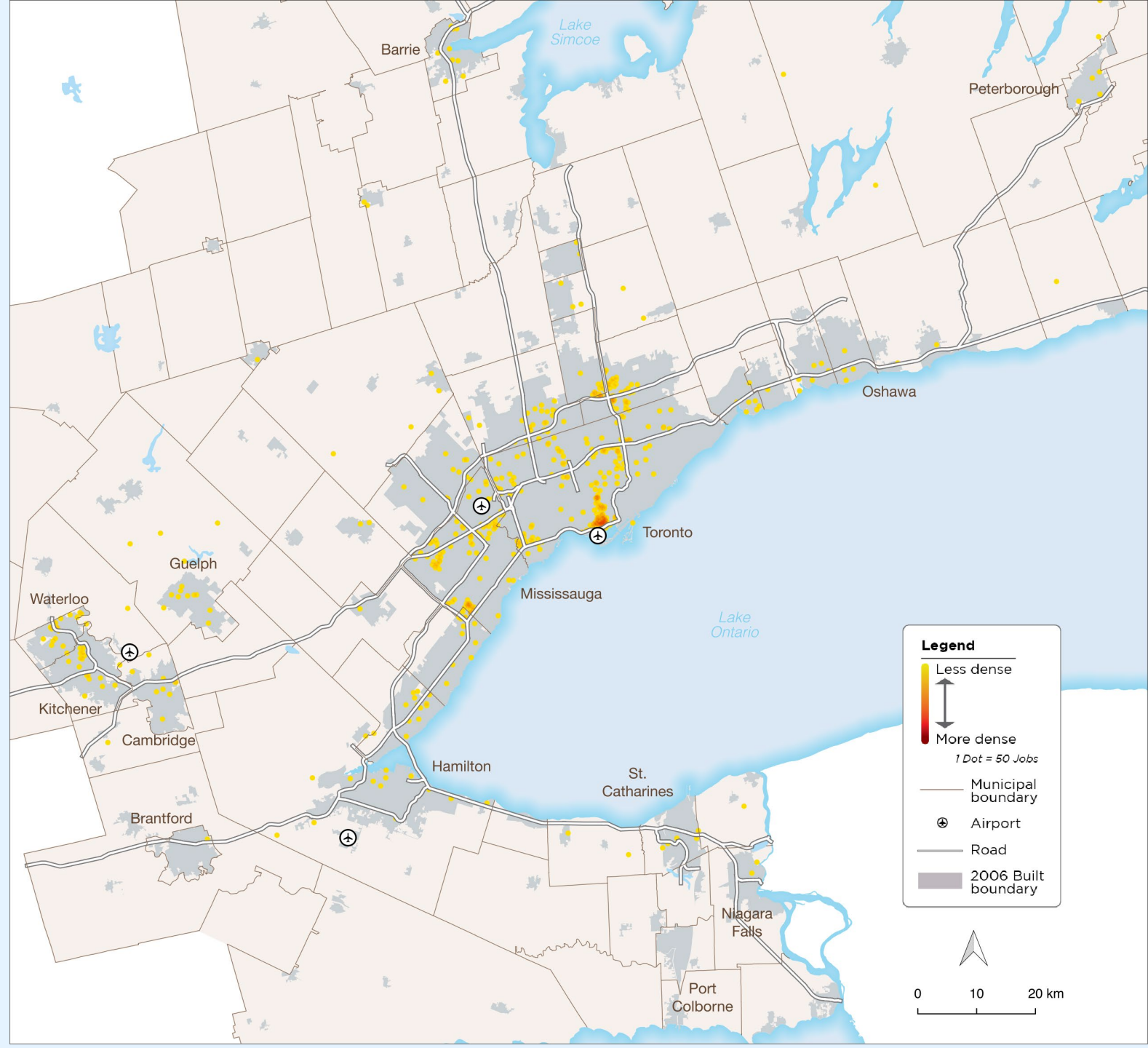
# Back Office

51,715 jobs  
in 2016



# Science-based

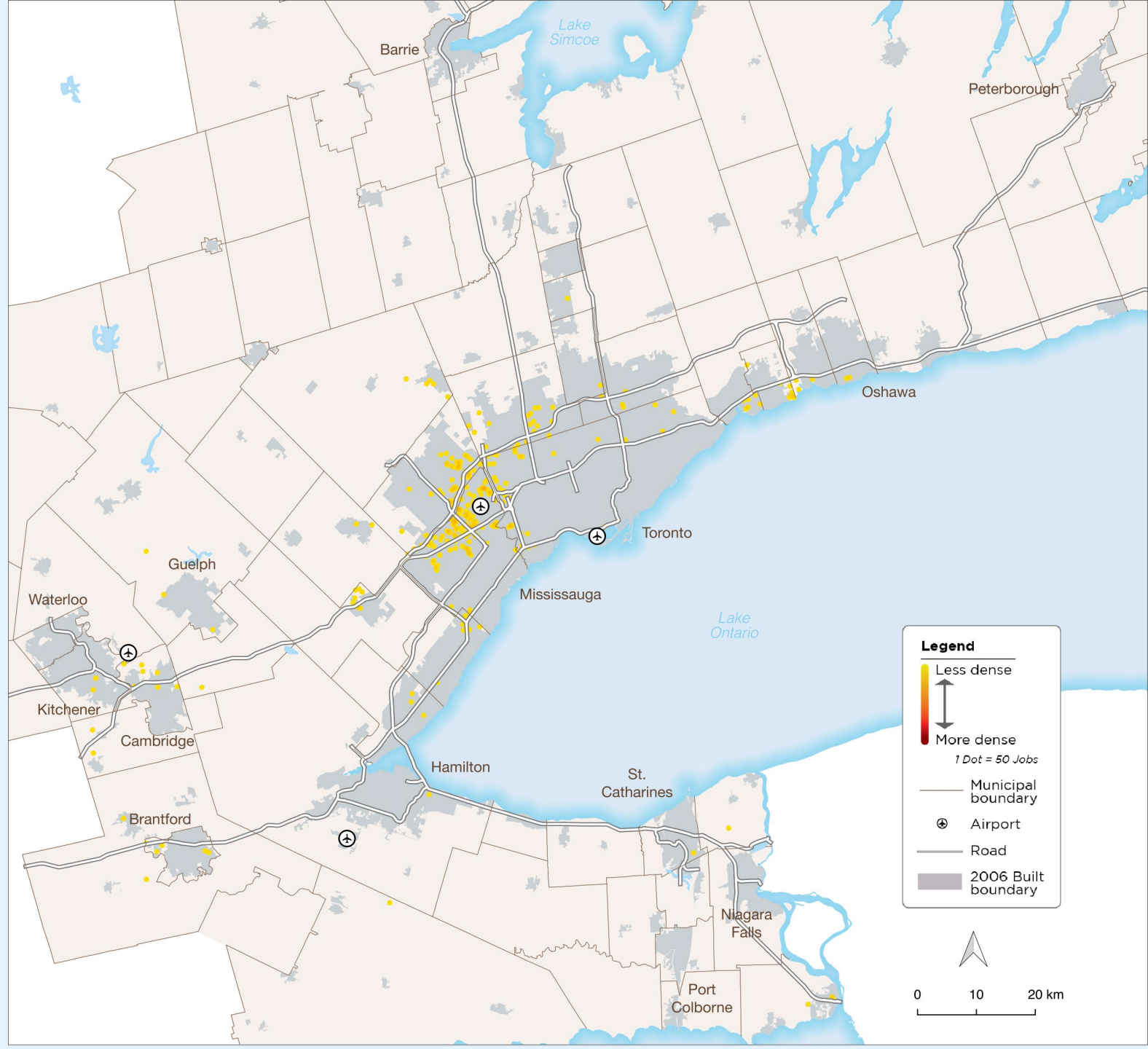
64,980 jobs  
in 2016





# Logisitics

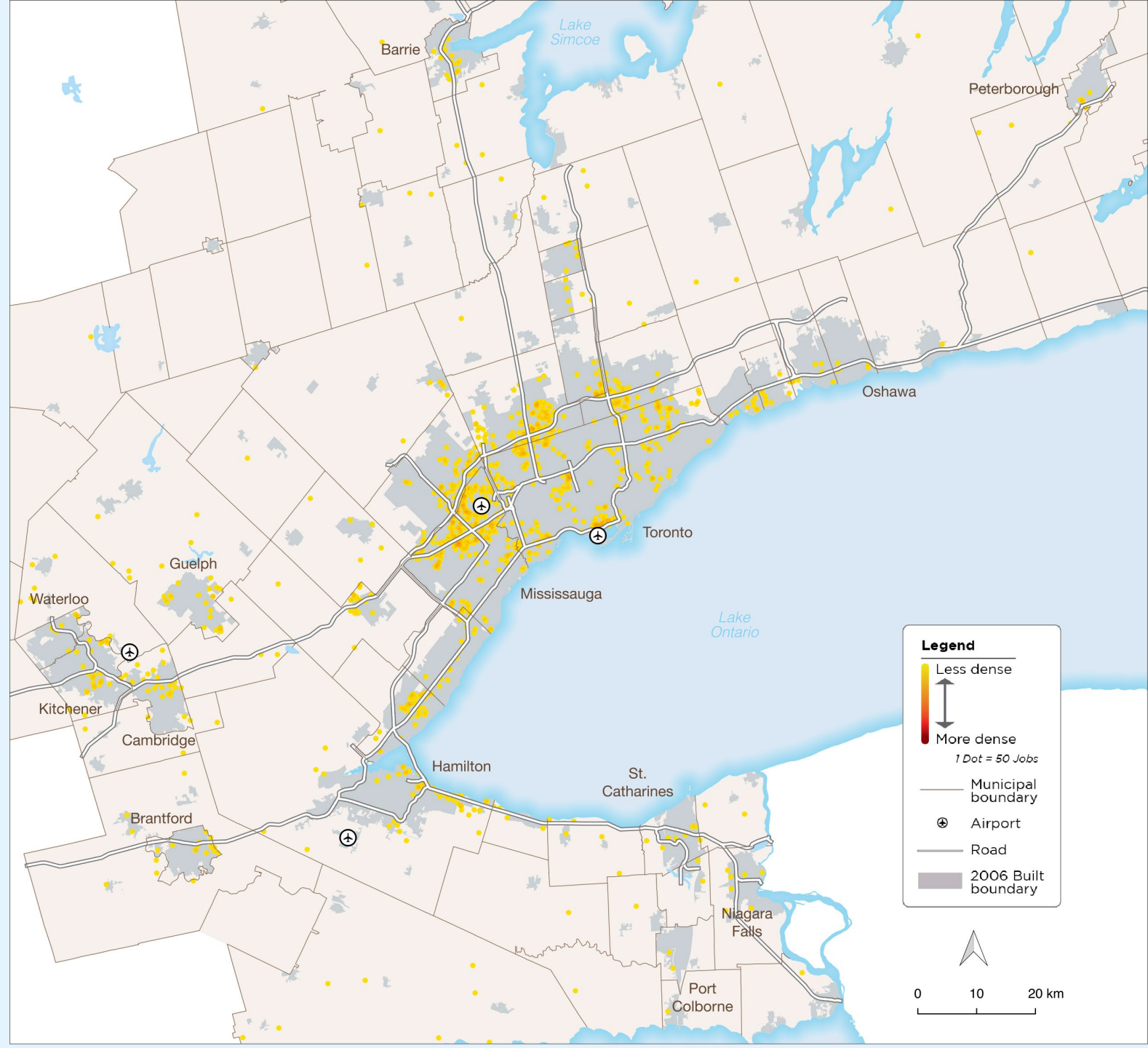
32,635 jobs  
in 2016





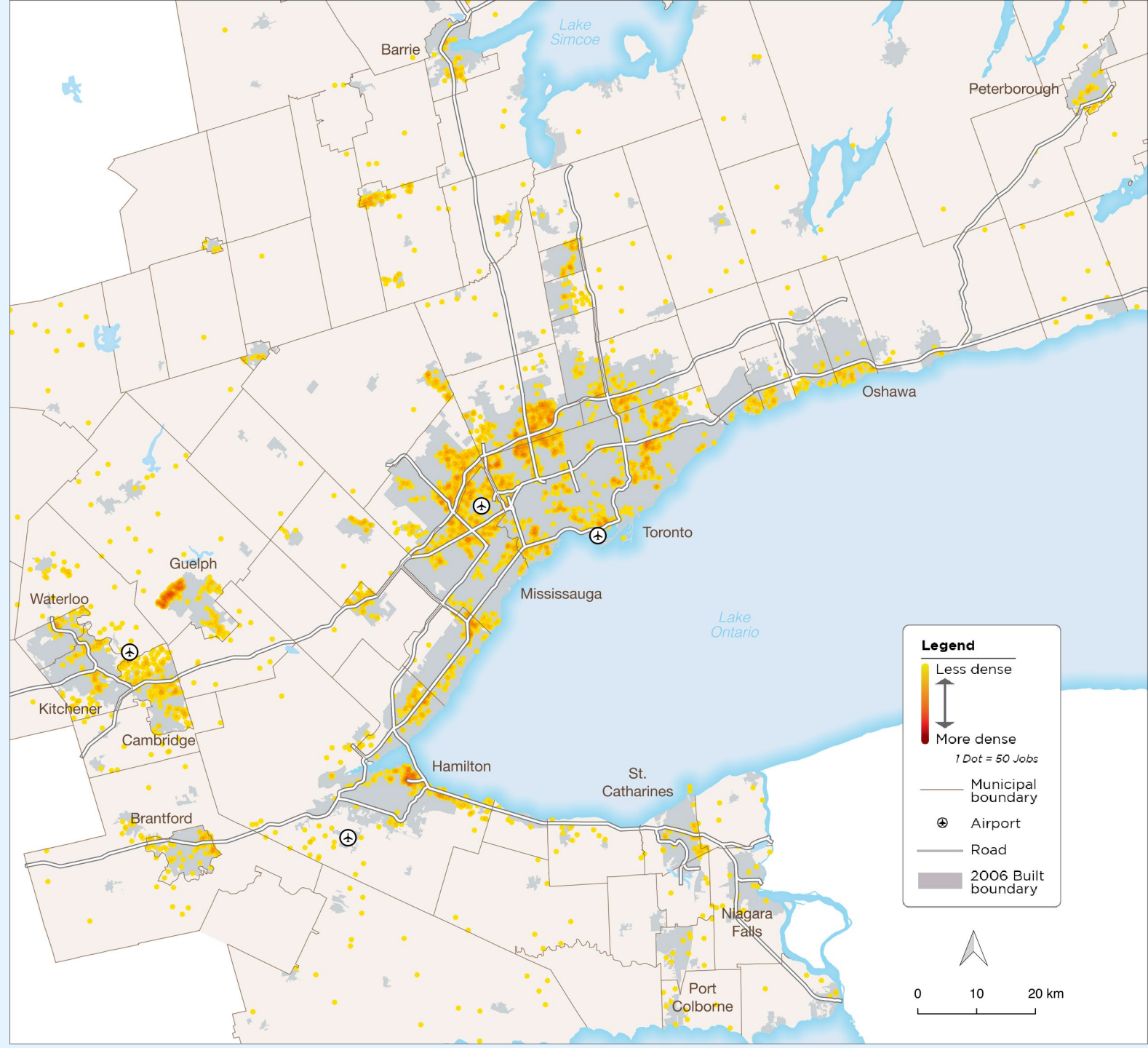
# Other Wholesaling

121,750 jobs  
in 2016



# Other Manufacturin g

386,480 jobs  
in 2016



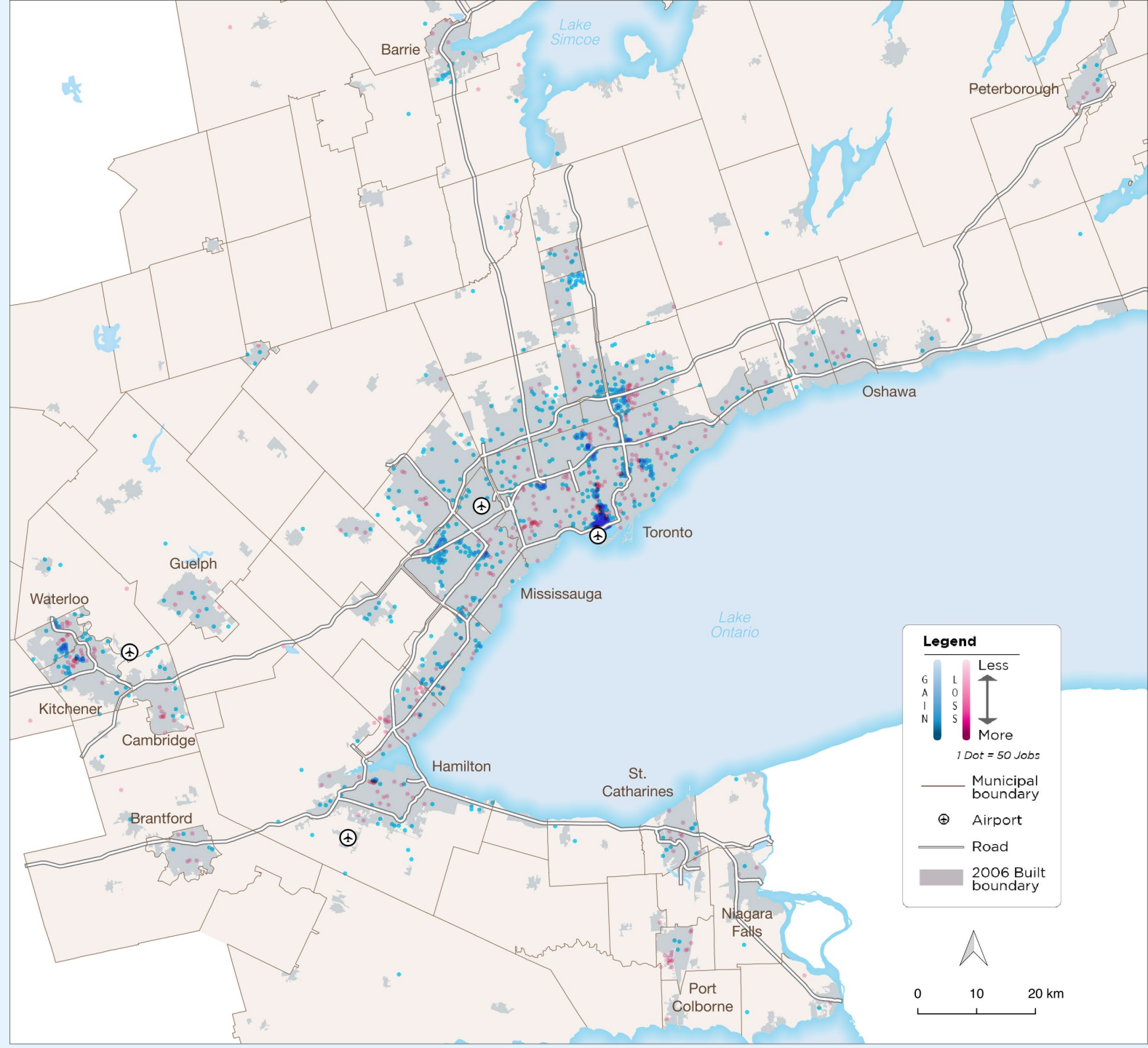
The shift in detail



# Knowledge-intensive Archetypes benefit from spatial clustering

**Finance**

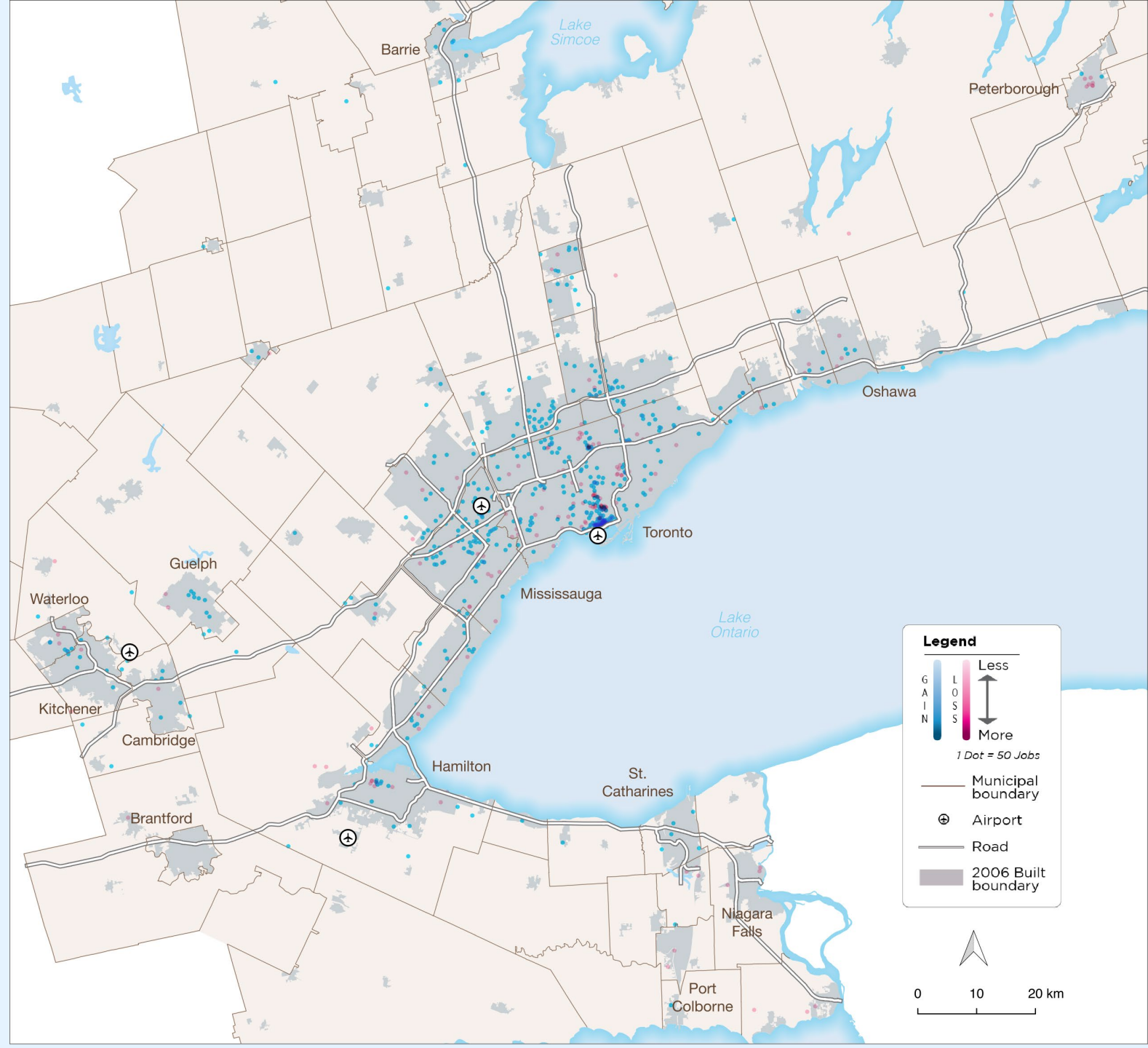
+ 47,150 jobs  
2006 - 2016



Knowledge-intensive  
Archetypes  
benefit from  
spatial clustering

**High Order  
Business  
Services**

+ 25,130 jobs  
2006 - 2016

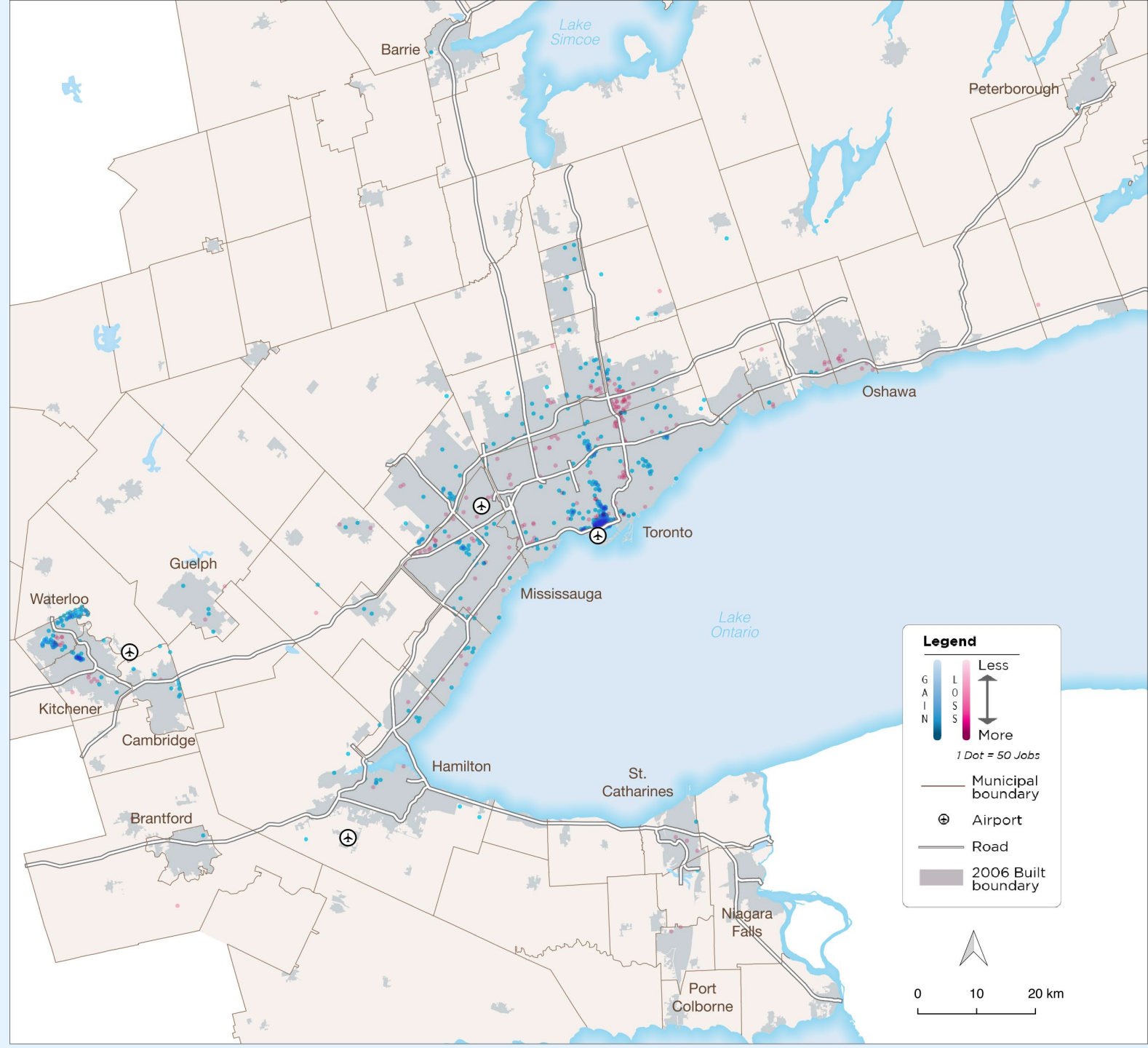




Knowledge-  
intensive  
Archetypes  
benefit from  
spatial clustering

**Soft Tech**

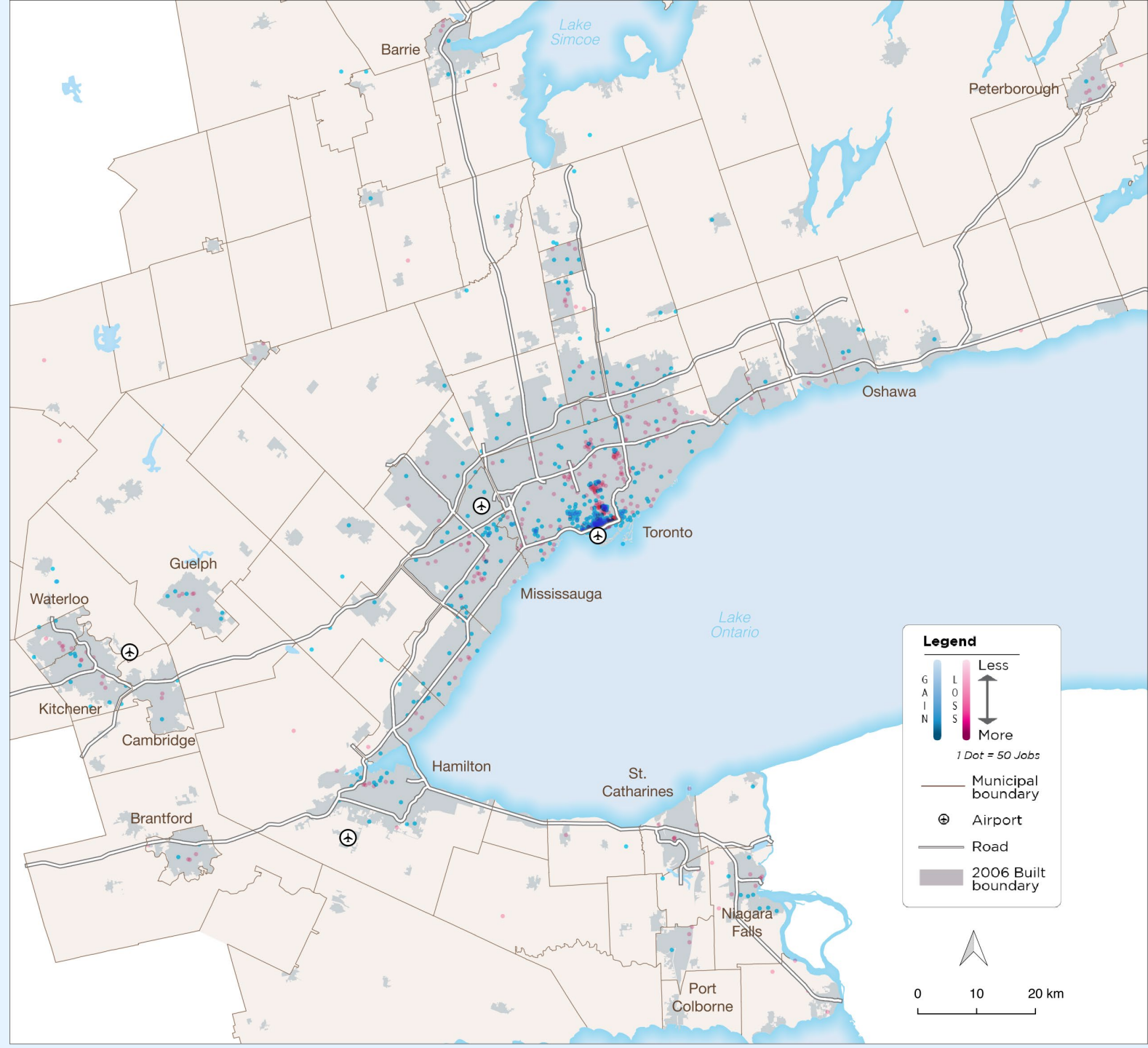
+ 19,310 jobs  
2006 - 2016



Knowledge-  
intensive  
Archetypes  
benefit from  
spatial clustering

**Arts &  
Design**

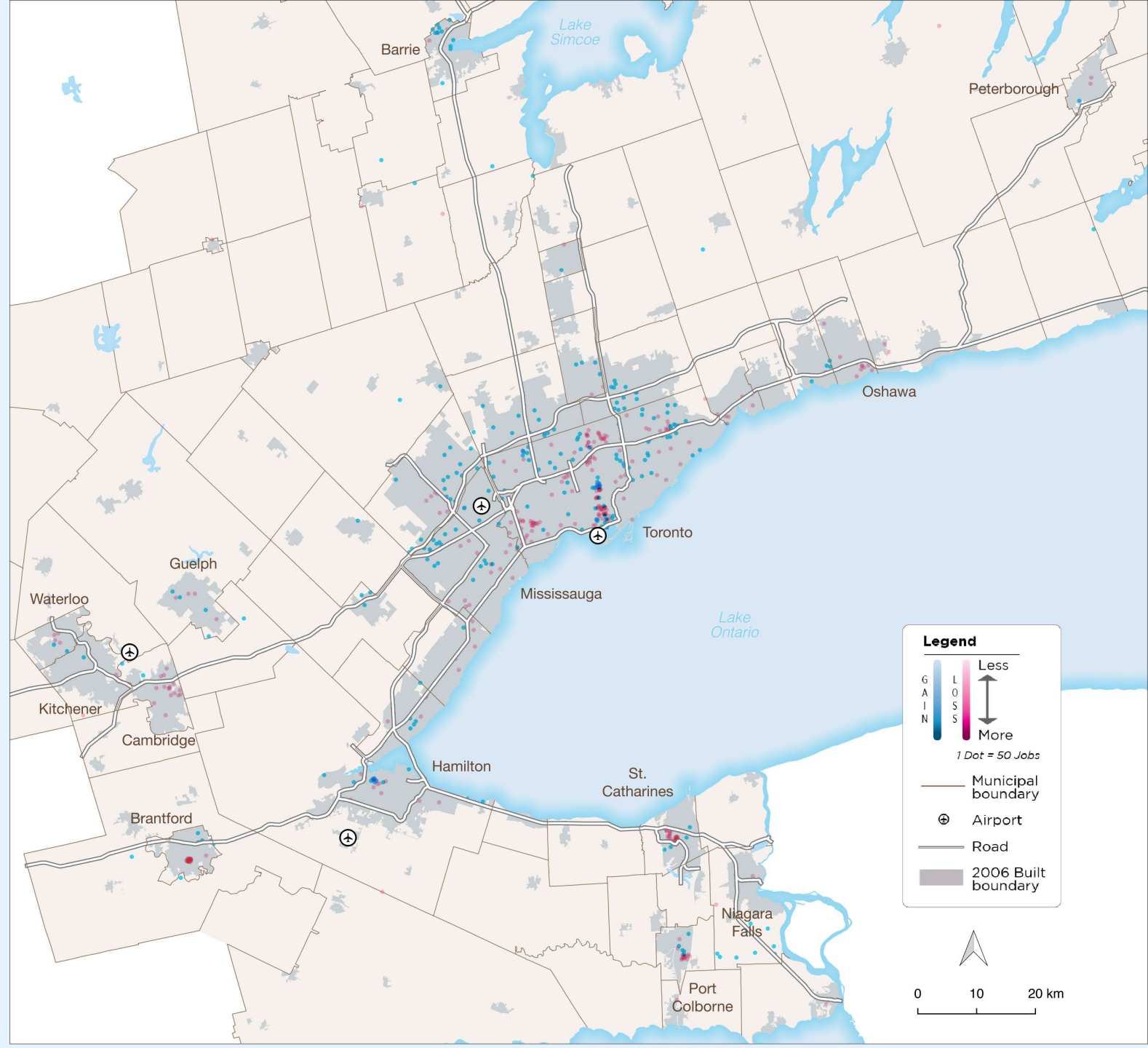
+ 10,020 jobs  
2006 - 2016



Some  
Archetypes  
focused on  
routine activities  
are  
suburbanizing

## Back Office

-2,995 jobs  
2006 - 2016

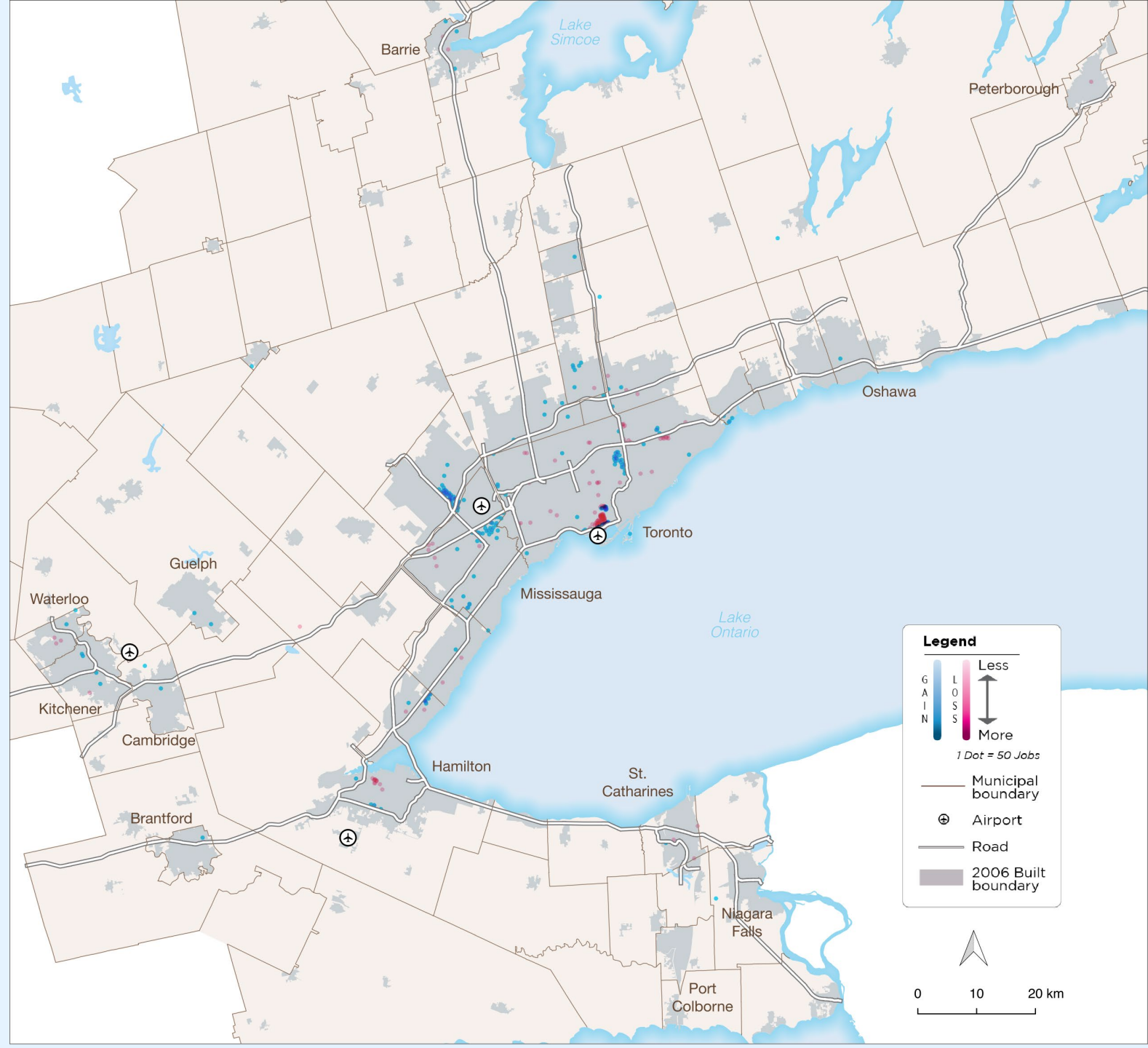




Some Archetypes  
focused on  
routine activities  
are suburbanizing

**Special:  
Telecoms**

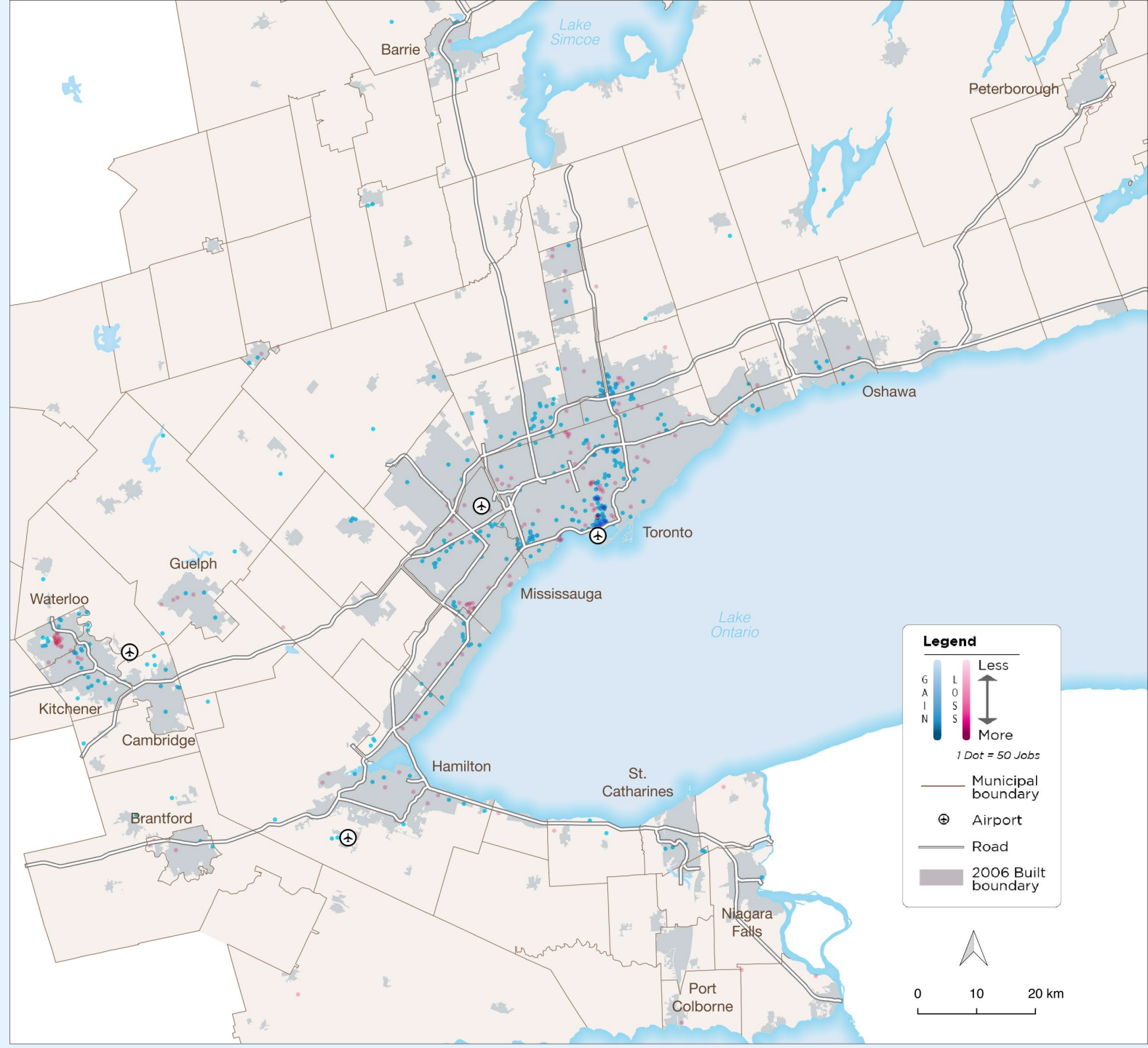
+ 6,635 jobs  
2006 - 2016



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

**Science-  
based**

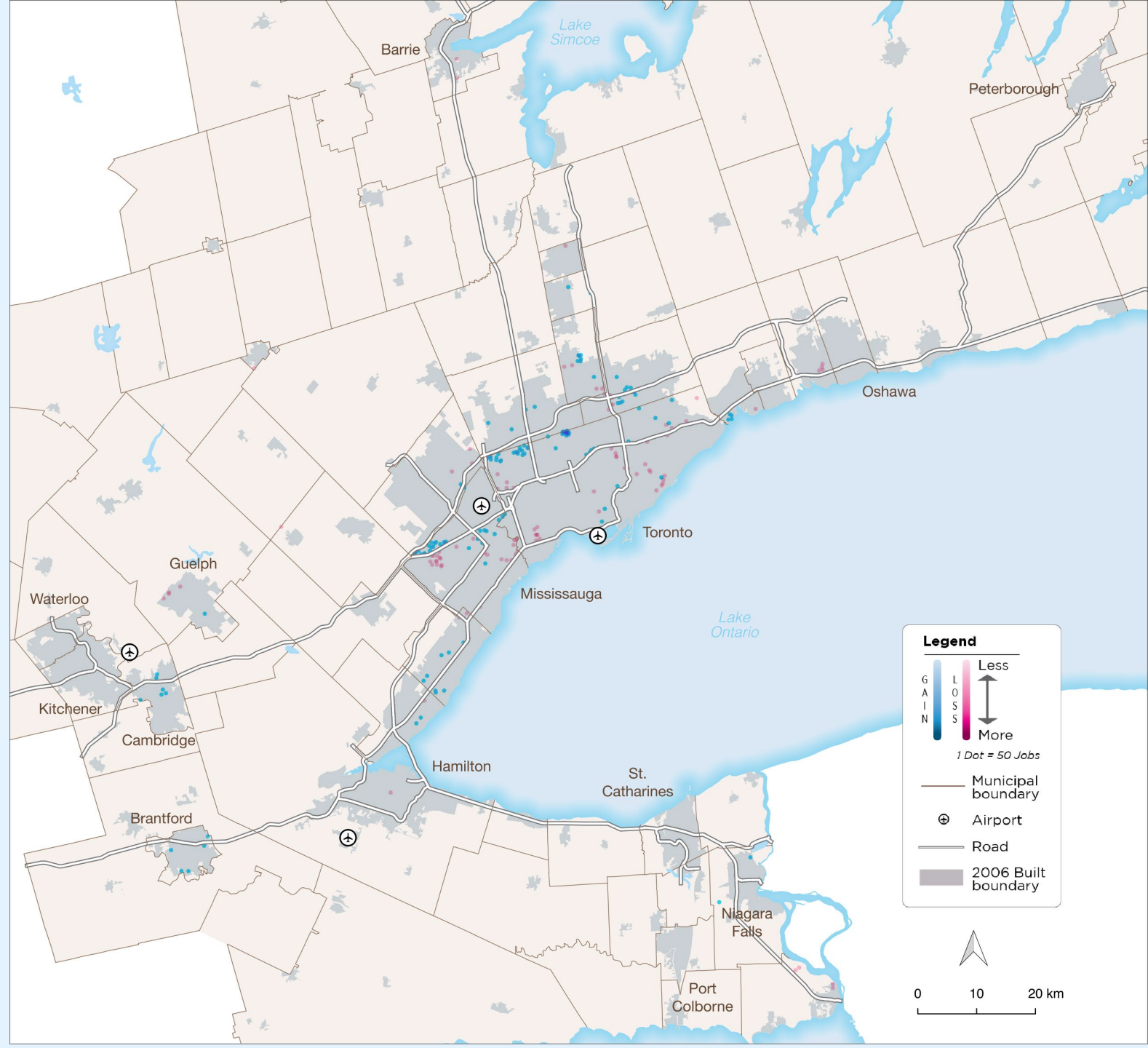
+ 12,030 jobs  
2006 - 2016



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

**Special:  
Pharma**

+ 2,215 jobs  
2006 - 2016

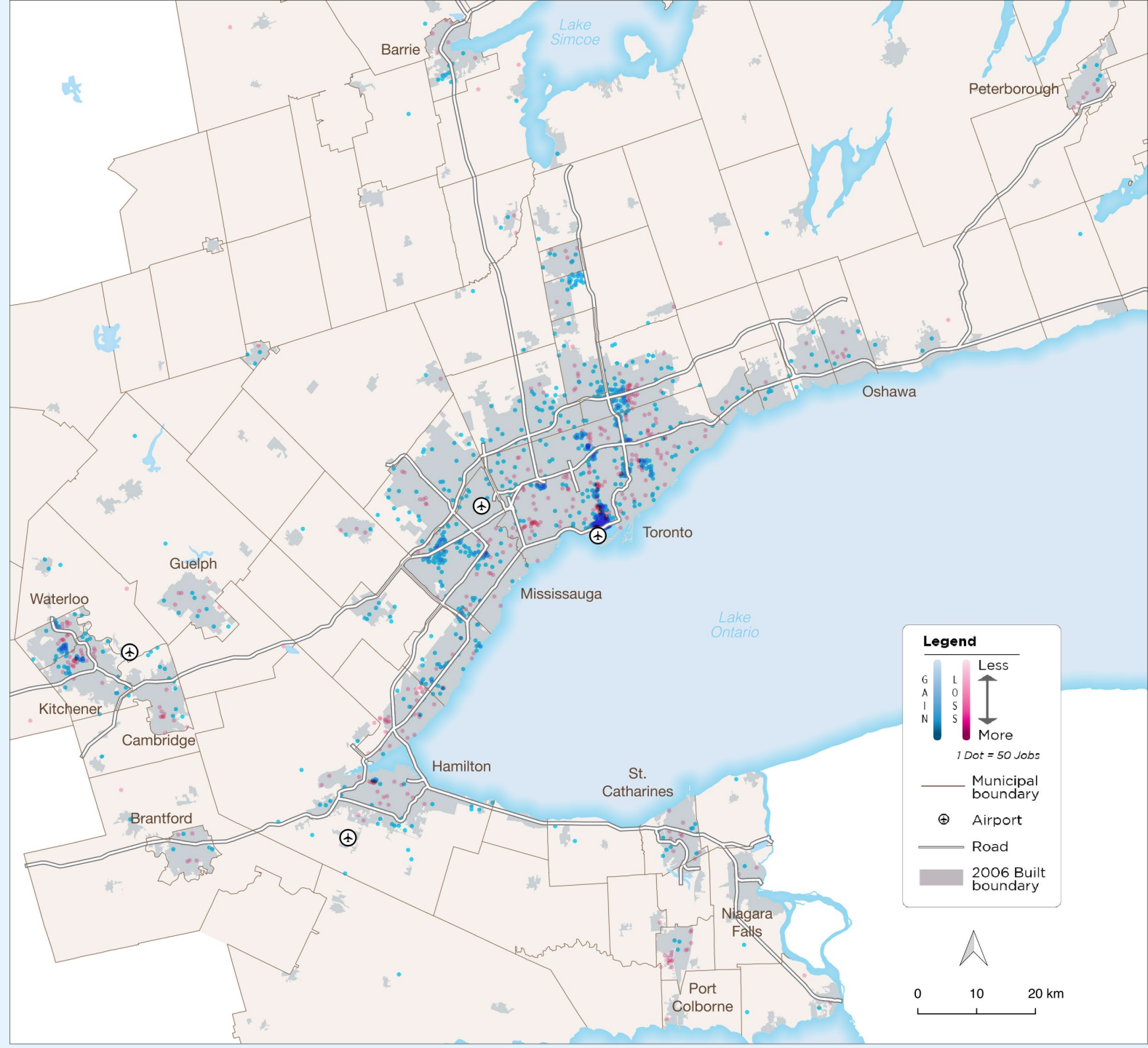




There is some limited growth of knowledge-intensive activities in a few suburban areas

**Finance**

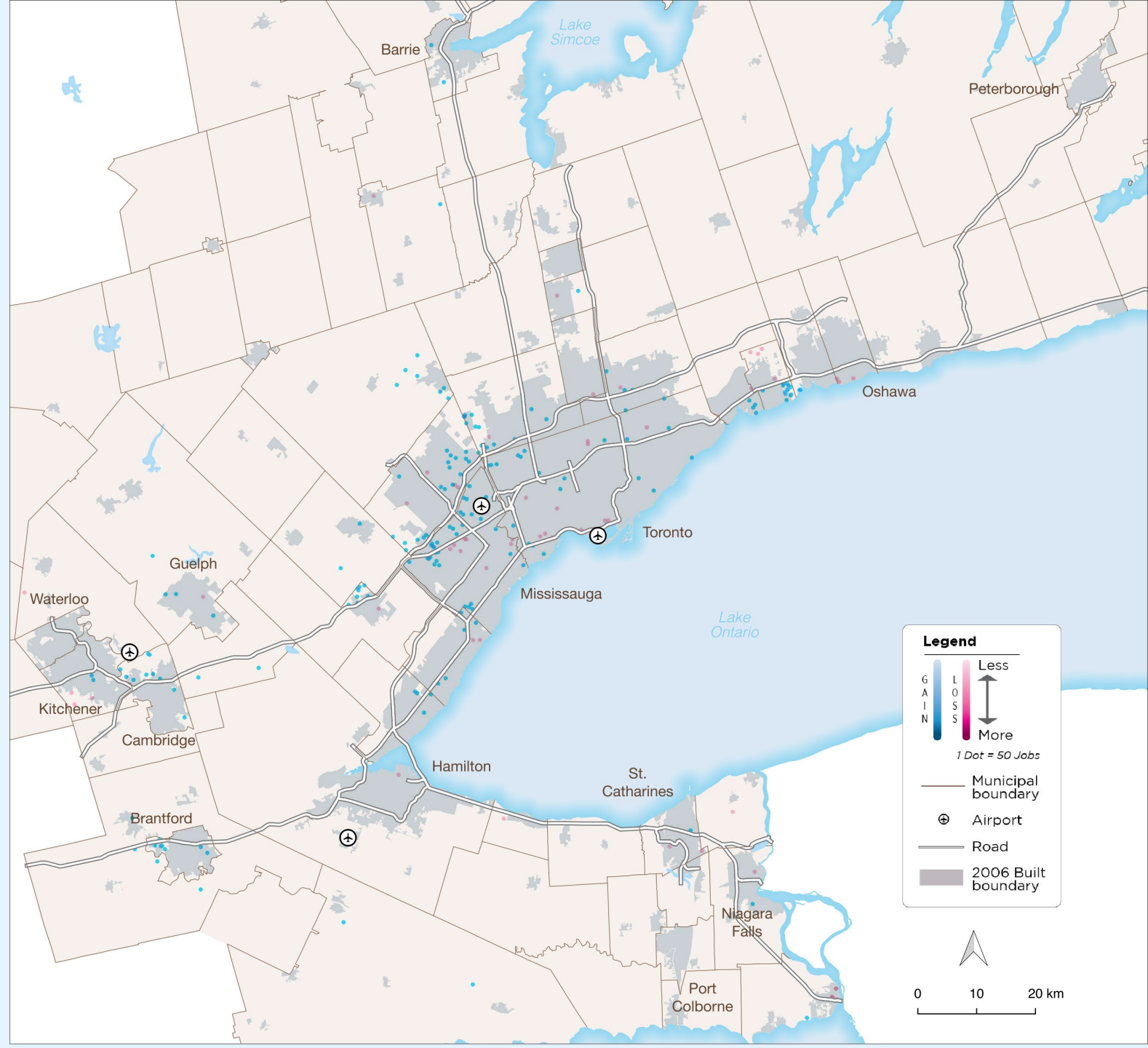
+ 47,150 jobs  
2006 - 2016



Logistics focuses  
in suburban  
areas, near  
transportation  
facilities

**Logistics**

+ 7,456 jobs  
2006 - 2016

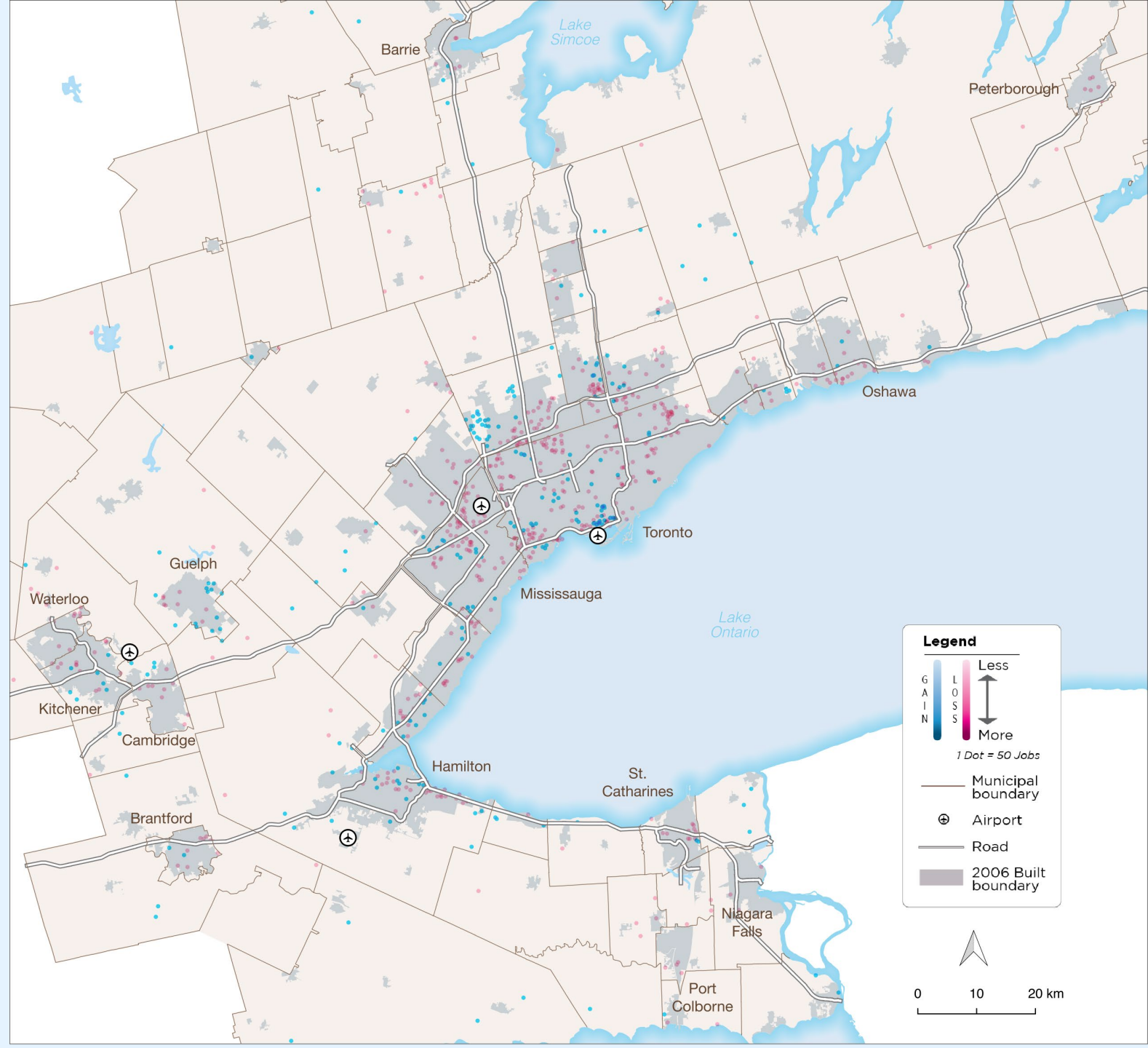




Some routine-oriented, dispersed activities are declining

## Other Wholesaling

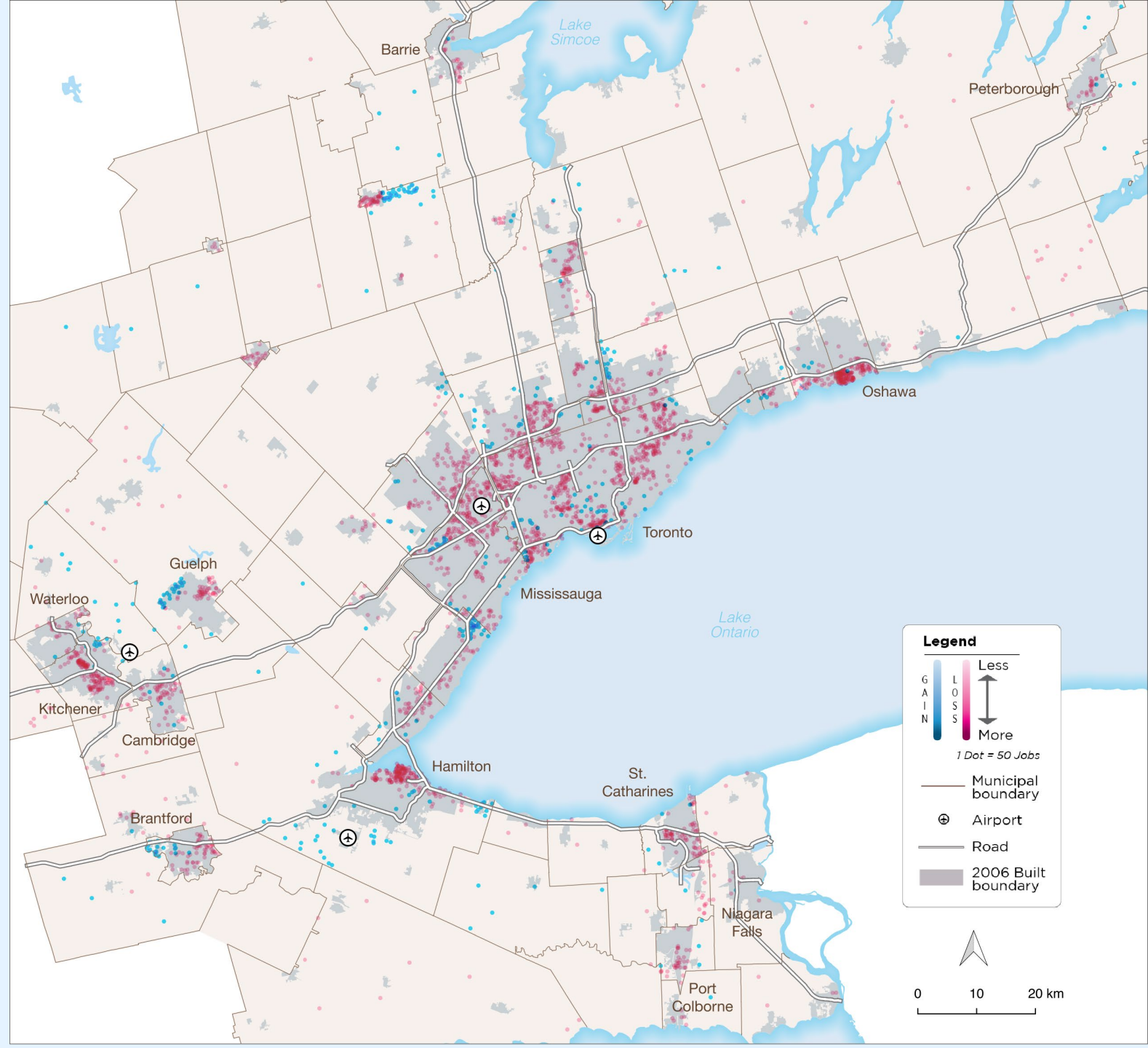
-18,170 jobs  
2006 - 2016



Some routine-oriented, dispersed activities are declining

## Other Manufacturing

-129,775 jobs  
2006 - 2016



# The geography of uncertainty and disruption

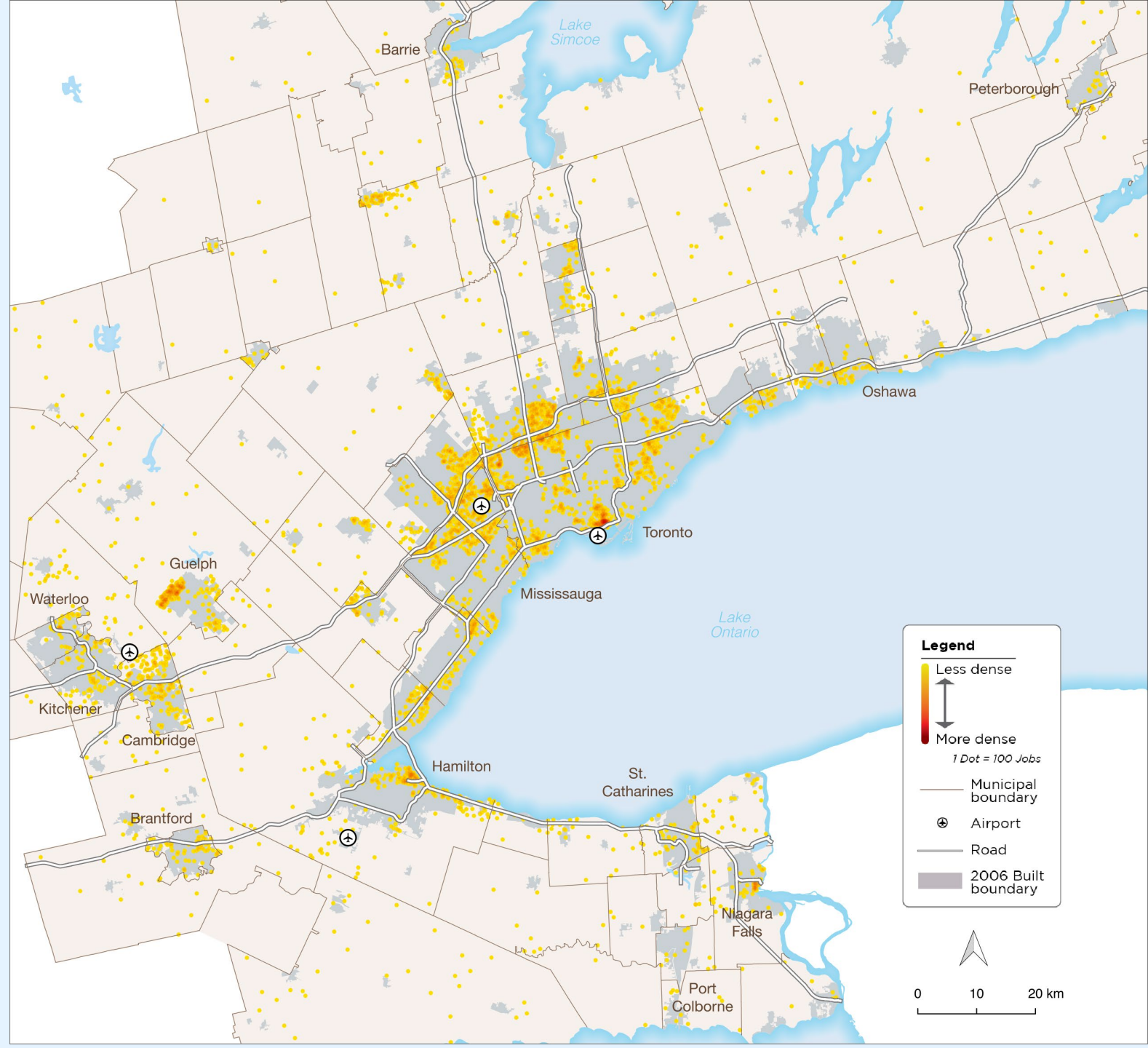


# Vulnerability to automation

Where are the  
jobs in the **most**  
vulnerable  
industries?

414,415 jobs  
in 2016

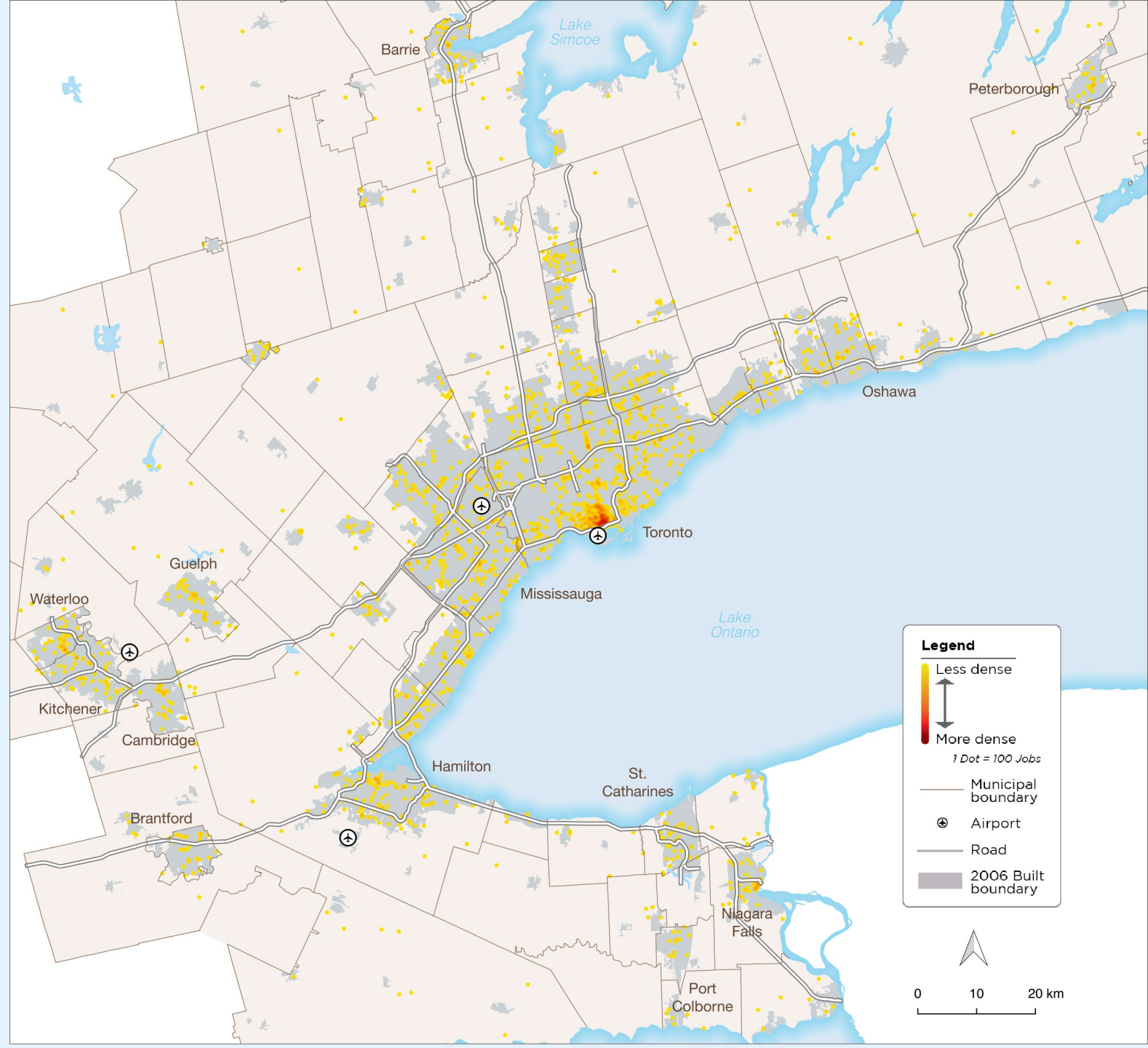
[excludes Accommodation and  
food services]



# Vulnerability to automation

Where are the  
jobs in the **most**  
vulnerable  
industries?

278,220 jobs in  
Accommodation  
and food  
services in 2016

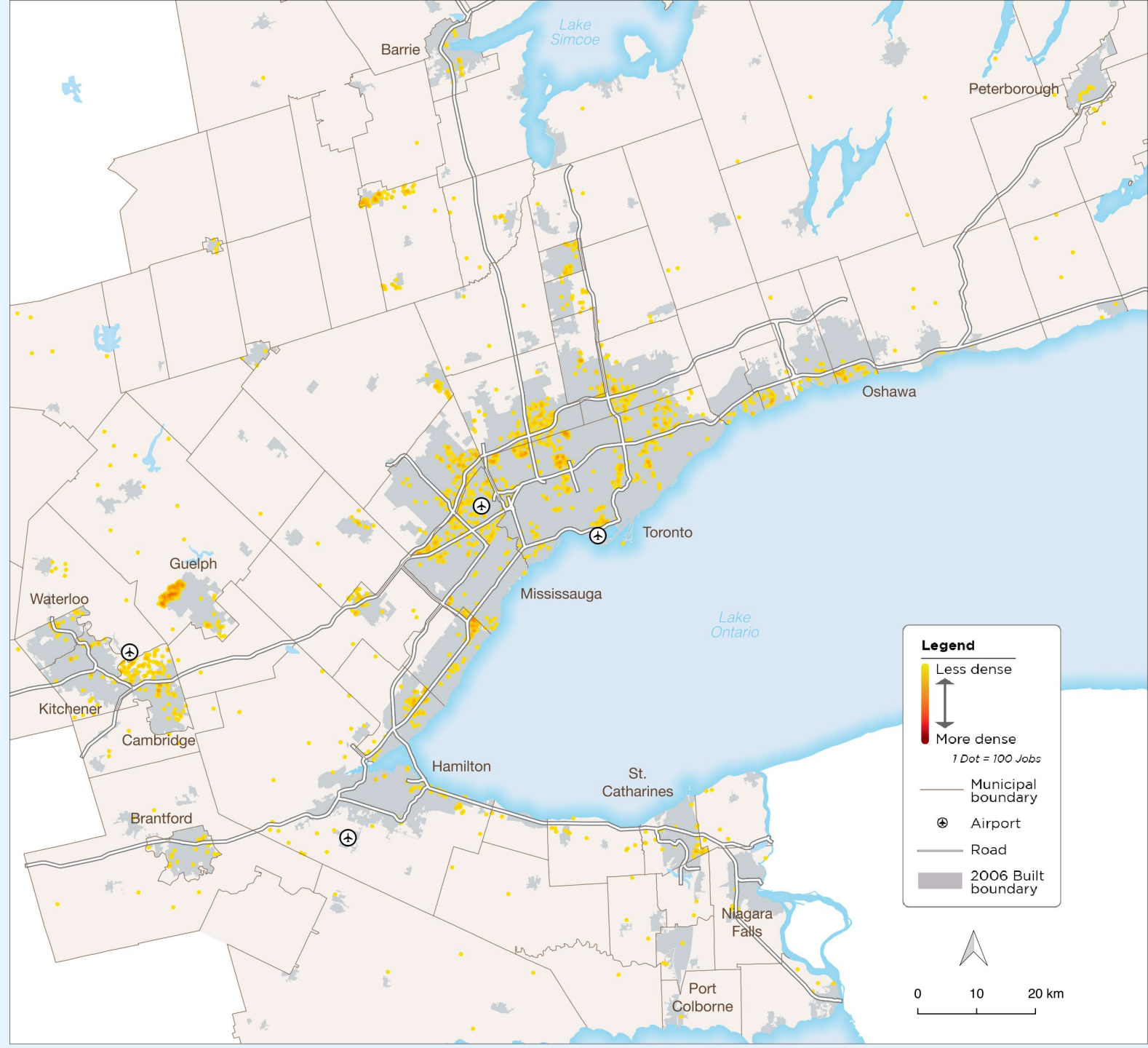




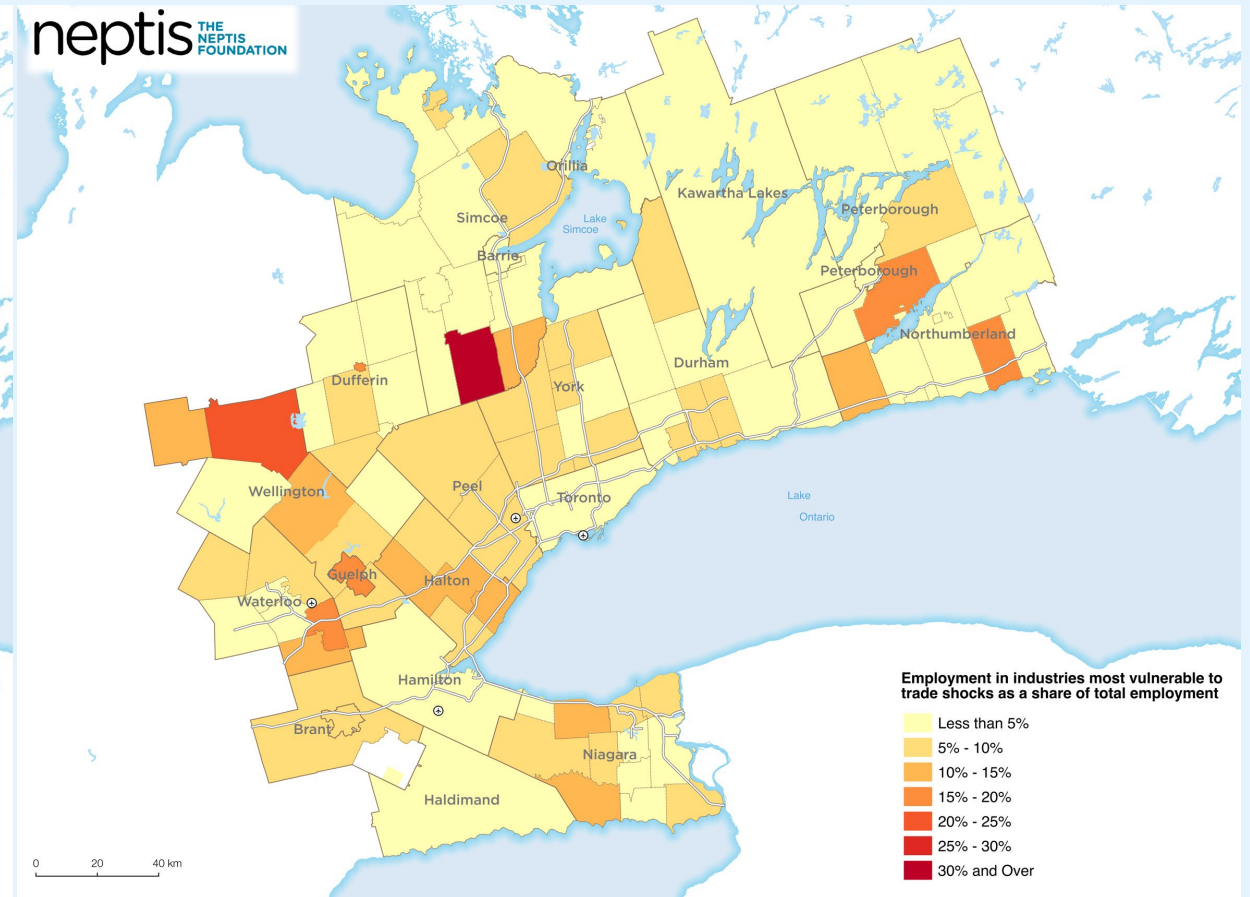
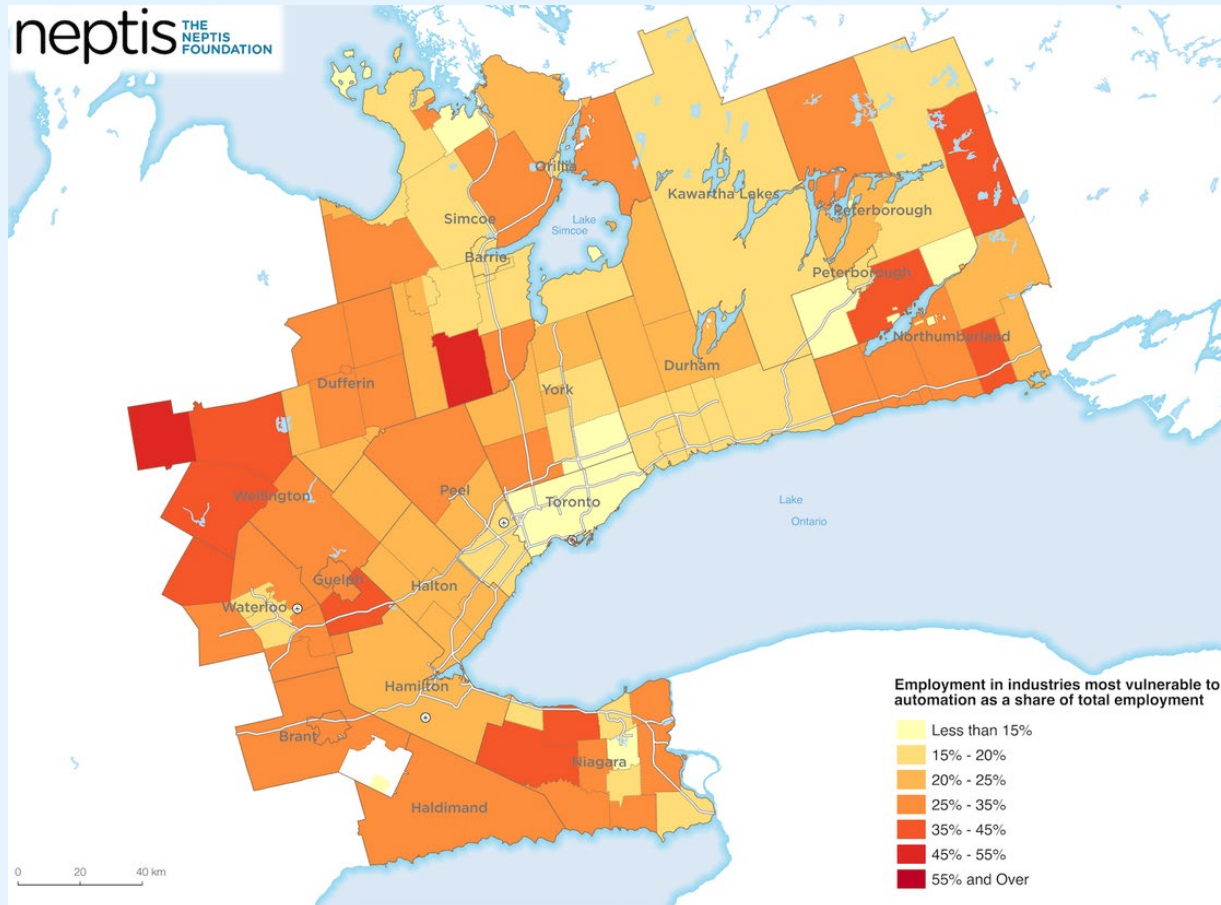
# Vulnerability to trade disruptions

Where are the jobs in the **most** vulnerable industries?

197,355 jobs in 2016



# Vulnerability to automation and trade disruptions by municipality



Vulnerability to automation

Vulnerability to trade disruption

Planning the NEXT GGH

# We need to take the new economic geography into account

- 👉 Fundamental to the success of
  - regional and local planning
  - economic development
  - major investments
  - municipal finances
  - quality of life of GGH residents.

# Key drivers suggest continued concentration of economic activity

- On-going transition to knowledge economy
- Importance of agglomeration economies to knowledge-intensive activities
- On-going concentration of capital
- Automation of (dispersed) routine work
- Growth of trade in services
- Growing role of innovation in competitiveness

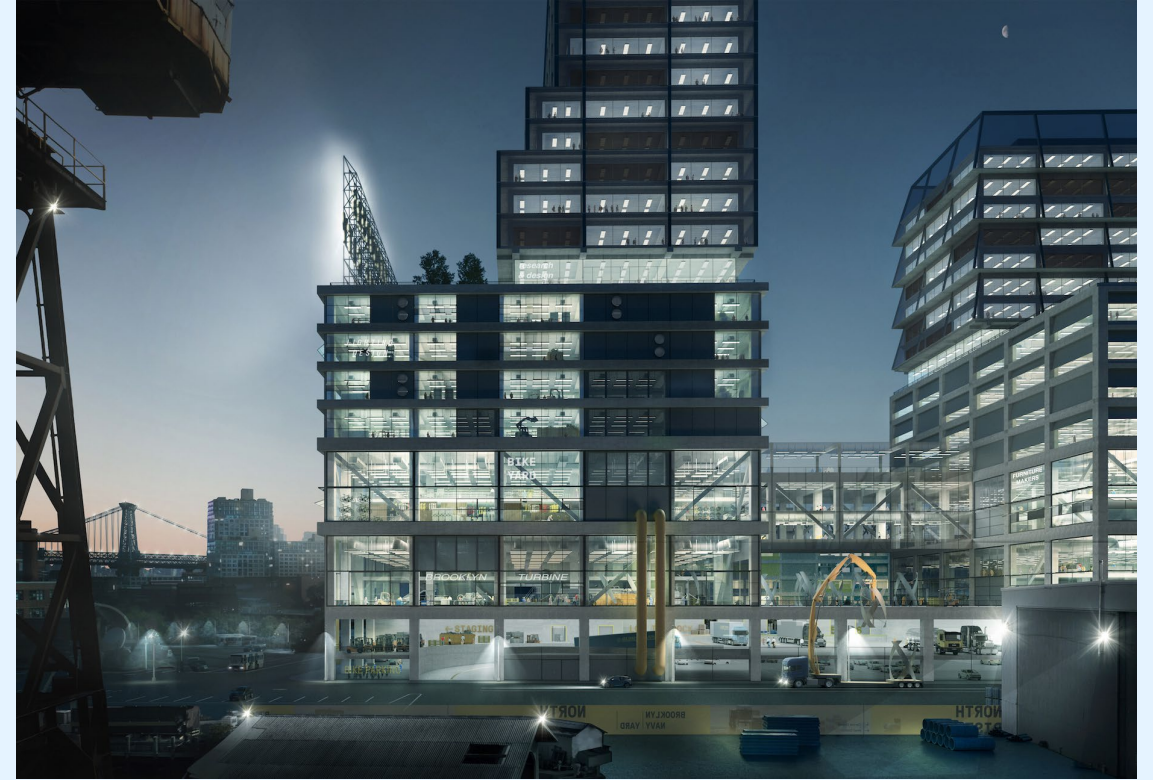
# Growth Plan for the GGH

- ➡ Revise employment projections and allocations
- ➡ Urgently address concentration of growth in the downtown
- ➡ Identify & plan for a second regional downtown
- ➡ Rethink the nature and role of UGCs and prioritise a few
- ➡ A regional logistics strategy
- ➡ Criteria for conversions, based on long term,



# New strategies for areas outside the downtown

- ➡ UGCs, MTSAs, Priority Corridors, etc. will not happen on their own
- ➡ Updated planning frameworks
  - improved public realm
  - accessibility to labour
  - worker amenities
  - flexibility in uses and mixing, as-of-right
  - frameworks that anticipate evolution



**Brooklyn Navy Yards**  
Mixed heavy and light industrial, offices, creative spaces

# Planning for disruption, uncertainty and rapid change

- ☞ Anticipatory approaches – understand the risks and opportunities
- ☞ Flexibility in land use planning
- ☞ Close integration of land use, economic development and transportation planning
- ☞ Place-based strategies

# Transit planning

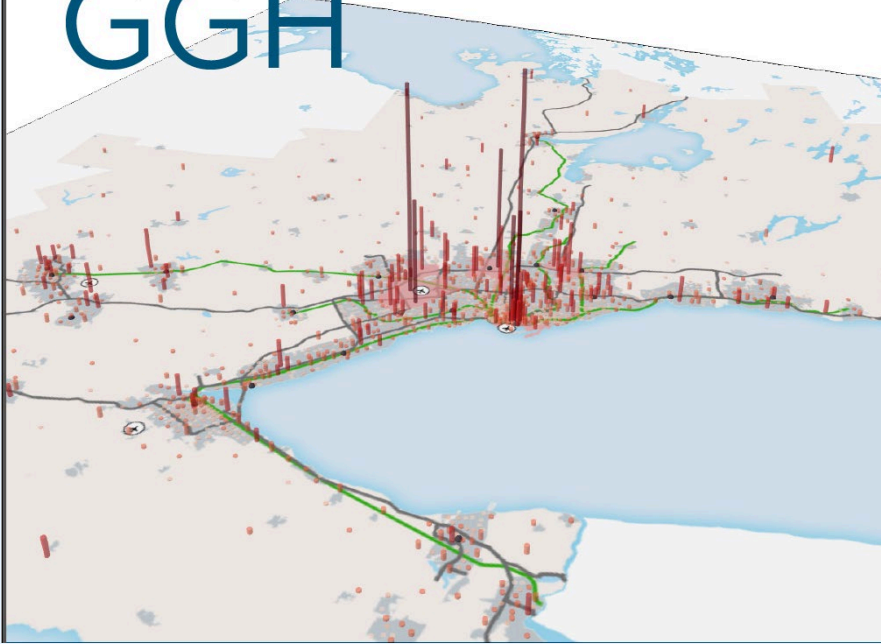
- ☞ Recognise critical roles transit plays in knowledge-based economy
  - attracting development outside the downtown
  - supporting agglomeration economies
  - providing access to labour/jobs and productivity
- ☞ Prioritise serving existing job concentrations and supporting growth in key strategic areas

# *A regional economic development strategy*

- ☞ To inform, guide, integrate with transit and land use planning
- ☞ Role of land use planning in economic development
- ☞ Informed research, data and analysis
  - detailed archetype profiles and outlooks
  - employment lands inventory
  - projected space demand/supply
  - frequent monitoring



# PLANNING THE **NEXT** GGH



Thank you

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