PLANNING THE NEXT GGH

CADEON COUNCIL
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Research questions

What kinds of economic activities are growing/declining?

In what locations?

Within what kinds of urban environments?
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
what’s driving the shift?
Archetypes
the shift in detail
uncertainty and disruption
confronting the new normal
the shift
Core Employment

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

+75,450 jobs
2006 - 2016
The shift to hyper-concentration around the downtown
what’s driving the shift?
What's driving the shift?

Transition to a knowledge economy

Change in employment by skill level
GGH, 2001-2014 (000s)
**What's 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
- Each Archetype has a distinct spatial pattern within the GGH
Arts & Design

112,665 jobs in 2016
Finance

275,300 jobs in 2016
91,270 jobs in 2016
51,715 jobs in 2016
Science-based

64,980 jobs in 2016
Logistics

32,635 jobs in 2016
Other Wholesaling

121,750 jobs in 2016
Hard Tech

51,226 jobs in 2016
Other Manufacturing

386,480 jobs in 2016
the shift in detail
Knowledge-intensive Archetypes benefit from spatial clustering

Arts & Design

+ 10,020 jobs
2006 - 2016
Knowledge-intensive Archetypes benefit from spatial clustering

Finance

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

**Soft Tech**

+ 19,310 jobs
2006 - 2016
Some Archetypes focused on routine activities are suburbanizing

Back Office

-2,995 jobs
2006 - 2016
There is some limited growth of knowledge-intensive activities in a few suburban areas.

Science-based

+ 12,030 jobs
2006 - 2016
Logistics focuses in suburban areas, near transportation facilities

Logistics

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

Other Wholesaling

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

**Hard Tech**

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

Other Manufacturing

-129,775 jobs
2006 - 2016
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
Confronting the new normal
Uneven growth, uncertainty, disruption and rapid change

- Anticipatory approaches – understanding change, risks and opportunities
- Forecasting based on past trends is risky
- Archetypes can be used as an analytical tool
- Matching Archetypes with local assets
- Integrated strategies: land use + transportation + economic development
- That is, comprehensive place-based strategies
Thank you

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