

PLANNING THE NEXT GGH

CALEDON COUNCIL

TUESDAY MAY 28 2019

PAMELA BLAIS
METROPOLE CONSULTANTS

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

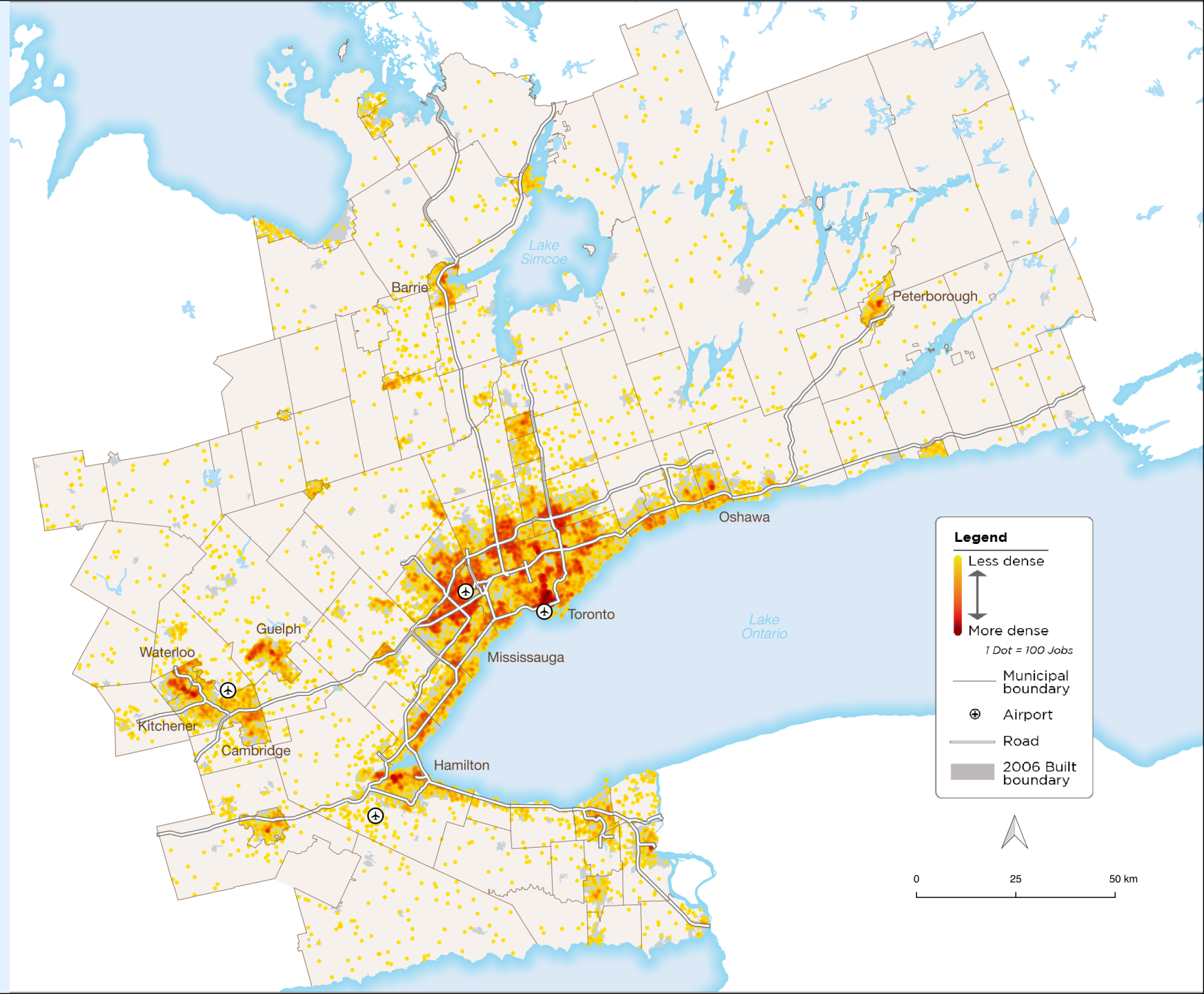
uncertainty and disruption

confronting the new normal

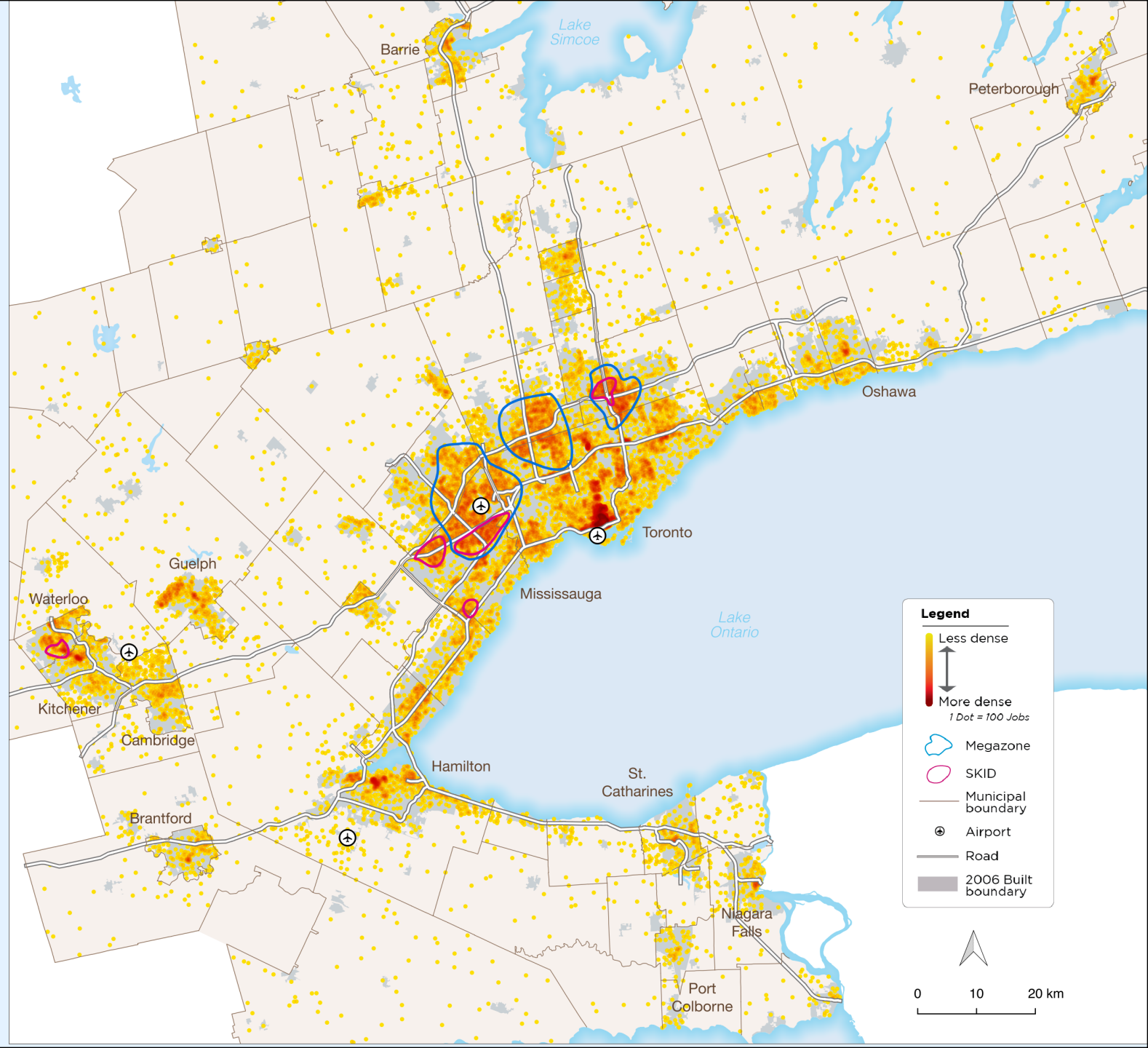
the shift

Core Employment

2,375,465 jobs
in 2016

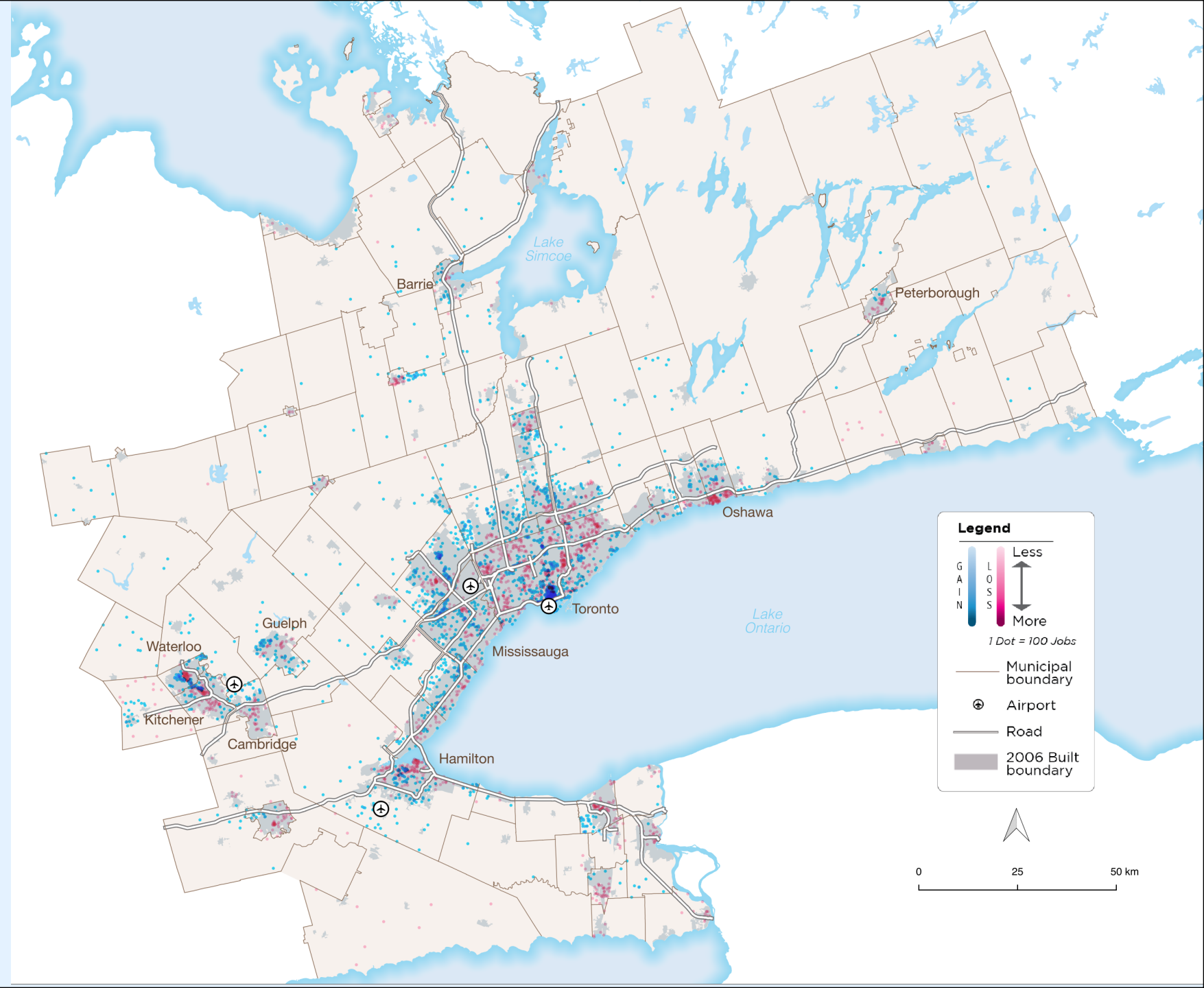


Core Employment with Megazones & Suburban Knowledge- Intensive Districts



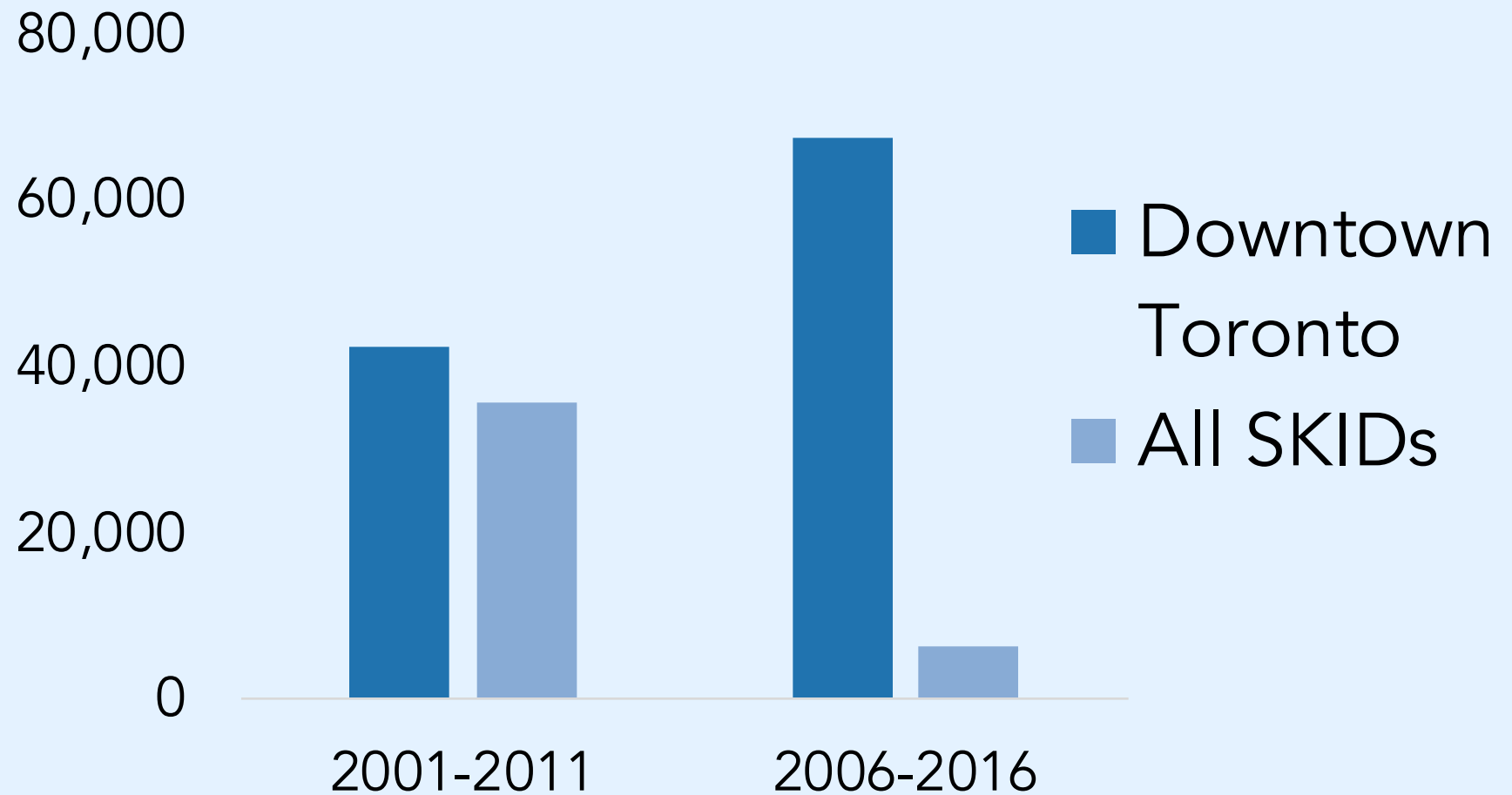
Core Employment Change

+75,450 jobs
2006 - 2016



Core Employment Change Downtown Toronto vs. SKIDs

**The shift to
hyper-
concentration
around the
downtown**

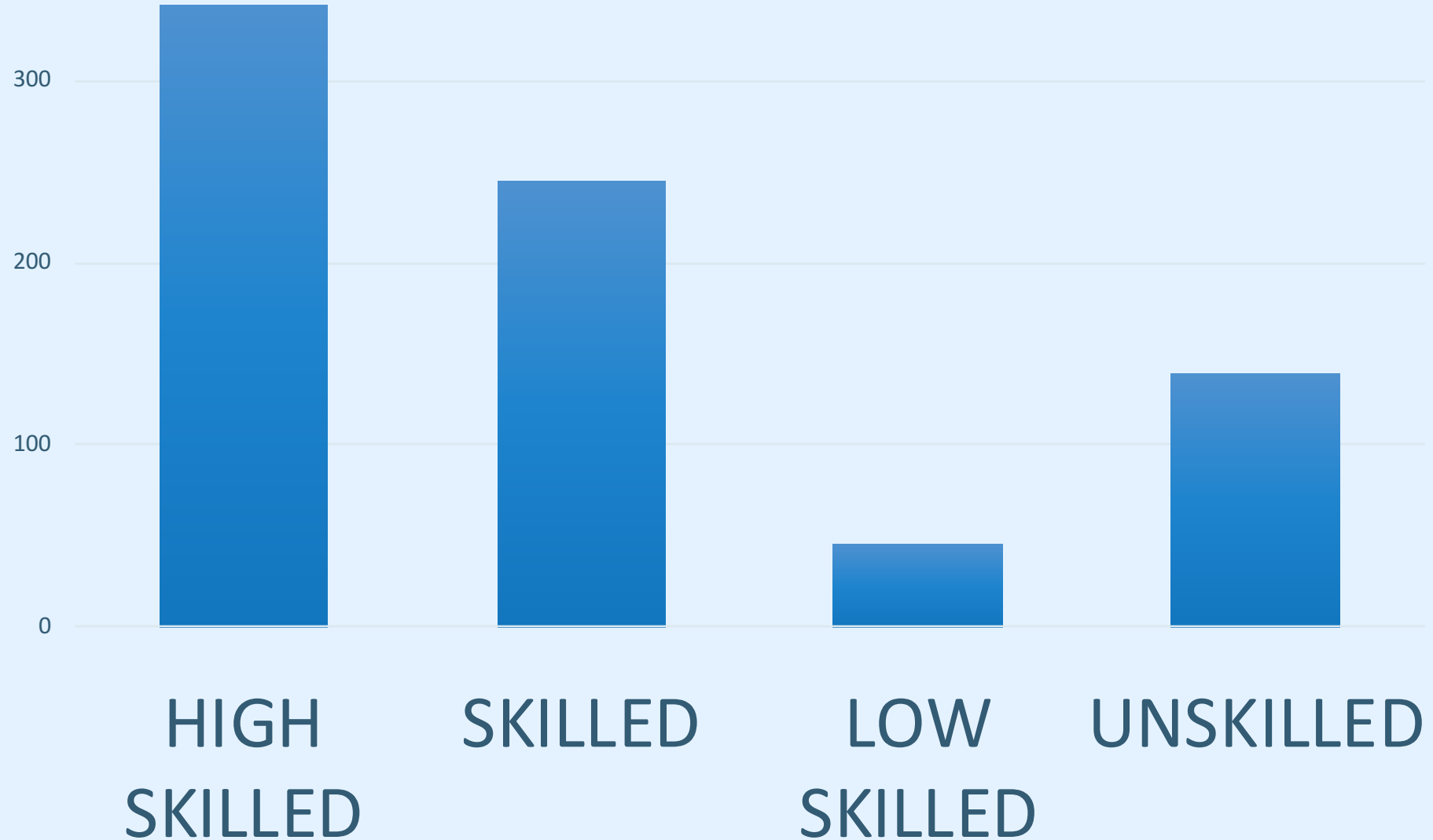


what's driving the shift?

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

**Whats
driving the
shift?**

Transition to
a knowledge
economy



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

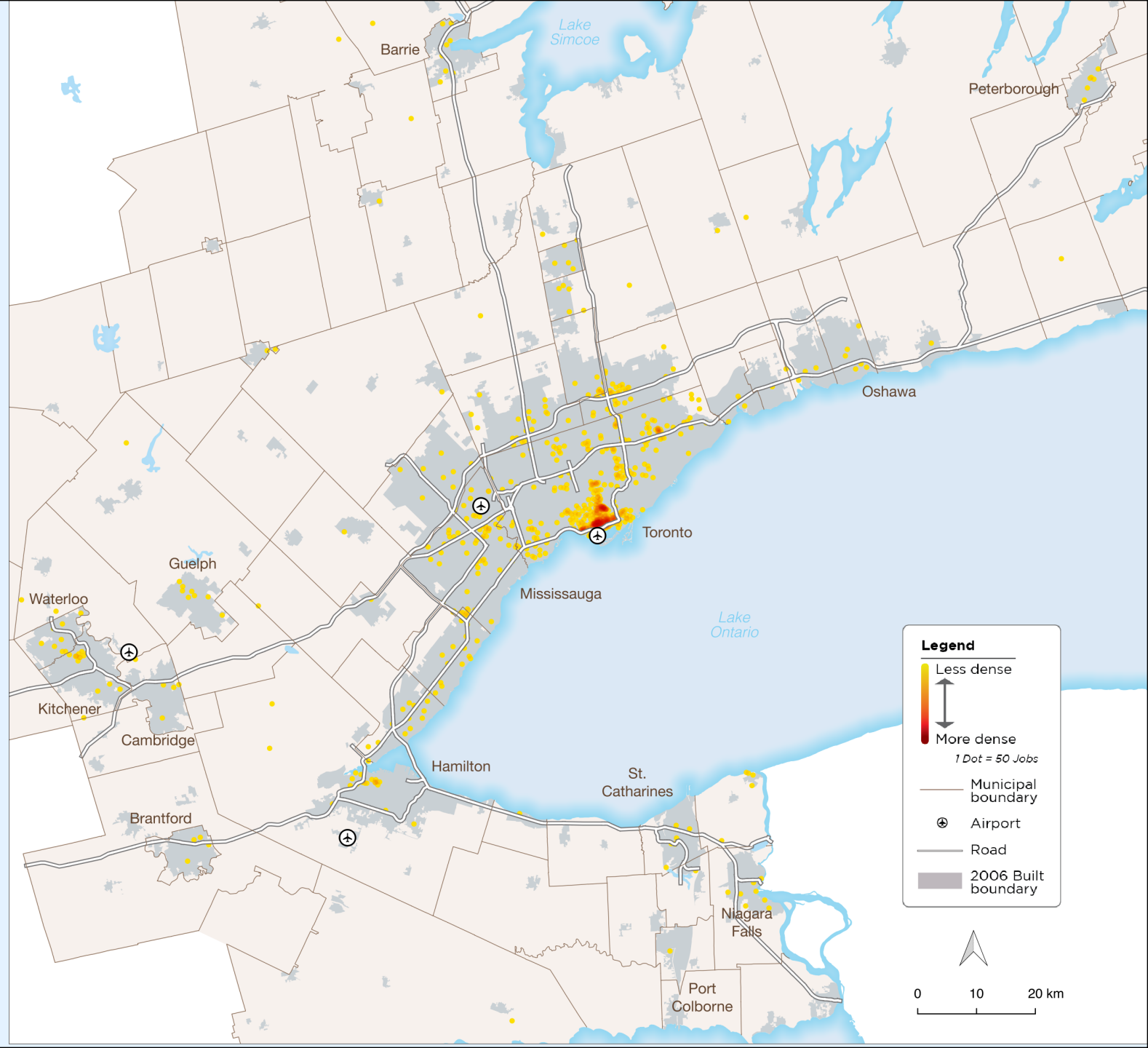
Archetypes

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
- Each Archetype has a distinct spatial pattern within the GGH

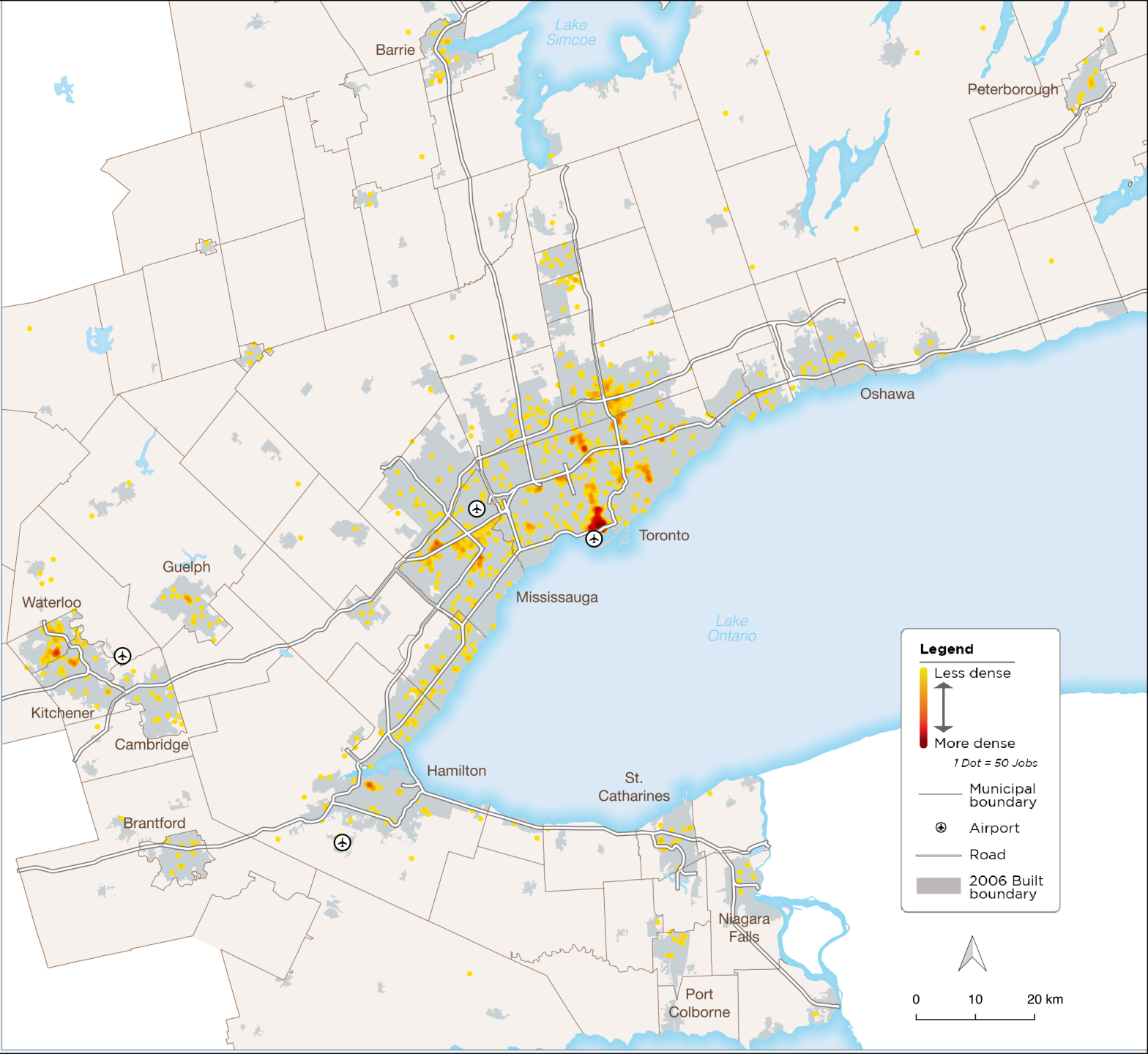
Arts & Design

112,665 jobs in
2016



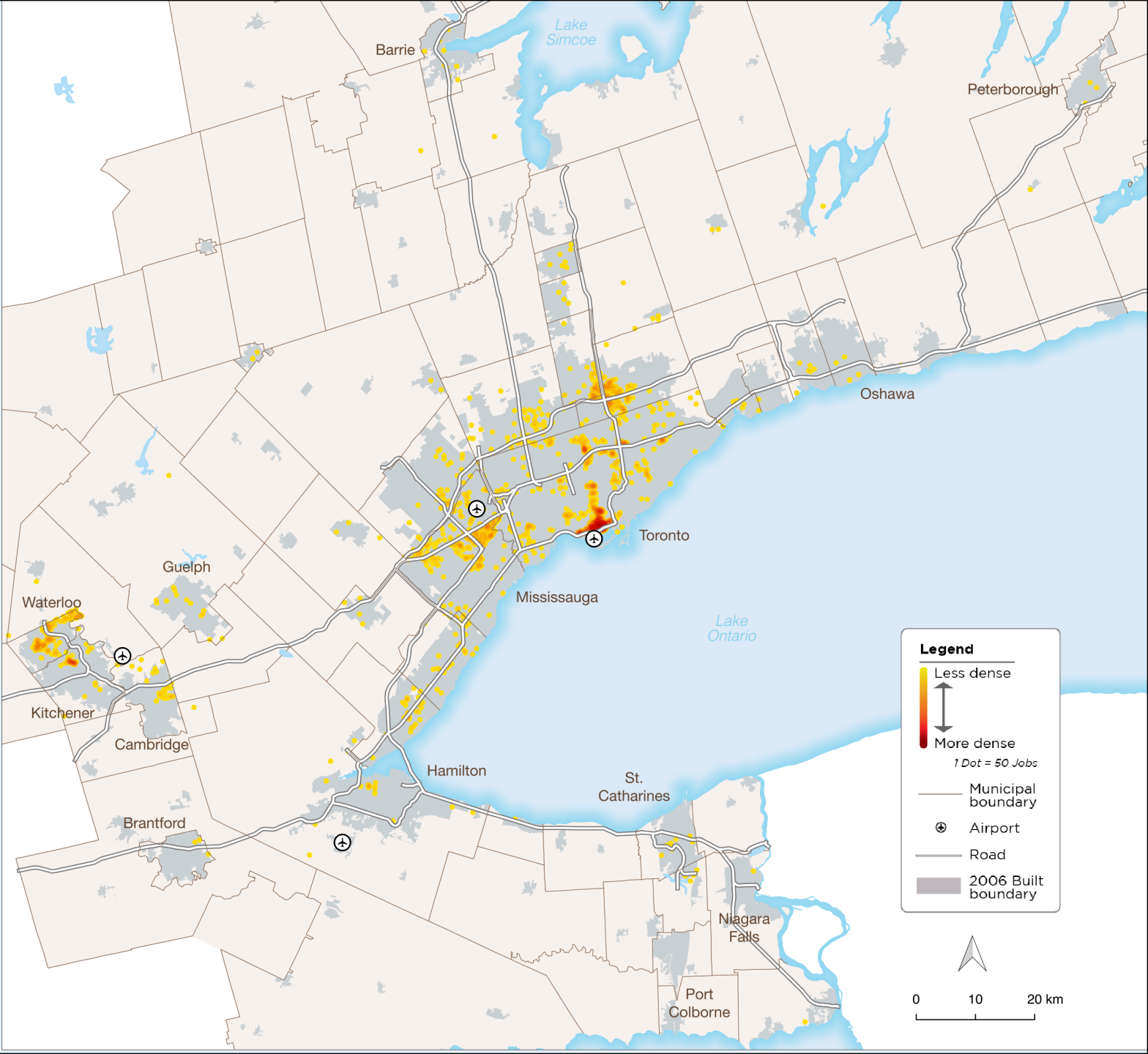
Finance

275,300 jobs in
2016



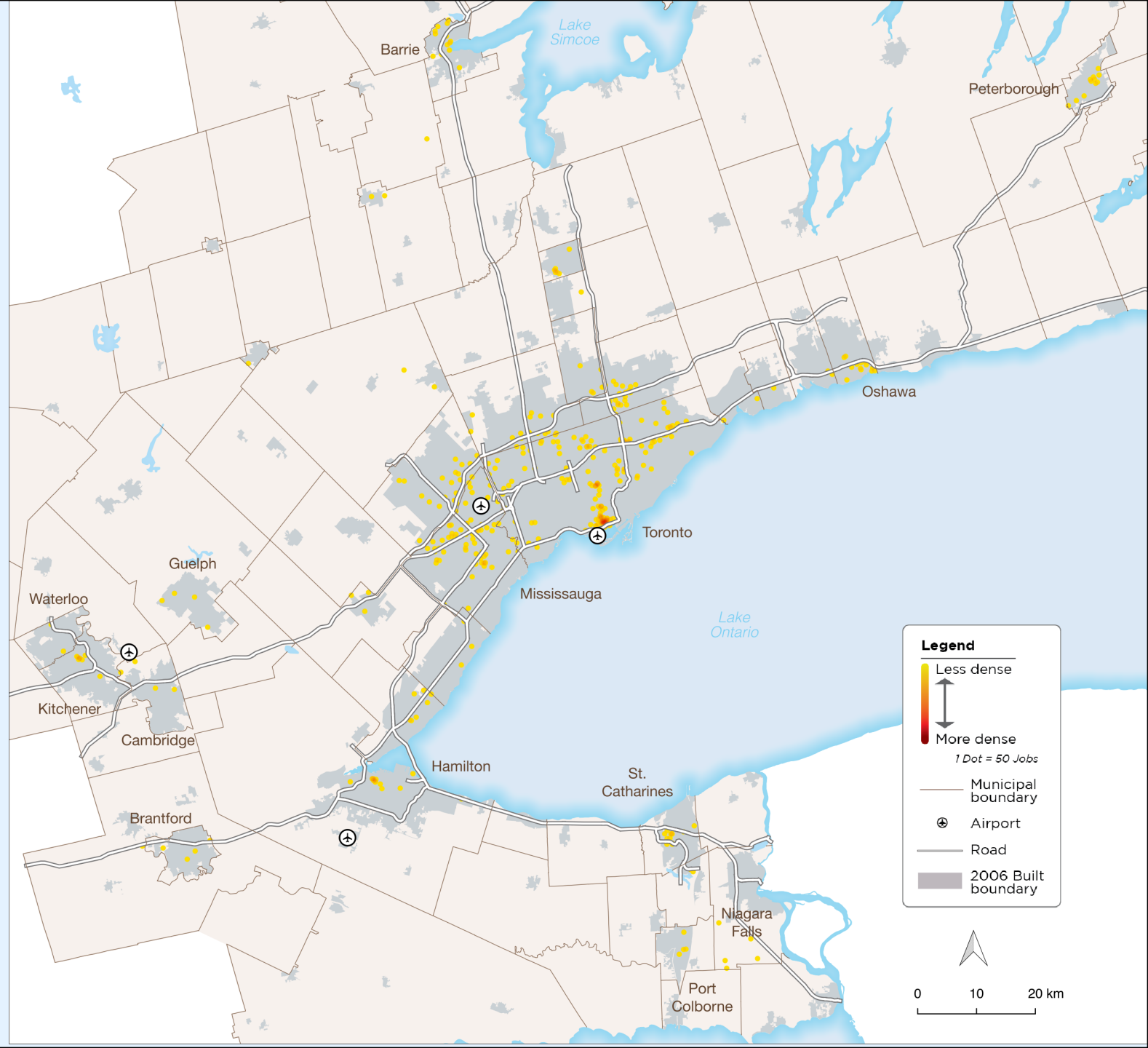
Soft Tech

91,270 jobs in
2016



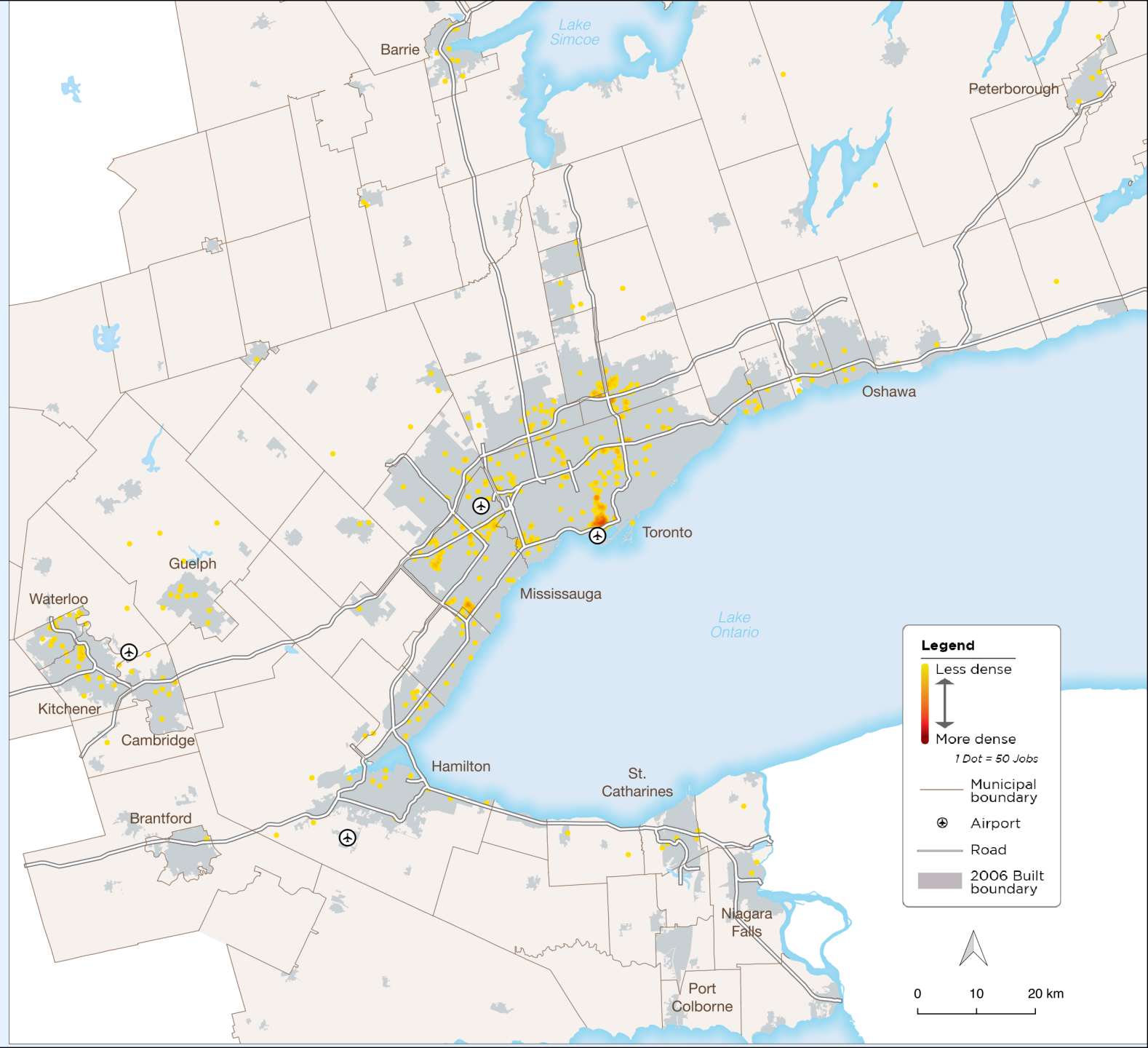
Back Office

51,715 jobs in
2016



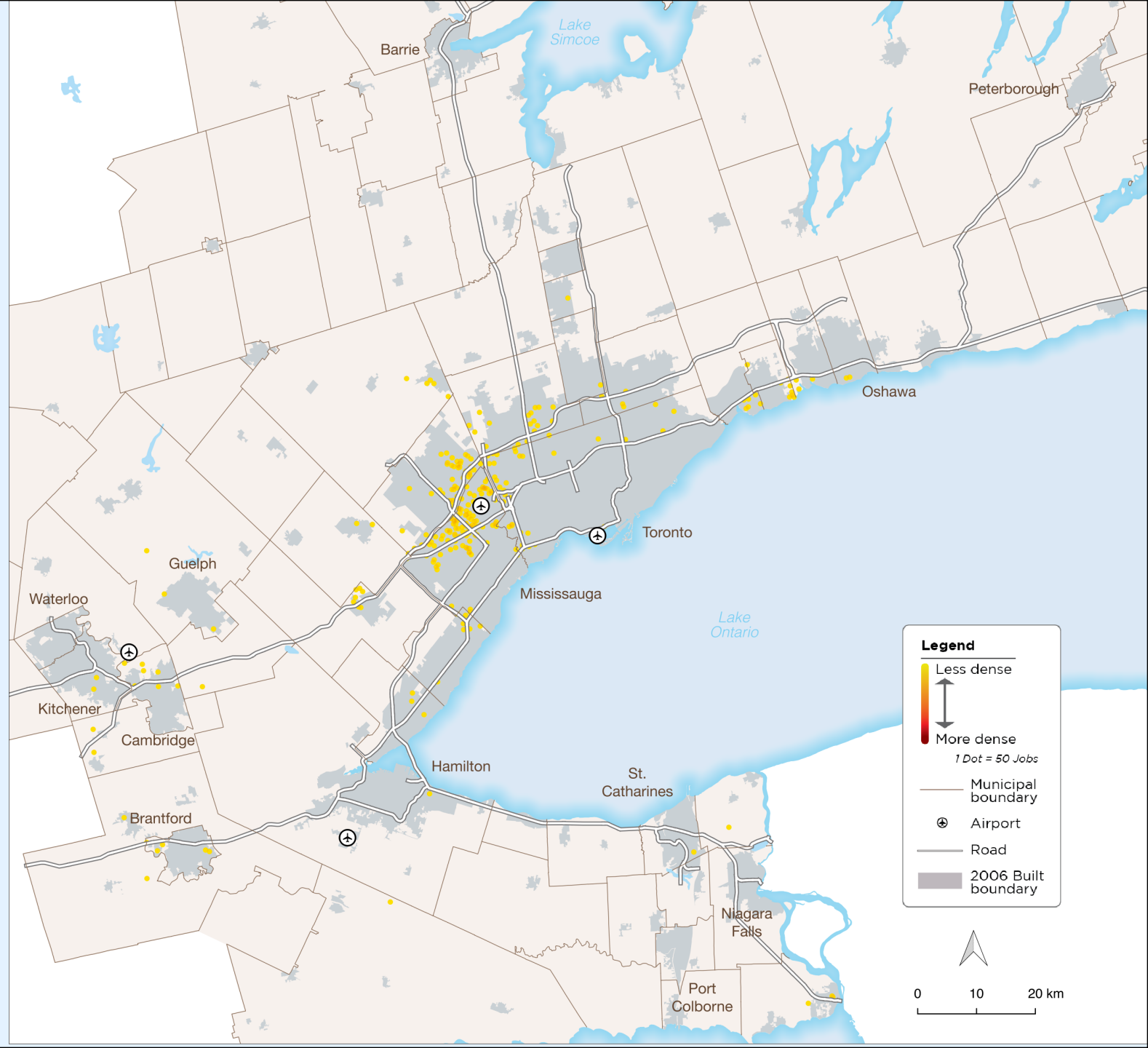
Science-based

64,980 jobs in
2016



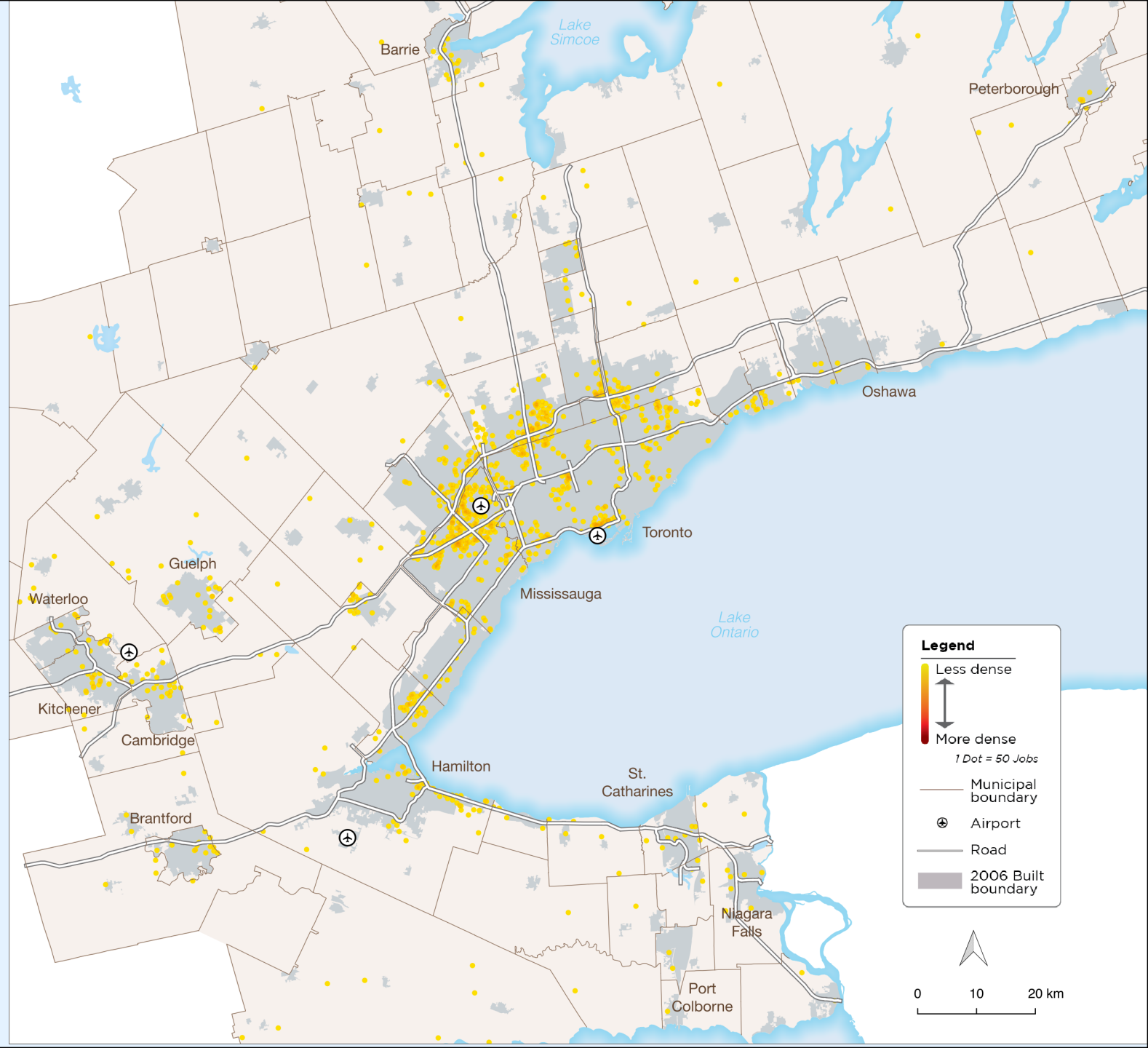
Logisitics

32,635 jobs in
2016



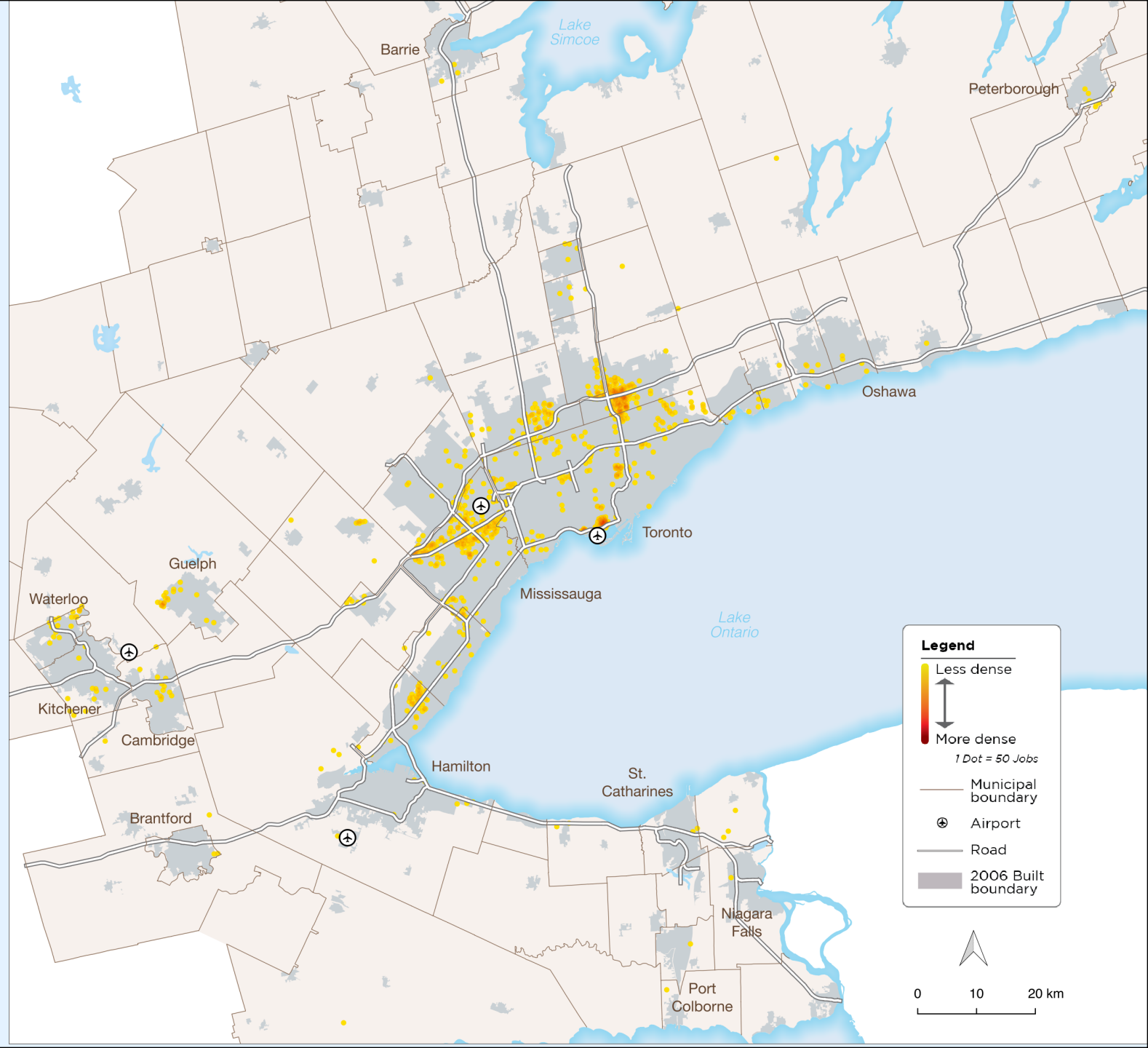
Other Wholesaling

121,750 jobs in
2016



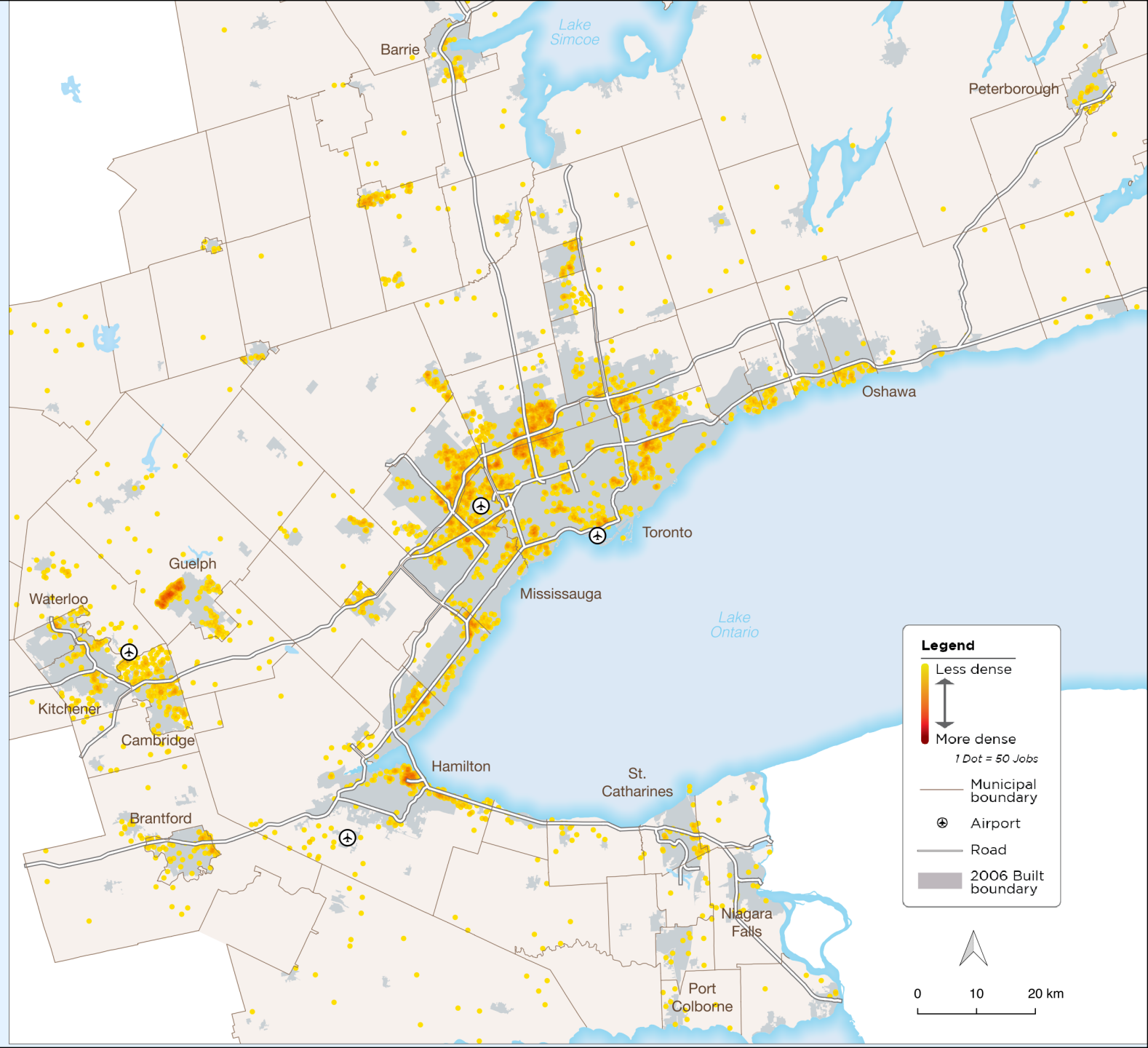
Hard Tech

51,226 jobs in
2016



Other Manufacturing

386,480 jobs in
2016

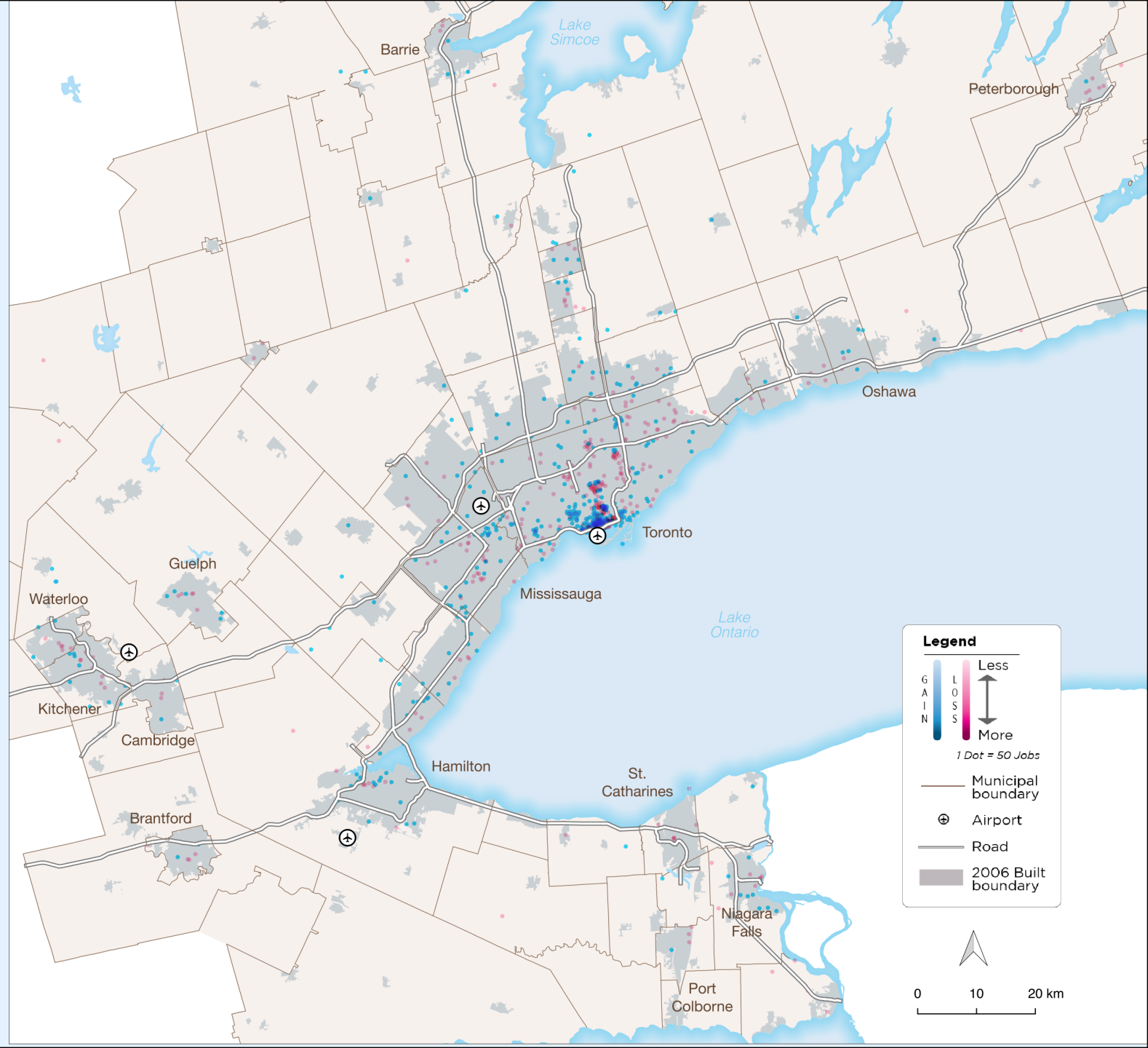


the shift in detail

Knowledge-
intensive
Archetypes benefit
from spatial
clustering

Arts & Design

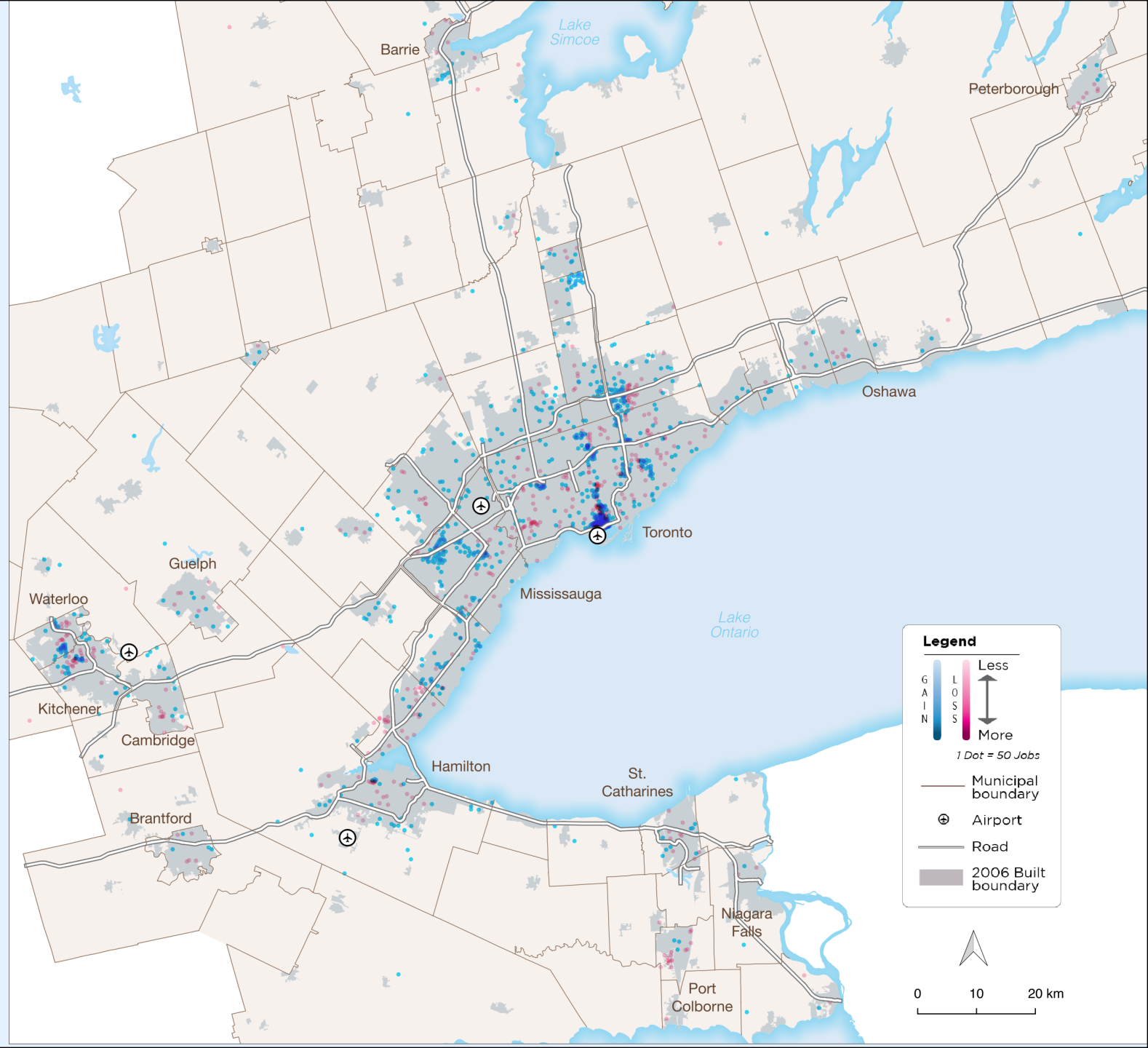
+ 10,020 jobs
2006 - 2016



Knowledge-
intensive
Archetypes benefit
from spatial
clustering

Finance

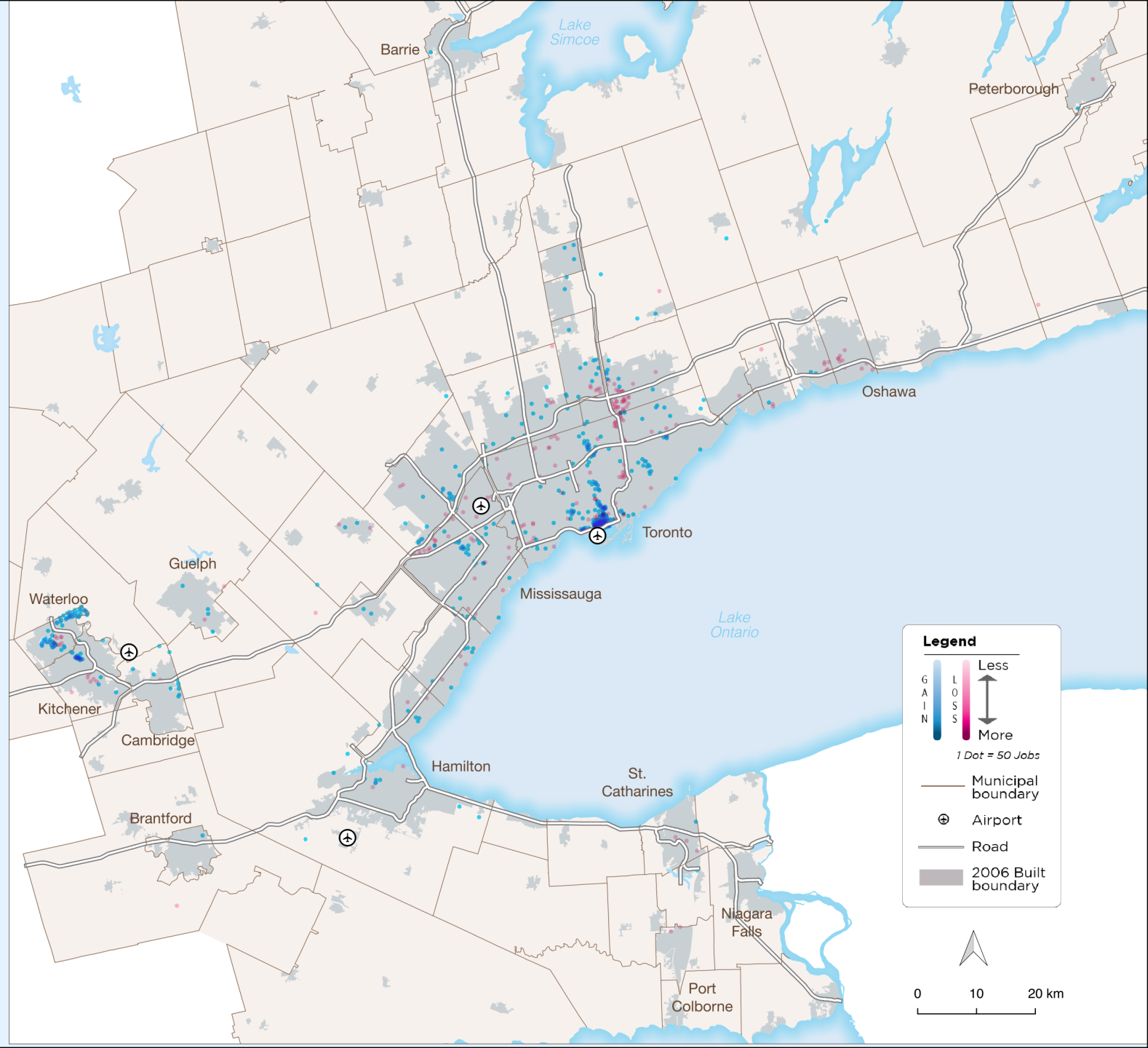
+ 47,150 jobs
2006 - 2016



Knowledge-
intensive
Archetypes benefit
from spatial
clustering

Soft Tech

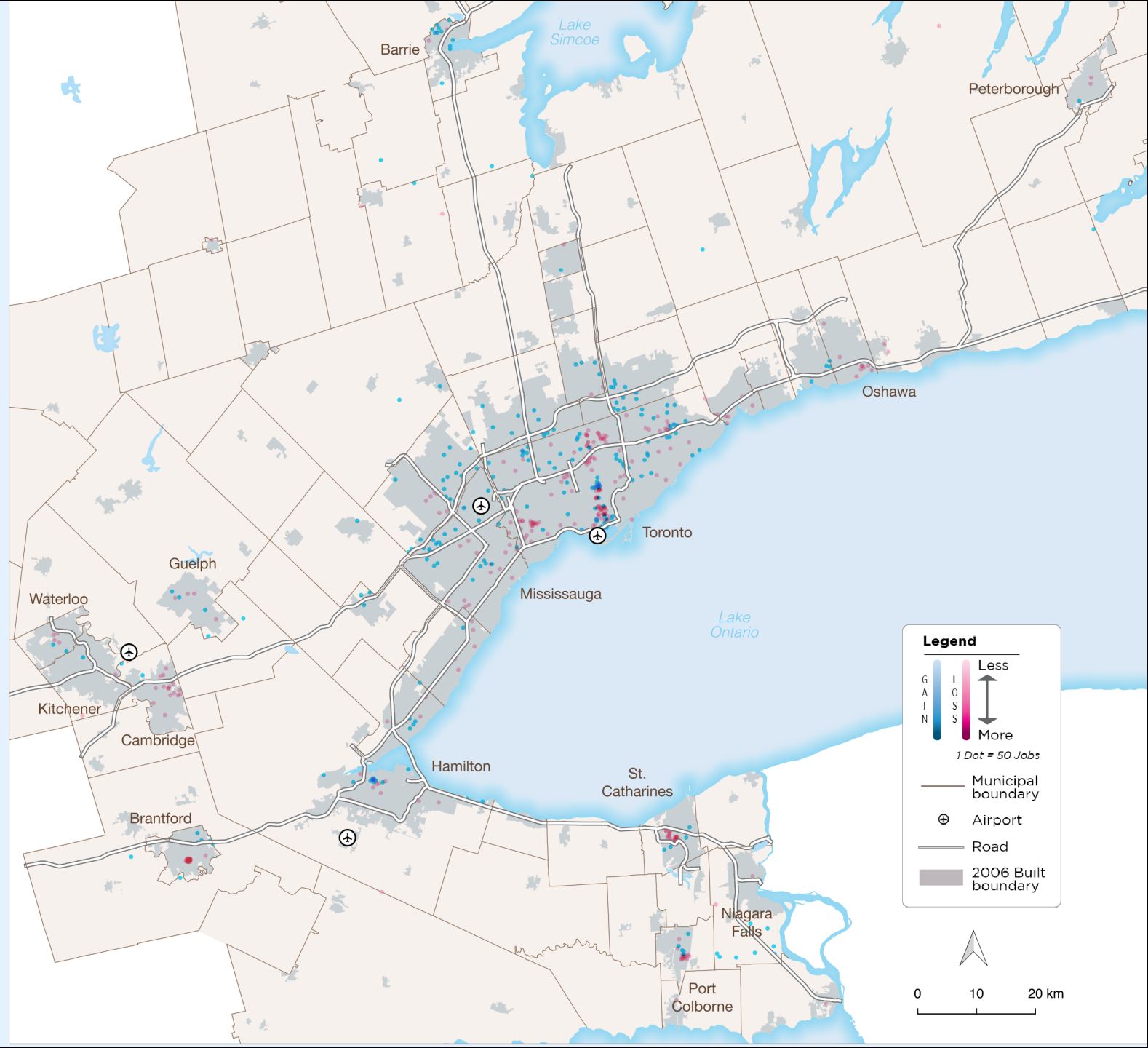
+ 19,310 jobs
2006 - 2016



Some Archetypes
focused on routine
activities are
suburbanizing

Back Office

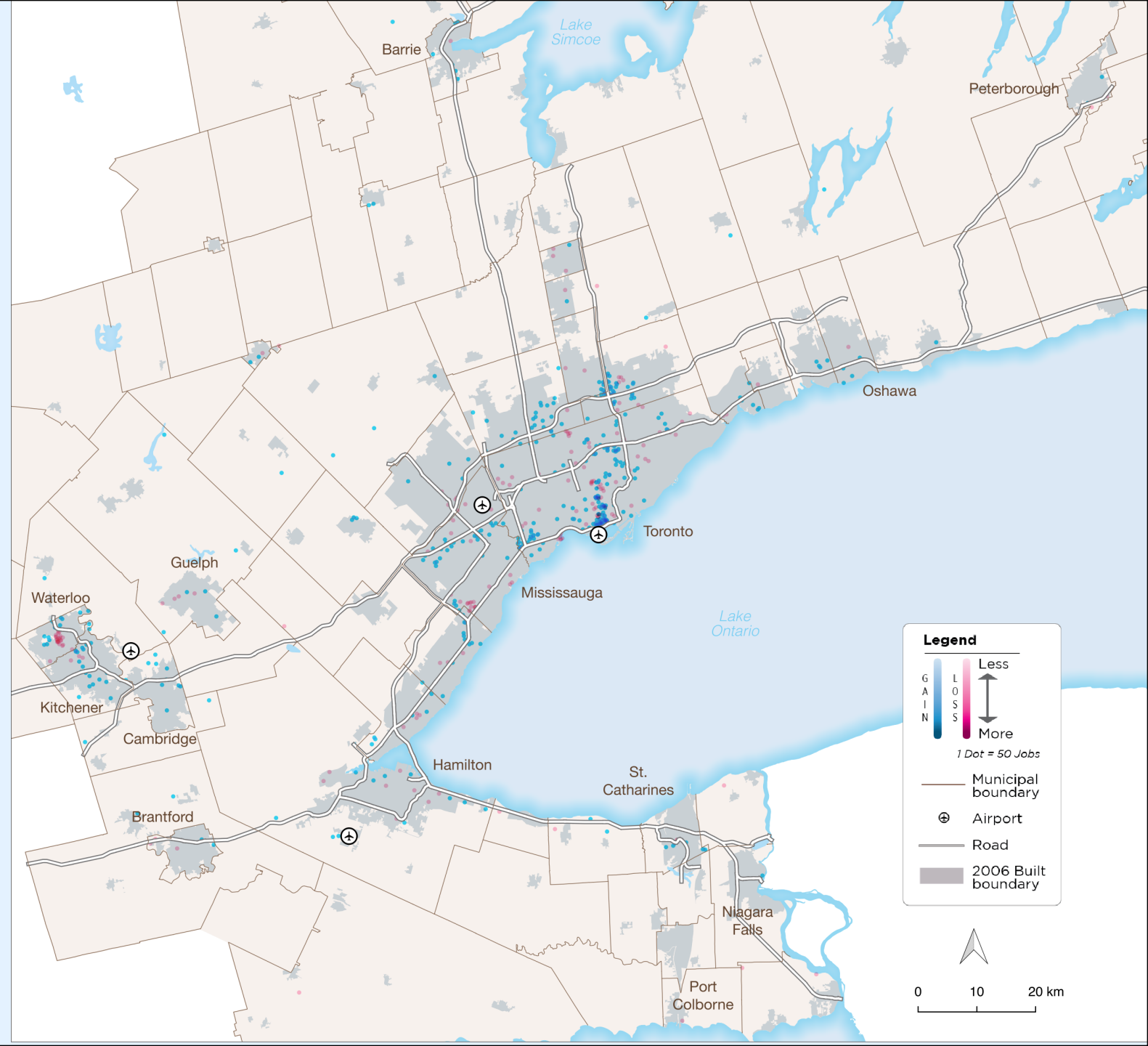
-2,995 jobs
2006 - 2016



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

Science-based

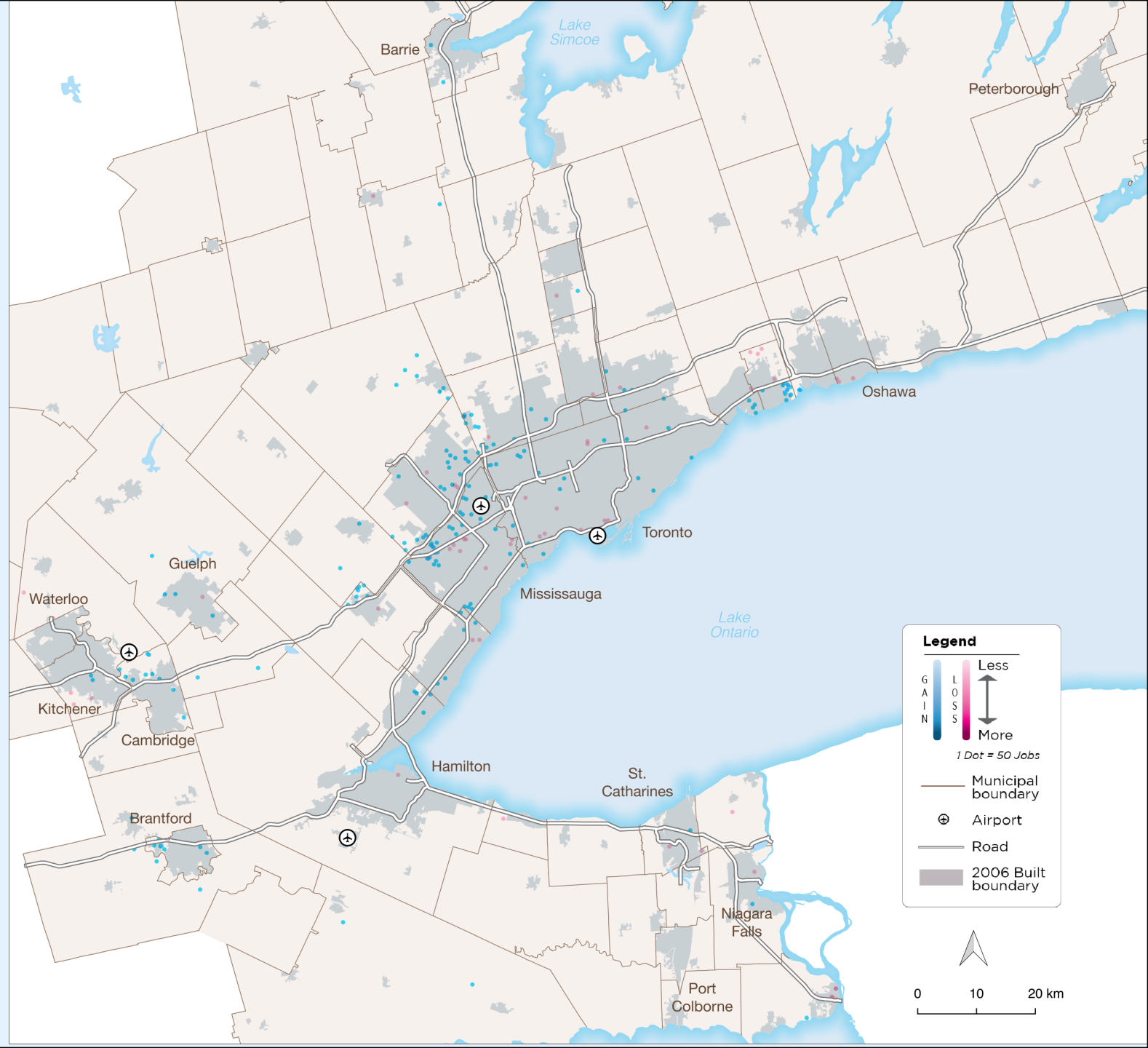
+ 12,030 jobs
2006 - 2016



Logistics focuses in
suburban areas, near
transportation
facilities

Logistics

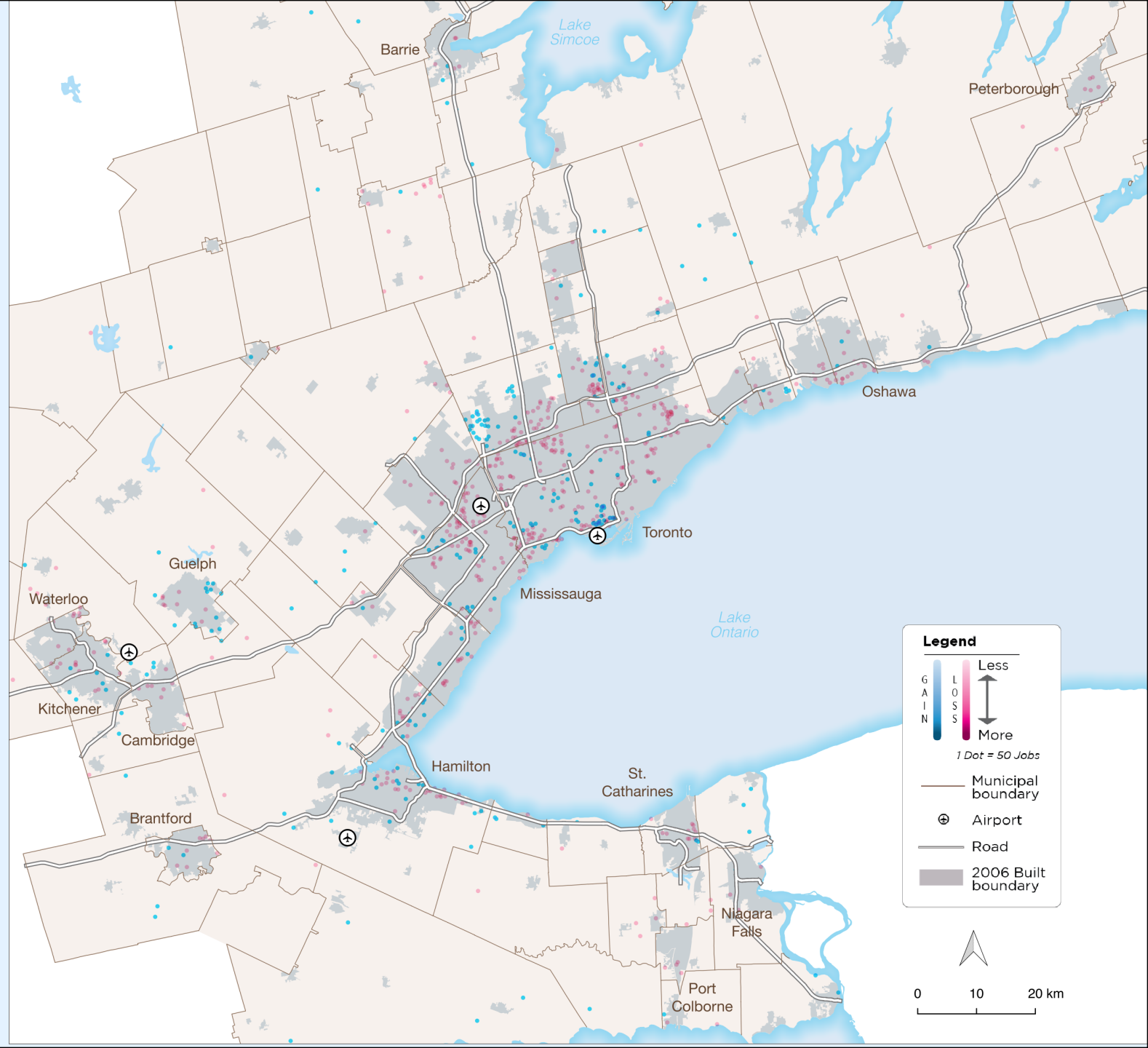
+ 7,456 jobs
2006 - 2016



Some routine-oriented, dispersed activities are declining

Other Wholesaling

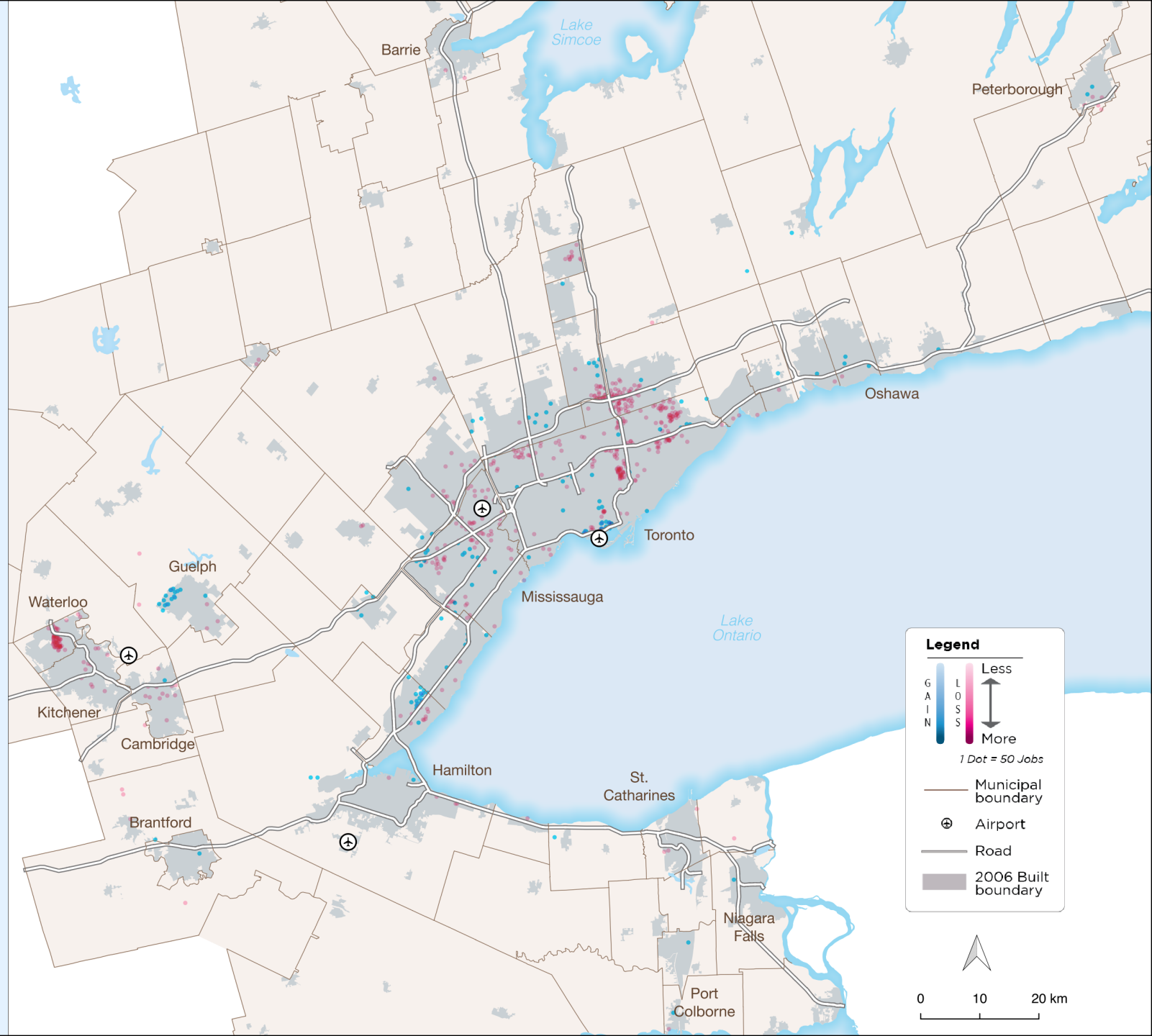
-18,170 jobs
2006 - 2016



Some high-order,
spatially
concentrated
manufacturing is
declining

Hard Tech

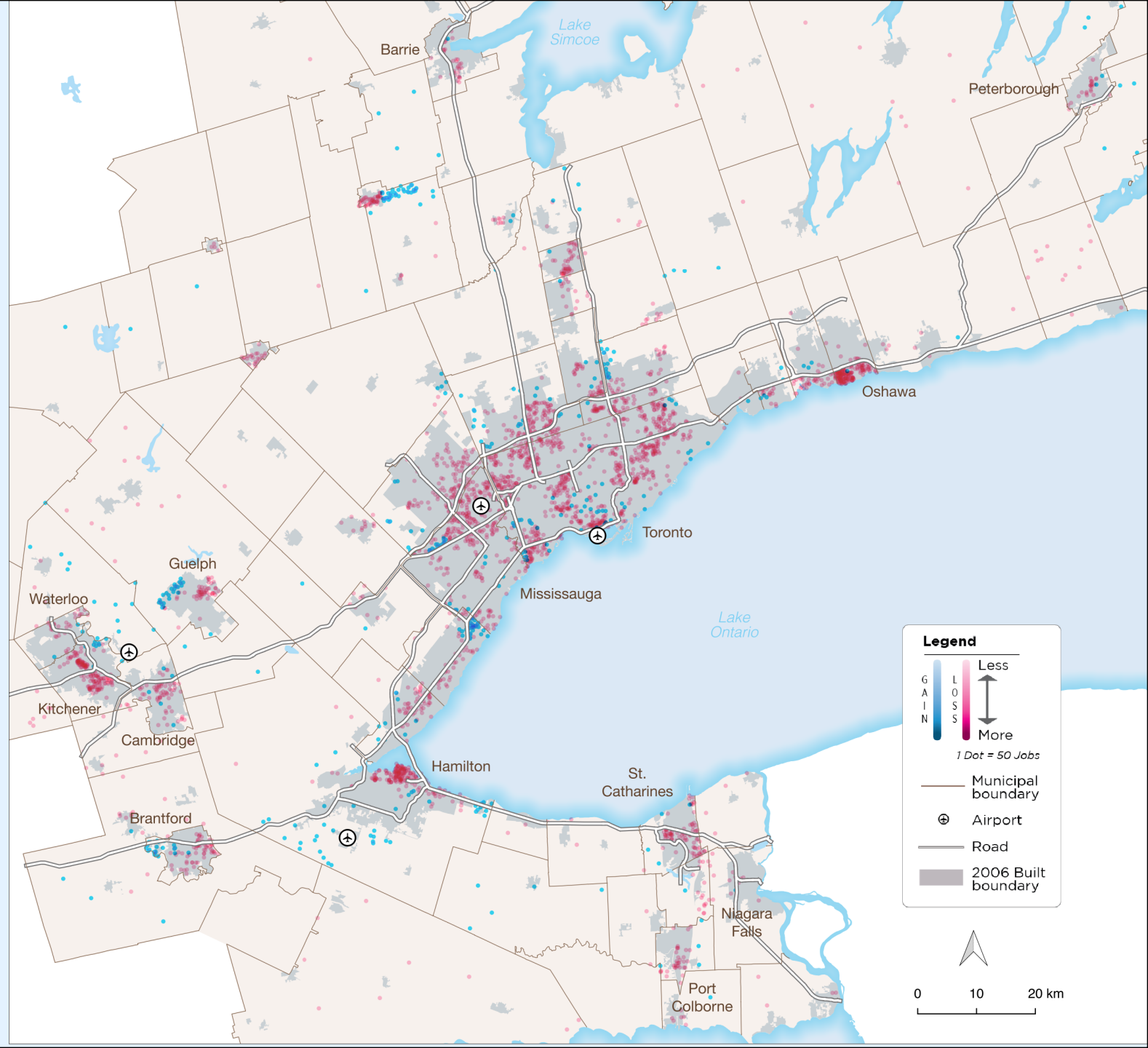
-21,585 jobs
2006 - 2016



Some routine-oriented, dispersed activities are declining

Other Manufacturing

-129,775 jobs
2006 - 2016



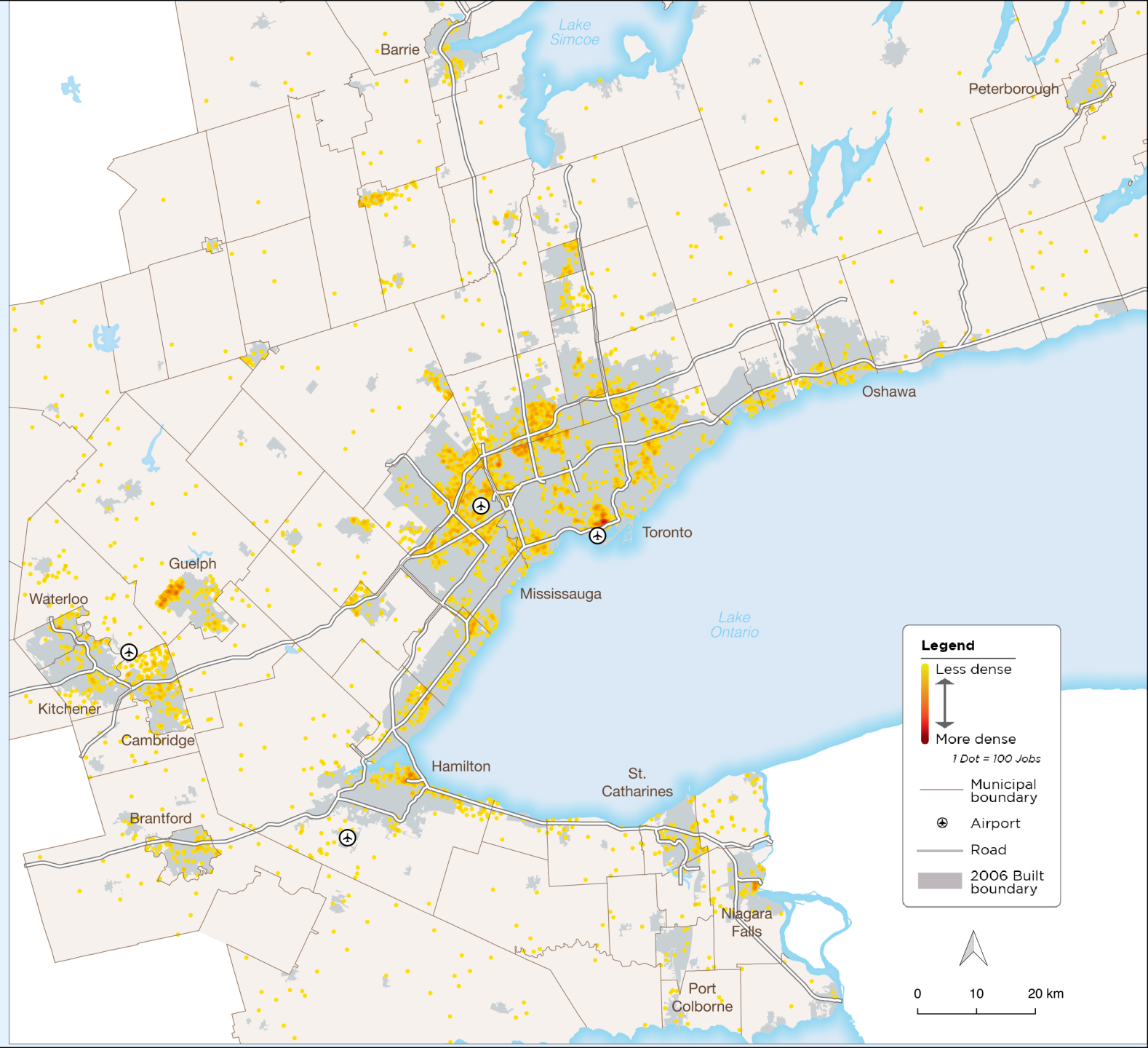
the geography of
uncertainty and disruption

Vulnerability to automation

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

414,415 jobs in 2016

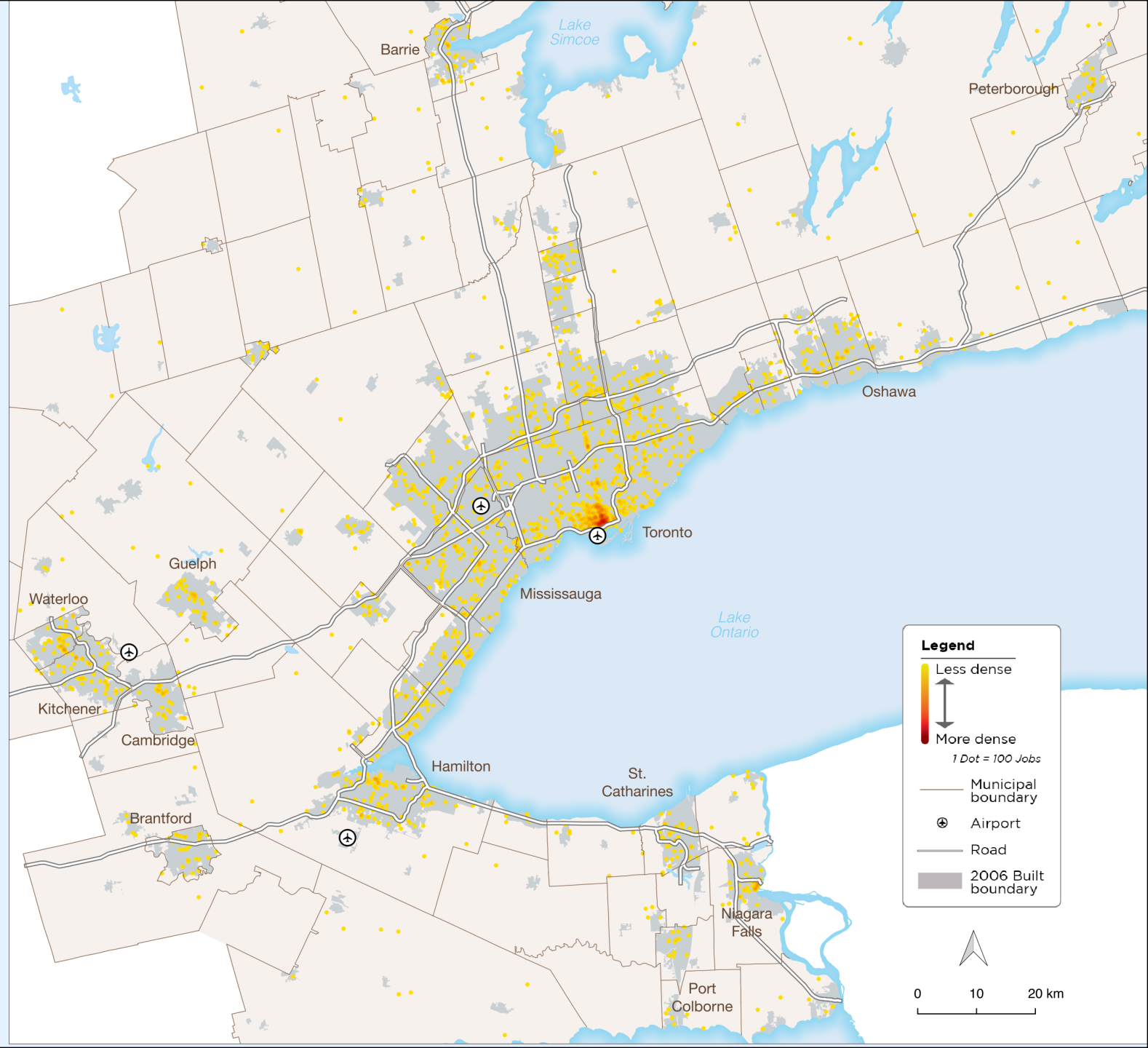
[excludes Accommodation and food services]



Vulnerability to automation

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

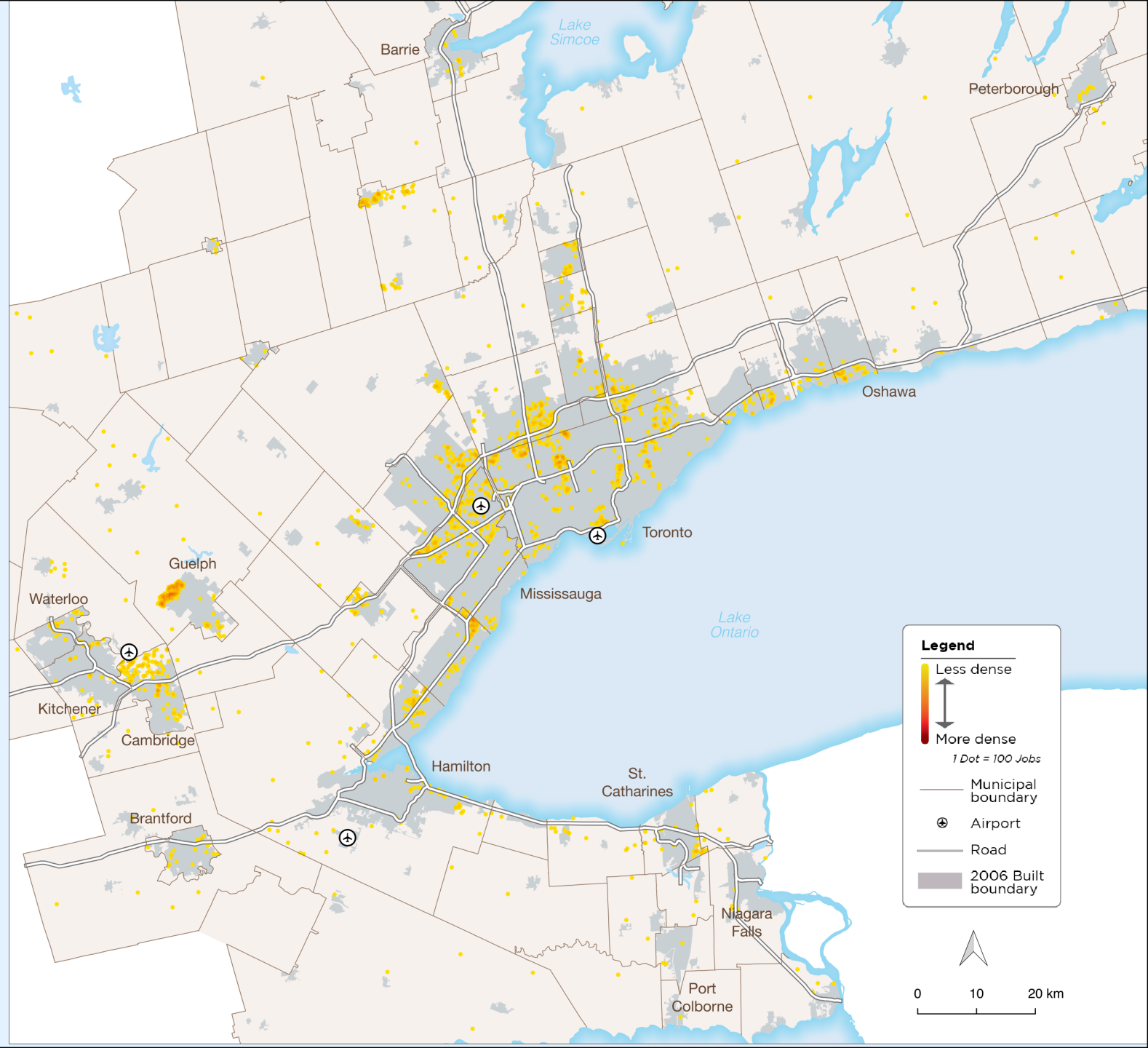
278,220 jobs in
Accommodation
and food services in
2016



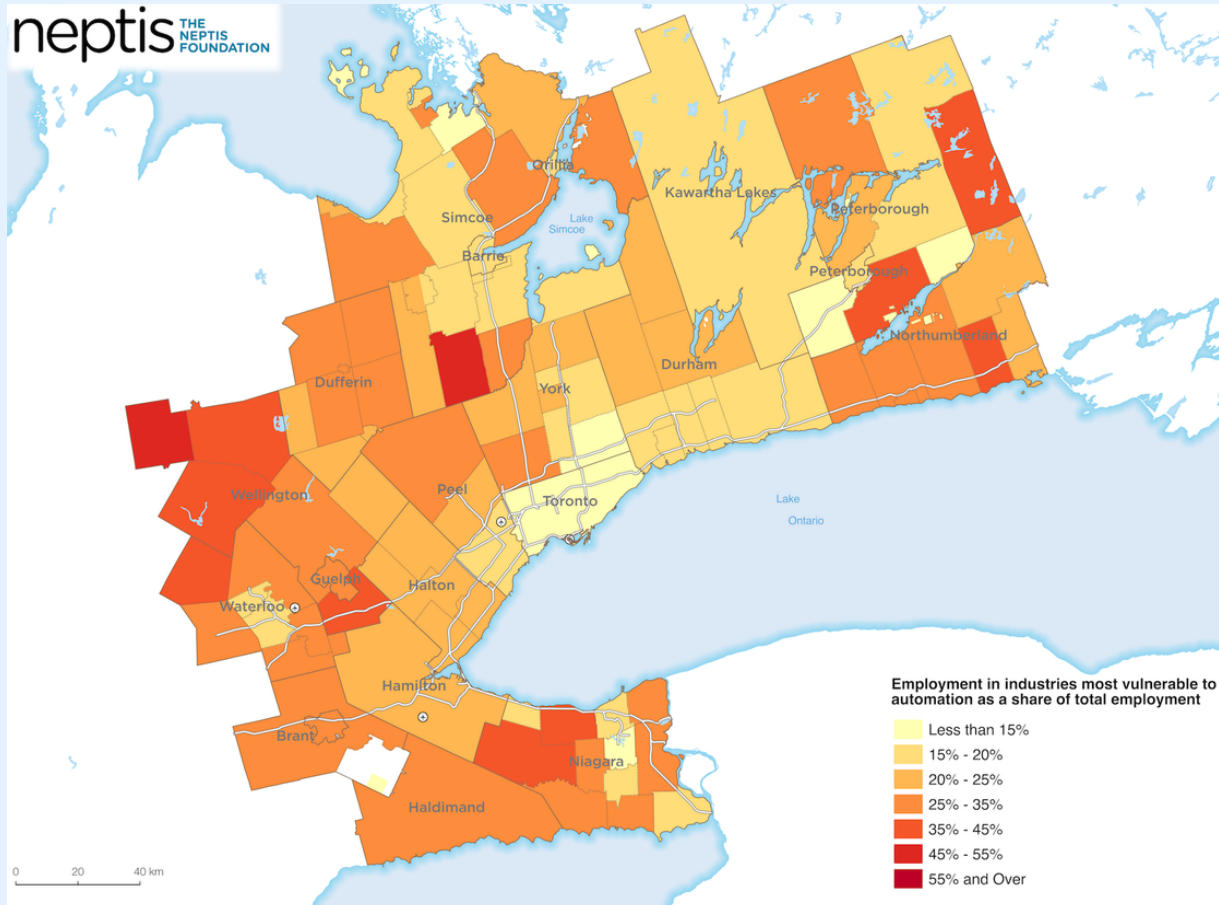
Vulnerability to trade disruptions

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

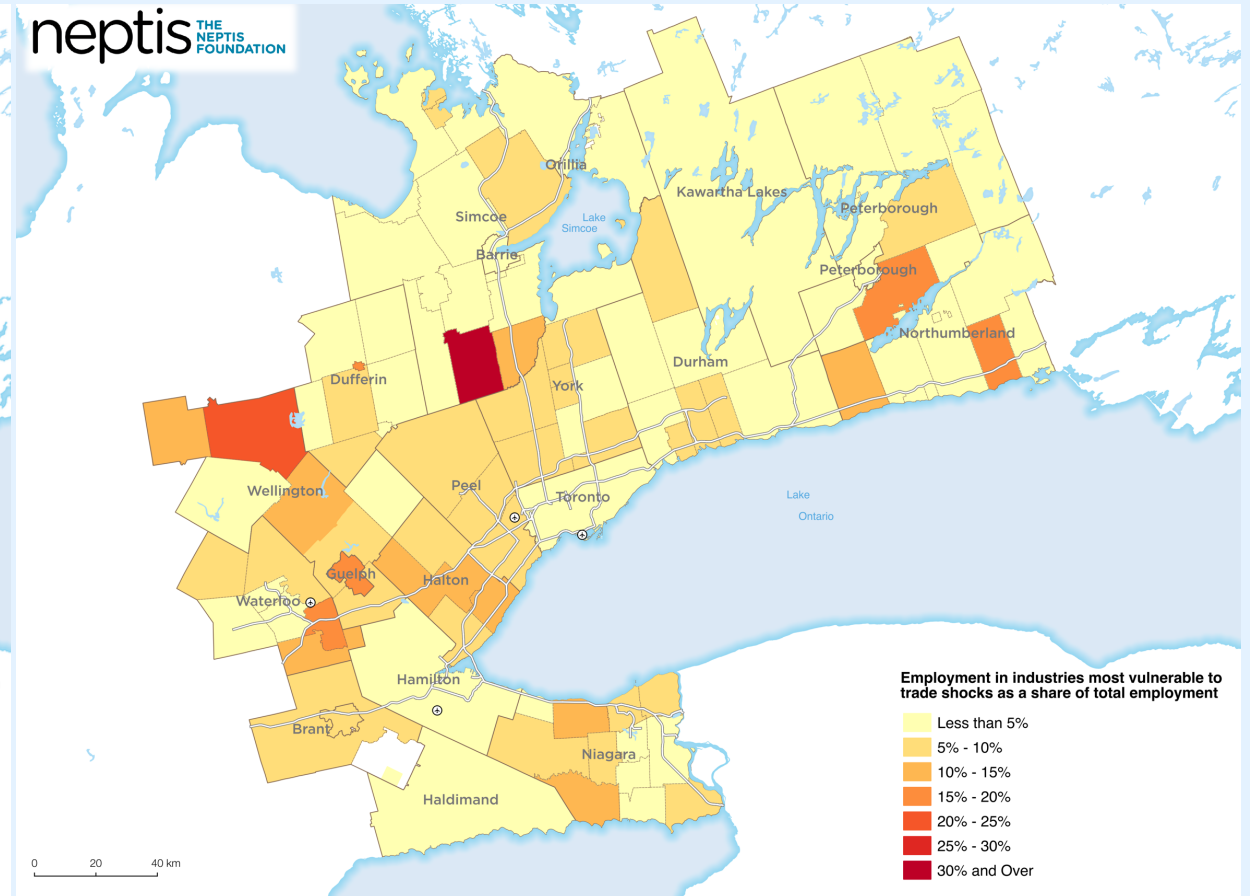
197,355 jobs in
2016



Vulnerability to automation and trade disruptions by municipality



Vulnerability to automation



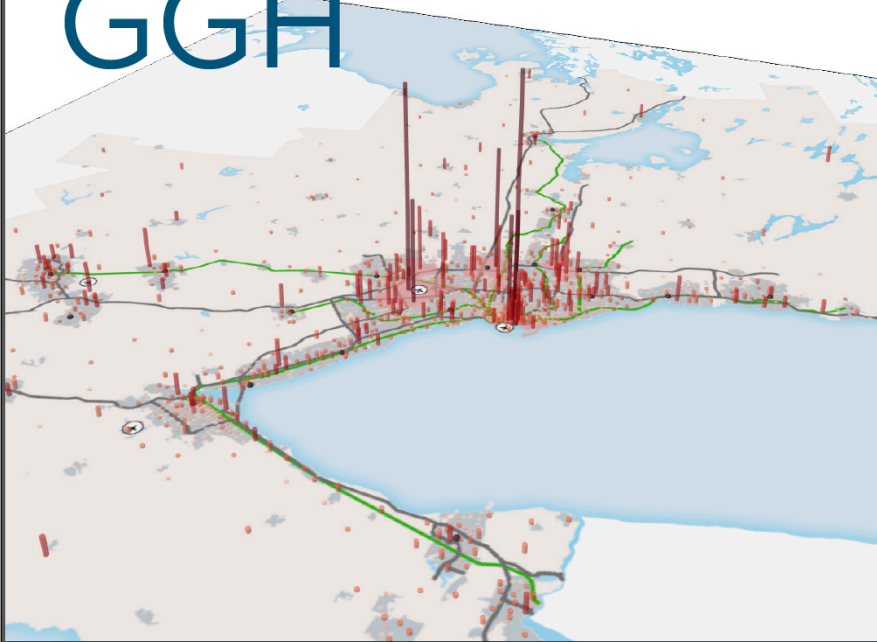
Vulnerability to trade disruptions

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

PLANNING THE **NEXT** GGH



Thank you

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