



**ONTARIO
ECONOMIC
DEVELOPMENT
SOCIETY**

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AUTHORS ACKNOWLEDGMENTS

We would like to thank the respondents for their participation in this critical economic development research. Special thanks are due to the Ottawa Chamber of Commerce, and both Carleton University professors and students. Gratitude is also due to the Ottawa Chamber of Commerce Economic Development Committee and its Chairman, Steve Conrad.

The metrics to measure municipal economic performance were put together by the Ontario Economic Development Society policy analysts over one and a half years completed on April 1 2014. The comments, questions, and feedback on this economic development scorecard are deeply appreciated.

DISCLAIMER

The findings, interpretations, and conclusions expressed in this study are entirely those of the Ontario Economic Development Society.

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Population

City of Ottawa

2011: 883,391¹

2012: 919,600²

2013: 979,336³

Ottawa-Gatineau

2011: 1,236,324⁴

2012: 1,273,00⁵

2013: 1,305,210⁶



In Ottawa - Gatineau, the land area is 6,287.03 square kilometers with a population density of 196.6 persons per square kilometer. 2012 verified by stat can. The Ottawa only population accounts for Ottawa's geographic region, which covers 2796 square kilometers.⁷ Two population counts by two viable sources are given for 2013.

Number of Companies

In 2013, 26 814⁸ companies were in Ottawa according to an unofficial data source. "Associations & Non-Profit (5.8%), Buildings & Constructions (4.95%), Consumer Services (5.9%), Health Care (9.63%), Business and consulting related & Professional Services (20.44%), Restaurant & Bars (5.9%), Shopping & Stores (10.83%), Travel & Leisure (3.46%)."⁹

¹ Government Website: Statistics Canada. <http://www12.statcan.gc.ca/-recensement/2011/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CSD&Code1=3506008&Geo2=PR&Code2=35&Data=Count&SearchText=Ottawa&SearchType=Begins&SearchPR=01&B1=All&Custom=&TABID=1> Accessed on December 25 2013.

² 2012 population estimation from Statistics Canada based on the 2006 post-censal estimate

³ http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/adr_en.pdf

⁴ Annual population estimates by metropolitan area, July 1, 2013 released on Feb.24, 2014 as Ottawa-Gatineau, Ontario part

⁵ <http://www.statcan.gc.ca/daily-quotidien/140226/dq140226b-eng.pdf>

⁶ <http://www12.statcan.ca/-recensement/2011/as-sa/fogs-spg/Facts-cma-eng.cfm?LANG=Eng&GK=CMA&GC=505>

⁷ 2012 population estimation from Statistics Canada based on the 2006 post-censal estimate

⁸ http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/adr_en.pdf

⁹ 2012 population estimation from Statistics Canada based on the 2006 post-censal estimate

¹⁰ http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/adr_en.pdf

¹¹ Annual population estimates by metropolitan area, July 1, 2013 released on Feb.24, 2014

¹² <http://www.statcan.gc.ca/daily-quotidien/140226/dq140226b-eng.pdf>

¹³ Government Website: City of Ottawa. <http://ottawa.ca/en/city-hall/accountability-and-transparency/corporate-planning-and-performance-management/fleet-0> Accessed on October 7, 2013.

¹⁴ Manta. <http://www.manta.com/world/North+America/Canada/Ontario/Ottawa/>. Retrieved from OntarioEDS research archives on December 28 2013.

¹⁵ Manta. <http://www.manta.com/world/North+America/Canada/Ontario/Ottawa/>. Retrieved from OntarioEDS research archives on December 28 2013.

Five Largest Sectors**2010¹⁰**

SECTOR	NUMBER OF EMPLOYEES
Public Administration	116,700
Health & Education	96,600
Professional, Science & Tech. Services	57,500
Retail Trade	51,300
Construction	27,400

2011¹¹

SECTOR	NUMBER OF EMPLOYEES
Public Administration	117,100
Health & Education	99,700
Professional, Science & Tech. Services	61,200
Retail Trade	50,100
Accommodation and Food Services	26,900

2012¹²

SECTOR	NUMBER OF EMPLOYEES
Public Administration	119,900
Health & Education	98,600
Professional, Science & Tech. Services	63,100

¹⁰ Ottawa Annual Development Report, 2012, released by the City of Ottawa, p. 42.

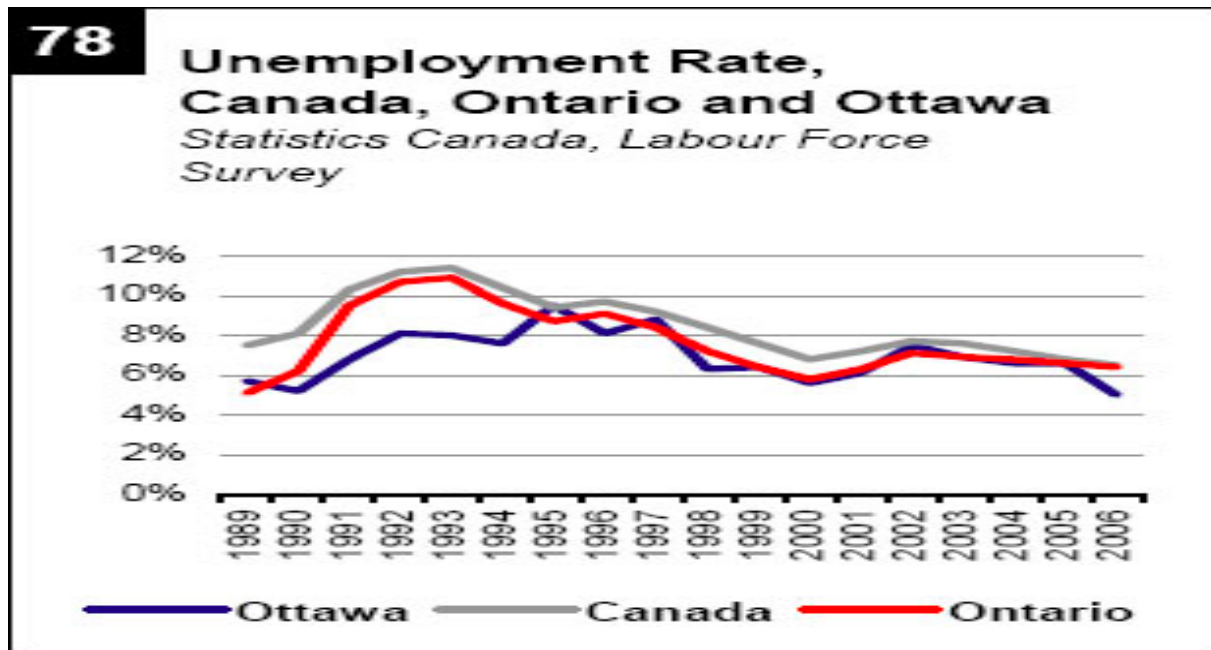
¹¹ Ottawa Annual Development Report, 2012, released by the City of Ottawa, p. 42.

¹² Ottawa Annual Development Report, 2012, released by the City of Ottawa, p. 42.

Retail Trade	54,700
Accommodation and Food Services	28,100

These figures represent the 5 largest sectors in Ottawa by numbers of employees for the years of 2010, 2011 and 2012. There is a clear consistency in the hierarchy of “top industries”, with the only notable change being the new position occupied by “Accommodation and Food Services”, replacing the sector of “Construction” for 2011 and 2012. It is interesting to note that despite the federal cuts in the public sector which were initiated in 2011, the overall size of the “public administration” sector continued to grow in Ottawa, although this trend is supposed to have changed for 2013-2014 (no official data yet published in this regard).

Unemployment Rate



January 2010: 5.9%¹³

January 2011: 6.1%¹⁴

January 2012: 5.4%¹⁵

January 2013: 5.8%¹⁶

¹³ <http://www5.statcan.gc.ca/cansim/a47> Accessed February 21, 2014.

¹⁴ <http://www5.statcan.gc.ca/cansim/a47> Accessed February 21, 2014.

¹⁵ <http://www5.statcan.gc.ca/cansim/a47> Accessed February 21, 2014.

¹⁶ <http://www5.statcan.gc.ca/cansim/a47> Accessed February 21, 2014.

January 2014: 6.2%¹⁷

Unemployment rate derived from Statistics Canada: Labor force survey estimates (LFS), by census metropolitan area based on 2006 census boundaries, 3-month moving average, unadjusted” for the Ottawa-Gatineau (Ontario and Quebec) region.

¹⁷ <http://www5.statcan.gc.ca/cansim/a47> Accessed February 21, 2014.

Sectorial Employment Data¹⁸

<p>January 2010:</p> <ul style="list-style-type: none"> ● Total: 519,000 ● Private: 312, 600 ● Public: 189, 800 ● Non Profit: 16,600 	<p>January 2011:</p> <ul style="list-style-type: none"> ● Total: 539,100 ● Private: 336,600 ● Public: 188,500 ● Non Profit: 14,100 <p>Change: +0.56%; +2,900 jobs</p>
<p>January 2012:</p> <ul style="list-style-type: none"> ● Total: 539,100 ● Private: 336,600 ● Public: 188,500 ● Non Profit: 14,100 <p>Change: +3.3%; +17,200 jobs</p>	<p>2013 and 2014:</p> <p>January 2013: Total: 541,100 Change: +0.45%; +2,400 jobs</p> <p>January 2014: Total: 528,700 Change: -2.4%; -12,800 jobs</p>

This data represents Ottawa's total employment figures broken down into the spheres of "total", "private", "public" and "non profit" for the years of 2010, 2011 and 2012. Only total employment data is available for 2013 and 2014. Changes in employment over the years have been expressed in percentage and numeric terms.

Income Trends Per Capita

2010: \$42,888¹⁹

2011: \$43,680²⁰

2012: \$44,985²¹

2013: \$45,573²²

2014: \$46,866²³

The total income of Ottawa-Gatineau residents divided by the total population. The Income trend per capita has been steadily increasing since 2006. 2013 and 2014 data is a

¹⁸ Ottawa Annual Development Report, 2012, released by the City of Ottawa, p. 41.

¹⁹ http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/adr_en.pdf Accessed February 21, 2014

²⁰ http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/adr_en.pdf Accessed February 21, 2014

²¹ http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/adr_en.pdf Accessed February 21, 2014.

²² Estimate - City of Ottawa; http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/adr_en.pdf Accessed February 21, 2014

²³ Estimate - City of Ottawa; http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/adr_en.pdf Accessed February 21, 2014

projection from the City of Ottawa in their 2012 Annual Development Report.

Median Income²⁴

2008: \$87,160²⁵

2009: \$89,140²⁶

2010: \$90,790²⁷

2011: \$93,440²⁸

Median total income, all families (dollars) for Ottawa-Gatineau region (2008-2011).
Statistics Canada has not made data for 2012 / 2013 / 2014 available yet.

Commercial & Residential Property Taxes

Average Property Tax

2011²⁹

Commercial Property Tax per \$1,000 of assessed value	Residential Property Tax per \$1000 of assessed value
\$33.48/square foot	\$12.38

2012³⁰

Commercial Property Tax per \$1,000 of assessed value	Residential Property Tax per \$1000 of assessed value
\$27.30/square food	\$9.78

2013³¹

Commercial Property Tax per \$1,000 of assessed value	Residential Property Tax per \$1,000 of assessed value
\$26.85/square foot	\$11.73

Approximates

²⁴ <http://www.statcan.gc.ca/tables-tableaux/sum-som/101/cst01/famil107a-eng.htm>. Accessed December 3rd 2013

²⁵ <http://www5.statcan.gc.ca/cansim/a26> Accessed February 21, 2014

²⁶ <http://www5.statcan.gc.ca/cansim/a26> Accessed February 21, 2014

²⁷ <http://www5.statcan.gc.ca/cansim/a26> Accessed February 21, 2014

²⁸ <http://www5.statcan.gc.ca/cansim/a26> Accessed February 21, 2014

²⁹ Ottawa Business Journal. <http://www.obj.ca/Local/City-Hall/2011-11-01/article-2792482/Ottawa-property-taxes-exceed-national-average%3A-study/1>. Retrieved from OntarioEDS research archives on December 28 2013.

³⁰ Real Property Association of Canada.

http://c.ymcdn.com/sites/www.realpac.ca/resource/resmgr/publications/realpac_altus_2012_report_fi.pdf. Retrieved from OntarioEDS research archives accessed on December 20 2013.

³⁰ Real Property Association of Canada.

http://c.ymcdn.com/sites/www.realpac.ca/resource/resmgr/publications/realpac_altus_2012_report_fi.pdf. Retrieved from OntarioEDS research archives accessed on December 20 2013.

³¹ Real Property Association of Canada.

³¹ https://c.ymcdn.com/sites/www.realpac.ca/resource/resmgr/research/2013_realpac_-_altus_propert.pdf

1.2% for residential.³²
3.2% for commercial properties.³³

City of Ottawa levies property taxes on commercial and residential properties. 2013 percentages represent an approximate charge of the assessed value of the property & are sourced from a City of Ottawa staff phone call. 2012 & 2011 use a monetary measurement of property tax in dollars taxed per \$1000.00 of property value.

Residential Real Estate Costs

Average Home & Condominium Prices

2011: \$343,284 (4.9% increase from 2010)³⁴

2012: \$351,792 (2.3% increase from 2011)³⁵

2013: Searching for viable data source.

- **Ottawa Real Estate Board:** \$346,774 1.1% decrease from February 2012³⁶
- Immigration Ontario: \$353,454 (single family detached)³⁷

Costs of Ottawa residential properties: 2013 data is based on most reliable source.

Average Residential Monthly/annual Rental Prices

2011: \$1086³⁸

2012: Expected: \$1122 (3% increase from 2011)³⁹

“Ottawa's most modest apartments - no-bedroom bachelor pads - averaged out at \$727 in monthly rent. Three-plus bedroom flats cost an average of \$1,322. Townhouse units cost a little extra - an average of \$914 for a one-bedroom unit and \$1,227 for three-bedroom

³² OntarioEDS Research Archives.

<https://www.dropbox.com/home/Policy%20Analysts/Research/Economic%20Scorecards/Scorecards%20Developed%20Before%20December%202013>. Accessed on December 28 2013.

³³ OntarioEDS Research Archives.

<https://www.dropbox.com/home/Policy%20Analysts/Research/Economic%20Scorecards/Scorecards%20Developed%20Before%20December%202013>. Accessed on December 28 2013.

³⁴ Real Estate Services Website. http://www.agentinottawa.com/1956 - Present Prices/page_491704.html Accessed from OntarioEDS research archives on December 28 2013.

³⁴ Real Estate Services Website. http://www.agentinottawa.com/1956 - Present Prices/page_491704.html Accessed from OntarioEDS research archives on December 28 2013.

³⁵ Real Estate Services Website. http://www.agentinottawa.com/1956 - Present Prices/page_491704.html Accessed from OntarioEDS research archives on December 28 2013.

³⁵ Real Estate Services Website. http://www.agentinottawa.com/1956 - Present Prices/page_491704.html Accessed from OntarioEDS research archives on December 28 2013.

³⁶ Ottawa Real Estate Board. <http://www2.ottawarealestate.org/home/NewsInformation/LatestNewsRelease.aspx>. Accessed from OntarioEDS research archives on December 28 2013.

³⁷ Government Website: Ontario Immigration.

http://www.ontarioimmigration.ca/OI/en/living/OI_HOW_LIVE_OTTAWA.html Accessed on December 30 2013.

³⁸ Ottawa Sun. <http://www.ottawasun.com/2012/05/14/ottawa-rental-rates-third-highest-in-country> Accessed on December 28 2013.

³⁹ Ottawa Sun. <http://www.ottawasun.com/2012/05/14/ottawa-rental-rates-third-highest-in-country> Accessed on December 28 2013.

units.” Ottawa Sun predicts expectations for 2012.⁴⁰ 2013 data not found.

Brief Commercial Property Analysis

Ottawa’s office market is one of Canada’s major markets with approximately 37 million square feet and one of Canada’s larger office sectors with respect to employment, accommodating an estimated 300,000 office sector employees. The development, construction, fit-out, operations and transactions of Ottawa’s office properties in 2011 generated an estimated \$1.6 billion in total economic output impacts from spending, approximately total full-time employment of 9,500, and total income impacts of \$470 million.⁴¹

Building Permits Issued (\$)

2011: \$1.8 Billion⁴²

2012: \$2.05 Billion⁴³

Value of building permits issued in the years 2011 and 2012.

City Budget

2011: \$2.639 billion⁴⁴

2012: \$2.738 billion⁴⁵

2013: \$2.832 billion⁴⁶

Provincial and federal budget assistance allocated to city of Ottawa. The 2011 budget included a tax increase of 2.45% for all city services, drinking and wastewater service initiatives. Major areas of funding included in the budget consisted of continued transit maintenance and affordable housing initiatives. The 2012 budget included an additional tax increase for city services, especially the Ottawa Police Service of 2.45%, and a 6% rate increase of water and sewage services. Major funding went into the “Ottawa on the Move” transportation network project – maximization of transportation choices and increased mobility. The 2013 budget included the average residential property tax

⁴⁰ Ottawa Sun. <http://www.ottawasun.com/2012/05/14/ottawa-rental-rates-third-highest-in-country> Accessed on December 28 2013.

⁴¹ Deloitte. http://www.deloitte.com/assets/Dcom-Canada/Local%20Assets/Documents/RE/ca_en_real_estate_economic_impact_assessment_103012.pdf. Accessed from OntarioEDS research archives June 1 2014.

⁴² Ottawa Business Journal. <http://www.obj.ca/Real-Estate/Construction/2013-02-06/article-3171583/2012-construction-permits-surpass-previous-years/1>. Retrieved from OntarioEDS archives accessed on December 28 2013.

⁴³ Ottawa Business Journal. <http://www.obj.ca/Real-Estate/Construction/2013-02-06/article-3171583/2012-construction-permits-surpass-previous-years/1>. Retrieved from OntarioEDS archives accessed on December 28 2013.

⁴⁴ <http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/con058940.pdf> Date Accessed - 8th January 2014

⁴⁵ http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/adopted_budget_2012.pdf - Date Accessed - 8th January 2014

⁴⁶ http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/adopted_budget_2013.pdf Date Accessed - 8th January 2014

increase of 2.09% and continued funding for the proposed Ottawa Light Rail Transit (OLRT) project residential service initiatives and health support for low income residents

Gross Domestic Product

Ottawa-Gatineau region

2011:

- Conference Board Prediction - 1.4%⁴⁷ increase.

2012:

- Conference Board Prediction - 1%⁴⁸ - Actual change 0.5% increase.⁴⁹
- Actual increase in dollars: or \$62.3B.⁵⁰

2013:

- Actual change 0.3% increase.⁵¹
- Actual increase in dollars: \$62.5B⁵²

The rate of growth of GDP in Ottawa: year-to-year change marked by percentage (%) while real GDP is displayed in dollars (\$). Federal government cuts and a decline in construction activity held Ottawa-Gatineau's GDP growth to 1.4% in 2011.

END NOTES

Data was gathered from online sources as well as interpersonal interviews with stakeholders. OEDS requests government release data on the following metric: Number of people below low-income cutoff, within municipalities. Moreover, we request universities, colleges and/or government retain data on the percentage of employed / unemployed graduates 1 year after graduation, as well as the applicable program of study. More data on average commercial property prices would also be useful. The data requested would further inform economic developers to improve economic development as well as provide the necessary information for businesses who are considering establishing in Ontario communities. New metrics will be added to allow us to better measure municipal economic performance. We will improve sources as well as update data to present the most current and accurate data as new sources become available.

⁴⁷<http://app06.ottawa.ca/cs/groups/content/@webottawa/documents/pdf/mdaw/mza4/~edisp/cap312801.pdf> January 8th 2014

⁴⁸<http://www.obj.ca/Local/2012-09-18/article-3077413/Local-GDP-growth-to-slow-to-1%25%3A-Conference-Board/1> January 8th 2014

⁴⁹ City of Ottawa. Archived in Ontario Economic Development Society correspondence from Senior Policy Analyst team. Accessed on March 8 2014.

⁵⁰ Archived in Ontario Economic Development Society correspondence from Senior Policy Analyst team. Accessed on March 8 2014.

⁵¹ Archived in Ontario Economic Development Society correspondence from Senior Policy Analyst team. Accessed on March 8 2014.

⁵² Archived in Ontario Economic Development Society correspondence from Senior Policy Analyst team. Accessed on March 8 2014.