2022 ANNUAL DEVELOPMENT REPORT

City of Ottawa
Planning, Development and Building Services

July 2024

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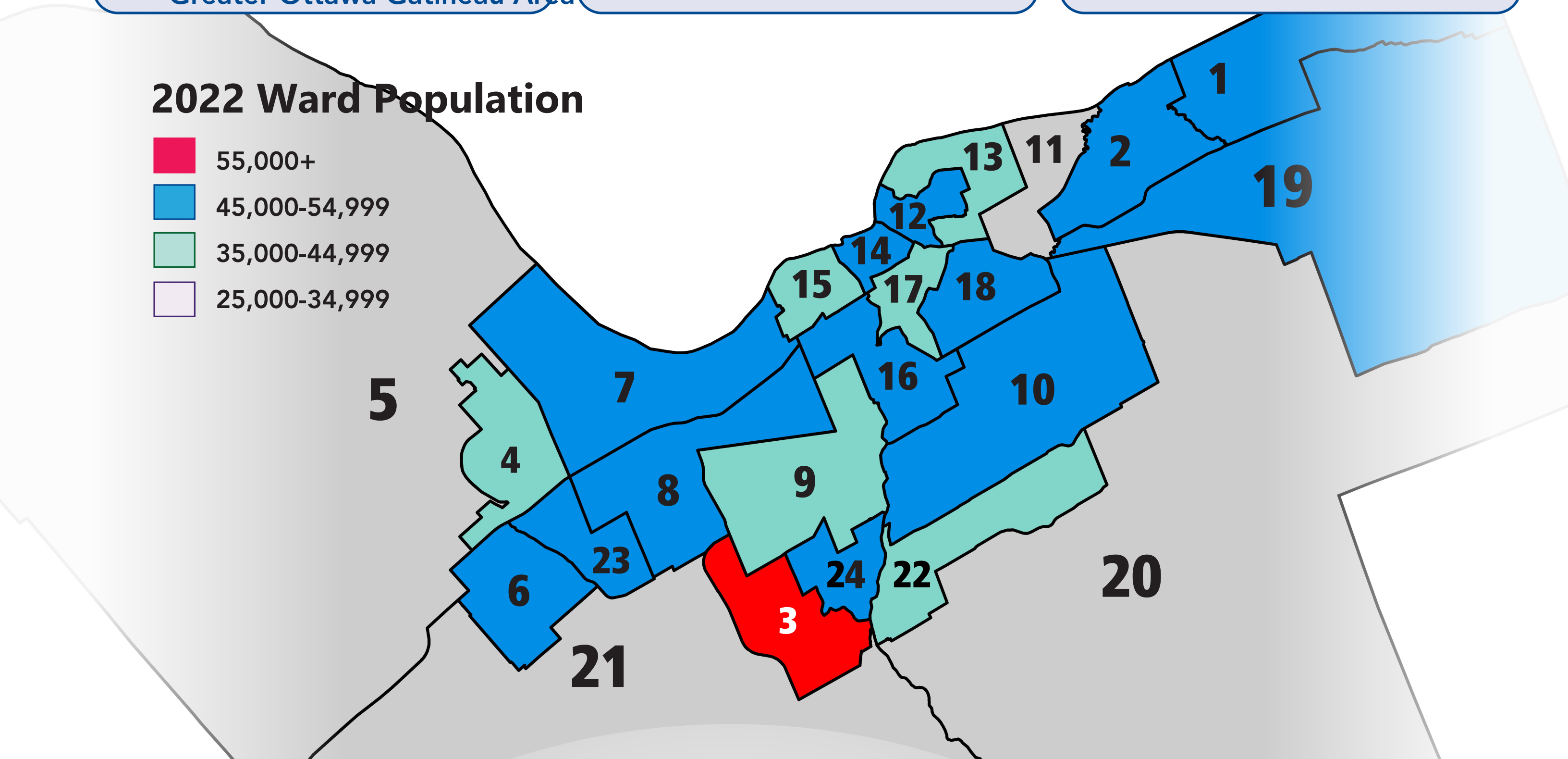
POPULATION & MIGRATION

Population

1,606,327 ↑ 2.2%
Greater Ottawa-Gatineau Area

1,550,826 ↑ 2.3%
Ottawa-Gatineau CMA

1,067,310 ↑ 2.0%
City of Ottawa



Net Migration (2020-2021)

+9,518
International

+162
Interprovincial

+1,200
Intraprovincial

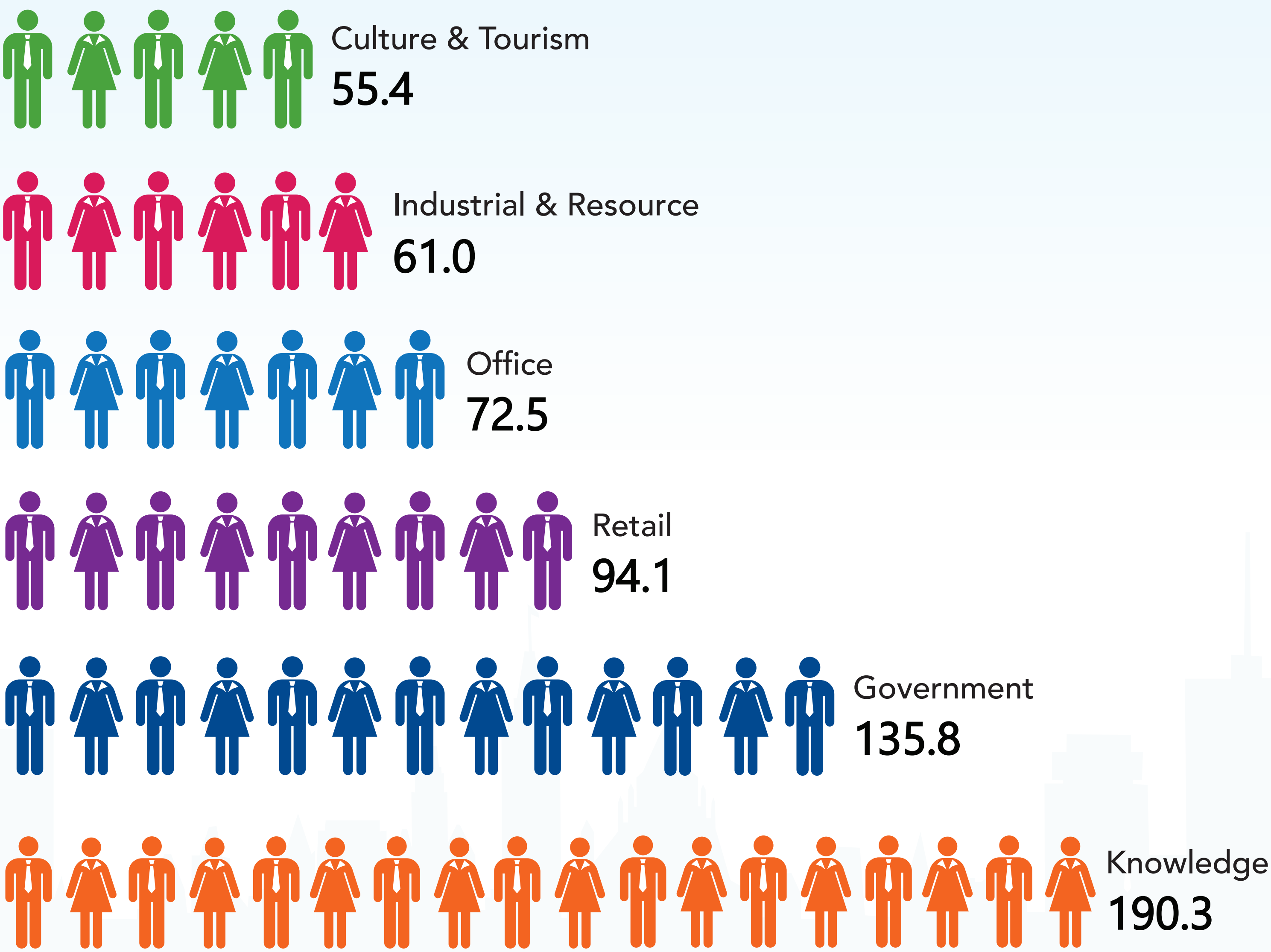
Total
10,880

EMPLOYMENT AND ECONOMY

Ottawa

610,500 ▲ 3.4% Employed residents	**4.2%** ▼ 1.9% Unemployment

Employed Residents by Cluster ('000s)



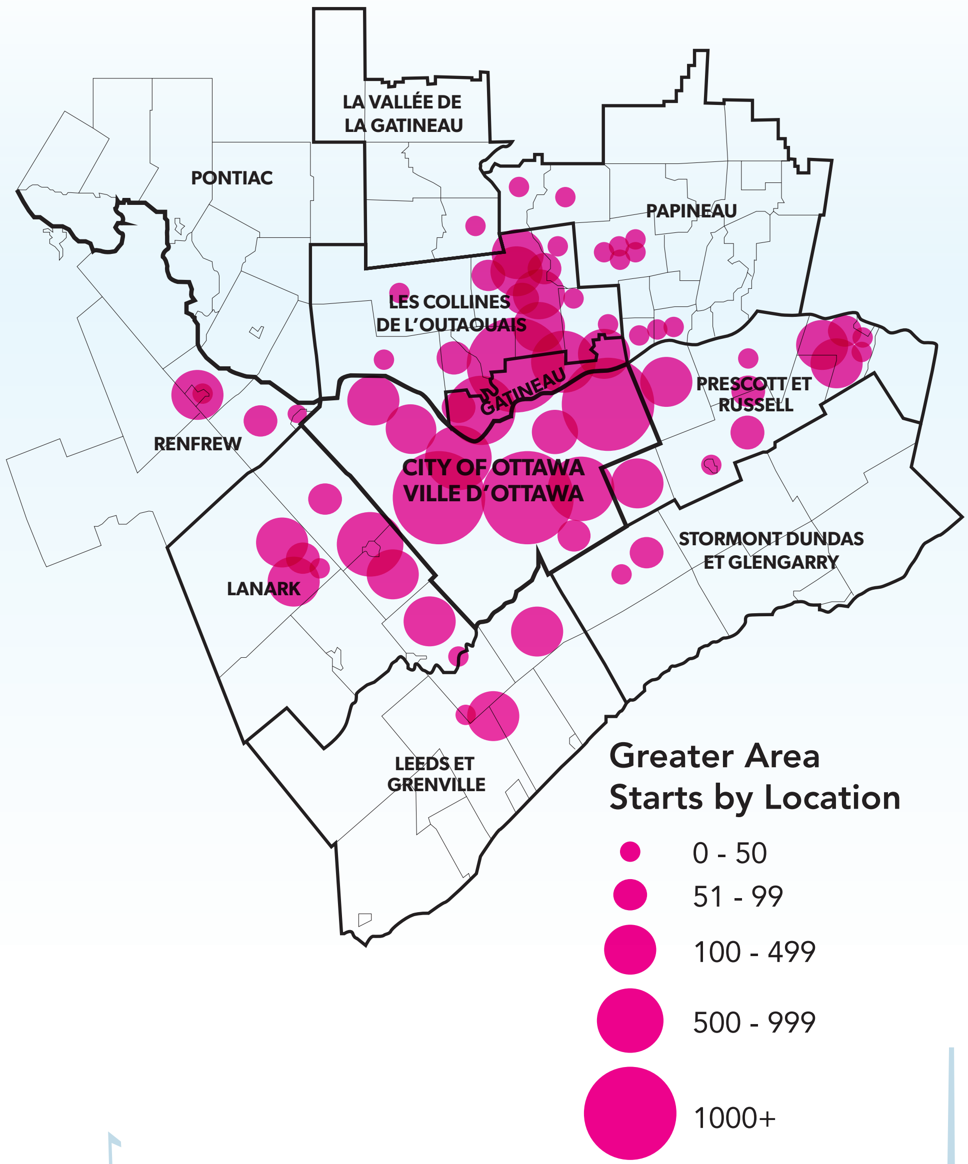
HOUSING STARTS

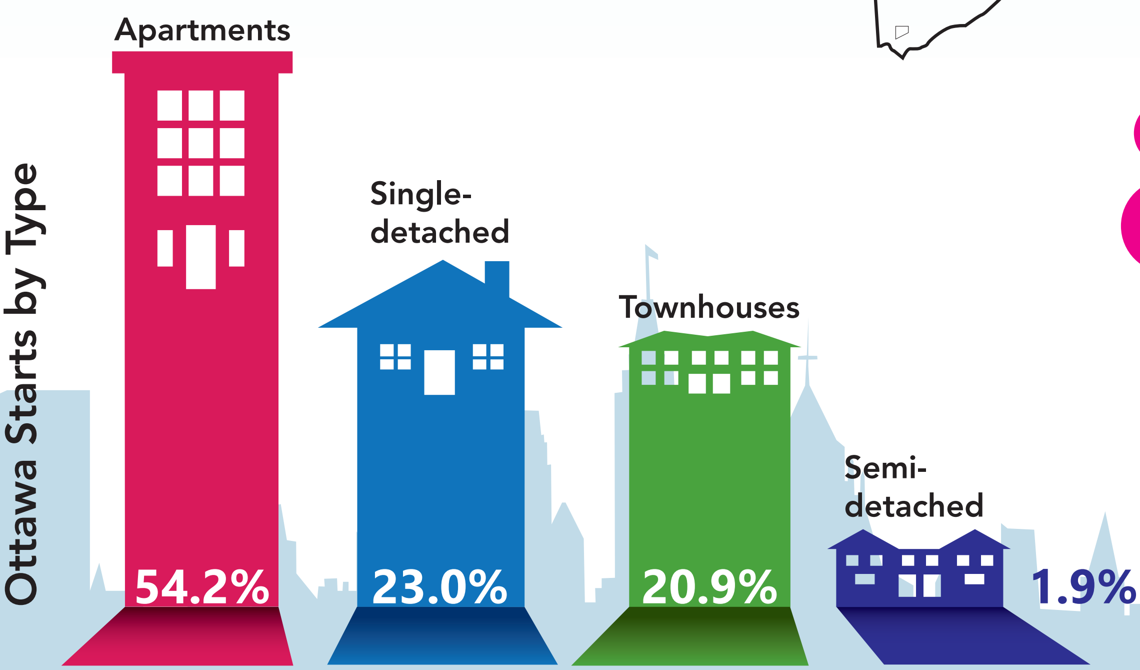
Ottawa

10,077 ▲ 7.2%
Housing starts

2.1% ▼ 1.3%
Rental vacancy rate

$691,664 ▲ 7.1%
Average resale price (all units)





NON-RESIDENTIAL DEVELOPMENT

Office

Vacancy
11.2%
2022
9.7%
2021

Inventory
4.1 million m^2 5.8%
44.4 million ft^2

Retail

Vacancy
3.6%
2022
3.1%
2021

Inventory
3.8 million m^2 0.6%
40.4 million ft^2

Industrial

Vacancy
2.5%
2022
2.0%
2021

Inventory
2.5 million m^2 9.6%
26.9 million ft^2

2022 Annual Development Report

City of Ottawa
Planning, Development and Building Services
Research and Forecasting Unit
July 2024

2022 ANNUAL DEVELOPMENT REPORT

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2022 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. It is supplementary to the Official Plan (OP) Monitoring Report which measures other development and planning data indicators against OP policy goals and objectives. The 2023 update of the ADR will be available in Q4 2024.

The ADR monitors population and employment change as well as housing, office, industrial and retail development. In addition, the ADR provides information on the Gatineau/Québec Census Metropolitan Area (CMA) and 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

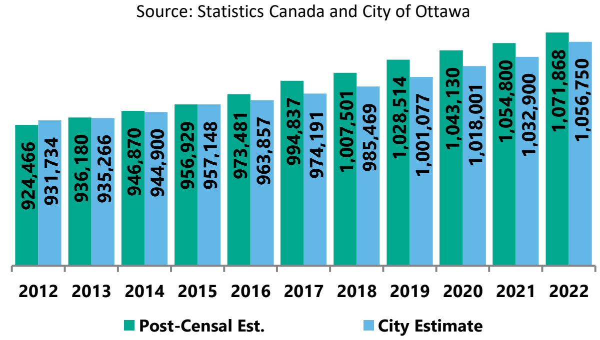
- City of Ottawa population, year-end 2022 (City estimate): 1,067,310 - up 2.0% from 2021
- Greater Ottawa-Gatineau Area population, year-end 2022: 1,606,327 - up 2.2% from 2021
- Net migration to Ottawa-Gatineau increased 160.3% from the year before

1.1 Population Growth

Major Cities

In 2022, the Ottawa-Gatineau Census Metropolitan Area (CMA) was the sixth largest in Canada with a population of 1,498,610. The population grew 1.7% between 2021 and 2022, below the 2.2% average for the six major Canadian centres. All major urban centres saw an increase in population growth compared to previous years following the COVID-19 pandemic. The Ontario part of the

City of Ottawa Population, Post-Censal and City Estimates, 2012-2022 (mid-year)
Source: Statistics Canada and City of Ottawa



[1] The City of Ottawa, City of Gatineau, and Ontario Municipalities Adjacent to Ottawa (OMATO) 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 (PPS)*.

CMA experienced more growth than the Quebec portion, maintaining roughly 76% of the overall CMA population (Table 1).

<u>2022 Population based on 2016 Census</u>

Statistics Canada prepares annual mid-year population estimates for Ottawa and other urban centres. The current series is based on the 2016 Census adjusted for undercounting (people missed in the Census). To this base, births and net in-migration are added and deaths are subtracted each year. Estimates undergo two cycles of revision before a final estimate is confirmed. Statistics Canada's preliminary mid-year 2022 post-censal population estimate for Ottawa was 1,071,868 (Table 1).

<u>City Estimate</u>

The Planning, Development, and Building Services Department tracks population change by tabulating the number of new dwellings issued building permits, lagged to allow for occupancy. From these units, 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 included. The resulting number of dwellings is multiplied by the average number of persons per dwelling by housing type (based on Census results). 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 and sub-areas. Based on this technique, the city of Ottawa had a mid-year 2022 population of 1,056,750 and a year-end 2022 population of 1,067,310, a 2.0% increase from 2021 (Table 2).

<u>Summary</u>

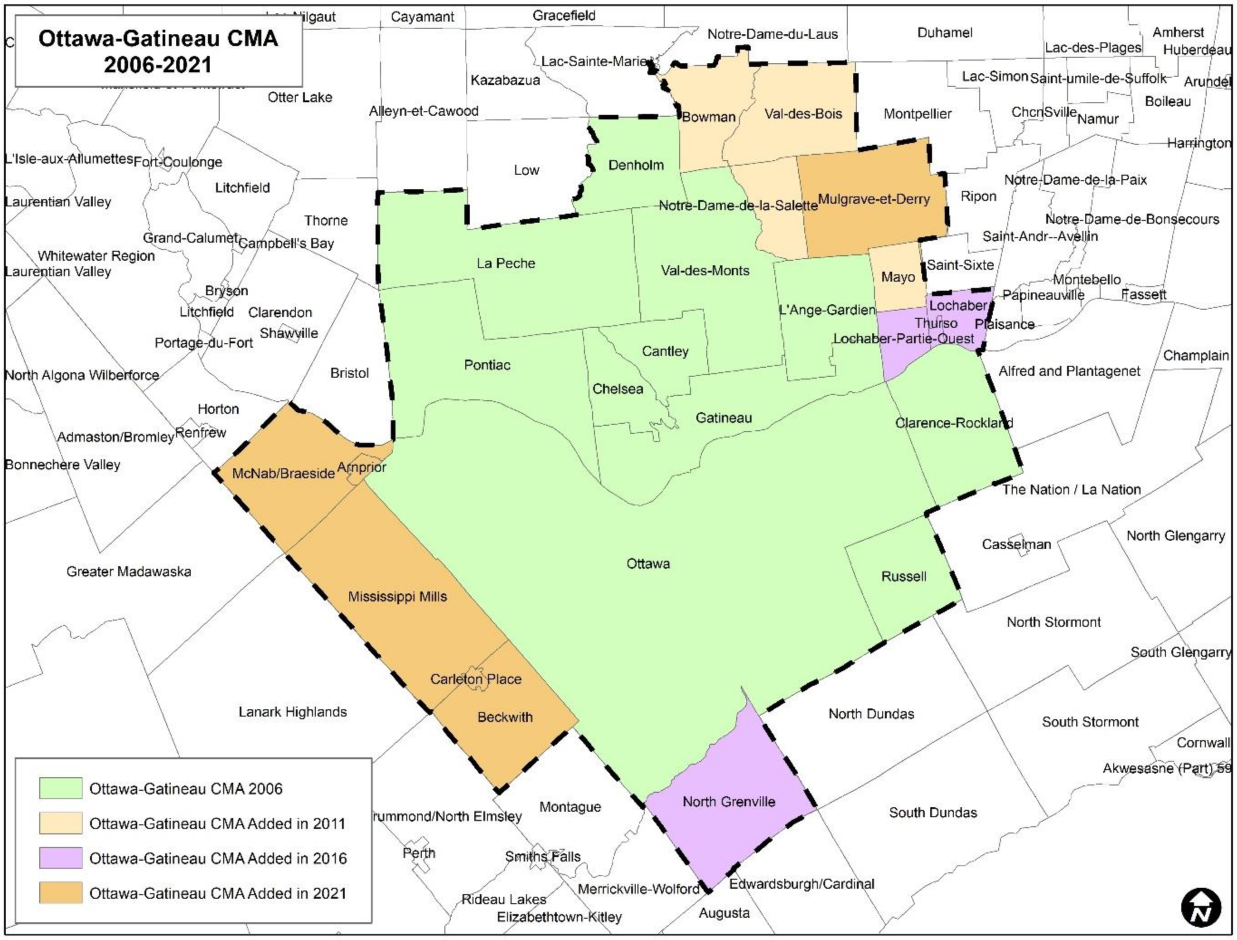
There is a range of population figures for the city of Ottawa in 2022 depending on source:

City of Ottawa Population by Source	**mid-2022**	**year-end 2022**
StatsCan Preliminary Post-2016 censal Estimate	1,071,868	n/a
City Estimate of actual population	1,056,750	1,067,310

Source: Statistics Canada; City of Ottawa

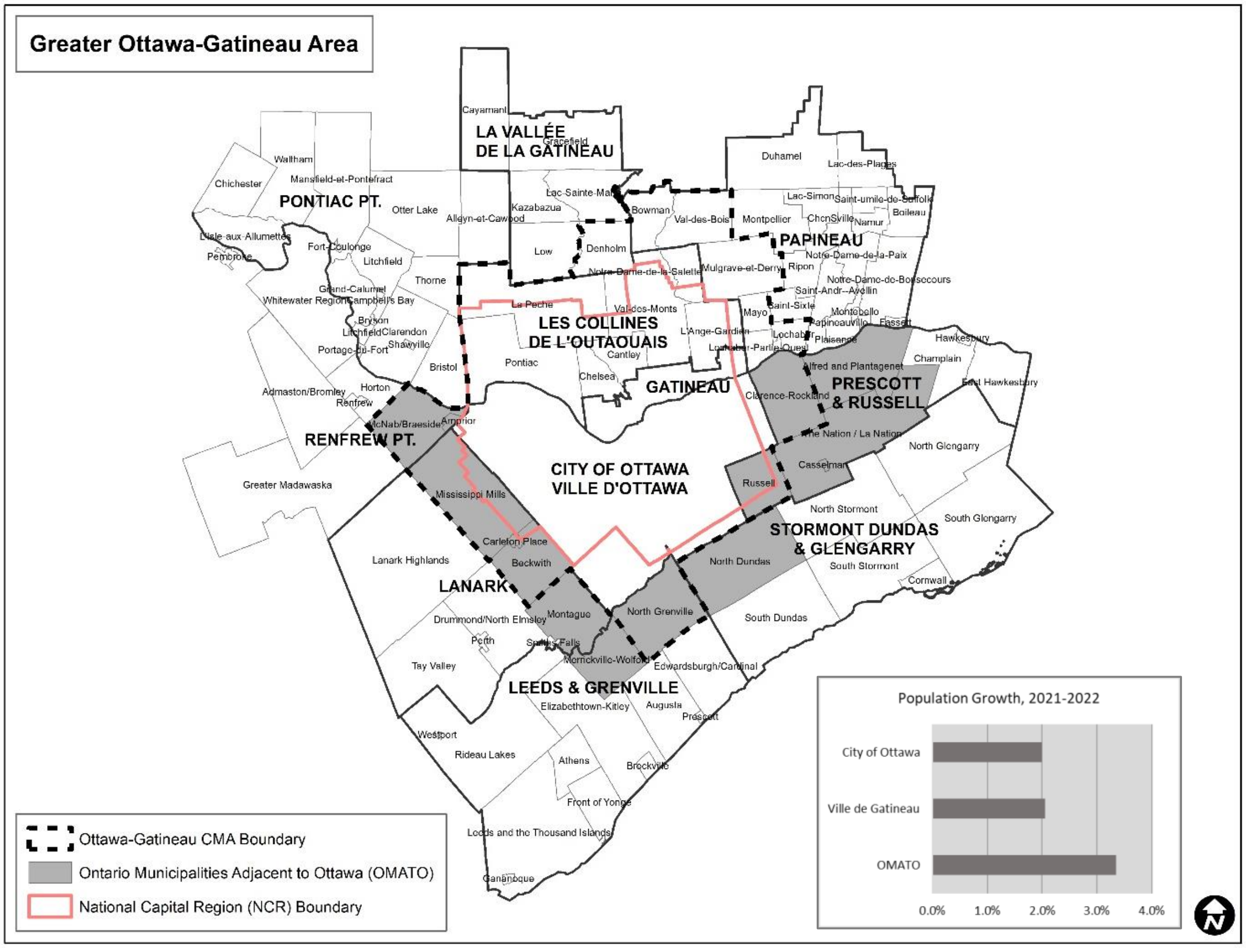
1.2 Population Distribution & Growth in the Greater Ottawa-Gatineau Area

The Greater Ottawa-Gatineau Area includes the Ottawa-Gatineau CMA, shown on Map 1, and other municipalities adjacent to the city of Ottawa as shown on Map 2. In 2022, there were 1,606,327 people in the Greater Ottawa-Gatineau Area, with the city of Ottawa containing the bulk of the region's population followed by the Ville de Gatineau, and OMATO[2] (Table 3; Map 2).



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

[2] OMATO: Ontario Municipalities Adjacent to Ottawa.



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). Shaded areas not physically adjacent to Ottawa, such as Casselman in Prescott & Russell County, have a high degree of their work force employed in Ottawa.

Ottawa

Within Ottawa, all sub-areas experienced an increase in population growth in 2022 except Bayshore, which experienced a 0.3% decrease in population, and the Rural Northeast, which saw no change in population. The greatest population growth took place in Leitrim at 12.0% followed by Downtown[3] Ottawa at 8.2% year-over-year. As a whole, the population of Downtown Ottawa was estimated to be 112,290 people in 2022, a 3.2% increase. Despite this growth Downtown, suburban areas outside the Greenbelt still saw the largest absolute population increase by area in 2022, following the pattern of previous years. In these areas, the population grew by 12,190 people (3.1% growth) to an estimated population of 411,220 in 2022, with suburban households also increasing by 3.1%. Areas inside the Greenbelt but outside of the Downtown had an estimated population of 443,220, 0.9% higher than in 2021. In

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

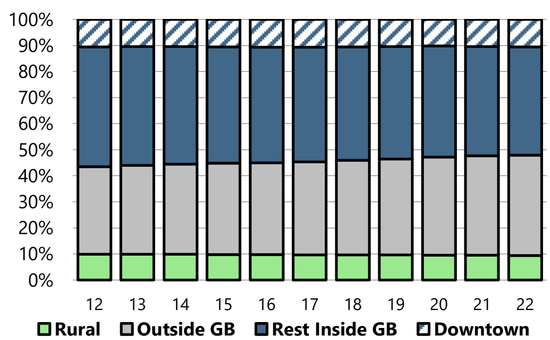
the rural area the population reached 100,570, up 1.3% from 2021 while rural households increased 1.6%.

Even with recent growth in the Downtown, the percentage share of the population living inside the Greenbelt remains fairly stable with slight decreases each year; at the end of 2022 the share was 52.0% compared to 52.4% a year earlier. The Downtown population share has also remained consistent, returning to pre-pandemic levels at 10.5% from 10.1% in 2020. Suburban centres increased to 38.5% of the population from 38.1% in 2021, while the rural area experienced a slight decrease to 9.4% (Table 2).

The largest share of population growth in 2022 was in Kanata-Stittsville (19.6% of all growth), followed by Downtown (16.9%), South Nepean (15.7%), Leitrim (9.2%), and Riverside South (7.4%). The Rural area experienced the least amount of growth at 6.1%.

DISTRIBUTION OF POPULATION (%) 2012-2022

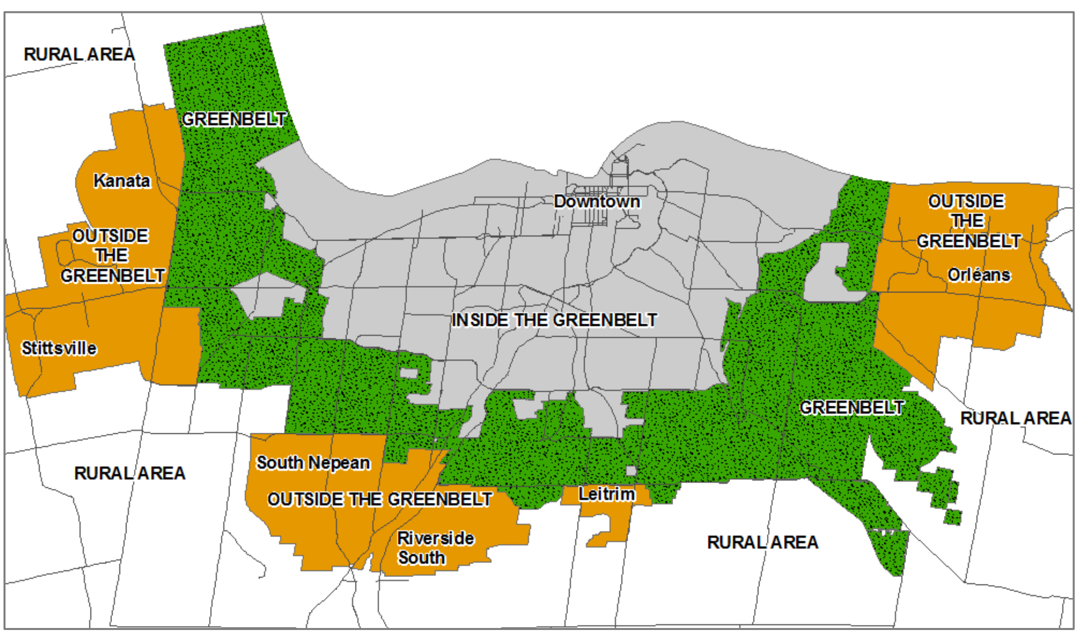
Source: City of Ottawa



CITY OF OTTAWA
GROWTH BY SUB-AREA, 2021-2022

Source: City of Ottawa

	Population Increase	% Share of Growth
Downtown	+3,530	16.9%
Other Inside the Greenbelt	+3,850	18.4%
Kanata-Stittsville	+4,090	19.6%
South Nepean	+3,280	15.7%
Riverside South	+1,550	7.4%
Leitrim	+1,930	9.2%
Orleans	+1,340	6.4%
Rural	+1,270	6.1%



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 305,794 at the end of 2022, an increase of 2.1% from 2021 (Table 3). Statistics Canada's preliminary postcensal estimate for July 2022 lists the population of Gatineau at 292,524.

Quebec municipalities outside of Gatineau and within the CMA increased in population by 3.7% in 2022 to a total of 57,850. The majority of these communities increased in population, except Denholm (-9.7%) and Lochaber (-24.8%) which saw a year-over-year decrease in 2022 (Table 3).

Ontario Municipalities Adjacent to Ottawa (OMATO)

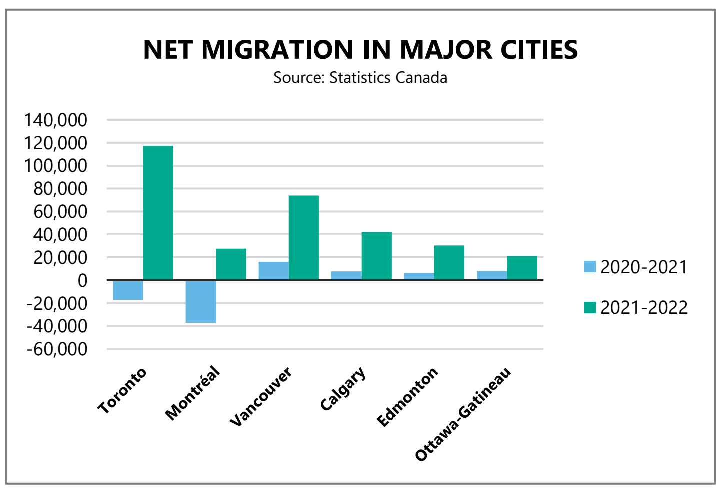
The City of Ottawa estimate for OMATO's 2022 year-end population is 175,373, a 3.4% increase from 2021. The five most populous OMATO municipalities were Clarence-Rockland (26,524, up 5.1% from 2021), North Grenville (19,842, up 6.3%), Russell (19,374, up 4.4%), North Dundas (14,881, up 1.4%), and Mississippi Mills (13,952, up 10.1%) (Table 3).

1.3 Migration

Migration data for 2020-2021 (the most recent available at the city level) shows the net number of people moving to Ottawa was 10,880, a 42.7% decrease from the year before. There was a 17.5% increase in movers from the Greater Toronto Area while all other areas across Canada either saw a decrease in movers to Ottawa or an increase in movers coming from Ottawa (Tables 4 and 5).

International net migration decreased to 9,518 in 2020-2021, down 2,953 people from a year earlier. Intraprovincial net migration also decreased from 2,987 to 1,200 and interprovincial net migration decreased from 3,518 to 162 (Table 4). This decrease in net migration is likely a result of travel restrictions during the COVID-19 pandemic.

In 2020-2021, more people moved to adjacent municipalities from Ottawa (a net loss of -4,461 people). From 2016-2021, Ottawa saw a net loss of 10,149 people to outlying regions, with the largest migration being 4,129 people from Ottawa to Lanark County. Meanwhile, 1,703 people moved from Gatineau to Ottawa during this period, although we saw a net loss of 452 people from 2020-2021 (Table 6).



Major Cities

Migration estimates for CMAs are more recent than at the city-level. All six of Canada's major urban centres experienced a significant increase in net migration between 2021-2022 following the height of the COVID-19 pandemic. Net migration to Canada's major cities increased 2,009.7% year-over-year from 2021-2022. Toronto was the biggest attractor of migrants, with the arrival of 117,140 in 2022, a 781.2% increase from 2021-2022. Ottawa-Gatineau saw net migration increase by 160.3% with 21,070 new migrants between 2021-2022 (Table 7).

NET MIGRATION PER 1,000 INHABITANTS, 2021-2022 (preliminary)

Source: Statistics Canada

CMA	*2020-2021*	*2021-2022*
Calgary	4.4	26.2
Vancouver	7.6	26.0
Edmonton	4.2	20.0
Toronto	-1.0	17.5
Ottawa-Gatineau	5.9	**14.1**
Montréal	-9.2	6.3

In terms of net migration per thousand inhabitants (adjacent table), Calgary experienced the highest net migration rates for 2021-2022, followed by Vancouver and Edmonton. Ottawa-Gatineau and Montréal saw the lowest rates. Of all major cities, Calgary experienced the greatest increase in net migration.

2. Housing

HIGHLIGHTS

- Housing starts were up 7.2% in the city of Ottawa in 2022
- 54.2% of Ottawa starts were apartments
- Rental vacancy rate decreased from 3.4% in 2021 to 2.1% in 2022

2.1 New Construction

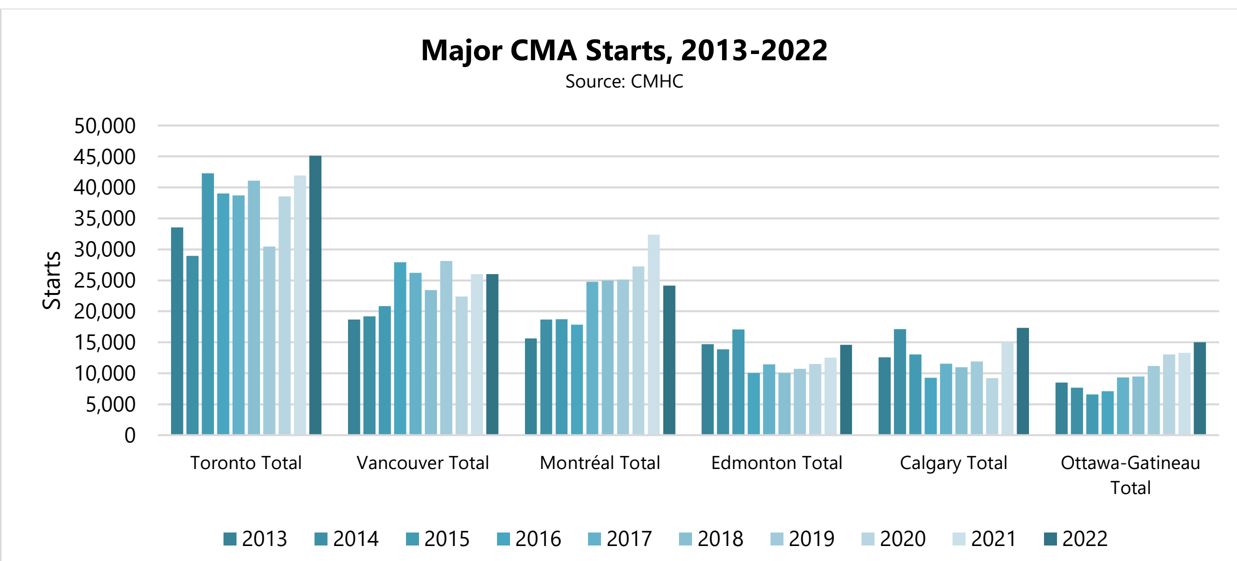
Major CMA Housing Starts

City of Ottawa and Ottawa-Gatineau CMA Housing Starts, 2022

Sources: CMHC

	Starts, 2022	% chg. 2021-22
City of Ottawa	10,077	7.2%
Ott-Gat CMA	15,023	13.1%

In the city of Ottawa, there were 10,077 housing starts in 2022, a 7.2% increase from 2021. The larger Ottawa-Gatineau CMA ranked fifth in absolute housing starts among Canada's six largest metropolitan areas with 15,023 units. Most major urban centres experienced an increase in housing starts year-over-year, while Vancouver and Montreal experienced a 0.1% and 25.3% decrease, respectively. Edmonton had the largest year-over-year increase at 16.3%, followed by Calgary with 15.2%. Apartment starts saw the largest relative increase in Ottawa-Gatineau, Edmonton, and Calgary, while single-detached starts saw larger increases in Vancouver, Edmonton, and Calgary CMAs (Table 8).



Ottawa Starts and Completions by Unit Type

More multi-unit dwellings were built than single-detached units in 2022 for the twenty-first year in a row. In 2022, there were 2,105 single-detached starts, the lowest number of single-detached starts since 2017. The share of single-detached starts accounted for 20.9% of all new starts, down from 29.5% in 2021 (Table 9).

The most popular dwelling type, at 54.2% share, were apartments, with 5,463 units started in 2022, up from 3,790 units in 2021. There was a decrease in the number of semi-detached and townhomes units between 2021 and 2022, with 194 units semi-detached units started (1.9% share) and 2,315 townhomes started (23.0% share).

Ottawa completions in 2022 saw 4,662 freehold units and tracked above its five-year average of 4,473 completed units per year. Overall, private rental apartments were the most popular dwelling type completed, followed by freehold townhomes and freehold single-detached dwellings. In 2022, 7,668 units were completed, 11.3% above the five-year average of 6,845 units (Table 10).

Ottawa New Single-Detached Prices

New single-detached home prices increased 22.5% to $924,928 in 2022 from $755,109 the previous year, or 14.6% after factoring for inflation (Table 11). Inflation is generally derived from the All-Items Consumer Price Index (CPI), which averaged 153.5 in 2022 (from a base of 100 in 2002). The annual 2021 inflation rate as measured by the CPI was 6.9%, 2.7 percentage points higher than it was in 2021 at 4.2%.

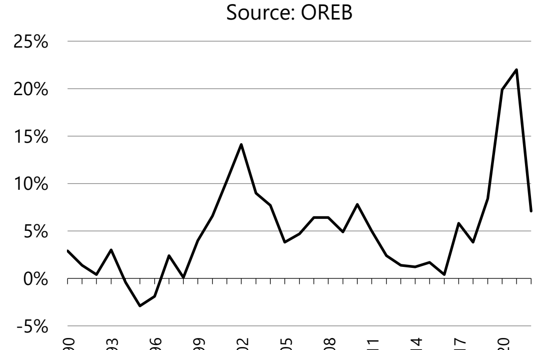
2.2 Resale Housing

Resale House Prices

The average MLS[4] residential resale price in the area covered by the Ottawa Real Estate Board (OREB) was $691,664 in 2022, an annual increase of 7.1% from $645,976 in 2021 (Table 12).

Average MLS price change, Ottawa Real Estate Board area

Source: OREB



Sales Activity and Trends

MLS sales in the larger OREB area decreased for the first time in 10 years between 2021 and 2022. In 2022, only 15,307 units were sold, down 24.6% from 20,302 sales a year earlier (Tables 12 and 13).

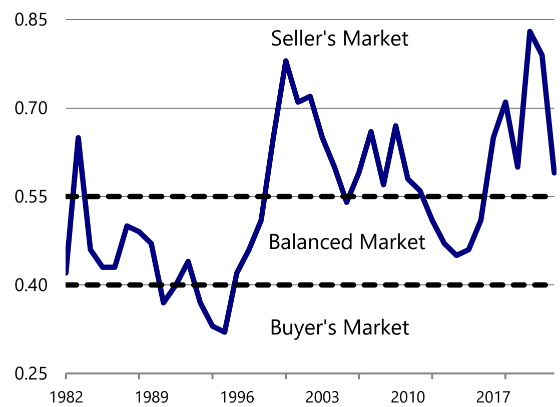
[4] MLS: Multiple Listing Service, a registered trademark of the Canadian Real Estate Association.

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 decreased from 0.79 in 2021 to 0.59 in 2022, moving towards a more balanced market. Ottawa has been in a seller's market since 2017, after maintaining a balanced market from 2012 to 2016 (Table 13).

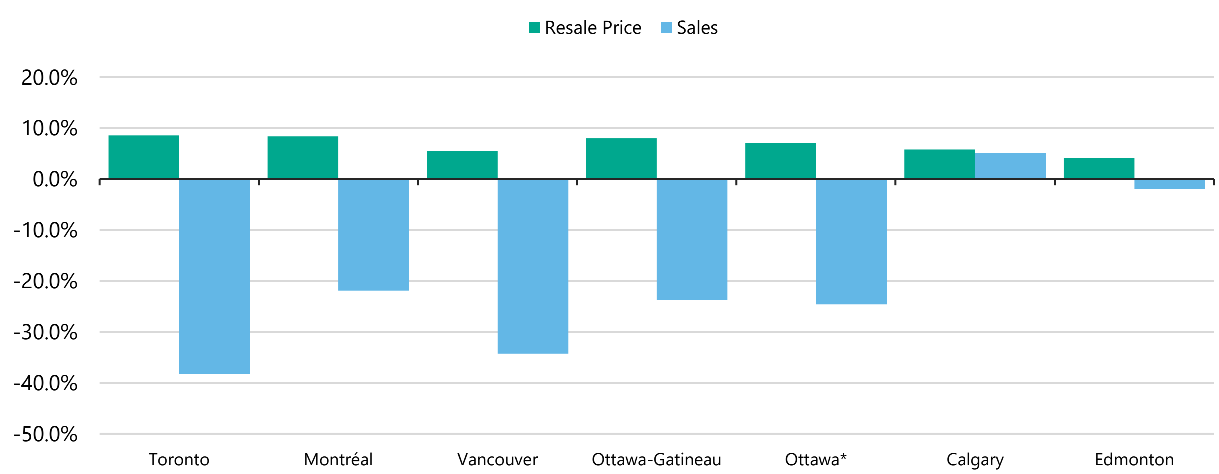
Ottawa Resale Sales to New Listings Ratio, 1986-2022
Source: OREB and CMHC



Major Cities

All major cities saw increases in resale prices in 2022. The average resale price in Ottawa-Gatineau increased by 8.0% to reach $637,214. Smaller increases were seen in Edmonton (+4.1%) and Vancouver (+5.5%), while Toronto and the Montreal saw the largest increases at 8.6% and 8.4%, respectively. While all cities experienced an increase in resale prices, all except for Calgary also experienced a decrease in housing resales (Table 12).

Percent Change in Resale Price and Sales, 2021-2022
Source: CMHC, Local Real Estate Boards and the City of Ottawa



* The Ottawa Real Estate Board (OREB) area, which is significantly larger than the city of Ottawa.

When condominium and non-condominium average prices are seperated, Ottawa still experienced an increase in both condominium (+8.2%) and non-condominium (+7.0%) price changes (adjacent table).

2022 AVG MLS® RESALE PRICE* & 2021-2022 % CHANGE				
Major City	**Price: Condominium**	**2021-2022 % Change**	**Price: Non-Condominium**	**2021-2022 % Change**
Toronto	$782,474	10.6%	$1,471,374	22.9%
Montréal	$455,857	10.4%	$583,216	8.6%
Vancouver	$797,600	10.2%	$1,254,426	5.5%
Ottawa	**$454,273**	**8.2%**	**$769,675**	**7.0%**
Calgary	$328,346	4.7%	$643,017	12.6%
Edmonton	$230,351	-0.2%	$458,539	5.4%
*Corresponds to Real Estate Board Territories Source: Canadian Real Estate Association and Local Real Estate Boards				

Meanwhile, Ottawa condominium and non-condominium sales decreased 24.0% and 24.8%, respectively (adjacent table).

2022 AVG MLS® RESALE SALES* & 2021-2022 % CHANGE				
Major City	**Sales: Condominium**	**2021-2022 % Change**	**Sales: Non-Condominium**	**2021-2022 % Change**
Toronto	27,298	-39.1%	47,842	-38.1%
Montréal	16,951	-22.3%	42,530	30.6%
Vancouver	15,592	-28.4%	13,311	-40.1%
Ottawa	**3,786**	**-24.0%**	**11,521**	**-24.8%**
Calgary	12,637	37.0%	21,987	-7.3%
Edmonton	6,470	13.5%	17,172	-8.0%
*Corresponds to Real Estate Board Territories Source: Canadian Real Estate Association and Local Real Estate Boards				

2.3 Rental Housing

<u>Supply</u>

CMHC estimates there was an increase of 5.2% in the total number of rental purpose row and apartment units from 74,266 in 2021 to 78,103 in 2022. The overall supply of condominium rental units decreased 2.1% from 10,822 in 2021 to 10,599. The percentage of condominiums offered as rentals also decreased by 28.7%, while average rents remained higher than rental apartments.

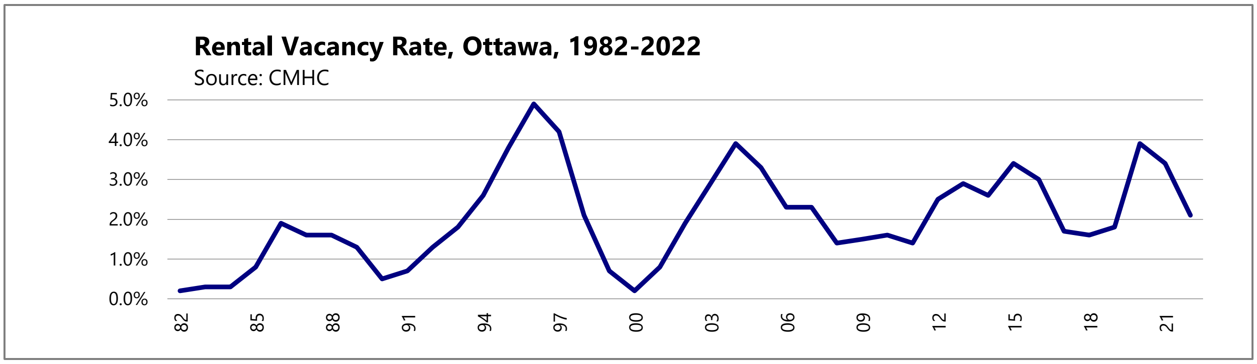
<u>Vacancy Rates</u>

Ottawa's rental vacancy rate decreased from 3.4% in 2021 to 2.1% in 2022. The vacancy rate was lower for bachelor units (1.6%) compared to two-bedroom units (2.4%) and one-bedroom units (2.0%). An overheated housing market supported rental demand to maintain low vacancy rates.

RENTAL VACANCY RATES BY CMHC ZONE, 2022

Downtown	1.3%
Sandy Hill/Lowertown	2.1%
Glebe/Old Ottawa South	0.7%
Alta Vista	3.5%
Carlington/Iris	1.0%
Chinatown/Hintonburg/Westboro N	1.7%
New Edinb./Manor Park/Overbrook	1.7%
Westboro S/Hampton Pk/Britannia	4.3%
Hunt Club/South Keys	1.4%
Vanier	2.5%
Gloucester North/Orleans	3.8%
Eastern Ottawa Surrounding Areas	
Nepean	1.7%
Western Ottawa Surrounding Areas	0.4%
City Average	**2.1%**

Source: CMHC's 2021 Rental Market Survey, Table 1.1.1



Private Rental Prices

The average rent for a two-bedroom apartment in Ottawa in 2022 was $1,625, an increase of 4.8% from 2021 and above the 2022 provincial rent increase guideline of 1.2%. The average rent of a two-bedroom apartment in Gatineau in 2022 was $1,269. The rent gap between Ottawa and Gatineau for a two-bedroom apartment is $356 or 24.6% which is lower than the 39.8% gap in 2021.

3. Economy

HIGHLIGHTS

- The number of employed residents increased 3.4% in Ottawa from 2021 to 2022
- A majority of employment clusters experienced growth in 2022, with the exception of Office and Government clusters which lost 2,800 and 600 jobs, respectively
- The Knowledge cluster had the largest employment numbers with 190,300 employed in 2022
- Ottawa's overall office vacancy rate increased to 11.2%

3.1 Labour Force

Employed Residents

Employment Changes, Major Centres, 2021-2022

Source: Statistics Canada, Labour Force Survey, Table 14-10-0384-01

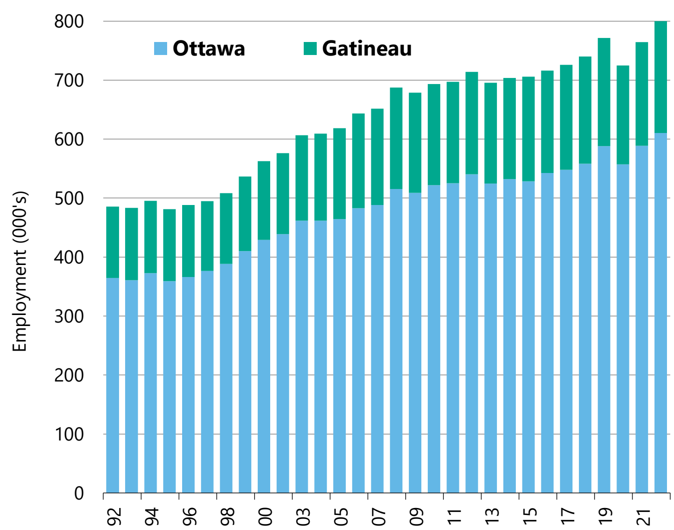
CMA	Net job change
Toronto	+160,200
Vancouver	+39,500
Montréal	+77,400
Edmonton	+30,500
Calgary	+56,300
Ottawa-Gatineau	**+33,300**

The Ottawa-Gatineau CMA saw an increase of 33,300 employed residents in 2022. Employment gains were seen in all of the nation's six largest metropolitan areas, with Toronto seeing the largest increase of 160,200 employed residents (adjacent table) and Edmonton experiencing the smallest increase. About 75% of the total jobs in the Ottawa-Gatineau CMA have historically been in the city of Ottawa, with 76.3% in 2022.

Statistics Canada's sample-based Labour Force Survey (LFS) shows the number of employed residents in the Ontario portion of the Ottawa-Gatineau CMA averaged 610,500 in 2022, up 3.4% or 21,800 employed residents from 2022. The unemployment rate decreased to 4.2% in 2022 from 6.1% in 2021. The local unemployment rate remained lower than provincial (5.6%) and national (5.3%) rates (Table 14).

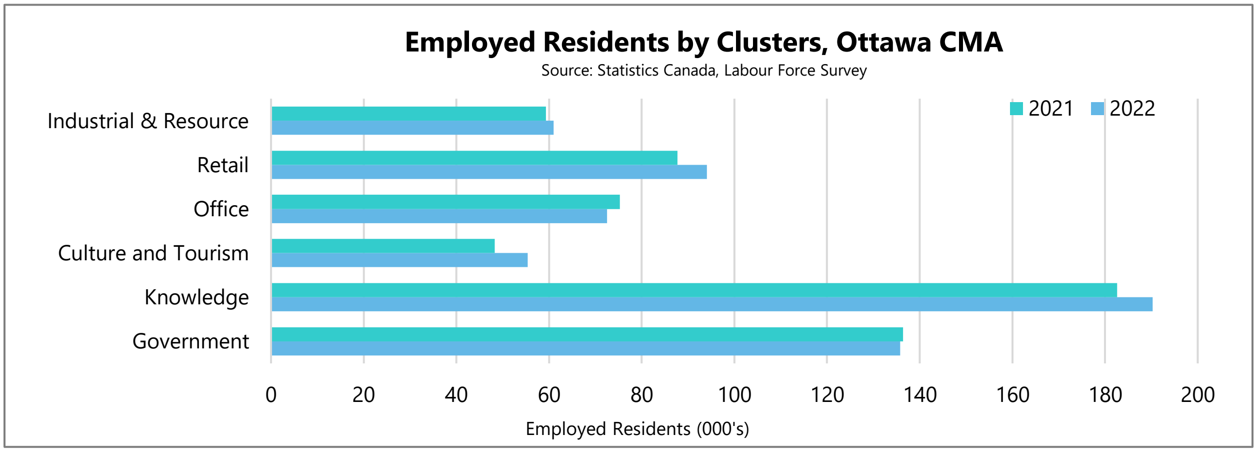
Total Employment, Ottawa and Gatineau, 1992-2022

Source: Statistics Canada, Labour Force Survey



The North American Industry Classification System's (NAICS) Major Sectors have been categorized into six main clusters of the local economy. A majority of employment clusters, with the exception of Office and

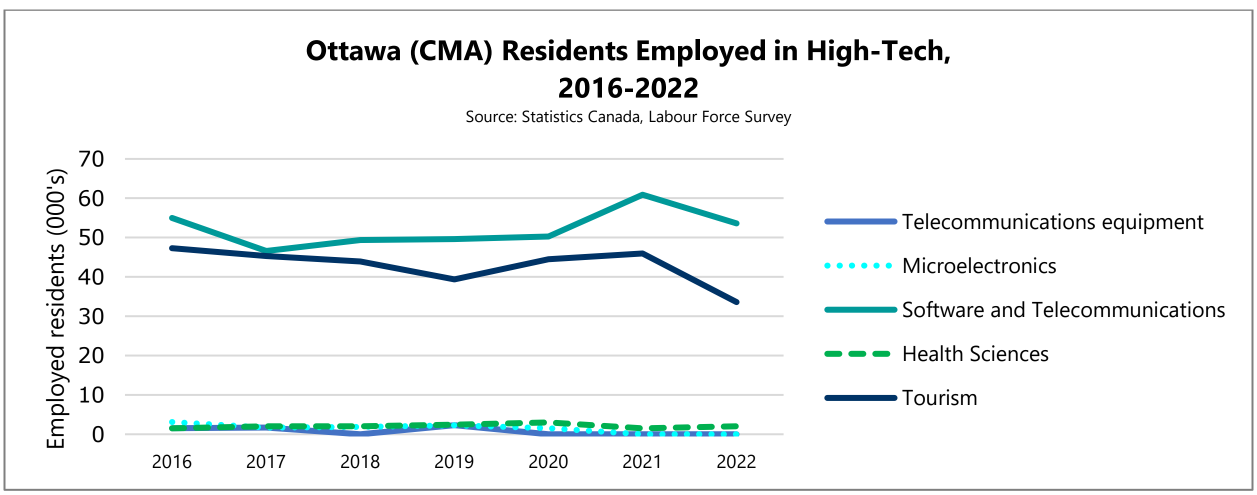
Government clusters, experienced growth in 2022. The Culture and Tourism cluster saw the most growth by adding 7,100 new employees, followed by the Retail cluster with 6,400 new employees. Meanwhile, the Office and Government clusters experienced decreases of 2,800 and 600 employees year-over-year. The Knowledge cluster maintained the largest employment numbers with 190,300 employed (Table 15).



In 2022, private-sector employment also experienced significant growth in employed residents representing 64.0% of all employed residents in Ottawa, up from 61.9% in 2021 and surpassing pre-pandemic levels of 63.6% in 2019 (Table 15).

<u>High-Tech</u>

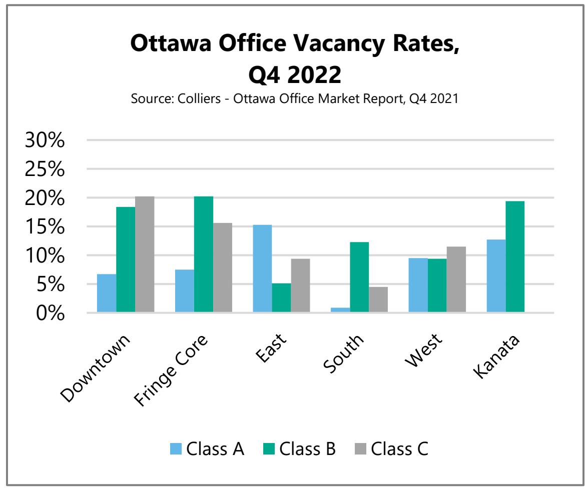
In 2022, Ottawa's Advanced Technology sector experienced a decrease of 6,800 employees. All High-Tech clusters saw a decrease in employees, with the exception of Health Sciences which grew by 33.3% or 500 employees. Tourism lost 12,400 employees (down 27.0%) and Software and Telecommunications lost 7,300 employees (down 12.0%) (Table 15).



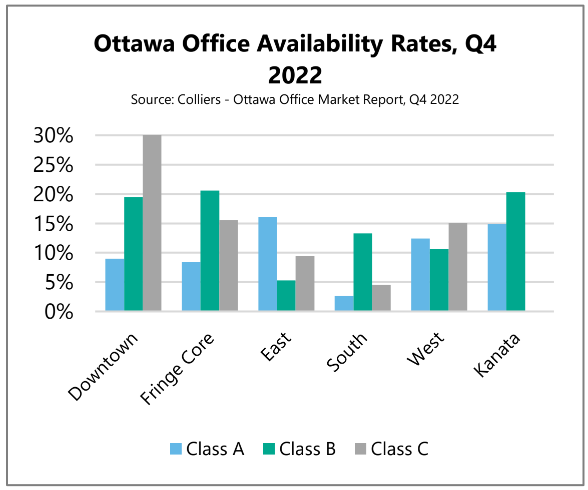
3.2 Office, Industrial and Retail Markets

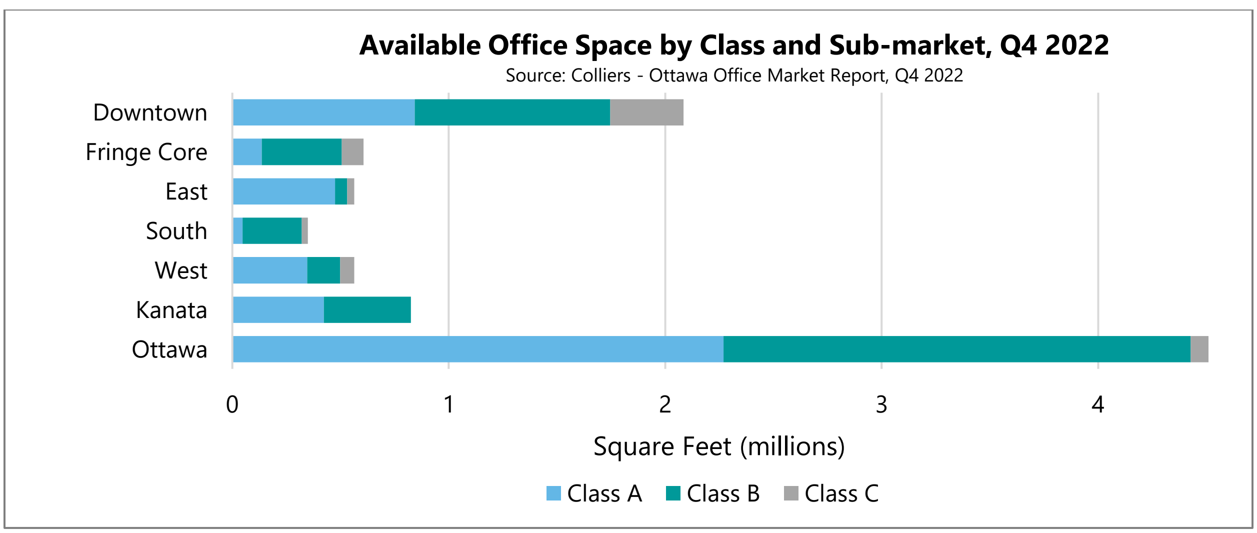
<u>Office Market</u>

Ottawa has an estimated commercial office space inventory of approximately 4.1 million square metres (44.4 million square feet). Ottawa's overall vacancy rate increased to 11.2% at the end of 2022 from 9.7% in 2021 (Table 16). The Ottawa South had the lowest vacancy rate of 6.2%, followed by Ottawa West at 9.6%, and Downtown at 10.6%. Kanata had the highest vacancy rate of 15.0% at the end of 2022.



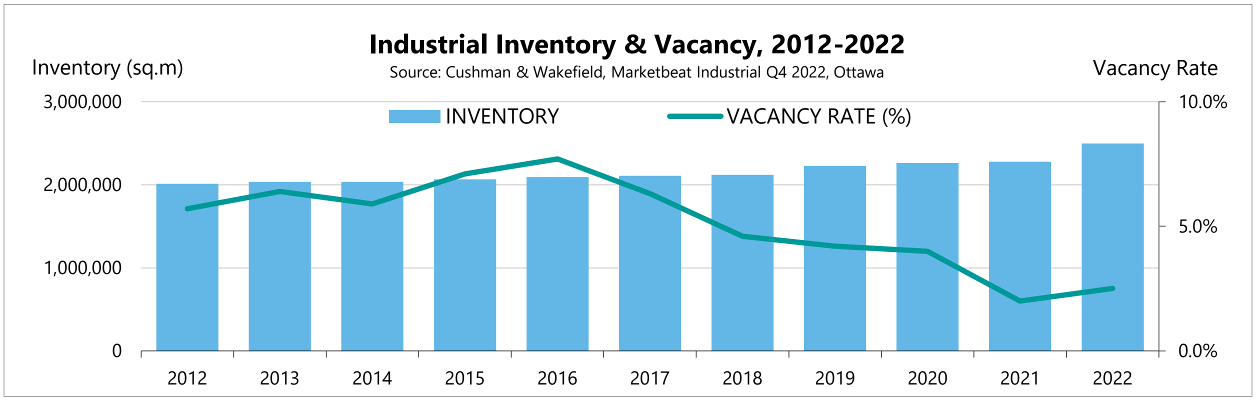
Ottawa's office market is diffentiated by office class and by geographic sub-market with variations in vacancy and availability rates between these variables. Availability rates include all available rentable space, such as expiring leases, subleases or on sale. Vacancy and availability rates show similar patterns by office class and sub-market, with availability rates providing additional upcoming space for new tenants. Class A office continues to be in high demand, particularly in the downtown and south/airport sub-markets. Although varying by sub-market, overall available office space is about 45.5% class A, 43.2% class B, and 11.3% class C.





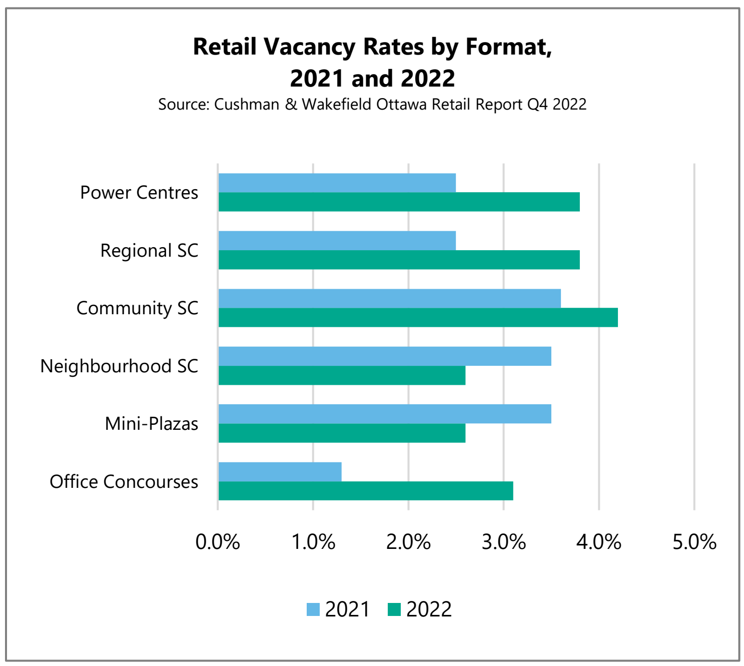
Industrial Market

Ottawa is estimated to have over 2.4 million square metres (26.9 million square feet) of industrial floor area at the end of 2022. The city is continuing to grow its industrial assets with 262,680 square metres of new industrial space. Over 56% of the industrial inventory is east of the Rideau River where the vacancy rate has remained steady at 2.4%. West of the Rideau River, vacancies increased from 1.5% to 2.9%. Overall, the vacancy rate increased from 2.0% in 2021 to 2.5% in 2022 (Table 17).



Retail Market

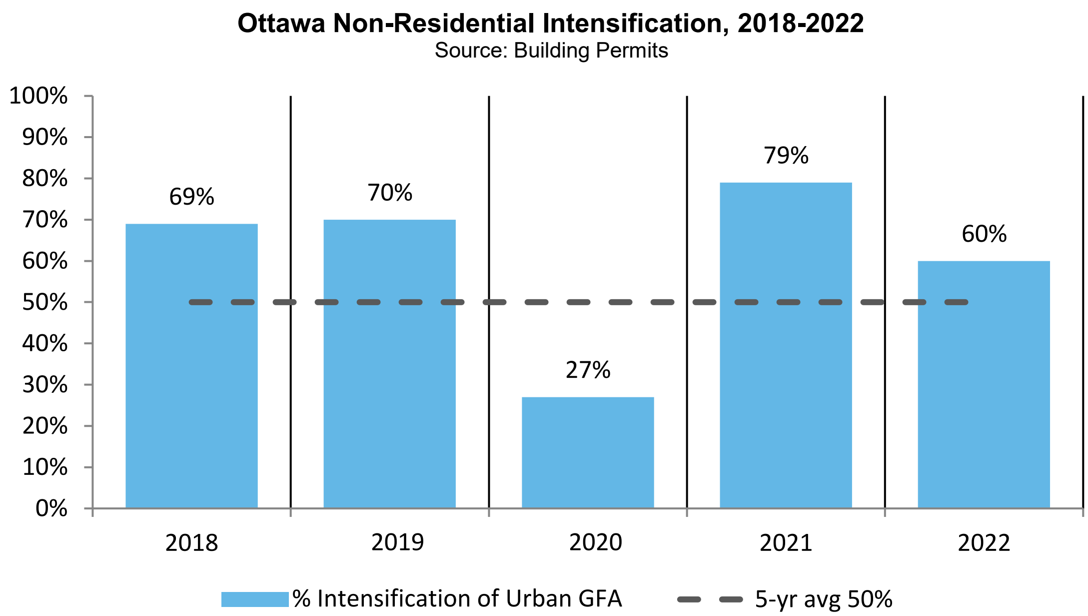
Retail space is categorized into several format categories. In 2022, all retail categories maintained similar shares of total floor area compared to 2021. Power Centres and standalone big box stores had the largest share of space at 27.2%, 2022.



Most retail formats experienced an increase in vacancy rates between 2021 and 2022, while Mini-Plazas and Neighbourhood Shopping Centres saw vacancy rates decrease. Office Concourses saw the greatest increase in vacancy from 1.3% in 2021 to 3.1% in 2022. Power Centres and Regional Shopping Centres also had vacancy rates increase to 3.8% and Community Shopping Centres increased to 4.2%. The city’s overall retail vacancy rate increased to 3.6% in 2022 from 3.1% in 2021 (Table 18).

3.3 Non-Residential Intensification

Non-residential intensification is the amount of commercial, industrial, and institutional gross floor area (GFA) constructed within the built-up urban and suburban areas. In 2022, approximately 85,866 m^2 (about 924,254 ft^2) had been constructed within the urban, built-up area, representing an intensification rate of 60%. Over the past five-years, non-residential intensification averaged 50% of total built space. This is lower than typical due to 2020 being an anomalous year when the Amazon Fulfillment Centre Warehouse was built in Barrhaven. The five-year average would be 71% excluding this anomaly *(*Table 19).



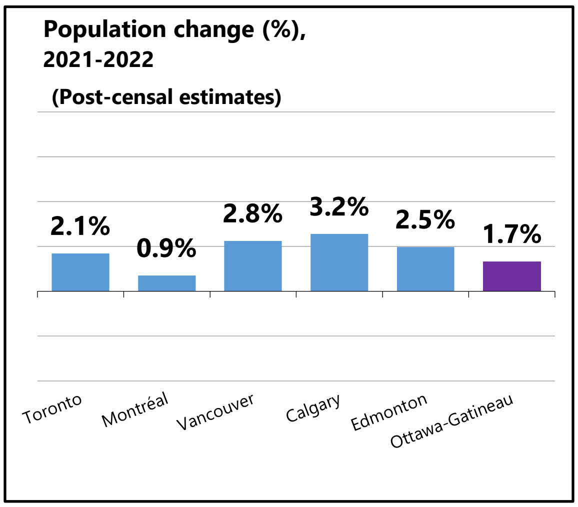
Appendix: Data Tables

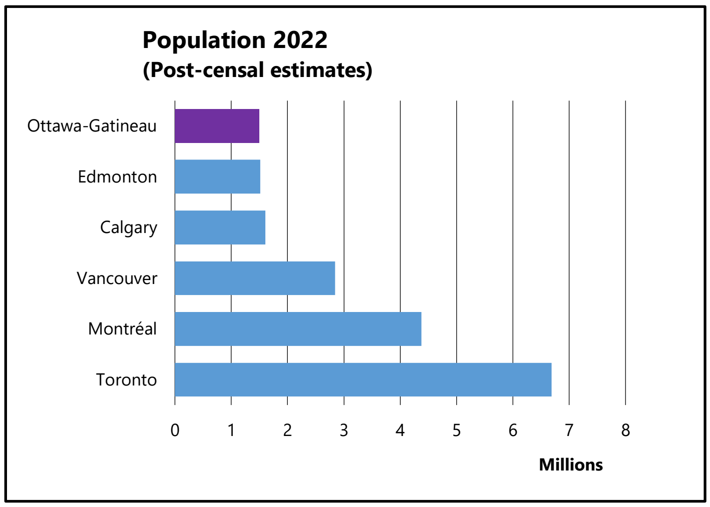
TABLE 1

POPULATION OF CANADA'S SIX LARGEST METROPOLITAN AREAS, 2018-2022

CMA*	2018	2019	2020	2021	2022	*2021-2022 % chg.*
Toronto	6,337,780	6,462,898	6,543,886	6,547,381	6,685,621	*2.1%*
Montréal	4,264,846	4,334,308	4,366,487	4,340,642	4,378,796	*0.9%*
Vancouver	2,658,582	2,709,277	2,743,765	2,764,932	2,842,730	*2.8%*
Calgary	1,483,528	1,514,426	1,542,956	1,558,588	1,608,342	*3.2%*
Edmonton	1,415,351	1,442,835	1,467,219	1,480,159	1,516,719	*2.5%*
Ottawa-Gatineau	**1,411,032**	**1,438,015**	**1,462,582**	**1,474,077**	**1,498,610**	***1.7%***
City of Ottawa**	1,004,802	1,025,354	1,044,484	1,052,526	1,071,868	*1.8%*

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 2018 to 2020, updated postcensal for 2021, and preliminary postcensal for 2022.
* 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	2018	2019	2020	2021	2022	*2021-2022 % chg.*
Ontario part of CMA	1,069,895	1,092,267	1,113,242	1,122,589	1,143,407	*1.9%*
(%)	75.8%	76.0%	76.1%	76.2%	76.3%	
Quebec part of CMA	341,137	345,748	349,340	351,488	355,203	*1.1%*
(%)	24.2%	24.0%	23.9%	23.8%	23.7%	
Total CMA Population	**1,411,032**	**1,438,015**	**1,462,582**	**1,474,077**	**1,498,610**	***1.7%***

Source: Table 17-10-0135-01, Statistics Canada.
Estimates are final postcensal for 2018 to 2020, updated postcensal for 2021, and preliminary postcensal for 2022.

TABLE 2

POPULATION AND HOUSEHOLD ESTIMATES BY SUB-AREA, 2018-2022

SUB-AREA	POPULATION							HOUSEHOLDS						
						Growth							Growth	
	2018	2019	2020	2021	2022	21-22	*% 21-22*	2018	2019	2020	2021	2022	21-22	*% 21-22*
Downtown*														
Central Area	12,610	12,470	12,110	13,520	14,230	710	*5.3%*	8,060	7,950	7,710	8,620	9,080	460	*5.3%*
Inner Area	91,950	92,520	91,450	95,240	98,060	2,820	*3.0%*	49,870	50,260	49,540	51,960	53,770	1,810	*3.5%*
Other Areas Inside Greenbelt														
Ottawa East	51,810	52,730	53,140	53,000	53,710	710	*1.3%*	26,640	27,250	27,540	27,510	27,970	460	*1.7%*
Beacon Hill	31,040	31,710	32,080	32,730	33,240	510	*1.6%*	14,610	14,930	15,050	15,310	15,550	240	*1.6%*
Alta Vista	75,170	74,930	75,210	75,820	76,790	970	*1.3%*	32,980	32,860	33,070	33,410	33,900	490	*1.5%*
Hunt Club	65,790	65,770	65,660	65,900	66,580	680	*1.0%*	26,860	26,860	26,800	26,950	27,420	470	*1.7%*
Merivale	78,010	78,850	78,790	79,100	79,750	650	*0.8%*	34,640	35,180	35,160	35,350	35,750	400	*1.1%*
Ottawa West	45,900	46,400	47,380	48,280	48,650	370	*0.8%*	21,970	22,230	22,820	23,320	23,490	170	*0.7%*
Bayshore	38,560	38,600	38,500	38,850	38,720	-130	*-0.3%*	17,940	17,980	17,930	18,170	18,100	-70	*-0.4%*
Cedarview	45,320	45,330	45,320	45,690	45,780	90	*0.2%*	18,840	18,870	18,890	19,140	19,220	80	*0.4%*
Urban Areas Outside Greenbelt														
Kanata-Stittsville	126,180	130,940	135,360	138,900	142,990	4,090	*2.9%*	47,400	49,440	51,260	52,830	54,560	1,730	*3.3%*
South Nepean	89,040	90,320	93,960	97,650	100,930	3,280	*3.4%*	33,170	33,690	35,140	36,650	37,900	1,250	*3.4%*
Riverside South	16,610	17,870	19,730	21,400	22,950	1,550	*7.2%*	5,940	6,350	7,010	7,570	8,060	490	*6.5%*
Leitrim	10,080	11,480	13,460	16,040	17,970	1,930	*12.0%*	3,340	3,770	4,430	5,270	5,870	600	*11.4%*
Orléans	117,830	119,780	122,590	125,040	126,380	1,340	*1.1%*	46,050	46,980	48,320	49,450	50,140	690	*1.4%*
Rural														
Rural Northeast	12,010	11,990	11,980	12,020	12,020	0	*0.0%*	4,350	4,380	4,410	4,450	4,480	30	*0.7%*
Rural Southeast	28,790	28,930	29,030	29,230	29,360	130	*0.4%*	10,100	10,190	10,270	10,380	10,470	90	*0.9%*
Rural Southwest	29,110	29,610	30,680	31,550	32,270	720	*2.3%*	10,390	10,590	11,010	11,350	11,630	280	*2.5%*
Rural Northwest	25,620	25,980	26,180	26,500	26,920	420	*1.6%*	9,160	9,310	9,400	9,530	9,710	180	*1.9%*
City of Ottawa	**991,430**	**1,006,210**	**1,022,600**	**1,046,440**	**1,067,310**	**20,870**	**2.0%**	**422,330**	**429,080**	**435,750**	**447,210**	**457,070**	**9,860**	**2.2%**
Downtown*	104,560	104,990	103,560	108,760	112,290	3,530	*3.2%*	57,930	58,210	57,250	60,580	62,850	2,270	*3.7%*
Other Inside Greenbelt	431,600	434,320	436,080	439,370	443,220	3,850	*0.9%*	194,480	196,160	197,260	199,160	201,400	2,240	*1.1%*
Total Inside GB	*536,160*	*539,310*	*539,640*	*548,130*	*555,510*	7,380	*1.3%*	*252,410*	*254,370*	*254,510*	*259,740*	*264,250*	4,510	*1.7%*
Urban Areas Outside GB	359,740	370,390	385,100	399,030	411,220	12,190	*3.1%*	135,900	140,230	146,160	151,770	156,530	4,760	*3.1%*
Rural	95,530	96,510	97,870	99,300	100,570	1,270	*1.3%*	34,000	34,470	35,090	35,710	36,290	580	*1.6%*
Downtown*	10.5%	10.4%	10.1%	10.4%	10.5%			13.7%	13.6%	13.1%	13.5%	13.8%		
Other Inside Greenbelt	43.5%	43.2%	42.6%	42.0%	41.5%			46.0%	45.7%	45.3%	44.5%	44.1%		
Total Inside GB	54.1%	53.6%	52.8%	52.4%	52.0%			59.8%	59.3%	58.4%	58.1%	57.8%		
Urban Areas Outside GB	36.3%	36.8%	37.7%	38.1%	38.5%			32.2%	32.7%	33.5%	33.9%	34.2%		
Rural	9.6%	9.6%	9.6%	9.5%	9.4%			8.1%	8.0%	8.1%	8.0%	7.9%		

NOTE: Sub-area totals may not add up to City of Ottawa total due to rounding. Based on 2001 post-censal estimates of population and occupied dwellings, and estimates based on new occupied dwellings from building permits.
* **Downtown** refers to the Central and Inner Areas combined.

Data are year-end.
Source: City of Ottawa, Research and Forecasting

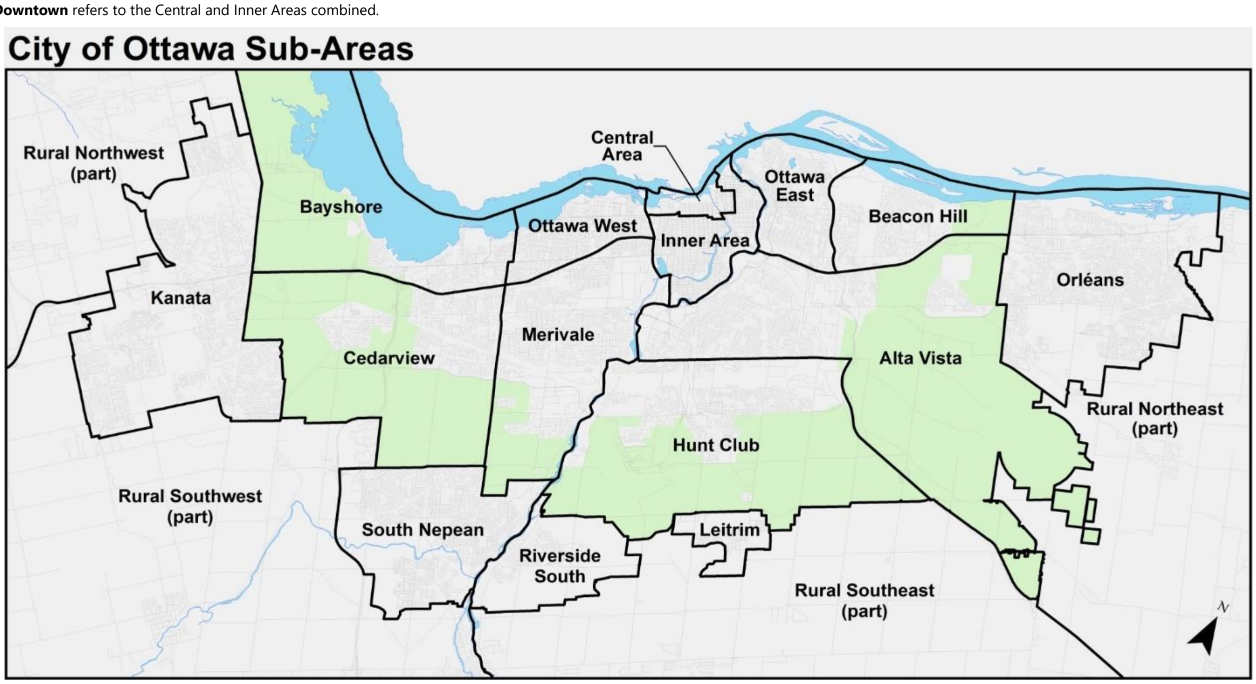


TABLE 3

GREATER OTTAWA-GATINEAU AREA POPULATION & DWELLINGS

Municipality	2019 City Estimates Population	2019 City Estimates Occupied Dwellings	2020 City Estimates Population	2020 City Estimates Occupied Dwellings	2021 City Estimates Population	2021 City Estimates Occupied Dwellings	2022 City Estimates Population	2022 City Estimates Occupied Dwellings
Ottawa, C	**1,006,211**	**429,080**	**1,022,604**	**435,747**	**1,046,443**	**447,211**	**1,067,310**	**457,072**
Gatineau, V	**288,865**	**124,715**	**294,606**	**127,445**	**299,620**	**129,871**	**305,794**	**133,217**
Prescott & Russell (part)	**65,405**	**25,038**	**66,925**	**25,819**	**69,250**	**26,679**	**71,814**	**27,567**
Alfred and Plantagenet, TP	9,192	3,779	9,176	3,779	9,494	3,917	9,667	3,966
Casselman, Vlg.	3,603	1,508	3,586	1,623	4,019	1,665	4,324	1,718
Clarence-Rockland, C	23,964	9,235	24,542	9,497	25,229	9,803	26,524	10,104
Russell, TP	17,022	6,143	17,803	6,457	18,557	6,764	19,374	7,195
The Nation Municipality	11,624	4,373	11,818	4,463	11,951	4,530	11,926	4,584
Leeds & Grenville (part)	**29,157**	**11,732**	**29,373**	**11,890**	**29,711**	**12,097**	**30,845**	**12,325**
Merrickville-Wolford, Vlg.	11,024	4,484	11,058	4,517	11,048	4,531	11,003	4,549
North Grenville, TP	18,133	7,248	18,315	7,373	18,663	7,566	19,842	7,775
Stormont, Dundas, Glengarry (pt)	**14,453**	**5,772**	**14,428**	**5,772**	**14,677**	**5,881**	**14,881**	**5,985**
North Dundas, TP	14,453	5,772	14,428	5,772	14,677	5,881	14,881	5,985
Lanark (part)	**35,260**	**14,195**	**37,575**	**15,228**	**38,572**	**15,734**	**39,935**	**16,123**
Beckwith, TP	7,499	2,840	7,903	3,003	8,120	3,097	8,406	3,139
Carleton Place, Tn.	11,999	4,800	13,606	5,435	14,111	5,628	13,877	5,816
Mississippi Mills, Tn.	12,272	5,228	12,580	5,463	12,671	5,610	13,952	5,742
Montague, TP	3,490	1,327	3,486	1,327	3,670	1,399	3,701	1,425
Renfrew (part)	**15,780**	**6,781**	**16,376**	**7,063**	**17,475**	**7,569**	**17,898**	**7,647**
Arnprior, Tn.	8,793	3,891	9,268	4,094	10,342	4,561	10,249	4,591
McNab/Braeside, TP	6,987	2,890	7,108	2,969	7,133	3,008	7,649	3,056
Québec part of CMA Outside Gatineau (QCOG)	**53,003**	**21,269**	**54,086**	**21,820**	**55,764**	**22,618**	**57,850**	**23,309**
Cantley, M	10,098	3,595	10,259	3,666	10,480	3,759	10,699	3,854
Chelsea, M	7,329	2,809	7,762	2,990	8,287	3,207	8,660	3,296
La Pêche, M	7,805	3,282	7,964	3,359	8,173	3,459	8,275	3,530
L'Ange-Gardien, M	4,060	1,880	4,103	1,964	4,251	2,103	5,207	2,217
Pontiac, M	5,635	2,193	5,615	2,193	5,770	2,262	5,862	2,271
Val-des-Monts, M	11,105	4,391	11,325	4,484	11,672	4,627	11,931	4,807
Denholm, M	563	254	571	259	579	264	523	269
Notre-Dame-de-la-Salette,M	741	340	747	345	769	357	797	362
Mayo, M	585	255	594	260	603	265	672	282
Bowman, M	619	304	617	307	616	310	628	319
Val-des-Bois, M	880	472	872	472	865	472	872	472
Lochaber, CT	474	157	504	158	538	160	404	160
Lochaber-Ouest, CT	653	250	661	254	666	257	714	257
Thurso, V	2,456	1,087	2,492	1,109	2,495	1,116	2,605	1,213
GREATER OTTAWA-GATINEAU AREA	**1,508,134**	**638,582**	**1,535,973**	**650,784**	**1,571,512**	**667,660**	**1,606,327**	**683,243**
Ottawa-Gatineau CMA	1,454,748	617,339	1,482,421	629,303	1,516,653	645,737	1,550,826	661,016
Ontario portion of the CMA	1,112,880	471,355	1,133,729	480,038	1,161,269	493,248	1,187,182	504,490
Québec portion of the CMA	341,868	145,984	348,692	149,265	355,384	152,489	363,644	156,526
OMATO	160,055	63,518	164,677	65,772	169,685	67,960	175,373	69,646
National Capital Region (NCR)	1,378,642	586,496	1,403,271	597,116	1,434,813	612,327	1,466,268	626,702

Sources: Statistics Canada, Census; estimates based on CMHC starts and municipal building permits **2020-2022 City Estimates are year-end.**

City of Ottawa (2020 and 2021 population estimates based on building permits adjusted for demolitions, vacancies and ongoing declines in average household size);

Note 1: because they are derived from different sources, 2020 and 2021 population estimates should not be compared to Census population figures.

Note 2: sub-totals by County include only those areas within OMATO or QCOG, not the entire County.

Note 3: Mulgrave-et-Derry was added to the CMA in 2021 and is not included in the "Qué. part of the CMA Outside Gatineau" or "Québec portion of the CMA sub-totals". Arnprior, McNab/Braeside, Mississippi Mills, Carleton Place, and Beckwith were also added to the CMA in 2021 and are not included in the "ON portion of the CMA" sub-totals prior to 2021.

OMATO: Ontario Municipalities Adjacent to the city of Ottawa, including municipalities included in the Ottawa-Gatineau CMA.

NCR: Certain municipalities contained in the The National Capital Region (NCR), have only a portion of their area in the reigon. However, for the purpose of this report, data for the entire municipality is included.

TABLE 4

NET MIGRATION TO THE CITY OF OTTAWA, 2016-2021

BY AGE GROUP

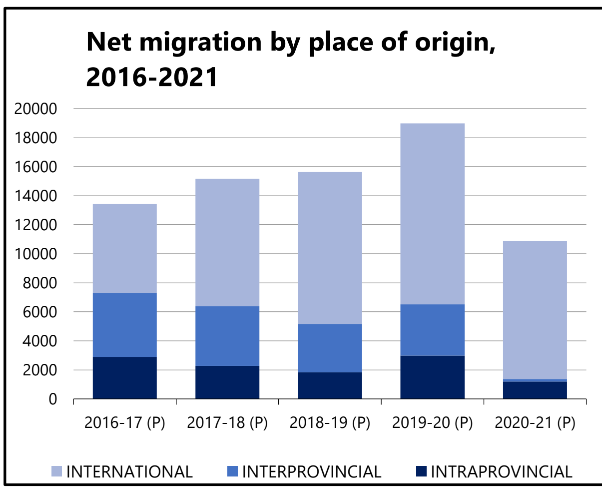
YEAR	AGE GROUP 0 - 17	18 - 24	25 - 44	45 - 64	65+	TOTAL
2016-17 (P)	3,295	2,542	6,390	585	603	13,415
2017-18 (P)	3,425	3,154	7,769	310	510	15,168
2018-19 (P)	3,617	3,025	8,442	542	7	15,633
2019-20 (P)	4,033	4,043	10,642	234	24	18,976
2020-21 (P)	**3,026**	**2,257**	**6,498**	**-686**	**-215**	**10,880**
5-year total	**17,396**	**15,021**	**39,741**	**985**	**929**	**74,072**
5 year %	**23.5%**	**20.3%**	**53.7%**	**1.3%**	**1.3%**	**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				
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
2019-20 (P)	**18,787**	**13,695**	**14,217**	**46,699**
2020-21 (P)	**16,274**	**10,342**	**11,005**	**37,621**
Out-Migrants				
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
2019-20 (P)	15,800	10,177	1,746	27,723
2020-21 (P)	**15,074**	**10,180**	**1,487**	**26,741**
Net Migration				
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
2019-20 (P)	2,987	3,518	12,471	18,976
2020-21 (P)	**1,200**	**162**	**9,518**	**10,880**

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



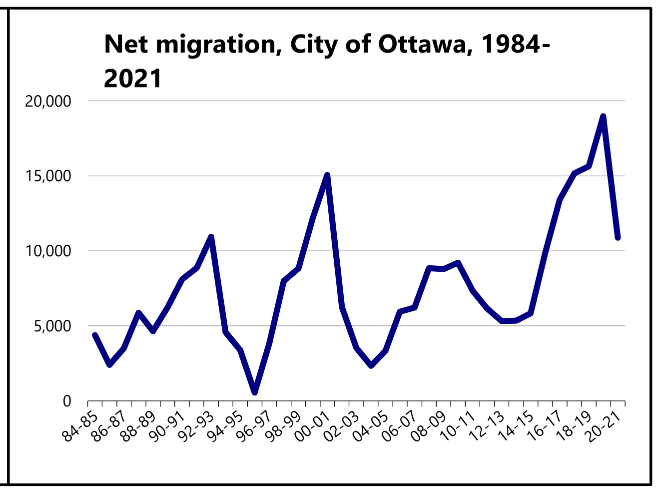


TABLE 5

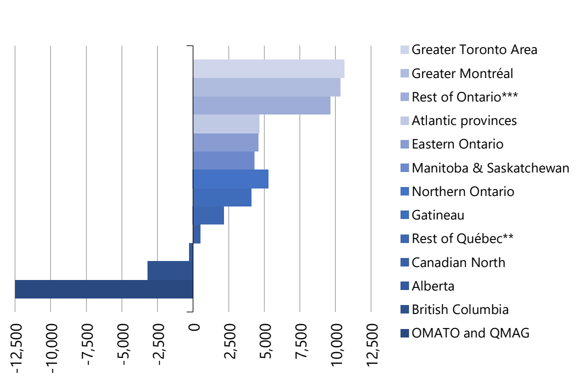
NET MIGRATION IN-FLOWS AND OUT-FLOWS, CITY OF OTTAWA

2011-2021			
IN-FLOWS*		**OUT-FLOWS***	
Greater Toronto Area	10,626	OMATO and QMAG	-14,462
Greater Montréal	10,353	British Columbia	-3,188
Rest of Ontario***	9,647	Alberta	-247
Northern Ontario	5,299		
Atlantic provinces	4,677		
Eastern Ontario	4,587		
Manitoba & Saskatchewan	4,313		
Gatineau	4,090		
Rest of Québec**	2,166		
Canadian North	518		
TOTAL IN-FLOWS	**56,276**	**TOTAL OUT-FLOWS**	**-17,897**
		Net Canadian Migration 2010-2020	38,379
		Net International Migration	**67,942**
		Net Migration 2011-2021	**106,321**

2020-2021			
IN-FLOWS*		**OUT-FLOWS***	
Greater Toronto Area	3,282	OMATO and QMAG	-4,109
Rest of Ontario***	1,079	British Columbia	-828
Greater Montréal	915	Gatineau	-452
Manitoba & Saskatchewan	616	Atlantic provinces	-291
Alberta	507	Rest of Québec**	-18
Northern Ontario	391		
Eastern Ontario	213		
Canadian North	57		
TOTAL IN-FLOWS	**7,060**	**TOTAL OUT-FLOWS**	**-5,698**
		Net Canadian Migration 2019-2020	1,362
		Net International Migration *(Table 4)*	**9,518**
		Net Migration 2020-2021	**10,880**

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

Migration In- and Out- Flows, 2011-2021



Migration In- and Out- Flows, 2020-21

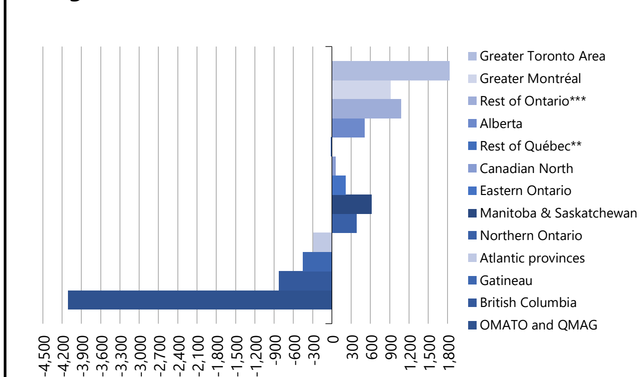


TABLE 6

MIGRATION BETWEEN OTTAWA AND ADJACENT MUNICIPALITIES, 2016-2021

	2016-2017 (R)	2017-2018 (P)	2018-2019 (P)	2019-2020 (P)	2020-2021 (P)	TOTAL 2016-2021
PRESCOTT-RUSSELL TO OTTAWA	*1,622*	*1,755*	*1,558*	*1,668*	*1,339*	*7,942*
OTTAWA TO PRESCOTT-RUSSELL	*1,695*	*2,121*	*2,438*	*2,669*	*2,706*	*11,629*
PRESCOTT-RUSSELL - NET MIGRATION	**-73**	**-366**	**-880**	**-1,001**	**-1,367**	**-3,687**
*S.D.&G.** TO OTTAWA*	*824*	*866*	*680*	*817*	*671*	*3,858*
OTTAWA TO S.D.&G.	*716*	*770*	*805*	*883*	*893*	*4,067*
S.D.&G. - NET MIGRATION	**108**	**96**	**-125**	**-66**	**-222**	**-209**
LEEDS-GRENVILLE TO OTTAWA	*827*	*873*	*819*	*895*	*715*	*4,129*
OTTAWA TO LEEDS-GRENVILLE	*1,074*	*1,277*	*1,242*	*1,313*	*1,228*	*6,134*
LEEDS-GRENVILLE - NET MIGRATION	**-247**	**-404**	**-423**	**-418**	**-513**	**-2,005**
LANARK TO OTTAWA	*947*	*1,001*	*967*	*1,044*	*769*	*4,728*
OTTAWA TO LANARK	*1,340*	*1,638*	*1,846*	*1,934*	*2,099*	*8,857*
LANARK - NET MIGRATION	**-393**	**-637**	**-879**	**-890**	**-1,330**	**-4,129**
RENFREW TO OTTAWA	*924*	*976*	*884*	*1,036*	*843*	*4,663*
OTTAWA TO RENFREW	*967*	*1,088*	*1,165*	*1,306*	*1,176*	*5,702*
RENFREW - NET MIGRATION	**-43**	**-112**	**-281**	**-270**	**-333**	**-1,039**
GATINEAU TO OTTAWA*	*2,538*	*2,431*	*2,354*	*2,621*	*2,157*	*12,101*
OTTAWA TO GATINEAU	*1,679*	*1,773*	*1,879*	*2,458*	*2,609*	*10,398*
GATINEAU - NET MIGRATION	**859**	**658**	**475**	**163**	**-452**	**1,703**
LES-COLLINES-DE-L'OUTAOUAIS TO OTTAWA	*244*	*223*	*167*	*207*	*178*	*1,019*
OTTAWA TO LES-COLLINES-DE-L'OUTAOUAIS	*273*	*244*	*336*	*362*	*452*	*1,667*
LES-COLLINES - NET MIGRATION	**-29**	**-21**	**-169**	**-155**	**-274**	**-648**
PAPINEAU TO OTTAWA	*17*	*25*	*10*	*17*	*7*	*76*
OTTAWA TO PAPINEAU	*16*	*22*	*16*	*22*	*48*	*124*
PAPINEAU - NET MIGRATION	**1**	**3**	**-6**	**-5**	**-41**	**-48**
LA-VALLÉE-DE-LA-GATINEAU TO OTTAWA	*34*	*10*	*22*	*14*	*26*	*106*
OTTAWA TO LA-VALLÉE-DE-LA-GATINEAU	*25*	*31*	*30*	*39*	*37*	*162*
LA-VALLÉE - NET MIGRATION	**9**	**-21**	**-8**	**-25**	**-11**	**-56**
PONTIAC TO OTTAWA	*38*	*58*	*31*	*30*	*42*	*199*
OTTAWA TO PONTIAC	*33*	*49*	*49*	*39*	*60*	*230*
PONTIAC - NET MIGRATION	**5**	**9**	**-18**	**-9**	**-18**	**-31**
TOTAL	**197**	**-795**	**-2,314**	**-2,676**	**-4,561**	**-10,149**
Gatineau	**859**	**658**	**475**	**163**	**-452**	**1,703**
OMATO Counties*	**-648**	**-1,423**	**-2,588**	**-2,645**	**-3,765**	**-11,069**
Quebec Counties*	**-14**	**-30**	**-201**	**-194**	**-344**	**-783**

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	2017-2018 (F)	2018-2019 (F)	2019-2020 (F)	2020-2021 (U)	2021-2022 (P)	% chg. 20-21/21-22	2017-2022 TOTAL
Toronto	91,210	95,933	54,918	-17,196	117,140	781.2%	342,005
Montréal	57,499	55,523	22,565	-37,310	27,426	173.5%	125,703
Vancouver	33,990	43,047	27,152	16,047	73,856	360.2%	194,092
Calgary	14,735	20,912	19,308	7,727	42,160	445.6%	104,842
Edmonton	16,454	18,480	16,233	6,302	30,312	381.0%	87,781
Ottawa-Gatineau	**21,459**	**22,569**	**20,556**	**8,094**	**21,070**	**160.3%**	**93,748**
TOTAL 6 CMA's	**235,347**	**256,464**	**160,732**	**-16,336**	**311,964**	**2009.7%**	**948,171**
Ottawa-Gatineau % of 6 largest CMA's	9.1%	8.8%	12.8%	-49.5%	6.8%	8.0%	9.9%

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

(F) = Final; (P) = Preliminary; (U) = Updated

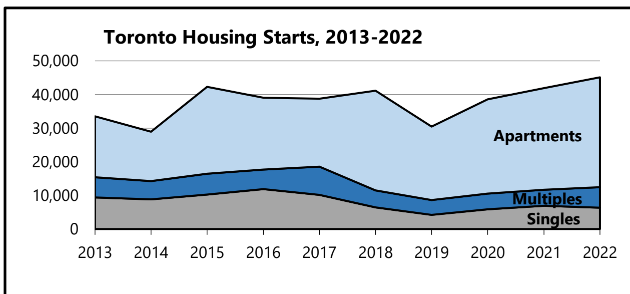
Note: Statistics Canada publishes two sets of migration data. The first, Migration Estimates for Census Division 3506, is used as the basis for Tables 4, 5 and 6 because it reports data at a detailed level of geography not available elsewhere. It provides data up to 2019-2020. The second dataset is CANSIM Table 17-10-0136-01, which is used for Table 7 and has data up to 2020-2021.

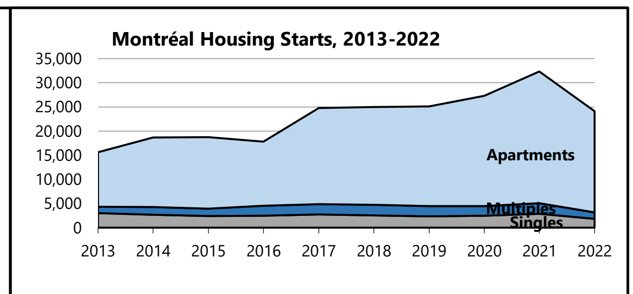
TABLE 8

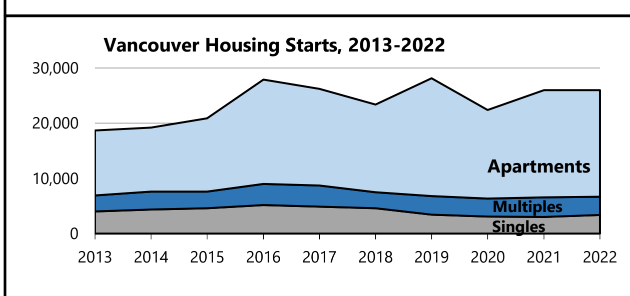
HOUSING STARTS IN CANADA'S SIX LARGEST CMA's, 2013-2022

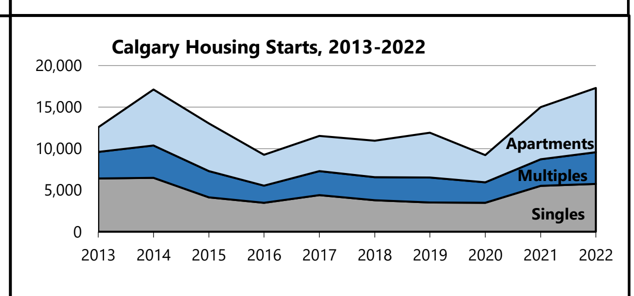
CMA	Dwg. Type	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% change 2021-22	% change 2013-22
Toronto	Singles	9,421	8,830	10,223	11,884	10,172	6,405	4,209	5,848	6,920	6,329	-8.5%	-32.8%
	Multiples	5,977	5,391	6,239	5,823	8,392	5,063	4,410	4,676	4,741	6,162	30.0%	3.1%
	Apartments	18,149	14,708	25,825	21,320	20,174	29,639	21,843	28,063	30,237	32,618	7.9%	79.7%
	Total	**33,547**	**28,929**	**42,287**	**39,027**	**38,738**	**41,107**	**30,462**	**38,587**	**41,898**	**45,109**	7.7%	34.5%
Vancouver	Singles	4,004	4,374	4,622	5,169	4,911	4,592	3,426	3,085	3,015	3,392	12.5%	-15.3%
	Multiples	2,883	3,227	2,998	3,828	3,795	2,924	3,394	3,264	3,551	3,303	-7.0%	14.6%
	Apartments	11,809	11,611	13,243	18,917	17,498	15,888	21,321	16,022	19,447	19,288	-0.8%	63.3%
	Total	**18,696**	**19,212**	**20,863**	**27,914**	**26,204**	**23,404**	**28,141**	**22,371**	**26,013**	**25,983**	-0.1%	39.0%
Montréal	Singles	3,039	2,677	2,402	2,499	2,771	2,549	2,369	2,493	2,901	1,833	-36.8%	-39.7%
	Multiples	1,289	1,608	1,511	2,018	2,130	2,182	2,104	1,953	2,144	1,340	-37.5%	4.0%
	Apartments	11,304	14,387	14,831	13,317	19,855	20,269	20,639	22,828	27,298	20,976	-23.2%	85.6%
	Total	**15,632**	**18,672**	**18,744**	**17,834**	**24,756**	**25,000**	**25,112**	**27,274**	**32,343**	**24,149**	-25.3%	54.5%
Edmonton	Singles	5,970	6,832	5,683	4,335	5,028	4,814	4,140	4,138	5,701	6,173	8.3%	3.4%
	Multiples	3,555	3,880	4,442	3,278	3,273	3,134	2,698	2,507	2,935	2,703	-7.9%	-24.0%
	Apartments	5,164	3,160	6,925	2,423	3,134	2,090	3,882	4,867	3,910	5,710	46.0%	10.6%
	Total	**14,689**	**13,872**	**17,050**	**10,036**	**11,435**	**10,038**	**10,720**	**11,512**	**12,546**	**14,586**	16.3%	-0.7%
Calgary	Singles	6,402	6,494	4,138	3,489	4,423	3,791	3,535	3,487	5,512	5,752	4.4%	-10.2%
	Multiples	3,207	3,903	3,150	2,055	2,885	2,777	2,991	2,449	3,191	3,804	19.2%	18.6%
	Apartments	2,975	6,734	5,745	3,701	4,226	4,403	5,383	3,299	6,314	7,750	22.7%	160.5%
	Total	**12,584**	**17,131**	**13,033**	**9,245**	**11,534**	**10,971**	**11,909**	**9,235**	**15,017**	**17,306**	15.2%	37.5%
Ottawa-Gatineau	Singles	2,262	2,254	2,414	2,365	2,703	3,131	3,017	3,411	4,003	3,171	-20.8%	40.2%
	Multiples	2,424	2,450	1,961	2,364	2,508	2,636	3,308	3,724	3,415	2,940	-13.9%	21.3%
	Apartments	3,798	2,961	2,181	2,388	4,116	3,701	4,878	5,899	5,862	8,912	52.0%	134.6%
	Total	**8,484**	**7,665**	**6,556**	**7,117**	**9,327**	**9,468**	**11,203**	**13,034**	**13,280**	**15,023**	13.1%	77.1%

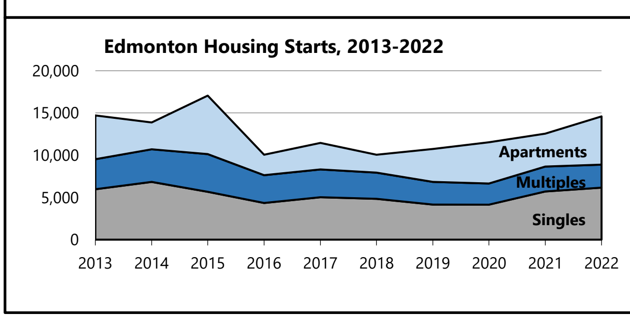
Multiples = Semi-detached and Row units
Source: CMHC Starts and Completions Survey











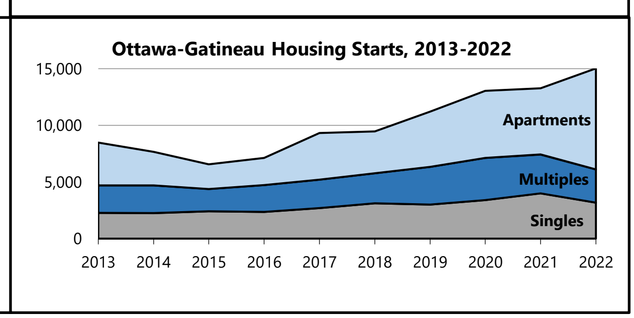


TABLE 21

RESIDENTIAL INTENSIFICATION BY WARD AND TRANSECT, mid 2018-2022

Ward No.	Ward Name	Mid 2018-2019	Mid 2019-2020	Mid 2020-2021	Mid 2021-2022	Mid 2018-2022	Mid 2021-2022 Share of Intensification	Mid 2018-2022 Share of Intensification
1	Orléans East-Cumberland	91	98	65	191	445	3%	2%
2	Orléans West-Innes	23	27	18	69	137	1%	1%
3	Barrhaven West	3	499	7	140	649	2%	3%
4	Kanata North	112	66	318	6	502	0%	2%
5	West Carleton-March	0	0	0	0	0	0%	0%
6	Stittsville	57	68	160	17	302	0%	1%
7	Bay	67	334	228	81	710	1%	3%
8	College	244	123	123	534	1,024	7%	5%
9	Knoxdale-Merivale	90	27	40	27	184	0%	1%
10	Gloucester-Southgate	73	63	89	8	233	0%	1%
11	Beacon Hill-Cyrville	13	217	15	133	378	2%	2%
12	Rideau-Vanier	610	920	1,472	302	3,304	4%	15%
13	Rideau-Rockcliffe	386	419	230	839	1,874	11%	9%
14	Somerset	412	1,777	88	1,334	3,611	18%	17%
15	Kitchissippi	413	431	508	2,189	3,541	29%	16%
16	River	80	807	557	1,117	2,561	15%	12%
17	Capital	98	559	148	279	1,084	4%	5%
18	Alta Vista	47	320	48	48	463	1%	2%
19	Orléans South-Navan	2	3	9	113	127	2%	1%
20	Osgoode	0	0	0	0	0	0%	0%
21	Rideau-Jock	0	0	0	0	0	0%	0%
22	Riverside South-Findlay Creek	3	1	1	8	13	0%	0%
23	Kanata South	27	132	21	20	200	0%	1%
24	Barrhaven-East	185	45	9	36	275	0%	1%
	Downtown Core Transect	**950**	**2,454**	**1,489**	**2,075**	**6,968**	**28%**	**32%**
	Inner Urban Transect	**996**	**1,993**	**1,712**	**3,041**	**7,742**	**41%**	**36%**
	Outer Urban Transect	**588**	**1,552**	**348**	**1,781**	**4,269**	**24%**	**20%**
	Suburban Transect	**502**	**937**	**605**	**594**	**2,638**	**8%**	**12%**
New Units in the Urban, Built-up Area		**3,036**	**6,936**	**4,154**	**7,491**	**21,617**		
New Units in the Urban Greenfield Area		**3,796**	**4,811**	**4,888**	**4,150**	**17,645**		
Total New Units in the Urban Area		**6,832**	**11,747**	**9,042**	**11,641**	**39,262**		
% Intensification		**44.4%**	**59.0%**	**45.9%**	**64.4%**	**55.1%**		
Official Plan Target		**40%**	**40%**	**40%**	**45%**	**51%**		

TABLE 10

HOUSING COMPLETIONS, CITY OF OTTAWA, 2013-2022, BY TYPE AND INTENDED MARKET

YEAR	FREEHOLD				CONDOMINIUM			PRIVATE RENTAL			CO-OP			ANNUAL TOTAL
	SINGLE	SEMI	ROW	TOTAL	ROW	APT.	TOTAL	ROW	APT.	TOTAL	ROW	APT.	TOTAL	
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**
2021	2,420	164	2,394	**4,990**	108	545	**653**	24	2,237	**2,295**	0	0	**0**	**7,938**
2022	**2,232**	**121**	**2,309**	**4,662**	**6**	**354**	**360**	**92**	**2,500**	**2,646**	**0**	**0**	**0**	**7,668**

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 11

ABSORBED NEW SINGLE-DETACHED HOME PRICES, OTTAWA, 2008-2022

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
2008	$417,683	113.1	0.737	$566,882	0.3%	2.2%
2009	$414,696	113.7	0.741	$559,858	-1.2%	0.5%
2010	$444,185	116.6	0.760	$584,755	4.4%	2.6%
2011	$492,380	120.1	0.782	$629,312	7.6%	3.0%
2012	$492,356	121.7	0.793	$621,008	-1.3%	1.3%
2013	$509,931	122.9	0.801	$636,895	2.6%	1.0%
2014	$523,271	125.3	0.816	$641,038	0.7%	2.0%
2015	$513,173	126.5	0.824	$622,704	-2.9%	1.0%
2016	$527,609	128.1	0.835	$632,225	1.5%	1.3%
2017	$536,000	129.9	0.846	$633,380	0.2%	1.4%
2018	$576,533	133.2	0.868	$664,398	4.9%	2.5%
2019	$606,665	135.9	0.885	$685,232	3.1%	2.0%
2020	$645,646	137.8	0.898	$719,207	5.0%	1.4%
2021	$755,109	143.6	0.936	$807,167	12.2%	4.2%
2022	**$924,928**	**153.5**	**1.000**	**$924,928**	**14.6%**	**6.9%**

Sources: CMHC, Housing Now Ottawa for 2005-2018; CMHC, Housing Market Information Portal for 2019-2022; 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 12

RESALE MARKET – ANNUAL SALES AND AVERAGE PRICE, CANADA'S SIX LARGEST CMAs, 2015-2022

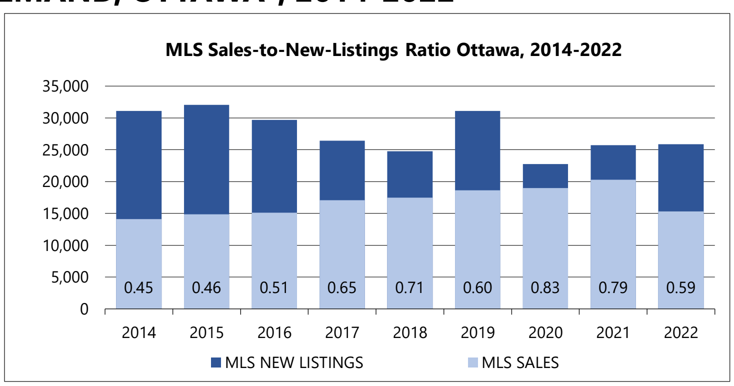
CMA		2015	2016	2017	2018	2019	2020	2021	2022	2021-22 % change
Toronto	Sales	101,846	108,500	92,335	77,426	87,797	95,151	121,712	75,140	-38.3%
	Avg Price	$622,046	$719,750	$822,603	$787,300	$819,382	$929,699	$1,095,475	$1,189,850	8.6%
Montréal	Sales	37,935	39,750	44,448	46,703	51,292	55,609	54,439	42,530	-21.9%
	Avg Price	$337,487	$347,000	$364,510	$378,709	$395,513	$453,224	$536,193	$581,486	8.4%
Vancouver	Sales	43,145	40,000	35,994	24,619	25,351	30,944	44,010	28,903	-34.3%
	Avg Price	$902,801	$1,007,000	$1,032,635	$1,050,885	$991,757	$1,071,317	$1,188,986	$1,254,426	5.5%
Ottawa-Gatineau	Sales	18,373	19,000	21,292	21,977	23,774	24,895	26,317	20,080	-23.7%
	Avg Price	$345,413	$345,445	$365,258	$377,792	$404,550	$478,222	$589,898	$637,214	8.0%
Ottawa*	Sales	14,842	15,100	17,083	17,476	18,622	18,971	20,302	15,307	-24.6%
	Avg Price	$369,477	$371,000	$392,474	$407,571	$441,693	$529,675	$645,976	$691,664	7.1%
Calgary	Sales	23,994	22,000	23,869	18,686	18,927	19,230	32,953	34,624	5.1%
	Avg Price	$453,814	$457,000	$466,259	$480,696	$460,083	$461,470	$499,155	$528,169	5.8%
Edmonton	Sales	18,227	16,700	16,441	15,519	16,657	17,036	24,652	24,184	-1.9%
	Avg Price	$369,536	$365,000	$374,397	$369,607	$362,758	$365,638	$381,868	$397,491	4.1%

Source: CMHC, Local Real Estate Boards and the City of Ottawa; Montreal Data : Quebec Professional Association of Real Estate Brokers (QPAREB)
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 13

RESALE MARKET – SUPPLY AND DEMAND, OTTAWA*, 2014-2022

YEAR	MLS SALES	MLS NEW LISTINGS	SALES-TO-NEW-LISTINGS RATIO
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
2021	20,302	25,737	0.79
2022	**15,307**	**25,876**	**0.59**



Source: 2014-15 data from CMHC, 2016- 2022 data from OREB.
NOTE: Due to listing cancellation and/or re-listing, MLS New Listings may not represent the actual 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 14

LABOUR FORCE INDICATORS, OTTAWA*, 2000-2022

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 (%)	ONTARIO (%)	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	873.8	590.7	564.1	26.6	285.0	67.6%	4.5%	5.6%	5.8%
2019	893.2	619.9	589.8	30.1	270.9	69.4%	4.9%	5.6%	5.7%
2020	909.6	602.5	557.8	44.7	308.3	66.2%	7.4%	9.6%	9.5%
2021	925.6	628.6	590.2	38.4	298.3	67.9%	6.1%	8.0%	7.5%
2022	**946.8**	**637.4**	**610.5**	**26.9**	**309.4**	**67.3%**	**4.2%**	**5.6%**	**5.3%**
% change:									
2021-22	2.3	1.4	3.4	-29.9	3.7	-0.6%	-1.9%	-2.4%	-2.2%
2018-22	8.4	7.9	8.2	1.1	8.6	-0.3%	-0.3%	0.0%	-0.5%

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
2021-22: 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.

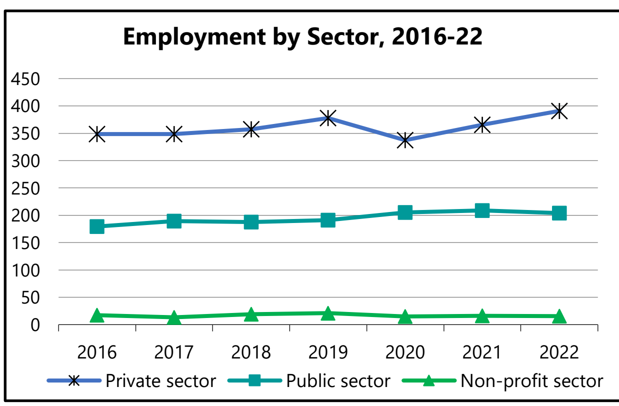
TABLE 15

EMPLOYMENT BY SECTOR (000's), OTTAWA CMA, 2016-2022

By Major Clusters	2016	2017	2018	2019	2020	2021	2022
Industrial & Resource Cluster	**45.8**	**48.6**	**53.0**	**49.2**	**46.5**	**59.3**	**61.0**
Primary	1.6	0.0	1.8	2.4	2.4	2.5	2.2
Utilities	0.0	0.0	1.9	2.0	0.0	2.0	2.4
Construction	26.5	30.4	31.2	28.3	29.4	37.5	36.2
Manufacturing	17.7	18.2	18.1	16.5	14.7	17.3	20.2
Retail Cluster	**84.2**	**86.3**	**93.9**	**90.8**	**86.6**	**87.7**	**94.1**
Wholesale Trade	16.4	14.0	14.5	14.2	13.4	15.0	11.9
Retail Trade	51.2	57.0	58.7	57.2	55.5	56.9	63.7
Transportation and Warehousing	16.6	15.3	20.7	19.4	17.7	15.8	18.5
Office Cluster	**71.5**	**71.6**	**71.9**	**79.3**	**68.6**	**75.3**	**72.5**
Administrative and Support Services	24.5	18.5	19.2	21.2	18.5	24.0	22.4
F.I.R.E.*	25.9	28.7	26.2	29.7	26.0	28.6	32.3
Other Services	21.1	24.4	26.5	28.4	24.1	22.7	17.8
Culture and Tourism Cluster	**56.1**	**50.3**	**55.3**	**59.3**	**45.8**	**48.3**	**55.4**
Accommodation and Food Services	29.6	27.4	30.5	34.8	25.9	27.3	32.4
Information and Cultural Industries	12.2	10.9	10.8	13.3	12.2	12.3	13.4
Arts, Entertainment and Recreation	14.3	12.0	14.0	11.2	7.7	8.7	9.6
Knowledge Cluster	**182.0**	**171.3**	**178.3**	**188.4**	**175.1**	**182.6**	**190.3**
Health and Education	120.4	111.3	115.8	115.2	113.2	114.0	111.2
Professional, Sci. & Tech. Services	61.6	60.0	62.5	73.2	61.9	68.6	79.1
Government Cluster	**104.6**	**121.3**	**111.0**	**122.5**	**133.8**	**136.4**	**135.8**
Public Administration	104.6	121.3	111.0	122.5	133.8	136.4	135.8
Total Employed Residents	**545.5**	**551.5**	**564.1**	**589.8**	**557.8**	**590.2**	**610.5**
By Primary, Secondary and Tertiary Sector							
Primary	1.6	0.0	1.8	2.4	2.4	2.5	2.2
Secondary	44.2	48.6	51.2	46.8	44.1	56.8	58.8
Tertiary	499.7	502.9	511.1	540.6	511.3	530.9	549.5
Total	**545.5**	**551.5**	**564.1**	**589.8**	**557.8**	**590.2**	**610.5**
By Type of Sector							
Private sector	348.7	348.5	357.5	377.7	337.3	365.3	391.0
Public sector	179.5	189.6	187.6	191.0	205.4	208.9	204.2
Non-profit sector	17.3	13.4	19.0	21.1	15.1	16.0	15.3
Total	**545.5**	**551.5**	**564.1**	**589.8**	**557.8**	**590.2**	**610.5**
% private	63.9%	63.2%	63.4%	64.0%	60.5%	61.9%	64.0%
By High-Tech Cluster							
Telecommunications equipment	1.5	1.7	0.0	2.3	0.0	0.0	0.0
Microelectronics	3.1	1.7	1.9	2.3	1.5	0.0	0.0
Software and Telecommunications	55.0	46.6	49.4	49.6	50.3	60.9	53.6
Health Sciences	1.5	2.0	2.0	2.4	3.0	1.5	2.0
Tourism	47.3	45.3	43.9	39.4	44.5	46.0	33.6
Total, all clusters	**108.4**	**97.3**	**97.2**	**96.0**	**99.3**	**108.4**	**89.2**
Advanced Technology	***61.1***	***52.0***	***53.3***	***56.6***	***54.8***	***62.4***	***55.6***

Source: Statistics Canada, Labour Force Survey, custom tabulations
Figures may not add due to rounding & data suppression by Statistics Canada
* F.I.R.E. = Finance, Insurance and Real Estate

Note: "0.0" indicates estimate is less than 1,500
(see footnote to Table 8 for definition of Ottawa CMA)



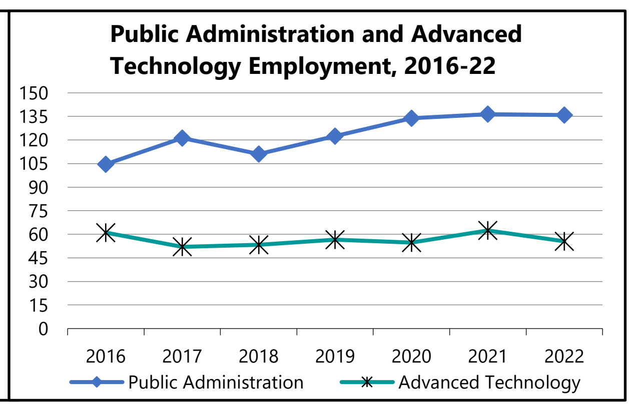
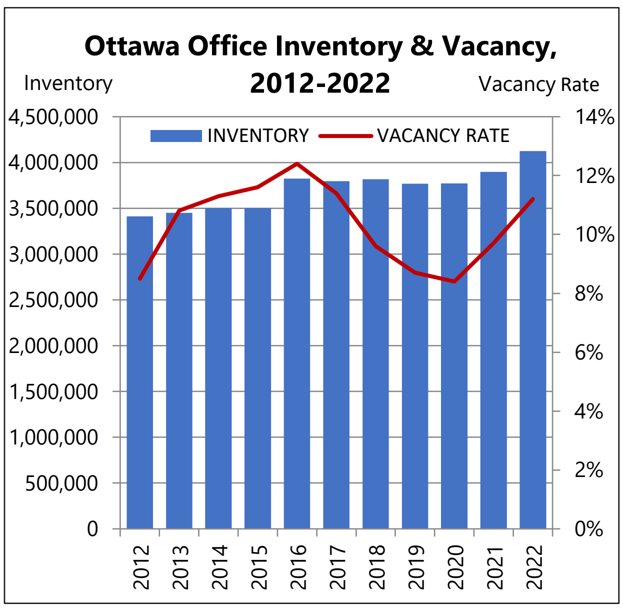


TABLE 16

OTTAWA COMMERCIAL OFFICE MARKET OVERVIEW, 2012-2022

YEAR	INVENTORY		VACANCY RATE	NET ABSORPTION		NET NEW SUPPLY	
	sq.ft.	sq.m.	(%)	sq.ft.	sq.m.	sq.ft.	sq.m.
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	8.4%	-219,296	-20,373	n/a	n/a
2021	41,939,527	3,896,310	9.7%	20,561	1,910	248,953	23,128
2022	**44,382,839**	**4,123,301**	**11.2%**	**-275,378**	**-25,583**	**0**	**0**

Source: Colliers International - Ottawa Office Market Report, Q4 2022; Inventory numbers may not add due to ongoing revisions from Colliers
Note: Net new supply was not reported for 2019 or 2020



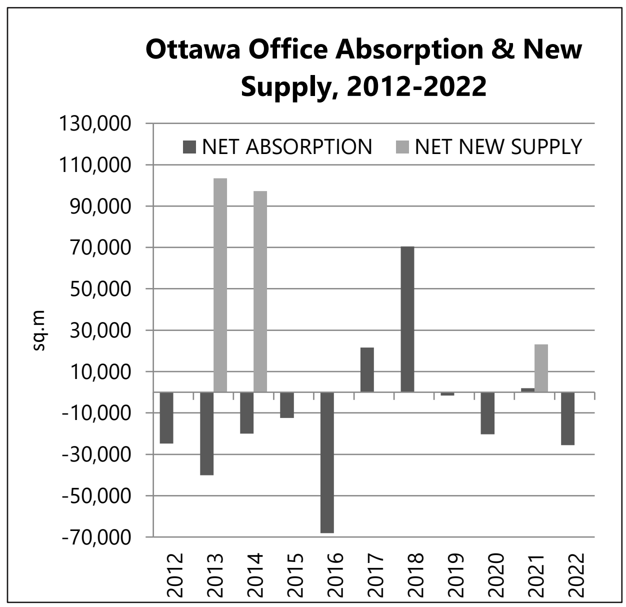


TABLE 17

OTTAWA INDUSTRIAL MARKET OVERVIEW, 2012-2022

YEAR	INVENTORY		VACANCY	ABSORPTION		NEW SUPPLY	
	sq.ft.	sq.m.	RATE (%)	sq.ft.	sq.m.	sq.ft.	sq.m.
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
2021	24,504,366	2,276,530	2.0%	533,376	49,552	75,940	7,055
2022	**26,851,853**	**2,494,619**	**2.5%**	**2,528,454**	**234,901**	**2,827,466**	**262,680**

Source: Cushman & Wakefield, Marketbeat Industrial Q4 2022, Ottawa

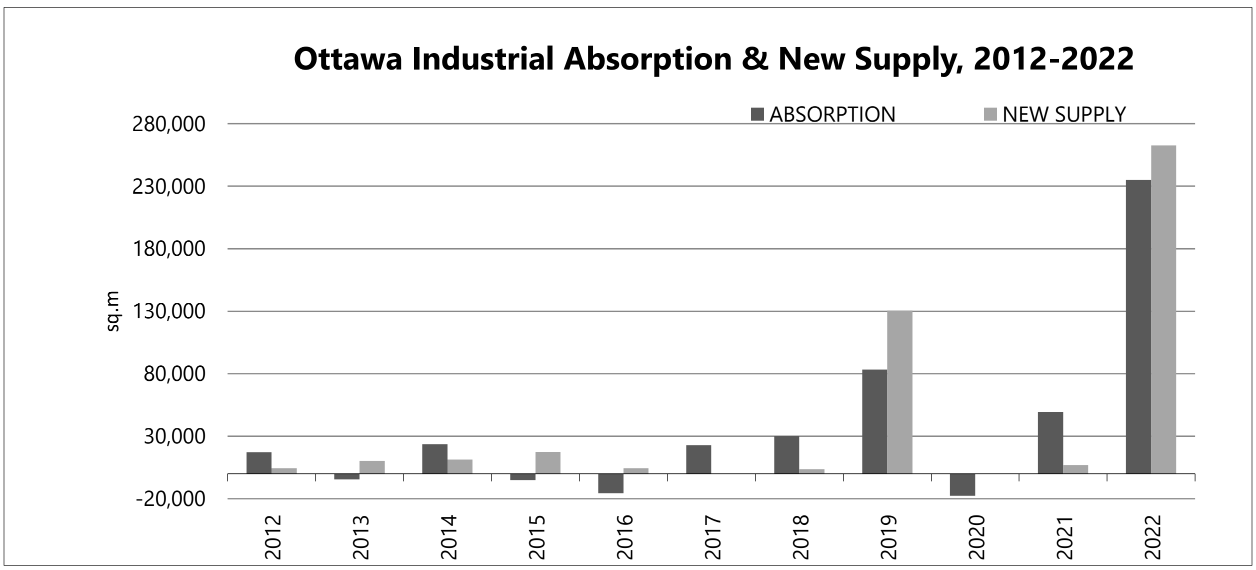


TABLE 18

OTTAWA RETAIL SPACE SUMMARY

FORMAT	Total Space, 2021			Total Space, 2022			Vacancy Rate	
	m²	sq.ft.	Share	m²	sq.ft.	Share	2021	2022
Power Centres	1,018,668	10,964,855	27.3%	1,018,668	10,964,855	27.2%	2.5%	3.8%
Other *	633,951	6,823,797	17.0%	639,299	6,881,360	17.0%	n/a	n/a
Traditional Mainstreets	489,791	5,272,067	13.1%	497,310	5,352,998	13.3%	n/a	n/a
Regional SC	403,682	4,345,202	10.8%	403,682	4,345,202	10.8%	2.5%	3.8%
Community SC	461,670	4,969,375	12.4%	461,670	4,969,375	12.3%	3.6%	4.2%
Neighbourhood SC	445,144	4,791,490	11.9%	452,670	4,872,504	12.1%	3.5%	2.6%
Mini-Plazas	227,471	2,448,476	6.1%	228,439	2,458,894	6.1%	3.5%	2.6%
Office Concourses	48,466	521,680	1.3%	48,466	521,680	1.3%	1.3%	3.1%
TOTAL	**3,728,844**	**40,136,942**	**100%**	**3,750,205**	**40,366,868**	**100%**	**3.1%**	**3.6%**

Source: City of Ottawa Building Permits; vacancy data from Cushman & Wakefield Ottawa Retail Report Q4 2021

* **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.

TABLE 19

EXISTING OP NET NON-RESIDENTIAL INTENSIFICATION, 2018-2022

Intensification Gross Floor Area (m^2)							2017-2022 Share of Intensification
Area	**2018**	**2019**	**2020**	**2021**	**2022**	**2018-2022**	
Urban, built-up area inside the Greenbelt	35,247	107,486	100,383	96,297	76,399	415,812	85%
Urban, built-up area outside the Greenbelt	9,904	25,863	19,062	8,078	9,467	72,374	15%
Total urban, built-up area GFA	45,151	133,349	119,445	104,375	85,866	488,186	
Total GFA	65,015	191,020	440,635	132,752	144,133	973,555	
% Intensification in the Urban, Built-up Area	**69%**	**70%**	**27%**	**79%**	**60%**	**50%**	
Transitway Stations	-8,075	39,981	48,344	51,629	75,013	206,892	
% Intensification at Transitway Stations of Urban GFA	**-12%**	**21%**	**11%**	**39%**	**52%**	**21%**	

Source: City of Ottawa, Building Permits

Notes:

1) Based on building permits issued from Jan 1 2018 to Dec 31 2022

2) Data are net of demolitions

TABLE 20

NEW HOUSING IN MUNICIPALITIES IN GREATER OTTAWA-GATINEAU AREA, 2013-2022

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% chng. 2021-22
OTTAWA	**6,284**	**5,537**	**4,696**	**5,019**	**6,849**	**6,950**	**7,069**	**9,239**	**9,402**	**10,077**	**7.2%**
Ottawa, Vanier, Rockcliffe (former)	2,262	1,244	1,406	979	2,363	1,971	1,488	3,220	3,208	4,515	40.7%
Nepean (former)	965	1,292	900	1,116	958	806	1,341	1,184	1,595	1,723	8.0%
Gloucester (former)	959	797	770	736	1,092	1,173	1,259	1,905	1,671	1,248	-25.3%
Kanata (former)	1,124	1,225	860	944	649	902	734	926	684	344	-49.7%
Cumberland (former)	440	549	311	611	760	731	612	631	688	842	22.4%
Goulbourn (former)	253	75	315	413	811	1,079	1,084	983	942	928	-1.5%
Osgoode (former)	73	104	60	69	57	85	71	83	111	57	-48.6%
Rideau (former)	37	36	33	102	263	293	104	204	147	99	-32.7%
West Carleton (former)	171	215	41	49	56	107	129	103	389	321	-17.5%
Inside the Greenbelt	2,336	1,488	1,447	1,052	2,776	2,069	1,709	3,246	3,440	5,016	45.8%
Outside the Greenbelt	3,948	4,049	3,249	3,967	4,073	4,881	5,360	5,993	5,962	5,061	-15.1%
Prescott & Russell (part)	**392**	**299**	**335**	**391**	**560**	**483**	**714**	**858**	**763**	**901**	**18.1%**
Alfred and Plantagenet, TP†	55	29	28	7	35	17	45	65	30	50	66.7%
Casselman, Vlg.†	2	1	5	20	14	27	30	117	42	54	28.6%
Clarence-Rockland, C (part of ON CMA)	153	112	93	112	230	181	192	266	311	305	-1.9%
Russell, TP (part of ON CMA)	123	113	183	167	218	211	442	319	312	437	40.1%
The Nation Municipality	59	44	26	85	63	47	5	91	68	55	-19.1%
Leeds & Grenville (part)	**116**	**103**	**93**	**169**	**175**	**218**	**106**	**159**	**211**	**231**	**9.5%**
Merrickville-Wolford, Vlg.*	11	1	6	19	15	21	27	33	15	18	20.0%
North Grenville, TP	105	102	87	150	160	197	79	126	196	213	8.7%
Stormont, Dundas & Glengarry (part)	**47**	**24**	**23**	**24**	**31**	**42**	**2**	**17**	**94**	**105**	**11.7%**
North Dundas, TP†	47	24	23	24	31	42	2	17	94	105	11.7%
Lanark (part)	**260**	**230**	**294**	**275**	**370**	**698**	**496**	**1,080**	**466**	**395**	**-15.2%**
Beckwith, TP	71	66	69	71	79	109	85	166	95	43	-54.7%
Carleton Place, Tn.	51	66	105	60	123	380	337	644	196	191	-2.6%
Mississippi Mills, Tn.	115	68	107	125	151	189	58	239	149	134	-10.1%
Montague, TP†	23	30	13	19	17	20	16	31	26	27	3.8%
Renfrew (part)	**188**	**82**	**95**	**72**	**92**	**81**	**154**	**286**	**514**	**79**	**-84.6%**
Arnprior, Tn.	173	66	76	58	70	66	119	206	474	30	-93.7%
McNab/Braeside, TP	15	16	19	14	22	15	35	80	40	49	22.5%
GATINEAU	**1,571**	**1,572**	**1,312**	**1,390**	**1,610**	**1,630**	**3,186**	**2,772**	**2,463**	**3,397**	**37.9%**
Hull (former)	275	246	106	263	247	325	813	441	74	1,729	2236.5%
Aylmer (former)	745	768	581	802	891	930	1,837	1,252	1,641	845	-48.5%
Gatineau (former)	467	520	464	325	377	275	396	833	535	714	33.5%
Buckingham (former)	42	22	127	0	39	72	89	155	105	46	-56.2%
Masson-Angers (former)	42	16	34	0	56	28	51	91	108	63	-41.7%
Qué. part CMA Outside of Gatineau	**423**	**331**	**272**	**346**	**368**	**399**	**375**	**558**	**809**	**703**	**-13.1%**
Cantley	96	87	60	64	70	65	44	72	94	97	3.2%
Chelsea	23	21	19	33	53	62	126	183	221	90	-59.3%
La Pêche	31	40	35	48	60	62	41	79	101	72	-28.7%
L'Ange-Gardien	36	45	35	39	37	35	35	85	141	116	-17.7%
Pontiac	16	24	19	15	16	20	11	0	70	9	-87.1%
Val-des-Monts	134	98	95	101	96	134	84	94	145	183	26.2%
Denholm	6	0	0	3	1	2	4	5	5	5	0.0%
N.-D.-de-la-Salette (part of CMA in 2011)	3	9	0	7	2	2	4	5	12	5	-58.3%
Mayo (part of CMA in 2011)	4	1	7	8	5	5	3	5	5	18	260.0%
Bowman (part of CMA in 2011)	2	2	2	5	0	1	1	3	3	9	200.0%
Val-des-Bois (part of CMA in 2011)	4	4	0	0	0	0	3	0	0	0	#DIV/0!
Lochaber (part of CMA in 2016)	n.d.	0	0	0	0	2	0	1	2	0	-100.0%
Lochaber-Ouest (part of CMA in 2016)	8	n.d.	n.d.	4	3	0	7	4	3	0	-100.0%
Thurso (part of CMA in 2016)	60	n.d.	n.d.	19	25	9	12	22	7	99	1314.3%
GREATER OTTAWA-GATINEAU AREA	**9,281**	**8,178**	**7,120**	**7,686**	**10,055**	**10,501**	**12,102**	**14,969**	**14,722**	**15,888**	**7.9%**
Ottawa-Gatineau CMA	**8,554**	**7,665**	**6,556**	**7,184**	**9,435**	**9,568**	**11,343**	**13,280**	**13,493**	**15,132**	**12.1%**
Ontario portion of the CMA	**6,560**	**5,762**	**4,972**	**5,448**	**7,457**	**7,539**	**7,782**	**9,950**	**10,221**	**11,032**	**7.9%**
Quebec portion of the CMA	**1,994**	**1,903**	**1,584**	**1,736**	**1,978**	**2,029**	**3,561**	**3,330**	**3,272**	**4,100**	**25.3%**
OMATO	**1,003**	**738**	**840**	**931**	**1,228**	**1,522**	**1,472**	**2,400**	**2,048**	**1,711**	**-16.5%**

*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 21

RESIDENTIAL INTENSIFICATION BY WARD AND TRANSECT, mid 2018-2022

Ward No.	Ward Name	Mid 2018-2019	Mid 2019-2020	Mid 2020-2021	Mid 2021-2022	Mid 2018-2022	Mid 2021-2022 Share of Intensification	Mid 2018-2022 Share of Intensification
1	Orléans East-Cumberland	91	98	65	191	445	3%	2%
2	Orléans West-Innes	23	27	18	69	137	1%	1%
3	Barrhaven West	3	499	7	140	649	2%	3%
4	Kanata North	112	66	318	6	502	0%	2%
5	West Carleton-March	0	0	0	0	0	0%	0%
6	Stittsville	57	68	160	17	302	0%	1%
7	Bay	67	334	228	81	710	1%	3%
8	College	244	123	123	534	1,024	7%	5%
9	Knoxdale-Merivale	90	27	40	27	184	0%	1%
10	Gloucester-Southgate	73	63	89	8	233	0%	1%
11	Beacon Hill-Cyrville	13	217	15	133	378	2%	2%
12	Rideau-Vanier	610	920	1,472	302	3,304	4%	15%
13	Rideau-Rockcliffe	386	419	230	839	1,874	11%	9%
14	Somerset	412	1,777	88	1,334	3,611	18%	17%
15	Kitchissippi	413	431	508	2,189	3,541	29%	16%
16	River	80	807	557	1,117	2,561	15%	12%
17	Capital	98	559	148	279	1,084	4%	5%
18	Alta Vista	47	320	48	48	463	1%	2%
19	Orléans South-Navan	2	3	9	113	127	2%	1%
20	Osgoode	0	0	0	0	0	0%	0%
21	Rideau-Jock	0	0	0	0	0	0%	0%
22	Riverside South-Findlay Creek	3	1	1	8	13	0%	0%
23	Kanata South	27	132	21	20	200	0%	1%
24	Barrhaven-East	185	45	9	36	275	0%	1%
	Downtown Core Transect	**950**	**2,454**	**1,489**	**2,075**	**6,968**	**28%**	**32%**
	Inner Urban Transect	**996**	**1,993**	**1,712**	**3,041**	**7,742**	**41%**	**36%**
	Outer Urban Transect	**588**	**1,552**	**348**	**1,781**	**4,269**	**24%**	**20%**
	Suburban Transect	**502**	**937**	**605**	**594**	**2,638**	**8%**	**12%**
New Units in the Urban, Built-up Area		**3,036**	**6,936**	**4,154**	**7,491**	**21,617**		
New Units in the Urban Greenfield Area		**3,796**	**4,811**	**4,888**	**4,150**	**17,645**		
Total New Units in the Urban Area		**6,832**	**11,747**	**9,042**	**11,641**	**39,262**		
% Intensification		**44.4%**	**59.0%**	**45.9%**	**64.4%**	**55.1%**		
Official Plan Target		**40%**	**40%**	**40%**	**45%**	**51%**		