UNLOCKING THE POTENTIAL OF THE AIRPORT MEGAZONE

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A Neptis Policy Brief

Planning for Prosperity: Globalization, Competitiveness, and the Growth Plan for the Greater Golden Horseshoe was released by the Neptis Foundation in late 2015. This research report was intended to contribute to the Province of Ontario's Coordinated Review of the Growth Plan for the Greater Golden Horseshoe, Greenbelt Plan, Oak Ridges Moraine Plan, and Niagara Escarpment Plan. The report described the changing economy and economic landscape of the Greater Golden Horseshoe, identifying important considerations for the Growth Plan.

In particular, *Planning for Prosperity* identified three major regional employment "megazones." These are large, economically significant employment areas that represent major sources of auto travel and traffic congestion, as well as greenhouse gas emissions. The megazones were not recognized in nor addressed by the Growth Plan. Because they extend across municipal boundaries, planning for them has been fragmented at best. *Planning for Prosperity* stressed the need to integrate land use planning, transportation planning, and economic development strategies in planning for employment. This integrated approach is not common in the GGH.

Given the importance of these megazones to the regional, provincial, and national economies, and their potential role in achieving key Growth Plan objectives, Neptis commissioned additional research on these areas to support integrated planning and policy development. This policy brief profiles the Airport megazone. Companion policy briefs will profile the other two megazones: Tor-York East and Tor-York West.

In particular, this brief is intended to inform future planning by providing more detailed data and information on:

- The local employment geography
- Types of employment in the megazone
- The potential of the area in terms of accommodating additional development and densification, supporting transit investments, and building upon economic assets
- Key characteristics of travel to the megazone

1

THE BASICS

The Airport Megazone (AMZ) covers 15,230 hectares surrounding and including Pearson International Airport. This area, about six times as large as downtown Toronto, contained 297,990[1] jobs in 2011. By our estimation,[2] that makes the AMZ the second-most significant employment concentration in the country, after downtown Toronto, with 464,650 jobs. There is relatively little residential development in the area, due in part to airport-related development restrictions – about 67,000 people lived in the area in 2011.

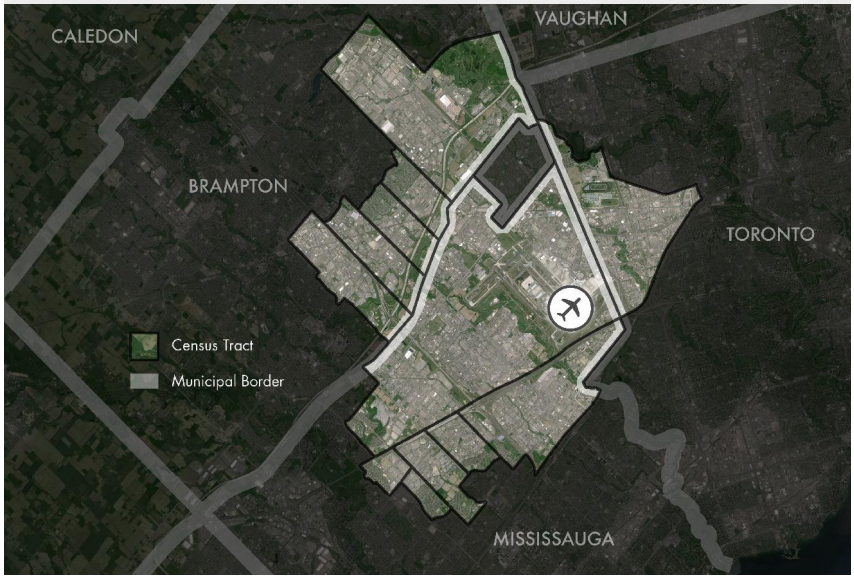
The Airport Megazone spans four jurisdictions: the cities of Mississauga, Brampton, and Toronto, and the Region of Peel. It is also subject to planning by the Greater Toronto Airports Authority. Given this jurisdictional fragmentation, the AMZ has not been recognized nor planned for as the significant economic and urban centre that it is.

Employment in the district has been growing, increasing by 22,550 jobs between 2001 and 2011. This represents 7% of the growth in jobs across the entire Greater Golden Horseshoe (GGH) during that period.

Most of the jobs found in the megazone are in "core" employment – that is, employment in tradeable goods and services that drive the regional economy and bring in revenues from

LOCATION OF THE AMZ IN THE GREATER GOLDEN HORSESHOE

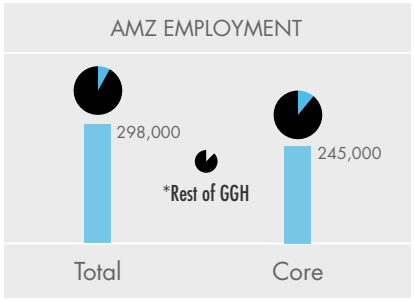
AREA OF THE AMZ

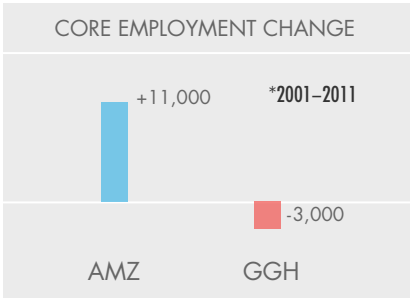


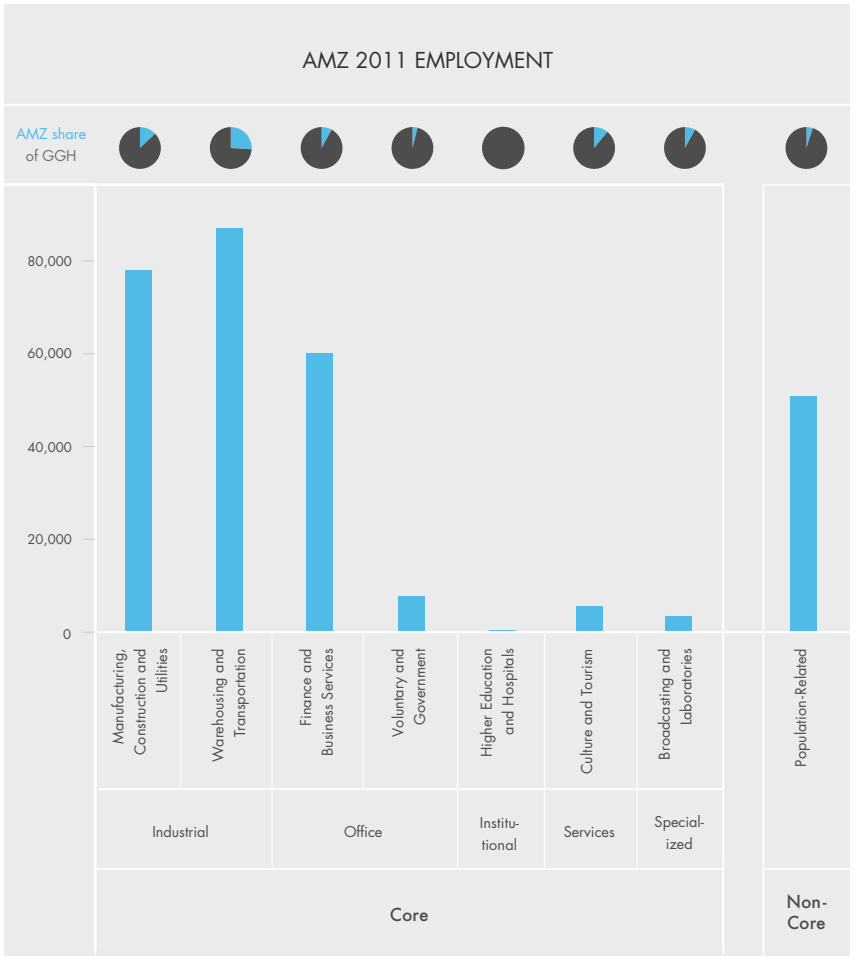
[1] Unless otherwise noted, all employment numbers quoted in this brief represent employment with a usual place of work only – jobs without a usual place of work and home-based jobs are not included. The data are drawn from the Census of Canada place of work data.

[2] *Planning for Prosperity*, p. 42.

outside the region.[3] There were 245,180 core jobs in the megazone in 2011, a net increase of 10,660 core jobs since 2001. While core employment in the megazone grew between 2001 and 2011, the GGH as a whole experienced a net loss of 3,110 core jobs, largely due to deindustrialization; the manufacturing sector alone lost 183,925 jobs in this period. Much of the region's growth since 2001 has been in non-core (that is, population-related) sectors, which grew by 76,640 jobs. (See Table 1 in the Appendix.)







2

TYPES OF EMPLOYMENT

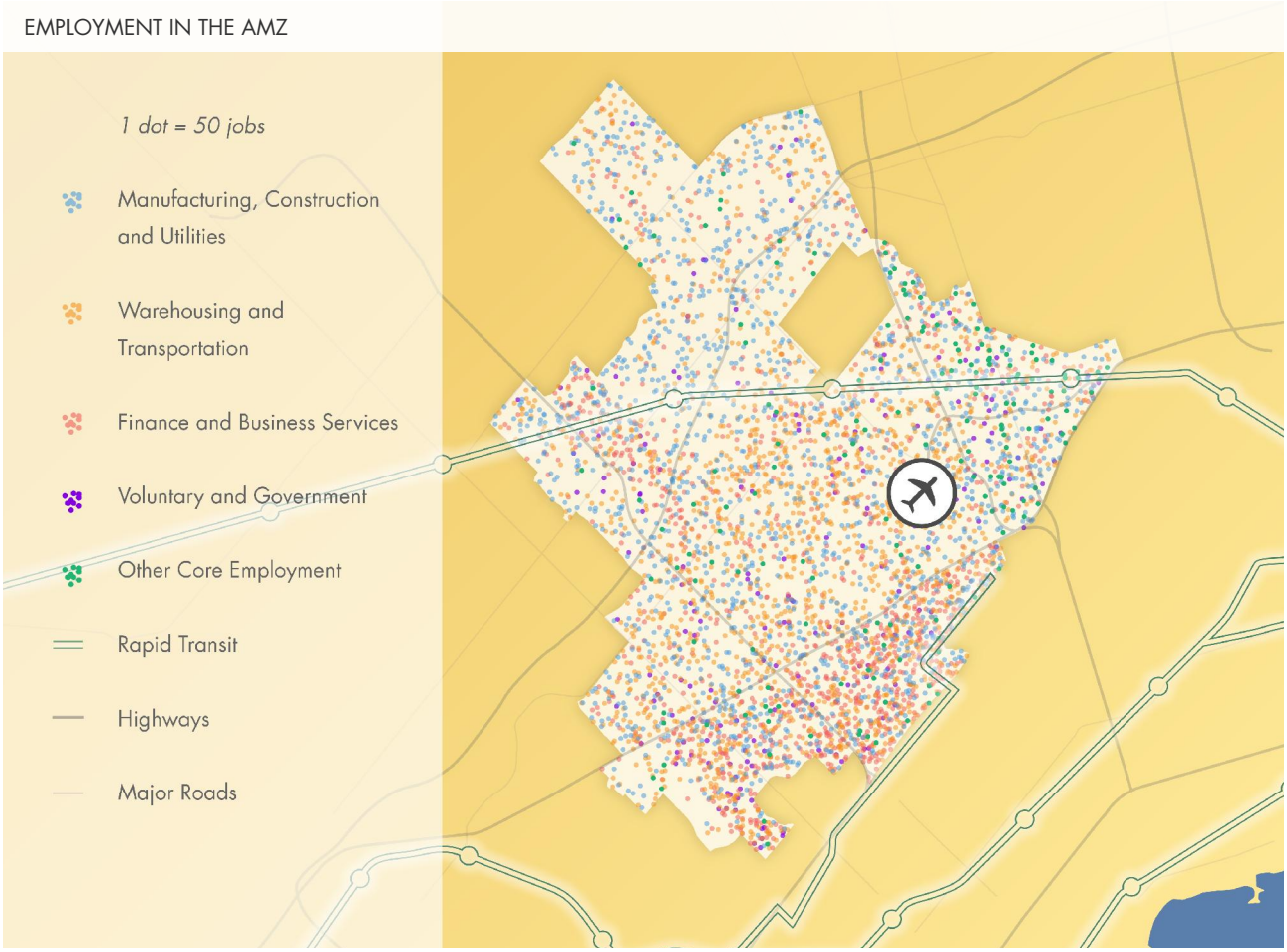
"Core" employment accounts for 82% of jobs in the Airport Megazone. This compares to 62% for the Greater Golden Horseshoe as a whole, suggesting that the AMZ is relatively concentrated in core, tradeable activities. Employment by planning category and sector[4] is shown in Table 2 in the Appendix.

The data indicate significant numbers of jobs in the manufacturing, construction, and utilities sector, as well as in the warehousing and transportation sector. For these two sector groupings, the Airport Megazone likely represents the largest concentration of employment in the GGH (approximately 79,000 and 88,000 jobs respectively,

[3] As distinct from "population-related" employment that serves local population, such as retail, personal services, and local schools.

[4] The planning categories used here (industrial, offices, etc.) are designed to link processes of economic restructuring and change with built environment characteristics relevant to planning. Shares do not necessarily add to 100% as a result of data suppression associated with breaking down data by NAICS code and census tracts.

EMPLOYMENT IN THE AMZ



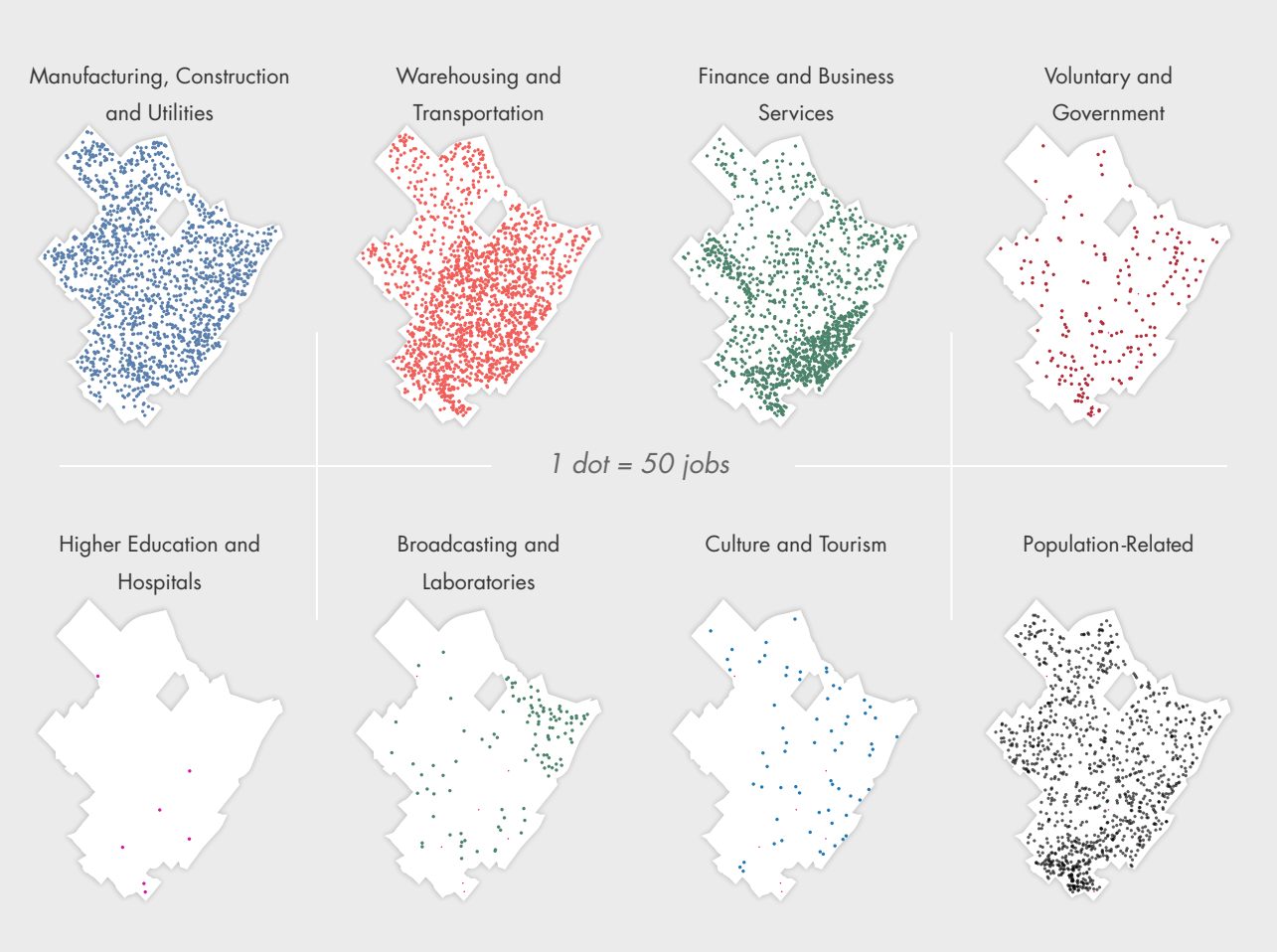
representing 13% and 26% of the region's employment in each sector).

Indeed, the AMZ shows a regional specialization in these sectors. Whereas manufacturing, construction, and utilities employment represents 17.2% of all jobs for the Greater Golden Horseshoe as a whole, in the AMZ it represents 26.4% of all jobs. Similarly, warehousing and transportation employment accounts for 9.5% of all jobs in the region, but 29.4% of jobs in the AMZ.

The lion's share of employment in the manufacturing, construction, and utilities sector is found in the manufacturing industries – 64,580 (82%) of the 78,560 jobs in this sector are in manufacturing. Key manufacturing sectors include food; plastics and rubber products; fabricated metal; machinery; and transportation equipment. This latter category represents 9,955 jobs and includes aircraft and related manufacturing, such as Pratt and Whitney and Magellan Aerospace.

The warehousing and transportation sector comprises 38,220 jobs in wholesale trade; 34,550 in transportation; 5,750 in warehousing and storage; and 9,020 in postal and courier services. Many of these jobs are linked directly or indirectly to Pearson Airport. For example, transportation includes 10,140 jobs in air transportation, such as air carriers, and an additional 12,825 jobs in transportation support activities (including airport operations, air traffic control, aircraft maintenance, etc.). There are also 9,755 jobs in truck transportation in the AMZ.

In addition, the AMZ includes regionally significant employment numbers in finance and business services – 60,335 jobs. There are more jobs in finance and business services in the AMZ than the total number of jobs in the North York City Centre (approximately 38,000).



Among finance and business services employment, key industries include commercial and personal banking and related activities (e.g., brokerages), representing almost 8,000 jobs, while an additional 2,395 jobs are in insurance-related activities. The AMZ also includes almost 10,000 telecommunications jobs, with major facilities for operators such as Rogers and Bell in the district.

On the business services side, architectural engineering and related activities account for 4,265 jobs in the AMZ, and computer systems design represents 5,900 jobs. Also significant are administrative and support services, representing 14,685 jobs.

This category includes back-office uses such as employment services, security services, and business support services such as call centres.

Lastly, the AMZ contains many hotels and convention centres, representing 3,155 jobs in accommodation services.

Employment growth in the Airport Megazone between 2001 and 2011 represents 7% of the growth in jobs across the entire Greater Golden Horseshoe during that period.

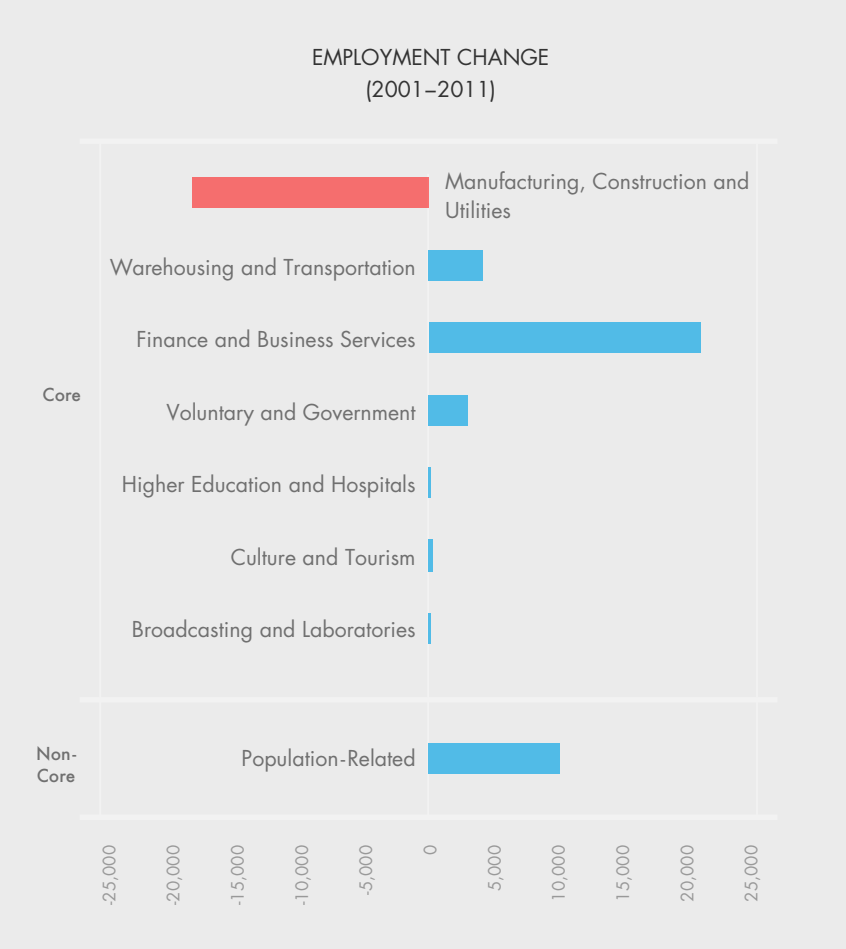
3

EMPLOYMENT CHANGE

Between 2001 and 2011, the Airport Megazone added 22,550 jobs, of which more than 10,000 were in "core" employment.

However, as elsewhere in the region, the net growth numbers mask change and transition in the megazone. The manufacturing, construction, and utilities sector lost almost 18,000 jobs – primarily in manufacturing, which experienced a loss of more than 19,000 jobs during the period. This loss was offset by growth in other industries, including 20,725 jobs in finance and business services. Other sectors that saw substantial growth include warehousing and transportation (4,175 jobs), and voluntary and government (3,115 jobs).

But the AMZ is unusual in that it experienced net growth in core jobs during the period – while the GGH as a whole experienced a net loss. Moreover, about 10,000 population-related jobs were added to the zone. (See Table 3 in the Appendix.)



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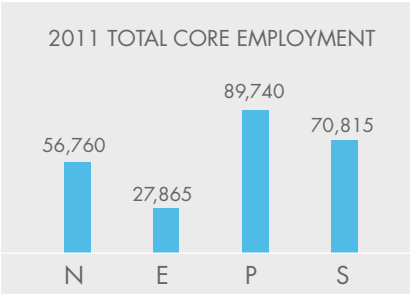
THE EMPLOYMENT GEOGRAPHY OF THE MEGAZONE

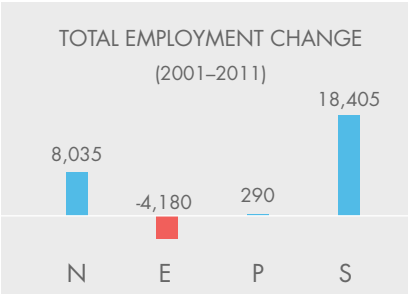
The AMZ naturally falls into four subzones: the Pearson Airport area, which is in Mississauga; the area south of the Airport, also in Mississauga; the area north of the Airport and Highway 407, in Brampton; and the area east of Highway 427, in Toronto.

The megazone as a whole contains large numbers of jobs in the manufacturing, construction, and utilities sector (especially manufacturing industries); the warehousing and transportation sector (especially wholesale and transportation industries); and the finance and business services sector. Employment in each of these sectors is found throughout the AMZ. However, different activities dominate in each of the subzones.

Distribution of employment

Of the four subzones, the Pearson subzone has the largest number of jobs – more than 100,000. The single census tract that constitutes this subzone includes the airport itself, as well as a large employment area to the west extending as far as Mavis Road. The Greater Toronto Airports Authority estimates the number of employees at the airport itself at 40,000. The second most significant area in terms of the absolute number of jobs is the Airport South subzone.





Manufacturing dominates in the AMZ North subzone in Brampton, followed by warehousing and transportation. The same pattern is found in the AMZ East subzone in Toronto. The Pearson subzone is, not surprisingly, dominated by warehousing and transportation employment, followed by manufacturing. In the AMZ South subzone, financial and business services are the dominant type of employment, followed by warehousing and transportation. (See Table 4 in the Appendix.)

Most of the AMZ South subzone was identified in *Planning for Prosperity* as one of five regional Suburban

Knowledge-Intensive Districts,[5] because it contains a large number of highly skilled and knowledge-intensive jobs.

Geography of employment change

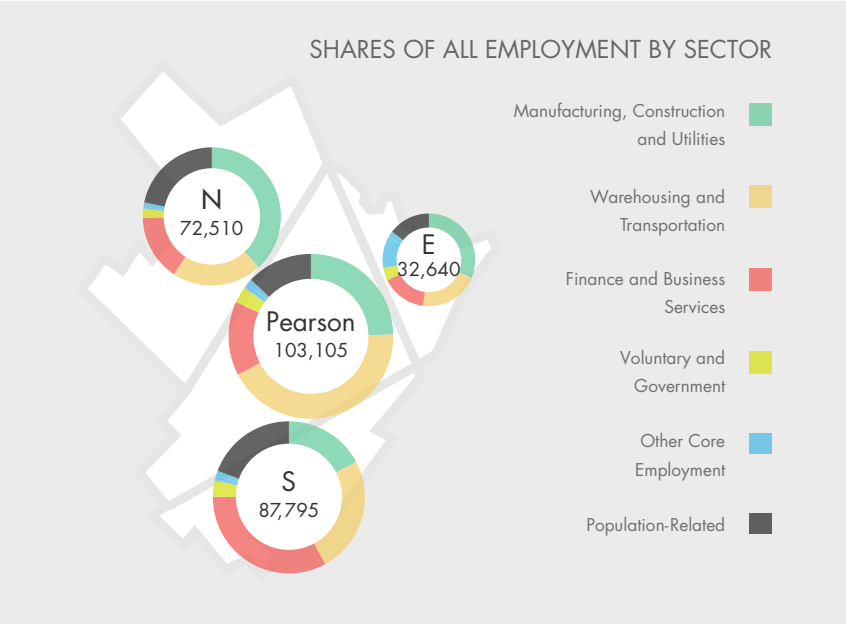
Employment change has not been uniform across the Airport Megazone. Some areas have experienced steady growth, most notably the AMZ North subzone, with more than 8,000 net new jobs, and the AMZ South subzone, which added more than 18,000 jobs. There has been little net employment change in the Pearson subzone, while the AMZ East subzone saw a net loss of more than 4,000 jobs.

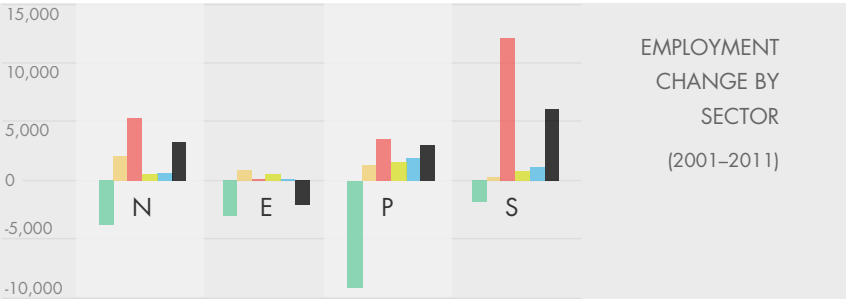
Employment change by sector

All subzones experienced a net loss of employment in the manufacturing, construction, and utilities sector. Have other types of jobs materialized to compensate for this loss? In the AMZ East subzone, the answer is no; the area experienced a net job decline. But the AMZ North subzone has seen growth in warehousing and transportation of more than 2,000 jobs, some of which may be related to the CN Brampton Intermodal facility. Employment growth in this subzone has also been boosted by the establishment of a large Rogers office operation with about 5,000 jobs occupying a former Nortel manufacturing facility.

The AMZ South subzone has also added more than 12,000 new finance and business service jobs, including almost 6,000 in finance.

And while there was almost no net growth in the Pearson subzone, the figure belies significant underlying change and transformation.





The subzone experienced a loss of over 9,000 manufacturing, construction, and utilities jobs, which was offset by the addition of 3,400 finance and business services jobs, 1,182 warehousing and transportation sector jobs, 1,480 voluntary and government sector jobs, and 2,865 population-related jobs. (See Table 5 in the Appendix.)

The AMZ includes 60,335 jobs in finance and business services – more than the total number of jobs in the North York City Centre (38,000).

[5] The South area shown, minus the two most westerly census tracts.

Density patterns

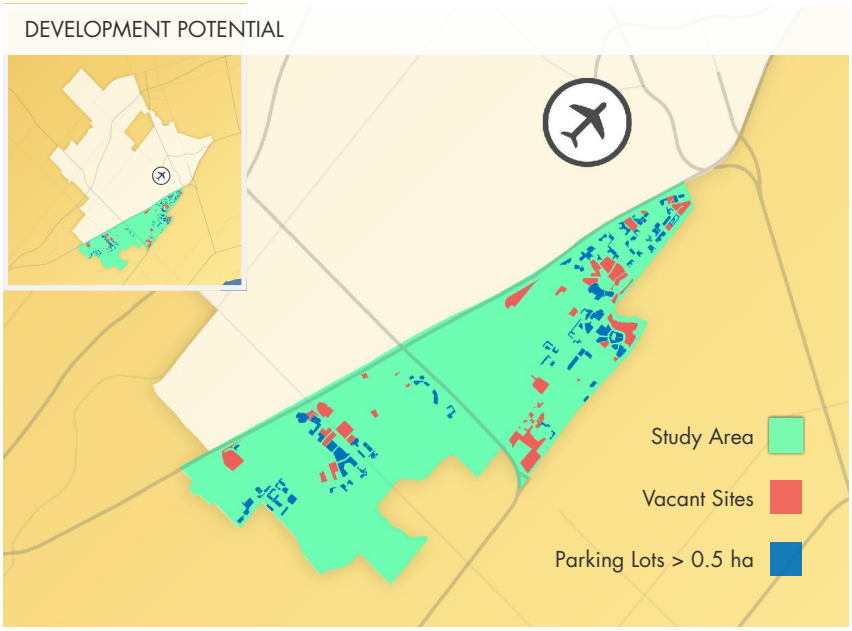
The geography of employment by type in the Airport Megazone is reflected in employment density patterns. Not surprisingly, areas with higher proportions of employment in finance and business services, which tend to locate in multi-storey office buildings, have higher employment densities than areas in which manufacturing, wholesaling, and distribution facilities dominate. Therefore, the AMZ South subzone, with its concentration of finance and business services in office buildings, has the highest employment density in the entire megazone, at about 33 jobs per hectare, and a population-plus-employment density figure of 43 residents plus jobs per hectare.[6] (See Table 6 in the Appendix.)

As noted earlier, population in the immediate vicinity of Pearson Airport is limited in part because of restrictions related to airport operations. For the most part, the AMZ subzones have been planned as single-use areas.

5

DEVELOPMENT POTENTIAL

Many areas within the Airport Megazone have low employment densities, especially those in which manufacturing, distribution, and warehousing dominate. However, these low densities imply redevelopment and infill potential, and an opportunity to integrate land use and transit, while addressing auto dependency and congestion. In fact, the Airport Corporate Centre (which makes up most of the AMZ South subzone) has been identified as an Intensification Area in the Mississauga Official Plan. As well, several Major Transit Station Areas are identified in the megazone: along Hurontario Street and Eglinton Avenue East, and at the Malton GO station. The Renforth Gateway Mobility Hub is identified in The Big Move.



The Airport Corporate Centre/AMZ South subzone

Significant redevelopment potential is perhaps most evident in the AMZ South subzone where, though the densities are high relative to other parts of the AMZ, there is still significant potential to densify. In this auto-dependent area, office buildings were built with considerable surface

[6] Large non-developable areas have been deleted from the land base estimation: the runway areas of Pearson Airport, parts of the Clairville Conservation Area that fall within the megazone, and the functional area of the CN Brampton intermodal facility.

parking and small building footprints relative to lot size. As transit service improves and transit ridership to the area grows, the area can be intensified through development of what are now surface parking lots.

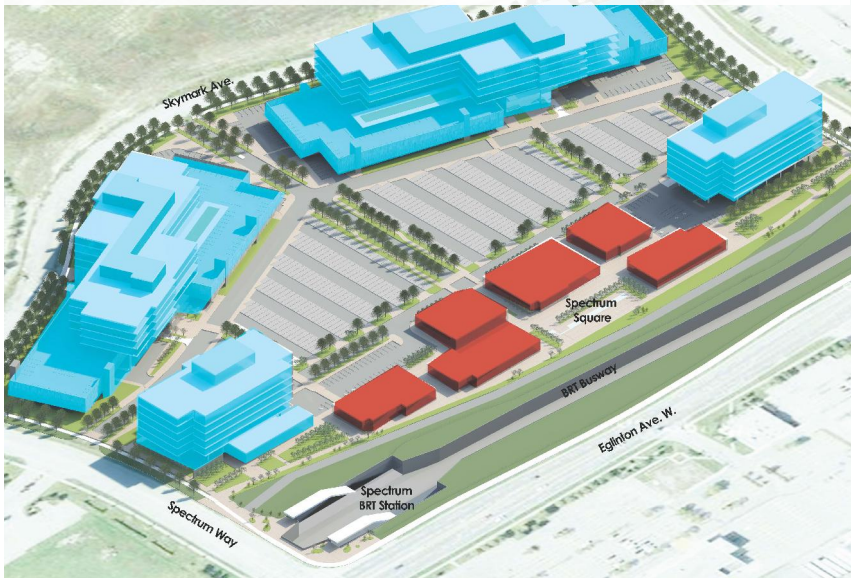
The MiWay Bus Rapid Transit (BRT) line extends along Eglinton Avenue, serving the Airport Corporate Centre (ACC). The maximum distance from Eglinton to the northern edge of the ACC is about one kilometre – so the oft-discussed "last mile" issue is not a significant problem. With a properly designed pedestrian environment, the whole ACC could have pedestrian access to the Eglinton MiWay BRT.

Spectrum Square – a project of up to 121,000 square metres of new office buildings and a "restaurant campus" currently under development north of Eglinton Avenue and east of Spectrum Way – suggests the potential of the area.

At present, it is estimated that Airport Corporate Centre alone contains about 57 hectares of vacant lands on 17 sites.[7] A rough estimate suggests that if each site were to be developed at a modest floor space index[8] of 1.0 times the lot area (equivalent to a two-storey building covering 50% of the lot), about 570,000 square metres of development could be added. At typical office occupancy rates,[9] this redevelopment could accommodate an additional 25,000 to 35,000 workers.[10]

SPECTRUM SQUARE

Source: spectrumsquare.ca



This estimate does not include additional areas that could be redeveloped, such as existing surface parking lots. The developable surface parking represents roughly 60 hectares in the ACC alone[11] – with the potential for an additional 600,000 square metres of development, and another 26,000 to 35,000 workers. Altogether, a conservative estimate suggests the potential to add space for 50,000 to 70,000 workers in the ACC area. This represents a unique opportunity to build on existing density and businesses, support higher levels of transit service, and address the significant role the area plays in contributing to regional auto travel and congestion.

However, achieving this redevelopment potential will require addressing outstanding issues. Densification is not possible without good transit service to free up surface parking for development. Transit also needs to be supported by improvements in pedestrian facilities. At present, the built environment is not conducive to walking and there is little in the way of a public realm. Integration with existing and improved transit, an updating of the area, and a plan to address the needs of knowledge-intensive activities and attract further investment are all needed.

[7] Table 9, 2016 Vacant Lands with All Attributes, Mississauga Open Data Catalogue, http://www.mississauga.ca/portal/residents/publicationsopen-datacatalogue.

[8] A floor space index (FSI) is the measure of the floor area of a building divided by the area of its lot.

[9] A very conservative 23 m^2 per worker is assumed to arrive at the lower number. Many facilities have less floor space per worker. A figure of 17 m^2 per worker was used to arrive at the higher number. The latter figure is at the higher end of the floor space per worker figures associated with the Spectrum Square project (which range from 13 to 17 m^2 per worker, or 140 to 180 ft^2).

[10] This figure includes currently vacant sites in the Spectrum Square lands, with development assumed at the same 1.0 times FSI as the other vacant sites.

[11] Only surface parking lots with an area greater than 0.5 hectares are included.

6

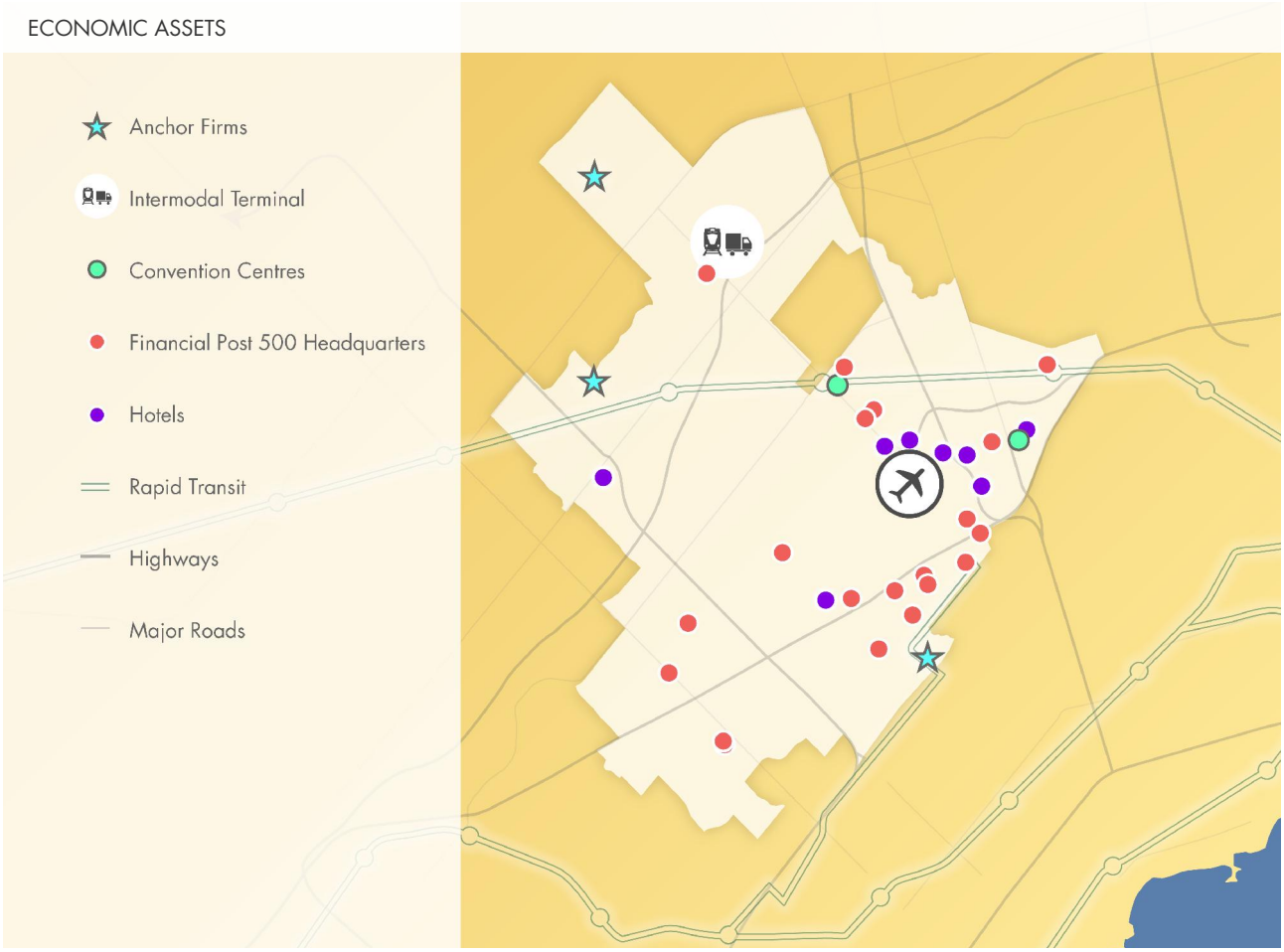
ECONOMIC ASSETS

In addition to its 300,000 jobs, the Airport Megazone contains important economic assets that could be strategically leveraged to promote economic development in the Zone and beyond. They include "anchor" firms, such as head offices and major institutions, or infrastructure assets such as the Airport itself. Leveraging these assets would mean supporting and encouraging the external linkages, production networks, synergies, and interactions of firms with a supportive urban environment and planning framework. In other words, it means acknowledging, planning for and actively promoting the important role of agglomeration economies – sometimes characterized as "sharing, learning, and matching"[12] – in competitiveness, and the role of urban environments. Other jurisdictions are employing deliberate strategies to take maximum advantage of these economic assets.[13]

Of course, the most significant asset is Pearson International Airport itself, which is not only a major employer, but also connects Toronto and much of Canada to the rest of the globe. Many of the firms and economic activities in the AMZ are there because of the airport. Similarly, the CN Brampton Intermodal facility is an anchor for local distribution firms.

The megazone contains many corporate head offices and anchor firms in key industries, such as Pratt and Whitney, Rogers, Bell, Hewlett Packard, and BlackBerry. Important industry clusters are also found here, including a group of firms in the life sciences sector.

The AMZ has an important concentration of hotels, as well as major visitor



[12] G. Duranton and D. Puga, "Micro-Foundations of Urban Agglomeration Economies." In *Handbook of Regional and Urban Economics*, ed. J.V. Henderson and J.F. Thisse, Amsterdam: Elsevier, 2004.

[13] See, for example, Brooking Institution's Bass Initiative on Innovation and Placemaking, http://www.brookings.edu/about/projects/innovation-and-placemaking

destinations such as the Toronto Congress Centre and the International Centre. At present, these assets are not being leveraged; each establishment is an island unto itself, located in an inhospitable and unwalkable urban environment with few other amenities. A visitor district could be developed along the Dixon Road/Airport Road corridor where the hotels and convention facilities are found, which intensifies development, improves walkability, adds amenities, and improves the character of the area – to increase the attractiveness of this area for visitors and those who host events.

Redevelopment in the AMZ offers a unique opportunity to build on existing density and businesses, support higher levels of transit service, and address the significant role the area plays in contributing to regional auto travel and congestion.

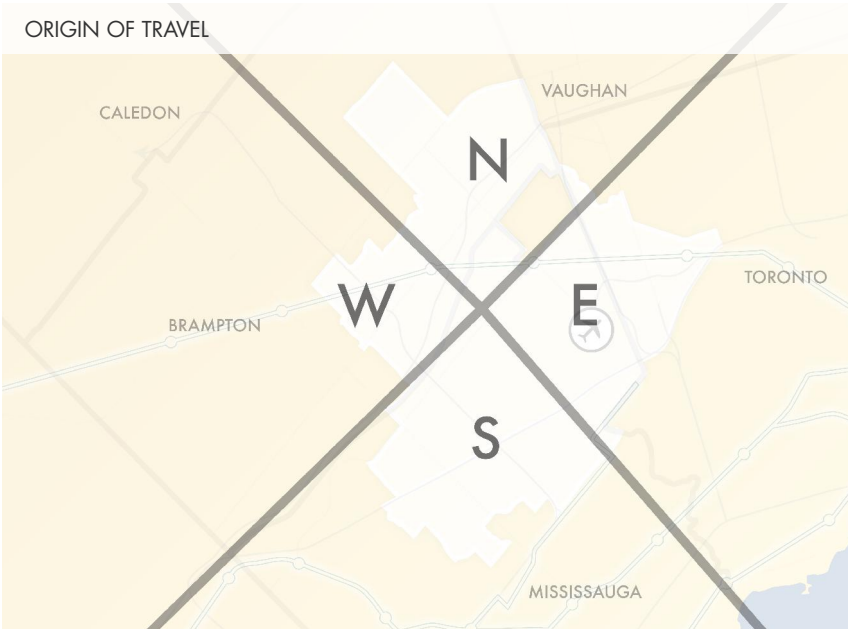
7

TRAVEL, TRANSPORTATION PATTERNS, AND TRANSIT USE

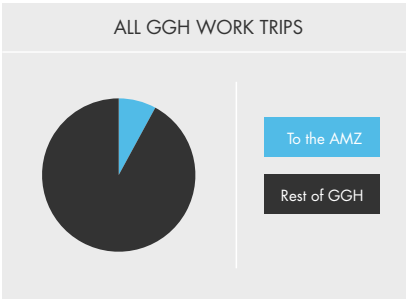
The Airport Megazone provides employment for almost 300,000 workers. On a typical weekday, about 268,000 trips to work are destined for the AMZ. Of these, 94% are made by automobile. This represents roughly 250,000 auto work trips to the area per day – plus another 250,000 return trips, for a total of roughly 500,000 daily car work trips associated with the district.

This figure does not include non-work trips, such as trips to Pearson Airport by air travellers. When travel for all purposes is considered, the AMZ attracts more than 546,000 trips per day. Assuming a similar number of return trips from the AMZ, we can

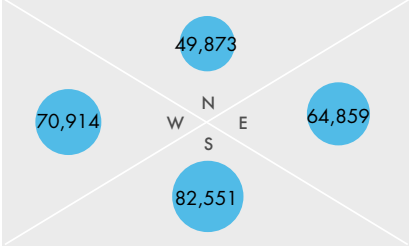
ORIGIN OF TRAVEL



ALL GGH WORK TRIPS



ORIGIN OF TRAVEL (WORK TRIPS TO AMZ)



conclude it generates over a million trips daily – almost all of them by car.

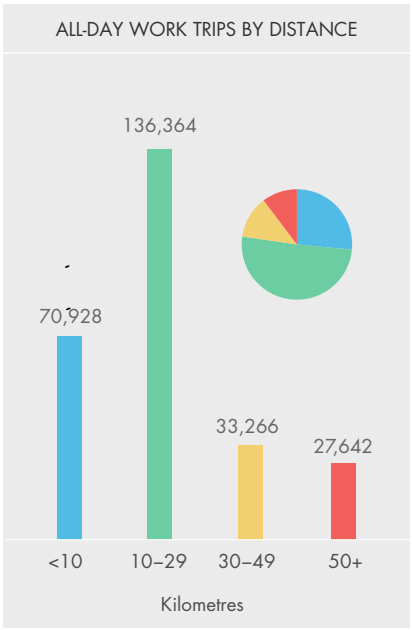
The AMZ is an auto-dependent area and likely the single biggest generator of car trips to work in the GGH. As such, it is a major source of regional congestion. Only about 16,000 of the 268,000 daily work trips taken to the AMZ are made by transit. In comparison, downtown Toronto generates only 133,287 all-day auto work trips, as 60% of workers there take transit and another 11% use active transportation (walking, cycling). (See Tables 7 and 8 in the Appendix.)

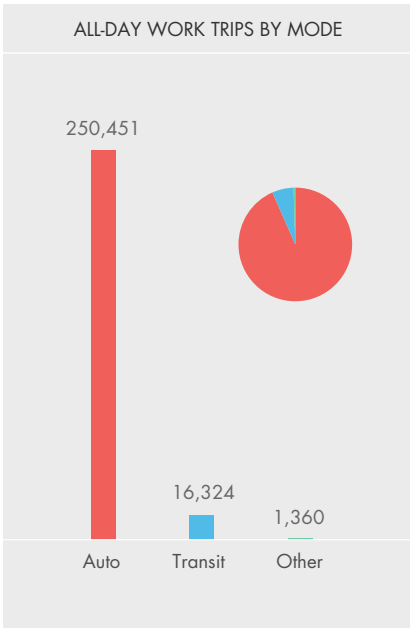
Where are Airport Megazone workers coming from?

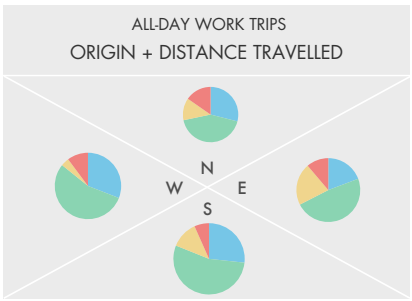
Not surprisingly, the AMZ attracts workers from a wide area. Slightly more than one-quarter or about 70,000 all-day work trips originate within less than 10 kilometres of their AMZ work destination. Just over half all-day work trips, or 136,000, cover between 10 and 30 kilometres.

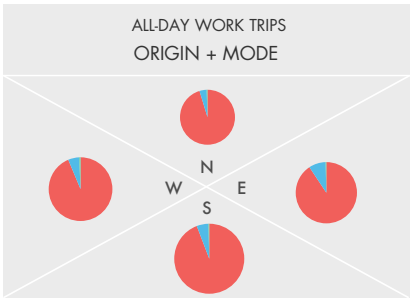
Workers travel from all directions to jobs in the AMZ. The predominant direction is from the south, which accounts for more than 30% (82,000) of all-day work trips. In addition, more than 70,000 travel from the west, almost 65,000 from the east, and almost 50,000 from the north. The patterns are similar for morning peak work trips. (See Table 9 in the Appendix.)

In terms of mode split, the highest transit modal share for trips to work is from the east, at 9% of trips, presumably because the City of Toronto has more transit routes than the other regions surrounding the AMZ. For travel from these other regions to the AMZ, transit represents 4 to 5% of trips. (See Table 10 in the Appendix.)









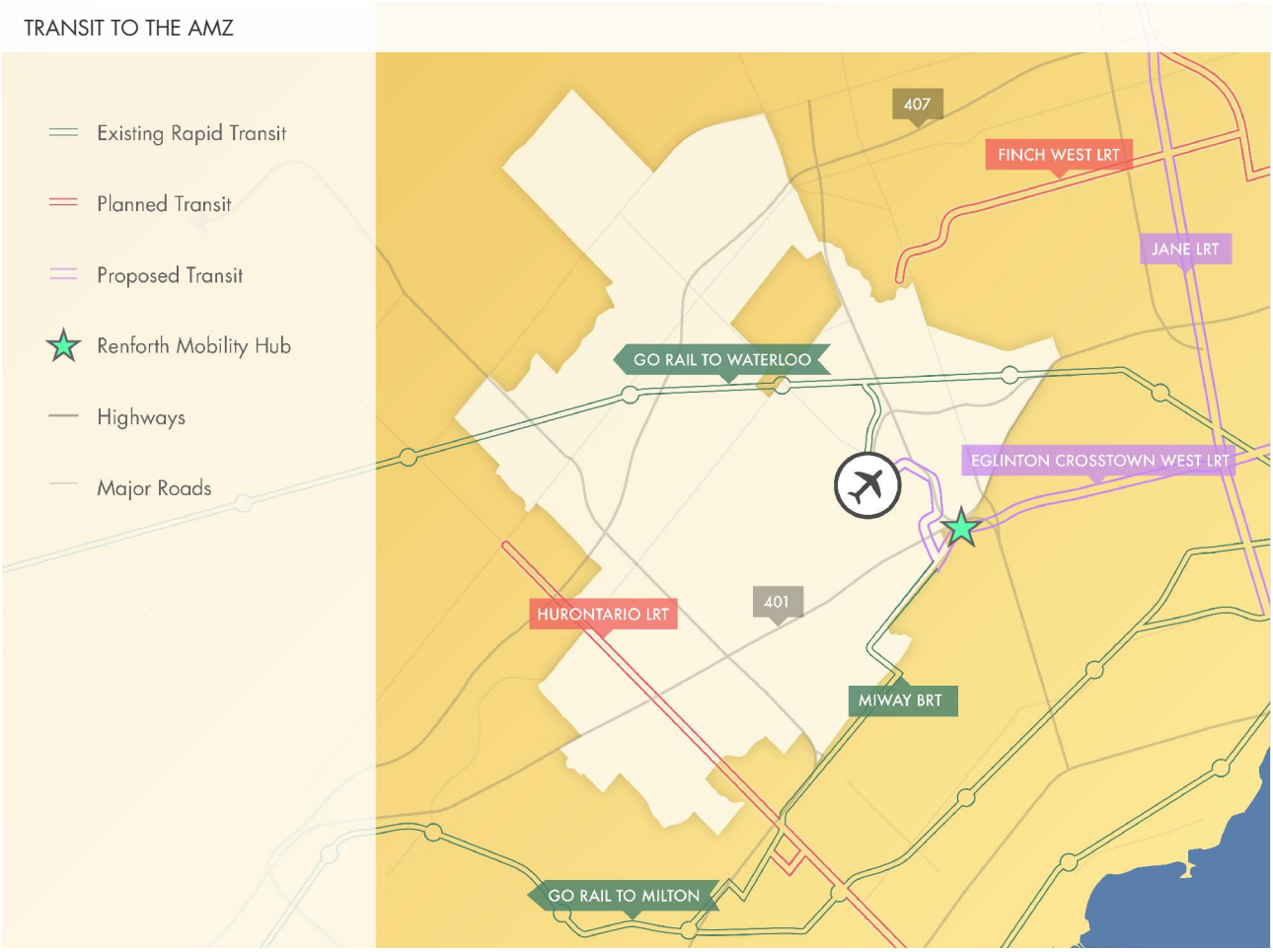
Trips from the west, north, and south tend to be shorter; between 27 and 31% of all work trips to the AMZ from these directions are under 10 km. Trips from the east, that is, from the City of Toronto and beyond, tend to be longer, and include the largest share of trips of more than 30 km (about one-third of trips from the east).

In terms of the absolute numbers of trips, the greatest number of short trips comes from the south and west – roughly 22,000 from each direction; similarly with mid-range trips in the 10–29 km range, at approximately 45,000 and 39,000 respectively. This suggests the potential for increased transit from the south and west to the AMZ, to address the auto-dependency and significant congestion this area generates. (See Table 11 in the Appendix.)

Trips by air passengers

Passenger travel to Pearson Airport is included in all-day, all-purpose trip data – currently estimated at about 546,000 daily trips to the Airport Megazone. Our data show that about 268,000 or almost half of these are trips to work. Trips to the AMZ made by air passengers going to Pearson Airport cannot be isolated from these

TRANSIT TO THE AMZ



data, but data from the Greater Toronto Airports Authority suggest that the number of daily passenger trips to the Airport is about 33,000[14] – or about 6% of all-day, all-purpose trips to the AMZ. Of these, about 88% (29,000) are by private automobile, taxi, or limousine.

This underlines the fact that trips to the airport itself – even when both passengers and airport employees are considered – while important, are only a component of the total travel to the AMZ. Most such trips are to the surrounding employment areas.

Transit to and within the AMZ

It is clear that transit and transit planning have not adequately addressed the AMZ as a significant employment and economic zone. Most of the transit – existing and planned – approaches the AMZ from the east. Yet much larger numbers of workers travel to the AMZ from the south and west than from the east, and these trips also tend to be shorter than those from the east. Current transit proposals also tend not to be focused on connecting with and serving employment in the whole megazone. An integrated, regional approach to serving this important economic and employment area is lacking.

[14] Data from the GTAA, for 2011. The daily figure was arrived at by dividing GTAA estimated annual air passenger trips to and from the Airport by 365 to arrive at a daily figure, then dividing this in half to estimate trips to the airport only.

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CONCLUSIONS

The AMZ is a regionally, provincially, and nationally significant economic zone, important in the production of tradeable goods and services. It includes sizeable concentrations of employment in transportation, finance, manufacturing, telecommunications, wholesale trade, architectural and engineering services, and computer systems design and services. It represents a significant cluster of knowledge-intensive activities. It also contains important economic assets – from Pearson Airport itself, to the CN Brampton Intermodal terminal, to head offices and clusters of firms in key industries.

Unlike other areas outside the City of Toronto, including many Urban Growth Centres designated in the Growth Plan, the Airport Megazone has seen growth in core employment since 2001, especially the growth of finance and business services in the South subzone, mostly in Airport Corporate Centre. The megazone also comprises distinct subareas that focus on different types of economic activity, with associated differences in urban form and density.

In short, the AMZ represents significant potential for economic development, city-building, achieving planning and Growth Plan objectives, and reducing congestion through a shift to transit.

Economic development potential could be realized by building on the zone's many existing assets: by strengthening the economic ecosystem and inter-firm linkages within the zone, improving access, and increasing its attractiveness to workers.

The area also contains significant redevelopment potential on undeveloped lots and expanses of surface parking. Strategic redevelopment could achieve densities that make higher levels of transit service viable.

Despite the potential, there are many challenges.

The AMZ is heavily auto-dependent, generating about 500,000 automobile work trips daily and almost a million total auto trips daily to and from the district. For a region grappling with congestion and a Province committed to greenhouse gas reduction targets, the question of travel to and from the AMZ cannot be ignored. Moreover, the built environment and public realm of the area are not very attractive to new investment and workers, and could undermine the positive impact of transit investments.

These issues remain largely unaddressed, in part because the area is governed by four municipal governments, as well as the airports authority. This jurisdictional fragmentation has meant that the AMZ as a whole, the second largest employment concentration in the country, is "invisible" to planners and decision-makers.

As a result, although transit investments are being made in and around the area, they tend not to focus on serving the AMZ as a single employment district, and are not well coordinated. The same is true of more recently proposed transit investments. Connection to the Airport or the Airport Megazone is often an afterthought of proposals intended for other purposes. The area is not sufficiently recognized nor prioritized in regional transit planning.

Current planning frameworks do not comprehensively address the quality of the built environment and public realm in a way that capitalizes on the development potential of the area, makes the area more attractive to new kinds of firms and skilled workers, ensures that transit attracts riders in sufficient numbers to warrant investments, and includes a planning and land use framework that supports the competitiveness and flexibility of firms in the area.

The issues could be addressed and the potential of the area realized through an integrated zone-wide reurbanization strategy. Such a strategy would simultaneously address the built environment and public realm, planning and land use frameworks, economic development potential, transit service, and access. Interventions would be tailored to address the varying mix of economic activities and built environment characteristics of the AMZ. For example, urban design and the mix of land uses need to be addressed in terms of their role in attracting new investment, supporting the economic ecosystem of the area, and enhancing firms' competitiveness.

In the context of economic restructuring in the Greater Golden Horseshoe, the changing needs of business, the Province's greenhouse gas emission reduction commitments, the Growth Plan and Big Move objectives, future transit investments, and the significant role that the AMZ plays in all of these considerations, an integrated reurbanization strategy is warranted.

APPENDIX

TABLE 1: AIRPORT MEGAZONE STATISTICS	
All Employment, 2011	297,990
AMZ Share of GGH employment, 2011	8%
Employment change, 2001–2011	22,550
AMZ share of GGH employment change	7%
Core Employment, 2011	245,180
AMZ Share of GGH core employment, 2011	11%
AMZ core employment change, 2001–2011	10,660
GGH core employment change, 2001–2011	-3,110

TABLE 2: EMPLOYMENT BY PLANNING CATEGORY, AMZ, 2011

	Core Employment								Population-Related
		Industrial		Office		Institutional	Services	Specialized	
	Core	Manufacturing, Construction & Utilities	Warehousing & Transportation	Finance & Business Services	Voluntary & Government	Higher Education & Hospitals	Culture & Tourism	Broadcasting & Laboratories	
AMZ employment	245,180	78,560	87,690	60,335	9,320	385	5,535	3,355	50,870
GGH employment	2,198,555	607,295	336,030	763,570	217,715	182,155	51,915	39,875	1,106,985
AMZ as share of GGH employment, by sector (%)	11	13	26	8	4	0	11	8	5
AMZ employment by planning category (% share)	82.3	26.4	29.4	20.2	3.1	0.1	1.9	1.1	17.1
GGH employment by planning category (% share)	62.1	17.2	9.5	21.6	6.2	5.1	1.5	1.1	31.3

TABLE 3: EMPLOYMENT CHANGE IN THE AMZ

	2001–2006	2006–2011	2001–2011
Core employment	21,010	-10,350	10,660
Manufacturing, Construction & Utilities	770	-18,630	-17,860
Manufacturing			-19,385
Warehousing & Transportation	5,690	-1,515	4,175
Finance & Business Services	11,780	8,945	20,725
Finance			5,825
Voluntary & Government	1,280	1,835	3,115
Higher Education & Hospitals	135	-80	55
Culture & Tourism	400	-10	390
Broadcasting & Laboratories	955	-895	60
Non-core (population-related)	3,785	6,220	10,005
Total Employment	24,620	-2,070	22,550

TABLE 4: CORE EMPLOYMENT BY PLANNING CATEGORY AND SUBZONE, 2011

	Industrial		Office		Institutional	Services	Specialized
	Manufacturing, Construction & Utilities	Warehousing & Transportation	Finance & Business Services	Voluntary & Government	Higher Education & Hospitals	Culture & Tourism	Broadcasting & Laboratories
North	27,665	15,280	11,220	1,525	70	310	690
East	10,250	6,725	5,135	1,480	0	3,570	705
Pearson	25,440	43,950	14,970	3,310	115	935	1,020
South	15,205	21,735	29,010	3,005	200	720	940

TABLE 5: EMPLOYMENT CHANGE BY PLANNING CATEGORY AND SUBZONE, 2001–2011

	Core							Population-Related
	Industrial		Office		Institutional	Services	Specialized	
	Manufacturing, Construction & Utilities	Warehousing & Transportation	Finance & Business Services	Voluntary & Government	Higher Education & Hospitals	Culture & Tourism	Broadcasting & Laboratories	
North	-3,840	1,955	5,315	485	60	145	-80	3,185
East	-3,055	825	5	465	-55	-130	-265	-2,105
Pearson	-9,105	1,180	3,400	1,480	75	140	145	2,865
South	-1,860	215	12,005	685	-25	235	260	6,060

TABLE 6: EMPLOYMENT DENSITY BY SUBZONE, 2011

	Area (ha)	Total Jobs	Jobs/ha	Population + Jobs	Population+Jobs/ha
North	5,255	73,405	15.5	97,350	20.5
East	1,736	32,780	19.1	41,622	24.3
South	2,659	88,605	33.3	115,073	43.3
Airport	5,595	103,200	23.2	110,960	24.9

TABLE 7: ALL-DAY TRIPS TO THE AMZ AND IN THE GGH

	All Day Trips to AMZ	All Day Trips in the GGH
For all purposes	546,091	17,924,261
Trips to work only	268,197	3,114,064
Morning peak	183,975	-

TABLE 8: WORK TRIPS TO THE AIRPORT MEGAZONE, BY MODE AND DISTANCE

		No.	Share of all trips
All day by mode	Auto	250,731	93.7%
	Transit	16,343	5.6%
	Other	1,361	0.7%
All day by distance travelled	Less than 10 km	70,928	26.4%
	10 – 29 km	136,364	50.8%
	30 – 49 km	33,266	12.4%
	50+ km	27,642	10.3%

TABLE 9: DIRECTION OF ORIGIN FOR TRIPS TO THE AIRPORT MEGAZONE

	North		East		South		West	
All purposes, all day	106,952	19.6%	106,964	19.6%	197,952	36.2%	134,223	24.6%
Work trips only, all day	49,873	18.6%	64,859	24.2%	82,551	30.8%	70,914	26.4%
Work trips only, morning peak	32,289	17.6%	43,698	23.8%	60,363	32.8%	47,625	25.9%

TABLE 10: ORIGIN OF TRAVEL BY MODE, WORK TRIPS, ALL DAY

	North		East		South		West	
	No.	%	No.	%	No.	%	No.	%
Auto	47,500	95.2	58,776	90.6	77,753	94.2	66,422	93.7
Transit	2,112	4.2	5,800	8.9	4,431	5.4	3,981	5.6
Active	261	0.5	283	0.4	327	0.4	489	0.7
Total	49,873	100	64,859	100	82,551	100	70,914	100

TABLE 11: ORIGIN OF TRAVEL BY DISTANCE, WORK TRIPS, ALL DAY

	North		East		South		West	
	No.	%	No.	%	No.	%	No.	%
Less than 10 km	14,455	29.0	12,492	19.3	22,056	26.7	21,925	30.9
10 km – 29 km	21,330	42.8	31,276	48.2	44,868	54.4	38,890	54.9
30 km – 49 km	6,459	12.9	13,824	21.3	10,123	12.3	2,860	4.0
50 km +	7,649	15.3	7,263	11.2	5,506	6.7	7,224	10.2
Total	49,893	100.0	64,855	100.0	82,553	100.0	70,899	100.0

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