Welcome to Ryerson!

What we do:
- Experiential learning
- Entrepreneurial and career-focused programs
- City building

A Growth Story…
- Enrollment in the 1990s = 21,000 students
- Enrollment in the early 2000s = 33,000 students
- Enrollment now = over 40,000 students
How does Ryerson compare for space?

York University
University of Toronto
Ryerson University

Master Plan Goal 1 – Urban Intensification

Master Plan Goal 2 – People first: Pedestrianization of the urban environment
Master Plan Goal 3 – Commitment to Design Excellence

Innovative Partnerships:
- Commercial theatres for classrooms
- St. Michael's Hospital collaboration

Mixed-use Development Partnership:
- Cadillac Fairview
- Private Sector
- Student Residences
- Adaptive Reuse
- Renovation & Expansion

Adaptive Reuse
Historical Continuity

Vertical Campus in progress: Daphne Cockwell Health Sciences Complex

Thank You!
Planning the waterfront for a liveable city: the Toronto experience

John Campbell
Renovo Advisory Services

The industrial history

We’re engaged in one of the most significant city building projects in the world.

Making revitalization happen
What are the challenges?

- Public cynicism
- Stop and start
- Limited resources
- Global competition
- Complex projects

Our business model
Master planning the waterfront

Consultation and collaboration with the public

Creating quality of place

Raising the bar for sustainability
Minimum Green Building Requirements

Leading revitalization with great parks and public spaces

Public art program

Creating new affordable housing
Building infrastructure that is ‘smart’

What have we done?

24 new or improved parks

East Bayfront - Before
East Bayfront - After

West Don Lands - Before
We're delivering on the promise of the waterfront

John Campbell
President & CEO
Where does growth go?
86% residential growth in target areas
Recent Related Parks and Open Spaces

Download the guidelines
Download the interactive PDF map
View the map
What are POPS?

Places of retreat, relaxation, respite

• Over 100 POPS reviewed and mapped

What are POPS?

Places for social gathering & interaction
What are POPS?
Places to engage in civic life

What are POPS?
Places to view Public Art

What are POPS?
Places to view Public Art

What are POPS?
Places to view Public Art
What are POPS?

POPS are a specific type of open space which the public are invited to use, but remain privately owned and maintained. They are a key part of the city’s public realm network, providing open space in much needed locations across the city and complementing existing and planned publicly owned parks, open spaces and natural areas.
Minto Urban Development Services
Toronto, Ontario
February 20, 2014

30 Yorkville Pedestrian Mews
Ferris + Associates Inc.
Landscape Architect and Urban Planner
CASE STUDY
The ‘Space Between’ Urban Spaces Surrounding Tall Buildings

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The 'Space Between' Urban Spaces Surrounding Tall Buildings
PATH system contains more than 20 miles (30 km) of weather protected shopping concourse.

**Why VERTICAL URBANISM?**

**The PATH in the Downtown:**

Over 20 major destinations are connected or in close proximity to the existing PATH. These destinations provide:

- significant pedestrian activity
- A unique civic, cultural or retail amenity

THANK YOU
Presentation Overview
Introduction, Topics to be Discussed, Definitions

• Topics to be discussed:
  — The scale of major office space demand in the GTA and City of Toronto to 2041
  — Employment trends and locational factors influencing where new office space is locating
  — Other general trends influencing the demand for major office development

• “Major Office” space defined
  — Free standing buildings
  — Minimum 20,000 sq ft (net floor area)

• Office submarkets:
  — Financial Core
  — Downtown Toronto
  — Central Toronto
  — Suburbs
  — GTA Region
### Demand for Major Office Space

- **Regional (GTAH) demand between 2011 to 2041 estimated at** 102.4 million sq ft
- **Over the same period, demand within the City of Toronto expected to exceed** 45.5 million sq ft
- **This level of office space growth is nearly identical to historical patterns in office development:**

<table>
<thead>
<tr>
<th>Year</th>
<th>Office Space Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011-2014</td>
<td>3.4 million sq ft</td>
</tr>
<tr>
<td>2015</td>
<td>4.4 million sq ft</td>
</tr>
<tr>
<td>2015-2021</td>
<td>4.8 million sq ft</td>
</tr>
<tr>
<td>2021+</td>
<td>13.9 million sq ft</td>
</tr>
<tr>
<td>Total</td>
<td>19.0 million sq ft</td>
</tr>
</tbody>
</table>

- **Are we on track to meet this demand?**
  - 3.4 million sq ft already constructed (2011-2014)
  - 4.4 million sq ft under construction (2015)
  - 4.8 million sq ft proposed (2015-2021)
  - 13.9 million sq ft planned in long-term projects (2021+)
  - **19.0 million sq ft demand remaining**
• Long-term demand in Toronto could be even greater than forecast:
  — Increasing office share of total employment
  — Projects not constructed to scale proposed, if at all
  — Office vacancy rates increase
  — Toronto attracts a more significant share of regional (GTAH) demand
  — Toronto continues to grow and emerge as a global business centre

Allocation of Office Space Demand
Where will this demand for office space be delivered?

Allocation of Major Office Space Demand

• Approximately 50% of Toronto office employment already concentrated in Downtown

• Downtown share of office employment increasing

• Office space absorption increasing in Downtown, with corresponding declines in balance of GTAH

Allocation of Major Office Space Demand

• Demand for new office space in the Downtown and Central Area being fuelled by low vacancy rates...
Allocation of Major Office Space Demand

• ...and the highest rental rates in the GTAH.

Allocation of Major Office Space Demand

Downtown: 88% of recent + ongoing development 80% of forecast office space growth

Office Market Trends

What factors are driving demand for new office space?

Office Market Trends

• Key economic trends driving demand for new/existing office space in Downtown:
  — Shift from manufacturing to service-based economy
  — Increased traffic/transit congestion throughout the GTA + reduced car ownership
  — Relocation + reverse migration of major corporations
  — Introduction of new office users with increased recognition of Toronto as global business centre
Recent residential development activity in Downtown

Attraction of young and educated workforce

Additional factors driving demand for construction of new/contemporary office buildings:

- Technological improvements unable to be delivered in aging office inventory
- Increasing emphasis on health and wellness
- Increasing office employment densities
- Changing office environments
- Escalating core rental rates driving demand in fringe areas (e.g., East Harbour, the “Kings”, Liberty Village, Port Lands, etc.)

Conversion of potential office sites in Downtown resulting in shortage + shift to fringe areas

Office Market Trends

Q & A