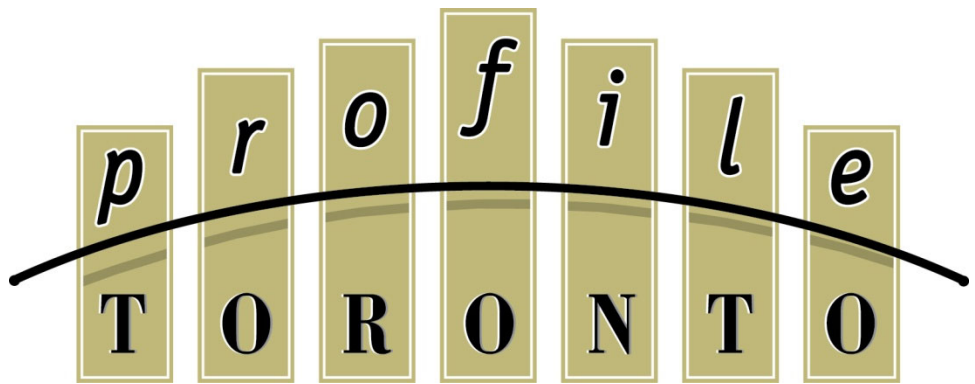


This City Planning bulletin summarizes the highlights of the 2013 City of Toronto annual Employment Survey, marking its 31<sup>st</sup> consecutive year.

This information resource presents a picture of change in Toronto's economy throughout the past three decades.

For more information, please visit us at [www.toronto.ca/demographics/surveys](http://www.toronto.ca/demographics/surveys)



March 2014

## Highlights

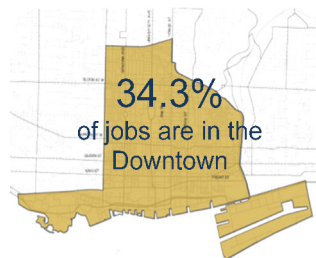
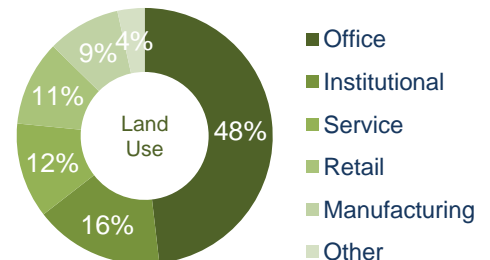
- Over three decades from 1983 to 2013, the number of jobs in the City grew by 259,800 jobs or nearly one quarter (23.5%).
- The 2013 survey counted 1,363,550 jobs, surpassing Toronto's 1989 former all-time employment high by 7,010 jobs.
- Toronto's overall employment in 2013 is up by 2.4% from 2012.
- Full-time employment has continued to stay above the 1 million mark for the seventh year. Part-time jobs increased by 12,690 in 2012 to 315,400 this past year.
- The number of establishments surveyed in 2013 was 74,800, a net gain of 200.
- Of the total number of establishments, 4,340 were new to the City in 2013. More than half (56.9%) are located within the Downtown (970), Centres (190) and Employment Districts (1,310).
- The Office sector remains the largest source of employment in Toronto representing nearly half of all jobs (48.2%), followed by the Institutional (16.3%), Service (12.1%), Retail (10.8%), Manufacturing (9.3%), and Other (4.0%) sectors, reflecting the diverse nature of the Toronto economy.
- In 2013, there were approximately 548,490 jobs in Toronto's Downtown and Centres comprising 40.2% of all jobs in the City.
- Yonge and Eglinton Centre was the fastest growing Centre in 2013, adding 4,320 jobs or 28.0%.
- In 2013, there were approximately 393,520 jobs in Toronto's Employment Districts accounting for 28.9% of jobs in Toronto.
- 82.0% of all Manufacturing sector establishments in the City reside in the Employment Districts, representing 92.3% of all Manufacturing jobs in Toronto.



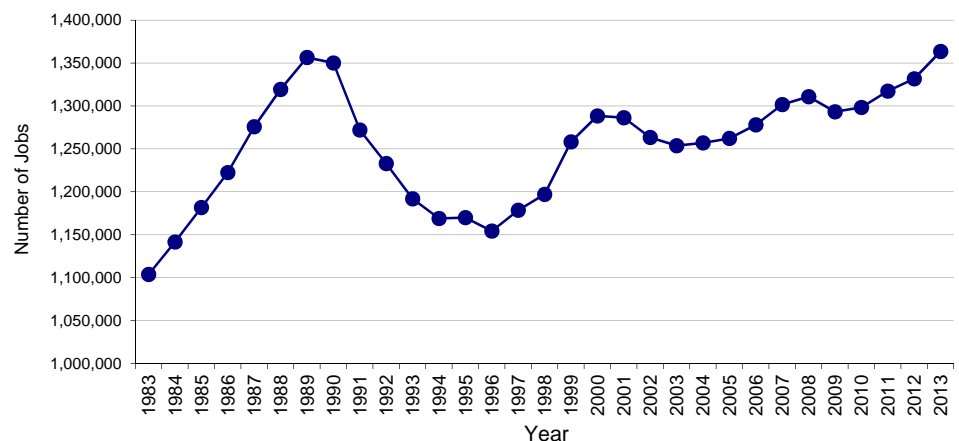
**Toronto Job Count**  
**1,363,550**



48.2% of jobs in Toronto are in the Office sector



74.0% of jobs in Toronto are Service Based



## Introduction

In 2013, the Toronto Employment Survey recorded the largest number of jobs in Toronto over the past thirty years. The survey counted 1,363,550 jobs, surpassing Toronto's 1989 former all-time employment high by 7,010 jobs or a modest 0.5%. In 2013, Toronto added 32,070 jobs to the City's employment base, growing by 2.4% in the course of one year. Over the past decade, the City's total employment has grown by 109,860 jobs or 8.8%, and over 30 years, employment in Toronto has grown by 259,870 jobs or 23.5% (see Table 1).

This bulletin summarizes the results of the 2013 Toronto Employment Survey. It highlights the key findings and trends of employment in Toronto by sector, the longevity of establishments, and emerging patterns in the Centres, Downtown, and Employment Districts. The results from the Employment Survey are used to gauge the City's economic and investment health and to monitor progress of the Official Plan policies.

It is also used in proactive policy development and to provide background information for forecasting and planning of infrastructure and services. This annual survey offers a timely insight into the business climate across Toronto to facilitate, accelerate and achieve economic growth.<sup>1</sup> Toronto's 31<sup>st</sup> Employment Survey was undertaken in the summer of 2013.

The City of Toronto is home to 2.8 million people and spans over 634.5 km<sup>2</sup> of land, making it Canada's largest City and the third largest City in North America.<sup>2,3</sup> Toronto is a major economic driver in Canada. The City's GDP of 151.4 billion dollars accounts for 70 billion dollars in export goods annually and retail sales of 62 billion dollars annually.<sup>4</sup> Toronto accounts for

22.5% of Ontario's gross domestic product and 8.4% of our national GDP (in 2012). The City of Toronto's economy has performed well over the last year. Toronto's GDP grew by 5.1% in the last year, far outpacing the provincial growth rate of 2.0% and the national growth rate of 1.41%.<sup>5,6</sup>

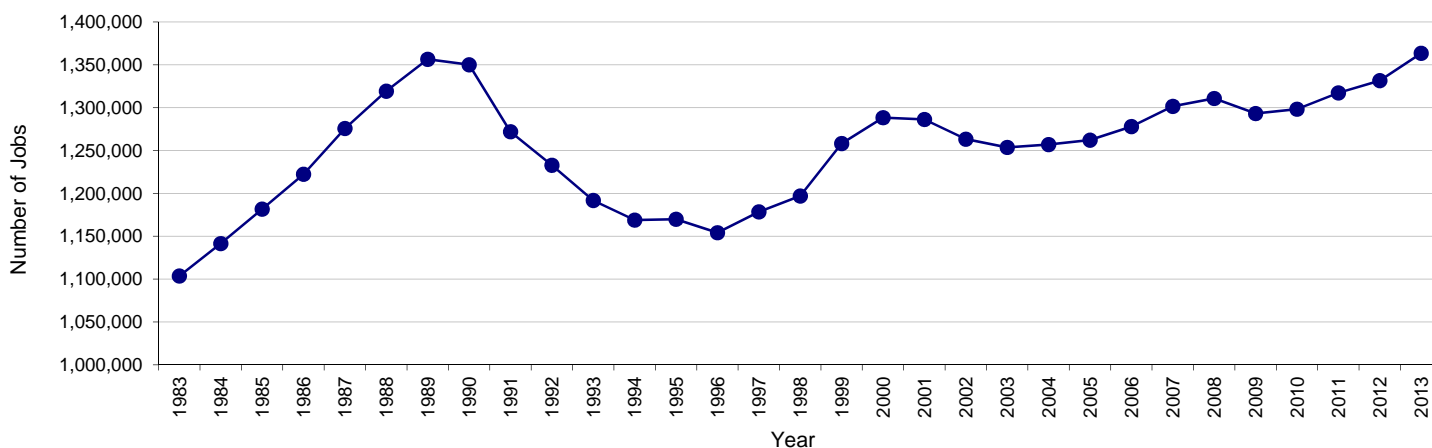
Map 1 shows the distribution of employment across the City, with distinct concentrations in the Downtown, Centres, and Employment Districts, demonstrating their continued vitality. Of the nearly 1.4 million jobs in the City; 76.9% are full-time jobs while 23.1% of jobs in Toronto are part-time. Over the year, the number of full-time jobs increased by 1.9% while the number of part-time jobs rose by 4.2%. Total median hourly wages declined in 2013 by 1.5%.<sup>7</sup>

**Table 1: Total Employment, 1983, 2003, 2012, 2013\***

Employment	Total Number of Employees				Net Change	Growth Rate %	Net Change	Growth Rate %	Net Change	Annual Growth Rate %
	1983	2003	2012	2013	1983-2013		2003-2013		2012-2013	
Full-time	992,410	982,990	1,028,770	1,048,150	55,740	5.6%	65,160	6.6%	19,380	1.9%
Part-time	111,270	270,700	302,710	315,400	204,130	183.5%	44,700	16.5%	12,690	4.2%
<b>Total</b>	<b>1,103,680</b>	<b>1,253,690</b>	<b>1,331,480</b>	<b>1,363,550</b>	<b>259,870</b>	<b>23.5%</b>	<b>109,860</b>	<b>8.8%</b>	<b>32,070</b>	<b>2.4%</b>

\* Numbers have been rounded to the nearest ten.

**Figure 1: Toronto Employment, City of Toronto, 1983 - 2013**



<sup>1</sup> All data in this Bulletin are from the Toronto Employment Survey unless otherwise indicated.

<sup>2</sup> Statistics Canada, *Annual Demographic Estimates: Subprovincial Areas*, Cat. No. 91-214-XWE, released February 26, 2014 at <http://www5.statcan.gc.ca/bsolc/olc-cel/olc-cel?catno=91-214-XWE&lang=eng>.

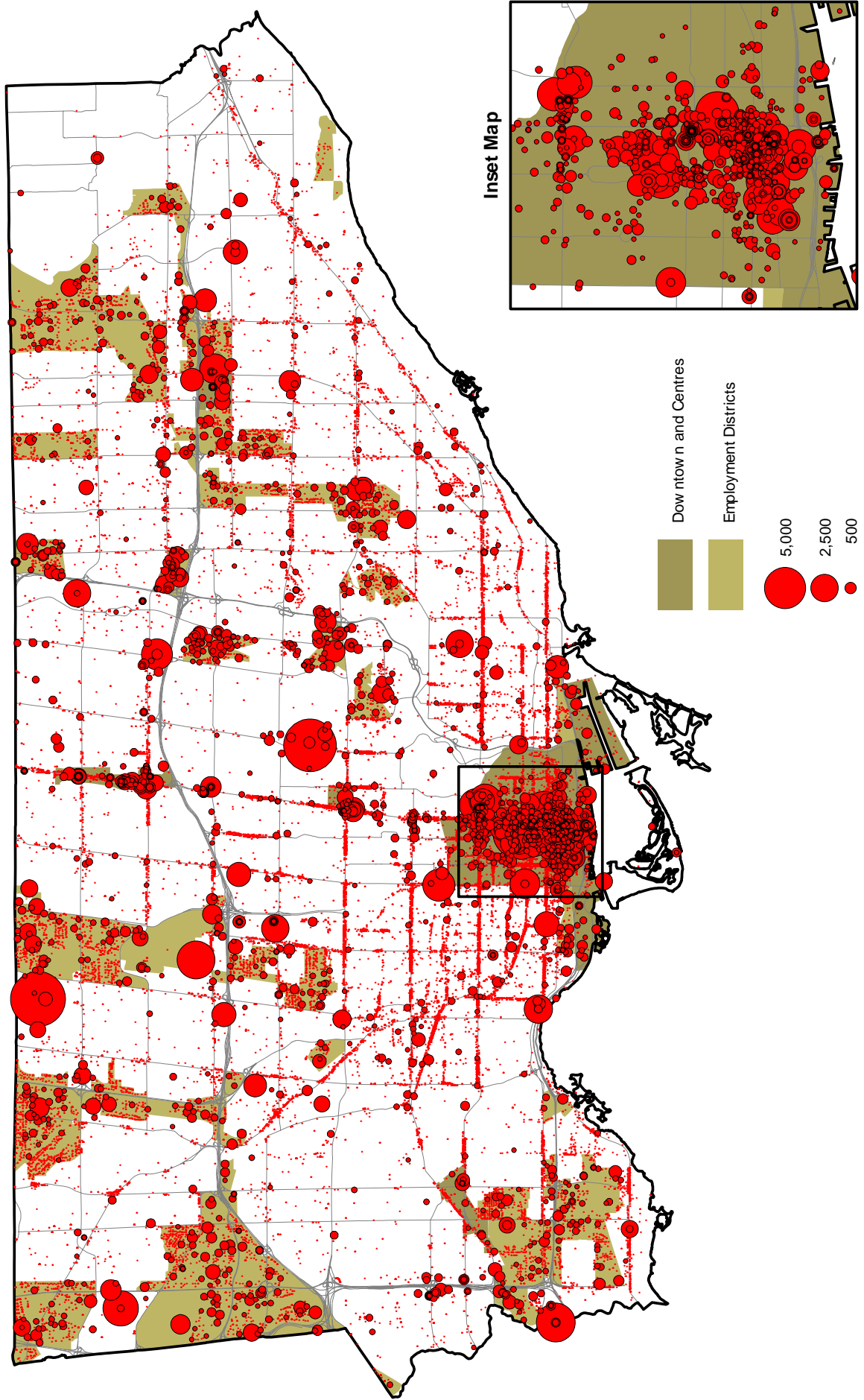
<sup>3</sup> Toronto Economic Development & Culture, *Business and Economic Development Facts*, 2010.

<sup>4</sup> Ontario. Ministry of Finance. *2012 Ontario Economic Outlook and Fiscal Review* at <http://www.fin.gov.on.ca/en/budget/fallstatement/2012/chapter2.html> last updated October 15, 2012.

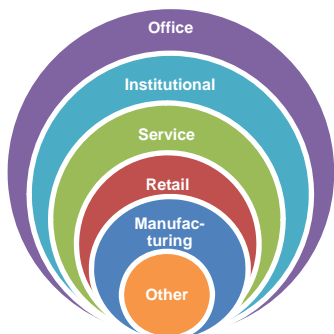
<sup>5</sup> City of Toronto. Economic Development and Culture. *Economic Dashboard*. November 12, 2013, at <http://www.toronto.ca/legdocs/mmis/2013/ed/bgrd/backgroundfile-63623.pdf>.

<sup>6</sup> Statistics Canada. *Gross Domestic Product by Industry 2013* at <http://www.statcan.gc.ca/daily-quotidien/130930/longdesc-cg130930a001-eng.htm> last modified September 30, 2013.

<sup>7</sup> Toronto Economic Development & Culture, *Economic Indicators August 2013*.



## Toronto Jobs by Land Use Activity



### 2012-2013

In the last year, the number of jobs in Toronto increased by 2.4% or 32,070 jobs. Every sector with the exception of Manufacturing grew over 2012 (see Figure 3). The Manufacturing sector lost 2,030 jobs in 2013, shrinking by 1.6%. The Office sector remains the largest source of employment in Toronto, representing nearly half of all jobs (48.2%). This sector grew by 18,600 jobs this year or 2.9%.

The Institutional sector is the second largest sector in the City, accounting for 16.3% of jobs in Toronto. This sector grew by 2.0% in 2013, adding 4,300 jobs. This sector is followed by the Service and Retail sectors which represent 12.1% and 10.8% of employment respectively. The Service sector grew by 3.9% while the Retail sector grew by a more modest 2.4% in 2013. The Manufacturing sector represents 9.3% of jobs in Toronto. The smallest sector in Toronto is the Other sector which includes all other economic activities; it represents just 4.0% of jobs in the City.

### 2008-2013

Since 2008, employment in Toronto has increased by 4.0% or 52,700 jobs. Over the last five years, the Office sector has continued its steady increase from 614,660 employees in 2008 to 656,680 employees in 2013, an increase of 42,020 jobs or 6.8%. Since 2008, the Retail sector has

declined by 0.6% or 960 jobs. The Manufacturing sector has continued its decline with a loss of 17,590 jobs or 12.2%. All other sectors have shown growth since the 2008 global economic downturn, demonstrating a recovery despite the adverse economic climate.

### 2003-2013

Over the decade, there have been notable changes in the sectoral composition of Toronto's economy (see Figure 2 and Table 2). The number of jobs in Toronto has grown from 1.25 million jobs in 2003 to 1.36 million in 2013, growing 8.8%.

All sectors except the Manufacturing sector have grown over the last ten years. The Office sector has seen the greatest growth, maintaining its dominance in Toronto's economy over the last decade. This sector has grown by 83,210 jobs or 14.5%. The Institutional and Service sectors grew by 17.4% and 15.3% respectively, contributing a combined addition of 54,870 jobs to Toronto's economy.

The Retail sector has seen significant change since 2003. At the beginning of the decade, the Retail sector experienced consistent growth in Toronto. The sector declined sharply over the following years due to the global recession, losing more than 10,990 jobs between 2007 and 2010. By 2011, the sector began to recover showing steady growth. Between 2003 and 2013 the Retail sector managed a modest net gain of 4,210 jobs overall, increasing the sector's size by 3.0%.

Figure 2: Sectoral Changes Over Time, 2003, 2008, 2013

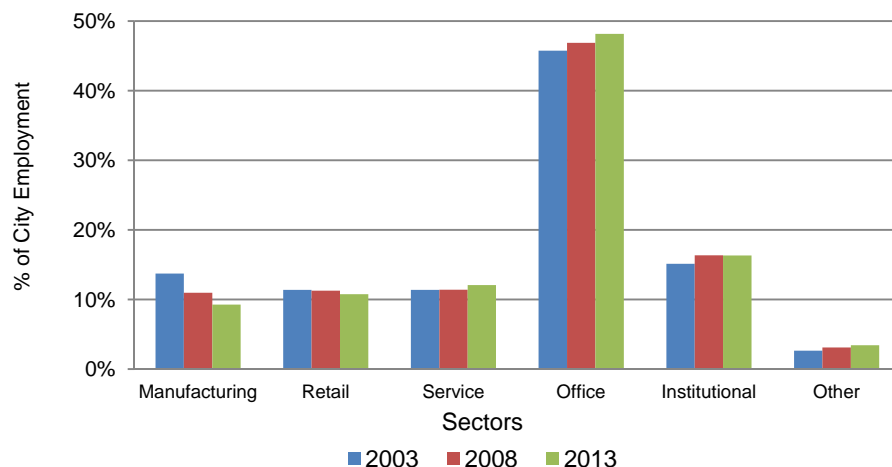


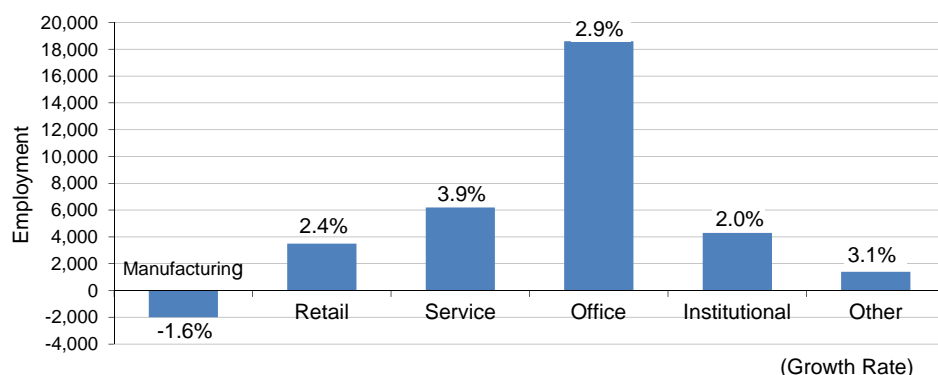
Table 2: Employment by Sector

Employment	Total Number of Employees				Net Change	Growth Rate %	Net Change	Growth Rate %	Net Change	Growth Rate %
	2003	2008	2012	2013						
					2003-2013		2008-2013		2012-2013	
Manufacturing	172,110	143,780	128,220	126,190	-45,920	-26.7%	-17,590	-12.2%	-2,030	-1.6%
Retail	142,600	147,770	143,310	146,810	4,210	3.0%	-960	-0.6%	3,500	2.4%
Service	142,650	149,580	158,300	164,510	21,860	15.3%	14,930	10.0%	6,210	3.9%
Office	573,470	614,660	638,080	656,680	83,210	14.5%	42,020	6.8%	18,600	2.9%
Institutional	189,710	214,360	218,420	222,720	33,010	17.4%	8,360	3.9%	4,300	2.0%
Other	33,150	40,700	45,140	46,640	13,490	40.7%	5,940	14.6%	1,500	3.3%
<b>Total</b>	<b>1,253,690</b>	<b>1,310,850</b>	<b>1,331,470</b>	<b>1,363,550</b>	<b>109,860</b>	<b>8.8%</b>	<b>52,700</b>	<b>4.0%</b>	<b>32,080</b>	<b>2.4%</b>

\* Numbers have been rounded to the nearest ten. Totals may differ from sum of full-time and part-time employment.

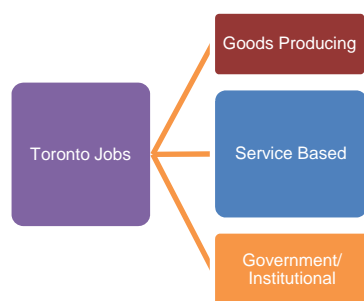


**Figure 3: Change in Total Employment by Sector, 2012-2013**



The greatest rate of increase occurred in the 'Other' sector; the City's smallest sector. The 'Other' sector includes entertainment venues, community and recreation uses. This sector grew by 40.7 % or by 13,490 jobs over the decade, representing 46,640 of Toronto's jobs in 2013. By contrast, since 2003 the Manufacturing sector continued to decline, transforming from what was once Toronto's second *largest* employment sector into Toronto's second *smallest* sector. This sector has shrunk from 172,110 jobs in 2003 to 126,190 jobs in 2013. This is a loss of 45,920 Manufacturing jobs in the last ten years shrinking this sector 26.7%.

## Employment by NAICS Sector



In 2011, City Planning undertook to incorporate the North American Industry Classification System (NAICS) into the data collection process of the Toronto Employment Survey. NAICS was established by Statistics Canada and the statistics agencies of Mexico and the United States to provide a coding standard that allows for data analysis and

comparison across municipal, provincial and national boundaries. NAICS coding is extremely detailed and highly specific. Determining the precise industrial classification of individual business establishments requires rigorous training, standards and discipline.

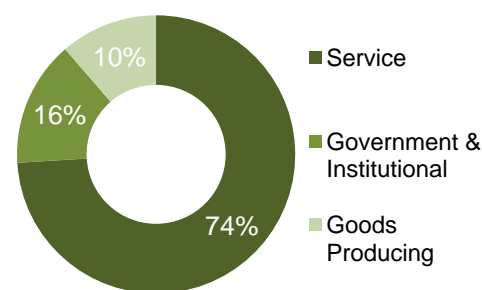
This third year of assigning complete NAICS 2007 codes to each business establishment in the City of Toronto was very successful with 99.9% of businesses assigned a full 6-digit code; 101 establishments remained un-coded.

Coding the data to the lowest, most detailed coding enables it to be aggregated to higher levels during analysis and when making comparisons. The NAICS coding for establishments is now quite stable, enabling comparisons over time as well as comparisons to other municipalities in Canada and elsewhere.

At the broadest level of analysis, NAICS categories can be broken down into three major industries: Goods Producing, Service Based and Government/Institutional (see Figure 4).

More than three quarters (74.0%) of all jobs in the City are in Service-Based Industries while 16.5% of employment is in Government/-Institutional-Based industries. The remaining 10.0% of jobs in the City are in Goods-Producing

**Figure 4: 2013 Employment by NAICS Industry Sector**



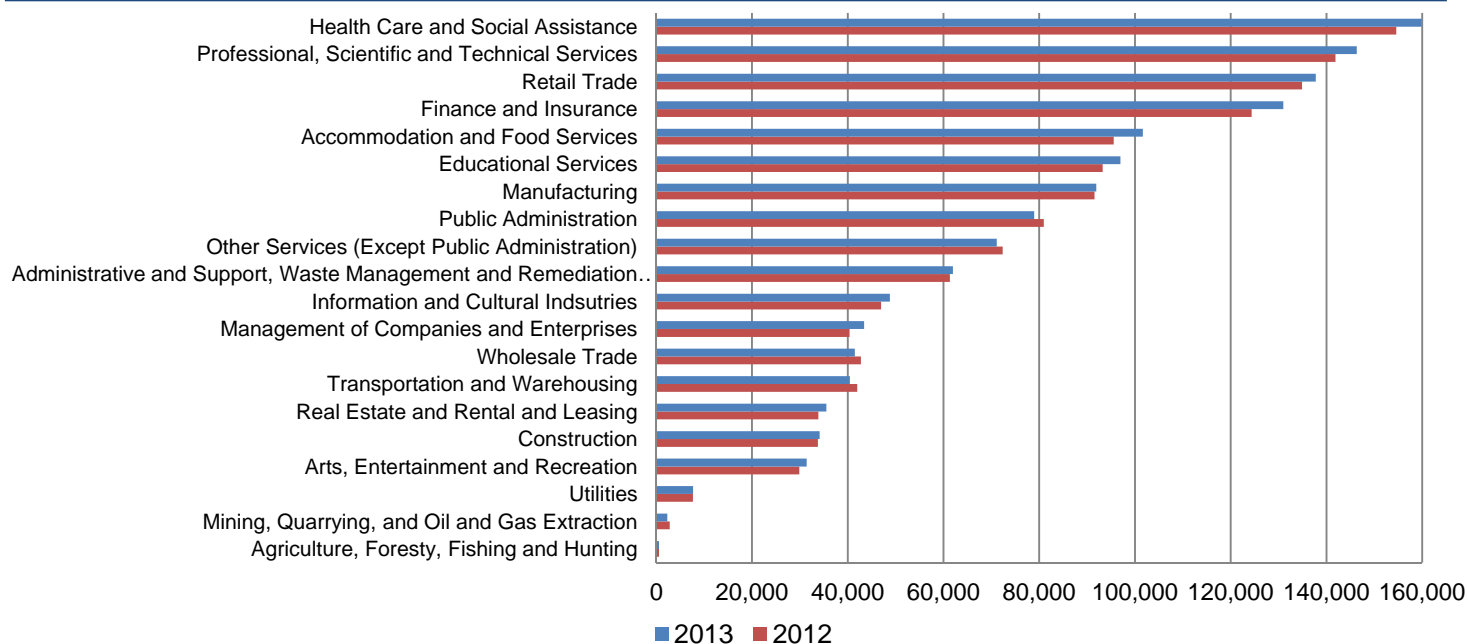
industries. The Service- Based Industries grew by 2.9% or 28,180 jobs. Goods Producing Industries grew by 0.2% or just 320 jobs in 2013.

NAICS classifies the economy into 20 major sectors. In 2013, 50% of all jobs in Toronto fell into the top five NAICS sectors, indicating that while Toronto's economy is varied there is a large concentration in certain fields. The top five categories are: Health and Social Assistance; Professional, Scientific and Technical Services; Retail Trade; Finance and Insurance, and Accommodation and Food Services.

Over 2013, the five largest sectors remained the same (see Figure 5). The Health and Social Assistance category remained the largest NAICS category with 159,900 employees comprising 11.7% of employment. This sector is followed closely by the Professional, Scientific and Technical Services sector with 146,300 jobs or 10.7% of all employment.

Over 2013, the Management of Companies and Enterprises sector saw the greatest growth with a 7.6% increase. Other significant gains were seen in the Accommodation and Food Services sector (6.4%), the Finance and Insurance sector (5.3%), and the Arts, Entertainment and Recreation sector (5.1%). The largest loss was seen in Mining, Quarrying and Oil and Gas Extraction (-17.5%) with 490 jobs lost.

Figure 5: 2013 Employment by NAICS Sector



## The National Household Survey and Other Employment Surveys

Employment forecasts rely on a consistent and long-running set of historical demographic and employment data from which to discern trends that may extend into the future. Counts of employment by place of work were previously a product of the now discontinued long-form Census.

In 2013, the initial employment counts became available from the new voluntary National Household Survey (NHS) of Statistics Canada. This survey was conducted in conjunction with the 2011 Census but was not compulsory, thus it has different response rates and its data may not be comparable to previous Census results. In order to evaluate this new data source, the results were compared with Statistics Canada's Labour Force Survey (LFS) and with the City's Employment Survey. The Toronto Employment Survey captures employment at business establishments and thus captures a large majority of the City's employment at nearly 74,800 locations.

The Employment Survey does not capture work at home and some types of employment with no usual place of work. By comparison to the 1996, 2001 and 2006 Censuses the Toronto Employment Survey has consistently captured between 95% and 97% of all employment in the City (see Figures 6 and 7).

In 2011, the Toronto Employment Survey recorded 48,180 *more* jobs than the National Household Survey, which is a highly unexpected outcome. Given that the Census and NHS record types of employment that the Toronto Employment Survey does not, it is not probable for the Employment Survey to capture all the employment that the NHS should have captured, and highly unlikely that it would capture *more* employment.

The preliminary results from the NHS show a marked drop in the total number of jobs by comparison to the 2006 Census, recording a loss of 5.0% or 67,390 jobs between 2006 and 2011. Conversely, the Toronto Employment Survey is reporting an increase in the total number of jobs in Toronto between 2006 and 2011, a growth of 3.1% and 39,310 jobs.

As a benchmark, the NHS results can be compared to the Statistics Canada's Labour Force Survey. The LFS is a monthly national survey which has used the same questionnaire since 1997. The LFS captures employed workers in the City but not all of its jobs. However, many of those jobs are filled by workers from the rest of the

Figure 6: Total Employment Captured, 1996, 2001, 2006, 2011

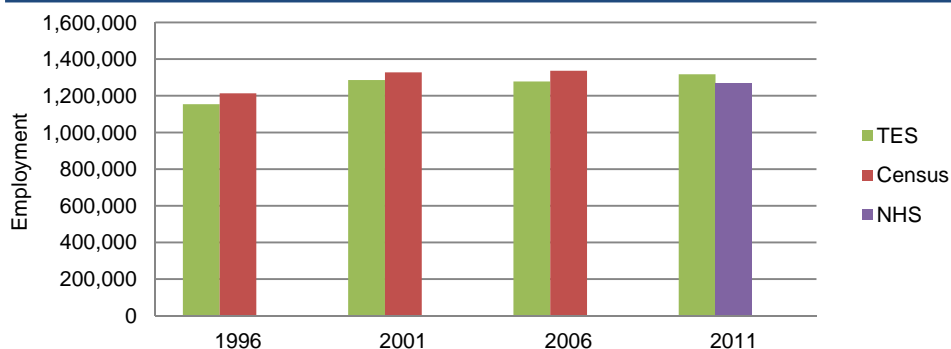
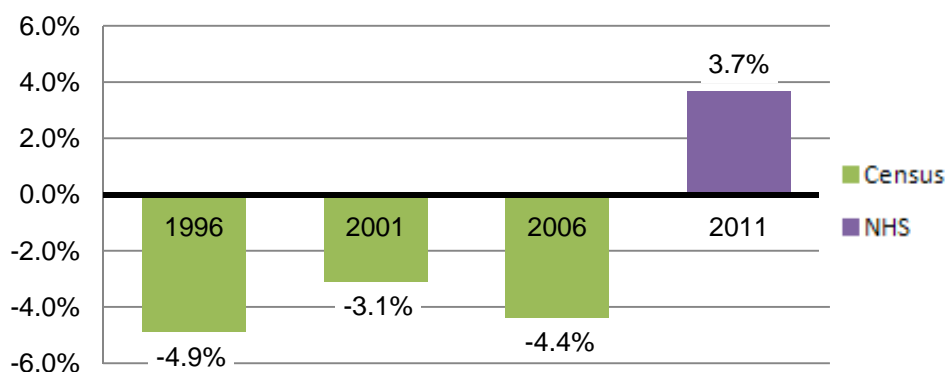


Figure 7: Percentage of Census and NHS Employment Captured



metropolitan area. Thus, the LFS statistics for the City and the Census Metropolitan Area (CMA) are a good indicator of employment in the City. The LFS indicates a slight decline in Toronto's employment and an increase in the CMA's employment between 2006 and 2011. The growth of the City's employment reported by the Toronto Employment Survey is within that range. Consequently, the marked drop in employment suggested by the NHS results is inconsistent with the LFS and the Toronto Employment Survey. The 2011 NHS appears to have *significantly* undercounted employment in the City. The absence of consistent current data of total employment represents a serious weakness in the development of future employment forecasts.

### NHS versus the Toronto Employment Survey by NAICS Sector

When comparing the NHS to Toronto Employment Survey data by NAICS sector, the differences are more notable. While the Employment Survey managed to capture more employment than the NHS, there were NAICS sectors in which the NHS reported much greater employment (and in many cases much less) than the Employment Survey.

The 20-sector breakdown of NAICS sectors in the Toronto Employment Survey data is not consistent with the breakdown of NAICS sectors recorded by the NHS. Of particular note is the Construction sector. The

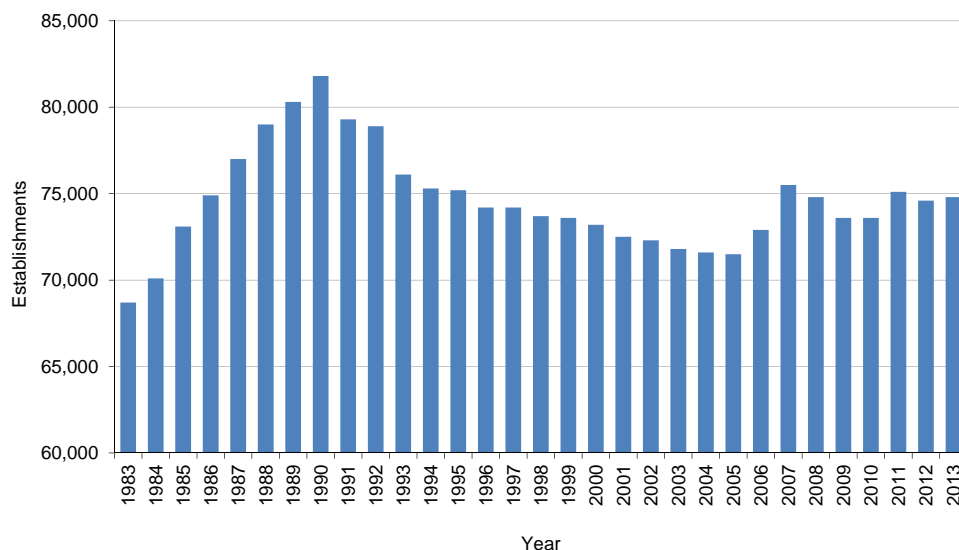
NHS recorded 60,140 Construction jobs in Toronto while the Toronto Employment Survey recorded just 26,610 jobs; less than half the number recorded by the NHS. Over the last three years, the Toronto Employment Survey has recorded Construction employment showing an increase of 7,520 jobs or 28.3% since 2011. Comparatively, the Census recorded a much more consistent job count in the Construction category between 2001 and 2006 with a loss of just 730 jobs or -2.5% over five years.

The 2006 Census count of Construction employment of 28,000 is much more consistent with the 2011 Toronto Employment Survey Construction sector count of 26,600 jobs. Given that the Construction category includes types of employment with no usual place of work, it is expected that the NHS would capture more employment than the Toronto Employment Survey, but similar to that of the 2006 Census. Compared to the Census and the Toronto Employment Survey, there appears to be a significant over-counting of Construction employment by the NHS.

### Number of Establishments

In 2013, the Employment Survey identified 74,800 business establishments in the City. The number of establishments increased by just 200 over the year (see Figure 8). While the percentage of establishments increased only slightly (0.27%) in 2013, employment in the City of Toronto has grown by 31,900 jobs in that same time or 2.4%. This means that the average number of people employed per establishment increased over 2012, to 18.2 versus 17.9 last year. The number of 'large' establishments, those with more than 100 employees, grew by 36 establishments or 1.8% this year. Currently, 2.8% of establishments in Toronto have more than 100 employees.

Figure 8: Total Number of Establishments, 1983-2013



The Office and Manufacturing sectors were the only sectors to lose establishments in 2013. The Office sector lost 200 establishments, shrinking by just 0.7% over 2013. However, employment in the Office sector increased by 18,600 jobs this year (2.9%) indicating that while the number of individual establishments decreased, the number of jobs in this sector continues to grow at a healthy pace.

The Manufacturing sector lost a modest 100 establishments in 2013, shrinking by 2.0%. Manufacturing sector employment has seen a consistent downward trend over the last 10 years, reflecting a similar decline internationally as the North American economy has continued to shift from a goods-producing

economy to a service-based economy.

Toronto's progression reflects an evolving urban economy which remains competitive in a changing national and global market. Nevertheless, the decline of Manufacturing sector employment in Toronto has begun to slow since the economic downturn of 2008, demonstrating a continuing demand for Manufacturing activities in the City. Still a centre for opportunity and industrial innovation, 4.5% of establishments new to the City in 2013 are part of the Manufacturing sector, bringing 1,420 Manufacturing jobs to the City.

The Service sector saw the greatest net gain of establishments in 2013,

adding 300 establishments or 1.7%, totaling 18,200 establishments in 2013. Over the last decade, the number of Service sector establishments has grown by 9.0% or 1,500 establishments.

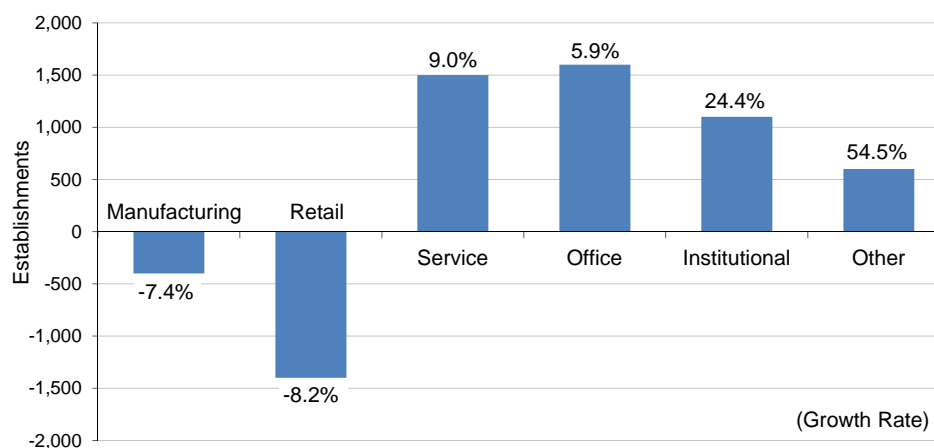
Since 2003, the Retail sector has lost 1,400 establishments, down by 8.2% to 15,700, the greatest decline by any sector over the period (see Figure 9). Over the last five years, the Retail sector outpaced the Manufacturing sector's rate of establishment loss, losing 1,000 more establishments than the Manufacturing sector. In 2013, the number of Retail establishments stabilized with 15,700 establishments. Unlike the Manufacturing sector, Retail sector employment has continued to grow over the decade; increasing the total number of jobs in the sector by 2.9% and 4,200 jobs. The Retail sector has experienced an increasing average number of employees per establishment.

In 2003, an average Retail store employed 8.3 employees whereas in 2013, on average, 9.4 employees were employed per establishment. This increase can even be seen over the last year where the average number of employees per Retail store increased from 9.1 employees to 9.4 employees. This reflects the continued growth of larger retail formats.

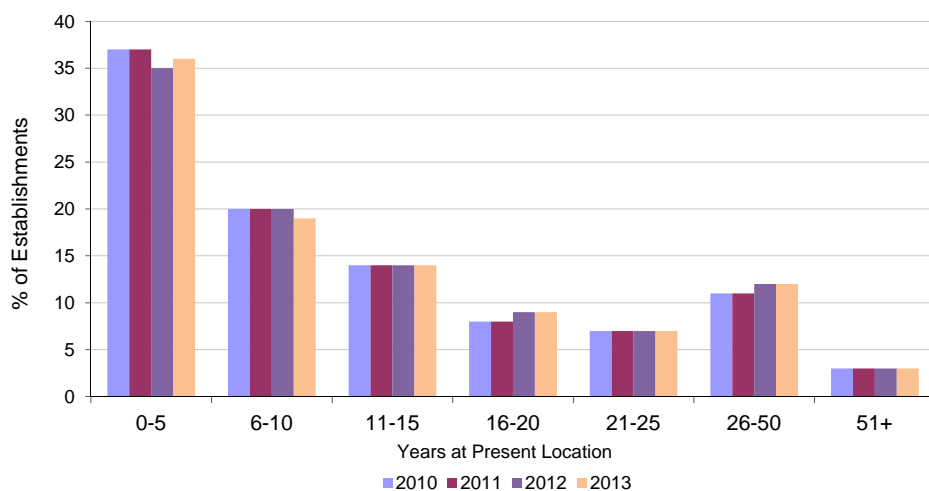
## Longevity

Despite the unsettled global economic conditions, Toronto remains an attractive place for new start-ups and for business to relocate from elsewhere. In 2013, 36.2% of Toronto's business establishments were 5 years old or younger. They comprised the largest number of establishments by length of tenure. This is a small increase over 2012 of 0.8% or 690 establishments (see Figure 10). The proportion of establishments in the same location for five years or less has declined

**Figure 9: Change in Number of Establishments, 2003-2013**



**Figure 10: Longevity of Existing Establishments**





since 2008 from 39.4% in 2008 to 36.2% in 2013.

The percentage of establishments present between eleven and fifteen years in the same location has remained consistent since 2009 between 13.3% and 14.4%. The proportions of establishments have been well established in Toronto for sixteen years or more stands at 30.4% or 22,700 establishments. This reflects the long-run stability of the local economy despite recessions, economic slumps and continued expansion of employment in the areas outside the City. This proportion has grown by 3.3% or 2,450 establishments during the past five years.

Nearly 15% of establishments have operated at their present location for over 25 years, showing a great degree of stability in the City.

## New Establishments in the City

The 2013 Toronto Employment Survey identified more than 4,340 establishments that were new to the City, accounting for 36,990 jobs (see Table 3). In 2013, 5.8% of establishments were new to Toronto. This number is much greater than the 3,400 establishments that chose to locate in Toronto the previous year. It should be noted that these establishments were not necessarily all new business start-ups, but also includes firms relocating from outside the City or new locations of multi-location firms such as banks and coffee shops.

Of the 4,340 newly located establishments, more than half (52.5%) were located in the Downtown and in the Employment

Districts and employment-related lands, with 970 and 1,310 establishments respectively, while 190 establishments were in the Centres and the balance of 1,870 establishments were found elsewhere in the City (see Figure 11).

The greatest number of new establishments in Toronto are located in the Office sector and account for 39.0% of all new establishments in 2013. The Service sector followed with 24.7% of new establishments (see Figure 12). Retail Sector establishments represented 18.9% of new establishments, and 4,640 Retail jobs. The remaining 17.4% of new establishments are located in the Manufacturing, Institutional and Other sectors, demonstrating the variety of the types of establishments the City attracts and contributing to Toronto's overall economic health.

Table 3: New Establishments, 2008-2013

Location	2007	2008	2009	2012	2013
Centres	220	260	270	170	190
Downtown	980	830	820	760	970
Employment District	970	1,120	960	1,100	1,310
Rest of the City	1,680	1,750	1,770	1,380	1,870
<b>City Total</b>	<b>3,850</b>	<b>3,960</b>	<b>3,820</b>	<b>3,410</b>	<b>4,340</b>

Sector	2007	2008	2009	2012	2013
Manufacturing	172	150	170	180	200
Retail	867	769	770	630	820
Service	954	999	930	910	1,070
Office	1,525	1,267	1,393	1,380	1,690
Institutional	208	151	223	180	330
Other	124	620	338	120	230
<b>City Total</b>	<b>3,850</b>	<b>3,956</b>	<b>3,824</b>	<b>3,400</b>	<b>4,340</b>

\*Totals differ due to rounding to the nearest 10.

Figure 11: New Establishments by Location, 2013

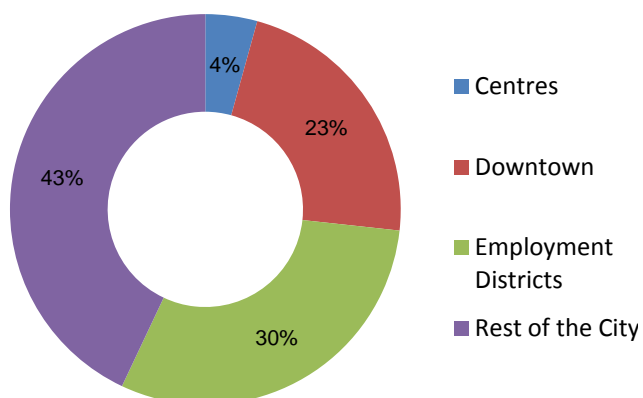
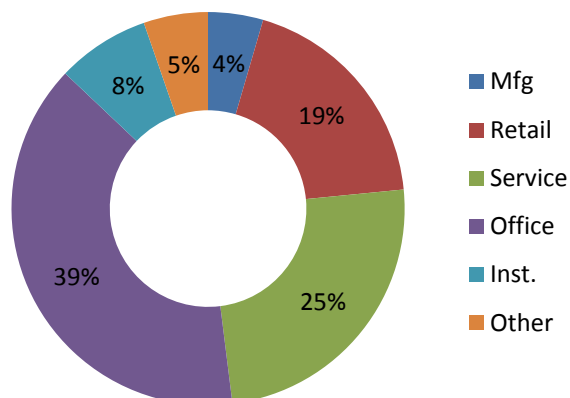
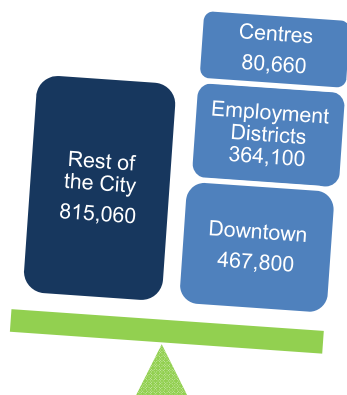


Figure 12: New Establishments by Sector, 2013



## The Downtown and the Centres



The strength of the regional economy is evident by the concentration of jobs in the Downtown and the four Centres identified in the Official Plan. Downtown Toronto is the largest employment area in the Greater Golden Horseshoe. The Downtown and Centres are critical to the City's growth management strategy as attractive mixed use settings for a diverse range employment and residential growth, making them, and Toronto a popular place to live, work, and do business. Map 1 shows the locations and boundaries of the Downtown and Centres, as outlined in the City's Official Plan.

### Downtown

In 2013, one in every three jobs in Toronto (34.3%), were located in the Downtown, employing 467,820

people (see Table 4). Employment in the Downtown increased 4.7% or 20,980 jobs over 2013 (see Figure 13). This is a 10.1% growth (42,930 jobs) over five years. The Downtown continues to attract new establishments. In 2013, 23.0% of new Toronto business establishments chose to locate in Toronto's Downtown.

In the Downtown, 66.5% of jobs are in the Office sector. The next largest sector is Institutional with 12.5% of employment. The smallest sector is the Manufacturing sector, representing just 0.9% of employment in the Downtown. The Office sector grew by 13,200 jobs this year or 4.3%, and by 34,795 jobs over the last five years, or 12.6%. Since 2008, all sectors have experienced some growth with the exception of the Manufacturing sector which lost 800 jobs in the last five years shrinking 15.7%. The Other sector, which includes entertainment venues, community and recreation uses, is the fastest growing sector, increasing by 15.1% over the last five years. The Service sector has also shown strong growth, adding 5,300 jobs or 12.2% in the Downtown.

### The Centres

In total, the Centres are home to 80,670 jobs, representing 5.9% of employment in the City. The Centres grew by 2,810 jobs in the last year (3.6%). Over the last decade, the Centres have grown by 14.0% and

9,910 jobs. Over the last five years, the Centres have grown considerably, increasing by 8.5% and 6,330 jobs (see Figure 14). Employment is predominantly Office-related with more than three quarters of all employment in this sector (see Figure 15).

### North York Centre

North York Centre has the largest concentration of employment outside of the Downtown. The Centre is home to 35,350 jobs, representing 2.6% of jobs in the City. The Office sector is by far the predominant sector in North York Centre, representing 82.6% of jobs, totalling 29,210. Over 2013, the Office sector shrank by 2.8%, losing 840 jobs and declining for the fourth consecutive year. Over the last five years however, the Office sector has grown by 2.5% adding 710 jobs.

Over the last five years, the Centre has grown by 740 jobs, even though 710 jobs were lost this past year. Only the Service and Institutional sectors experienced growth in 2013 gaining 8.9% and 5.2% respectively. However, this resulted in growth of just 260 jobs between the two sectors as these sectors are quite small in North York Centre.

### Yonge-Eglinton

Yonge-Eglinton Centre is the second largest Centre in Toronto. The Centre contains 19,760 jobs representing

**Table 4: Total Employment in the Centres and Downtown, 2008-2013**

	2008	2009	2010	2011	2012	2013	2008-2013		2012-2013	
							Net Change	% Change	Net Change	% Change
Downtown	424,890	420,460	432,810	441,920	446,840	467,820	42,930	10.1%	20,980	4.7%
North York Centre	34,610	34,650	38,790	36,520	36,060	35,350	740	2.1%	-710	-2.0%
Yonge-Eglinton	15,440	15,540	15,840	16,820	17,740	19,760	4,320	28.0%	2,020	11.4%
Scarborough Centre	13,850	14,190	14,700	15,030	15,400	16,870	3,020	21.8%	1,470	9.5%
Etobicoke Centre	10,440	9,850	9,190	8,840	8,660	8,690	-1,750	-16.8%	30	0.3%
Downtown and the Centres	499,230	494,690	511,330	519,130	524,700	548,490	49,260	9.9%	23,790	4.5%
Rest of City	802,390	816,160	781,860	779,170	792,630	815,060	12,670	1.6%	22,430	2.8%
<b>City Total</b>	<b>1,301,620</b>	<b>1,310,850</b>	<b>1,293,190</b>	<b>1,298,300</b>	<b>1,317,330</b>	<b>1,363,550</b>	<b>61,930</b>	<b>4.8%</b>	<b>46,220</b>	<b>3.5%</b>

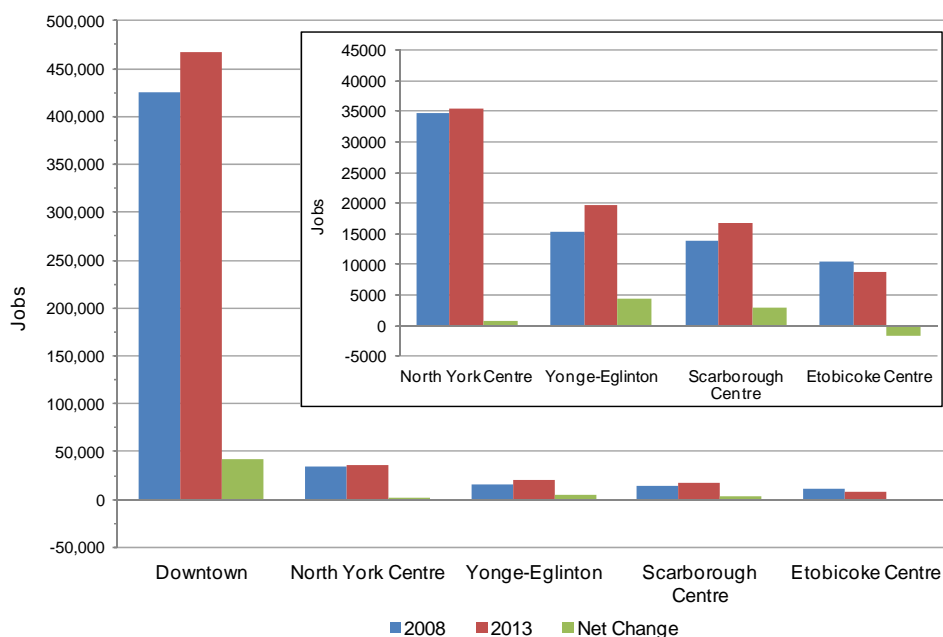
1.5% of employment in Toronto. Employment in this Centre has consistently increased over the last five years, growing by 4,320 jobs or 28.0% since 2008. Yonge-Eglinton has seen the greatest employment growth since 2007 of all the Centres as well as the greatest employment growth over the last year.

In the last year alone, the Yonge-Eglinton Centre has increased its number of jobs by 2,020, growing by 11.4%. Employment in the Yonge-Eglinton Centre is overwhelmingly Office-related, with 8 out of every 10 jobs in this sector (80.6%). Over the last five years, the Office sector has consistently increased in size, growing an impressive 37.5% over five years and 14.2% in the last year alone. Only the Office and Institutional sectors achieved employment growth in the last year, with all other sectors showing modest losses since 2012.

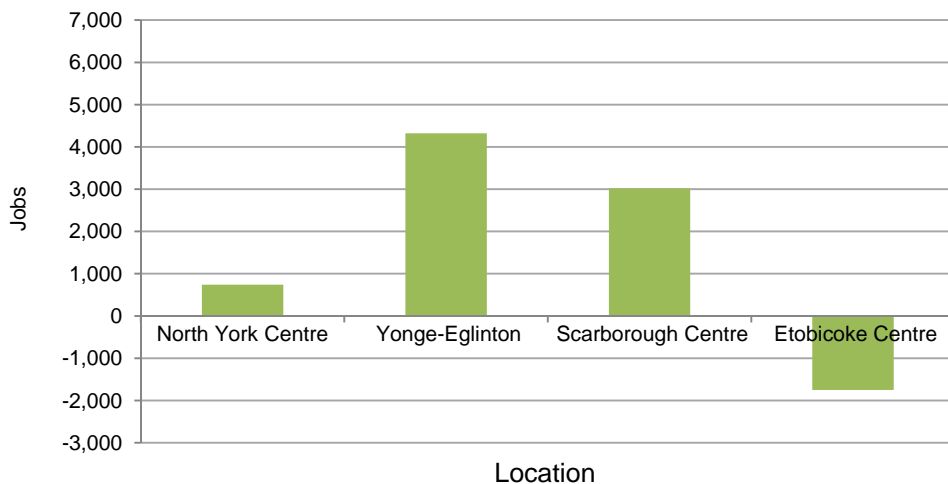
### Scarborough Centre

Scarborough Centre contains 16,870 jobs, representing 1.2% of employment found in Toronto. In 2013, Scarborough Centre grew by 9.5%, gaining 1,470 jobs and has enjoyed consistent growth over the last five years, weathering the recession remarkably well. Since 2008, the Centre has gained 3,020 jobs, growing 21.8%. The majority of employment in Scarborough Centre is Office-related. However, unlike North York and Yonge-Eglinton Centres, Scarborough Centre, has greater sectoral diversity. The Office sector in Scarborough represents 57.2% of jobs, followed by the Retail sector with 24.0% of jobs in the Centre. Both sectors have seen consistent growth over the last five years. The Office sector increased 51.4%, adding 3,280 jobs. In 2013, every sector saw growth with the exception of the Service sector which remained stable with neither losses nor gains.

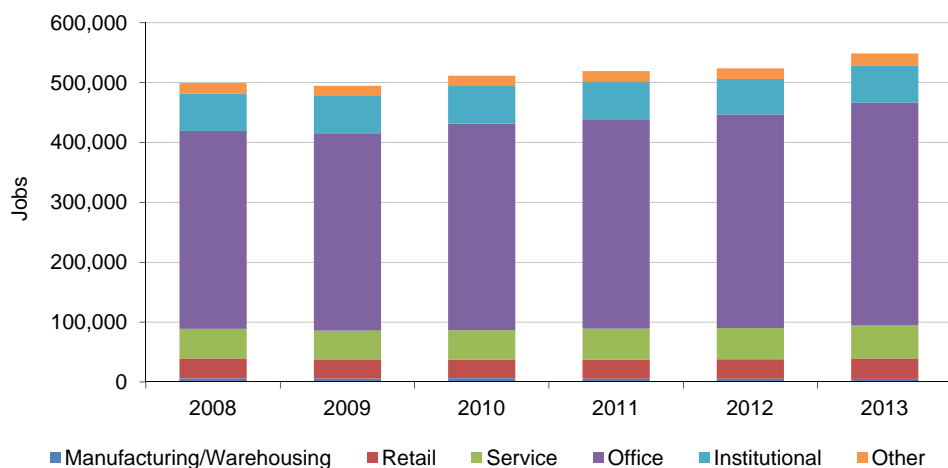
**Figure 13: Employment Change in Downtown and Centres 2008-2013**



**Figure 14: Net Change in Centres Employment 2008-2013**



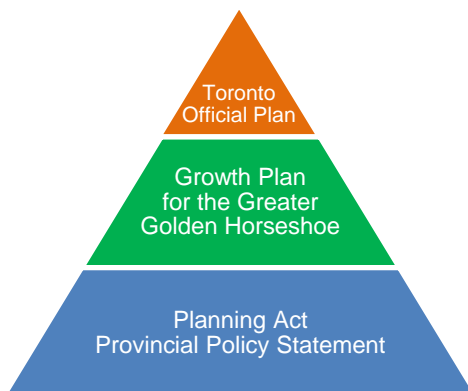
**Figure 15: Total Employment in the Downtown and Centres by Six Sectors, 2008-13**



## Etobicoke Centre

Etobicoke Centre is the smallest Centre in Toronto. It is home to 8,690 jobs, representing 0.6% of employment in Toronto. Over the last five years, the Centre has lost 1,750 jobs, shrinking 16.8% since 2008, and added 30 jobs for the first time in 2013. This decline in jobs is attributed to downsizing by a number of businesses in the Office, Service, and Retail sectors, all of which have shrunk between 19% and 21% since 2008. Similar to Toronto's other Centres, employment in this Centre is dominated by the Office sector, with nearly 7 out of every 10 jobs (69.4%) and totalling 6,030 of jobs found in Etobicoke Centre.

## The Importance of Employment Lands



*Places to Grow is the Ontario government's program to plan for growth and development in a way that supports economic prosperity, protects the environment and helps communities achieve a high quality of life across the province. Through Places to Grow, we develop regional growth plans that guide government investments and policies. - Ontario Ministry of Infrastructure<sup>8</sup>*

<sup>8</sup> Ontario. Ministry of Infrastructure. *Places to Grow*. Web page at <https://www.placestogrow.ca/index.php>, last updated February 14, 2014.

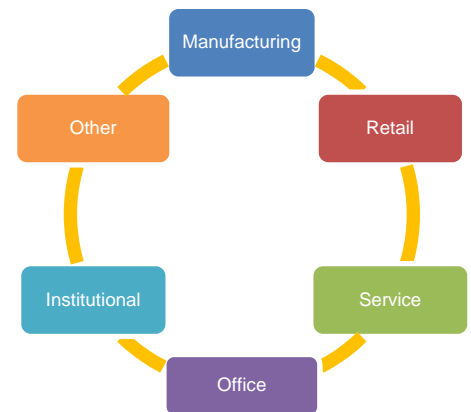
The Growth Plan for the Greater Golden Horseshoe was amended in 2013 with revised forecasts. The City of Toronto is forecasted to reach employment of 1,680,000 jobs by 2031 and 1,720,000 jobs by 2041. This anticipates that the City will add approximately 7,000 jobs per year over 40 years (2001-2041) increasing the employment base by 19.4%.<sup>9</sup>

Employment Districts and other designated employment areas are of particular importance to Toronto's economic health. Currently, 21,050 establishments are located in Toronto's Employment Districts. This accounts for more than a quarter (28.2%) of all business establishments in the City and accounts for 393,520 jobs, representing 28.9% of all jobs in Toronto. Further, 82.0% of all Manufacturing establishments reside in Employment Districts, accounting for 92.3% of all Manufacturing jobs in Toronto. In the last year, 100 Manufacturing establishments closed their doors in Toronto, and with them 2,000 Manufacturing jobs were lost from Toronto.

The continuous loss of Manufacturing sector jobs in Toronto and the conversion of the land they once occupied highlights the need to protect employment lands for other employment uses. The presence of sensitive uses, such as residential uses in an Employment District can result in a destabilization of an Employment District, resulting in further losses of Manufacturing establishments. It is the diversity of Toronto's economy that has enabled the City to weather the recent recession reasonably well. The protection of Employment Districts is imperative.

<sup>9</sup> Ontario. Ministry of Infrastructure. *Growth Plan for the Greater Golden Horseshoe*, Schedule 3, 2006.

## Employment Districts and Employment-Related Lands



Employment Districts and other Employment Related Lands are characterized by manufacturing, warehousing and product assembly activities as well as commercial business parks. These are regionally and globally competitive locations for national and international business and are areas for business formation. They provide a broad range of job opportunities for Toronto residents and the regional labour force.

Map 2 shows the location, boundaries and sectoral breakdowns of the Employment Districts identified in the City's Official Plan at the time of the 2013 Toronto Employment Survey. The lands represented by the Employment Districts are structural elements of Toronto's economic future in order not only ensure a stable environment for investment but also to maintain and grow the City's revenue base.

## Employment Districts

Toronto's Employment Districts contain 393,530 jobs; comprising 28.9% of all jobs found in the City (see Table 5). In 2013, 21,050 establishments were located in Toronto's Employment Districts; representing 28.2% of all businesses in Toronto.



The Employment Districts continued to attract new businesses with 30.3% of new businesses in Toronto in 2013 choosing to locate in Employment Districts. Of those 1,310 new establishments in Employment Districts, 160 were Manufacturing establishments. In fact, 80% of new Manufacturing establishments in Toronto chose to locate in Employment Districts.

Employment Districts are particularly important to the Manufacturing sector with 82.0% of all Manufacturing establishments in the City residing in Employment Districts, representing 92.3% of all Manufacturing jobs. Toronto lost 100 Manufacturing establishments and 2,000 Manufacturing jobs, or 1.6% of the sector. Thirty percent of all Employment District jobs are in the Manufacturing sector, totalling 116,450 jobs. This sector declined by 15,480 jobs over the last five years, but lost just 1,230 (1.0%) since 2012 (see Figure 16).

Nearly a quarter (24.4%) of all Office sector employment resides in the Employment Districts with 160,050 jobs. The Office sector is now the largest sector in the Employment

Districts representing 40.7% of all District Employment. The Office sector saw a net increase of 2,830 jobs or 1.8% over 2013. In the last five years, the Office sector has lost some 3,730 jobs, declining by 2.3%.

The third largest is the Service sector, representing 12.5% of District employment, and is followed closely by the Retail sector comprising 10.7%. The Service sector has continued to grow adding 700 jobs last year and 3,100 jobs or 6.7% over the past five years.

The Retail sector grew by 820 jobs over the last year or 2.0%. Over the last five years, the Retail sector has been relatively stable, losing just 0.3% of employment or 110 jobs, and yet added 820 jobs last year. The Institutional and Other sectors are the smallest sectors in the Employment Districts with 15,850 and 10,040 jobs respectively. Both of these sectors saw employment growth over 2013, adding a combined 1,580 jobs to the Employment Districts.

The following section presents trends of the Employment Districts in descending order of employment base

(see Figure 17). Employment Districts by sector for 2010 to 2013 are profiled in Table 6 on page 19.

## 1. South Etobicoke



South Etobicoke is the largest Employment District in Toronto and is dominated by the Office and

Manufacturing sectors. It is home to 41,080 jobs accounting for 10.4% of all Employment District employment in the City. South Etobicoke saw modest employment gains in 2013. However, the District lost employment over the last five years, losing 2,920 jobs, shrinking 6.6%. In 2013, the District experienced significant growth, gaining 700 jobs and growing 1.7% in just one year. The Manufacturing sector remains the largest sector in the District representing 37.7% of employment. In 2013, this sector continued its downward trend, losing 510 jobs while gains were made in the other five sectors. The Office sector grew 4.3% adding 500 jobs in 2013. This sector gained 670 jobs over the last two years, recovering from the sharp decline of 14.2% in 2011.

**Table 5: Total Employment in the Employment Districts, 2008-2013\***

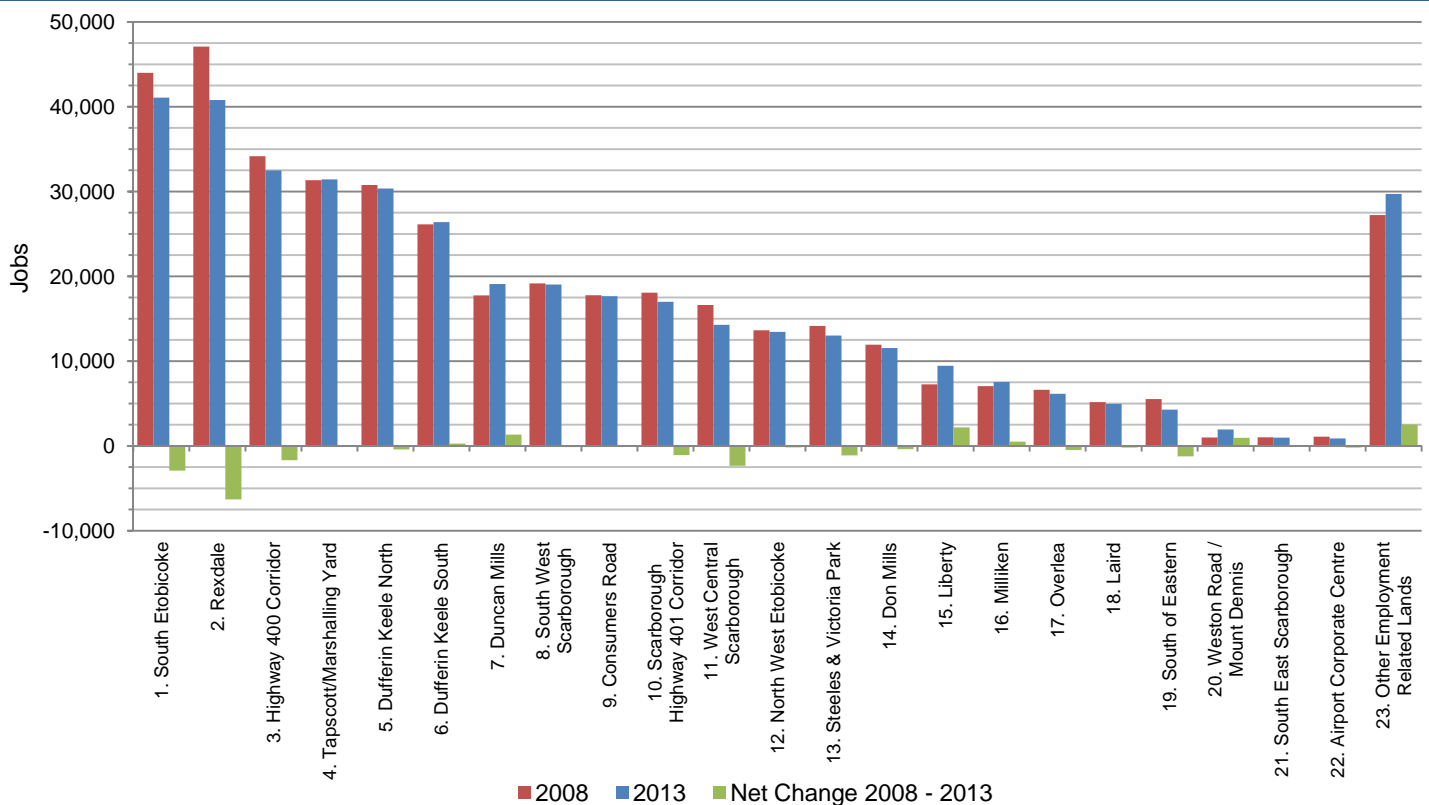
	2008	2009	2010	2011	2012	2013	2008-2013		2012-2013	
							Net Change	% Change	Net Change	% Change
1. South Etobicoke	44,000	43,180	40,960	39,820	40,390	41,080	-2,920	-6.6%	690	1.7%
2. Rexdale	47,090	44,690	40,000	38,940	39,510	40,790	-6,300	-13.4%	1,280	3.2%
3. Highway 400 Corridor	34,170	32,380	31,470	32,810	33,540	32,490	-1,680	-4.9%	-1,050	-3.1%
4. Tapscott/Marshalling Yard	31,340	30,290	30,420	30,950	30,960	31,440	100	0.3%	480	1.6%
5. Dufferin Keele North	30,780	29,500	31,540	32,430	31,080	30,350	-430	-1.4%	-730	-2.3%
6. Dufferin Keele South	26,130	24,320	23,990	24,610	25,100	26,400	270	1.0%	1,300	5.2%
7. Duncan Mills	17,750	17,780	17,900	17,560	18,580	19,090	1,340	7.5%	510	2.7%
8. South West Scarborough	19,170	17,830	18,020	18,990	18,670	19,030	-140	-0.7%	360	1.9%
9. Consumers Road	17,770	19,790	19,040	18,140	17,490	17,660	-110	-0.6%	170	1.0%
10. Scarborough Highway 401 Corridor	18,080	17,410	16,080	16,670	16,820	16,990	-1,090	-6.0%	170	1.0%
11. West Central Scarborough	16,610	15,060	15,490	15,360	14,730	14,270	-2,340	-14.1%	-460	-3.1%
12. North West Etobicoke	13,630	13,160	12,810	12,820	13,010	13,450	-180	-1.3%	440	3.4%
13. Steeles & Victoria Park	14,140	13,260	12,420	12,500	13,270	13,020	-1,120	-7.9%	-250	-1.9%
14. Don Mills	11,940	11,380	11,910	11,390	11,990	11,550	-390	-3.3%	-440	-3.7%
15. Liberty	7,260	7,710	7,550	8,140	8,300	9,450	2,190	30.2%	1,150	13.9%
16. Milliken	7,050	7,140	7,070	7,430	7,300	7,550	500	7.1%	250	3.4%
17. Overlea	6,620	6,060	6,270	6,090	6,220	6,150	-470	-7.1%	-70	-1.1%
18. Laird	5,160	4,380	4,680	4,550	4,390	4,960	-200	-3.9%	570	13.0%
19. South of Eastern	5,520	5,080	4,650	4,000	3,970	4,280	-1,240	-22.5%	310	7.8%
20. Weston Road/Mount Dennis	990	1,720	1,730	1,650	1,850	1,940	950	96.0%	90	4.9%
21. South East Scarborough	1,020	950	970	920	980	980	-40	-3.9%	0	0.0%
22. Airport Corporate Centre	1,080	1,060	1,040	1,140	1,230	890	-190	-17.6%	-340	-27.6%
23. Other Employment Related Lands	27,220	392,560	385,550	28,780	29,480	29,720	2,500	9.2%	240	0.8%
<b>All Employment Districts</b>	<b>404,520</b>	<b>392,560</b>	<b>385,550</b>	<b>385,690</b>	<b>388,860</b>	<b>393,530</b>	<b>-10,990</b>	<b>-2.7%</b>	<b>4,670</b>	<b>1.2%</b>
Rest of the City	906,330	900,630	912,750	931,640	942,620	970,020	63,690	7.0%	27,400	2.9%
<b>City Total</b>	<b>1,310,850</b>	<b>1,293,190</b>	<b>1,298,300</b>	<b>1,317,330</b>	<b>1,331,480</b>	<b>1,363,550</b>	<b>52,700</b>	<b>4.0%</b>	<b>32,070</b>	<b>2.4%</b>

\* Numbers have been rounded to the nearest ten. Districts are in descending order by size of employment base.

Figure 16: Total Employment in Employment Districts by Six Sectors, 2008-2013



Figure 17: Employment Change In Employment Districts, 2008-2013



The Institutional sector gained just 130 employees but grew by 17.5%, making it the fastest growing sector in South Etobicoke in 2013.

## 2. Rexdale

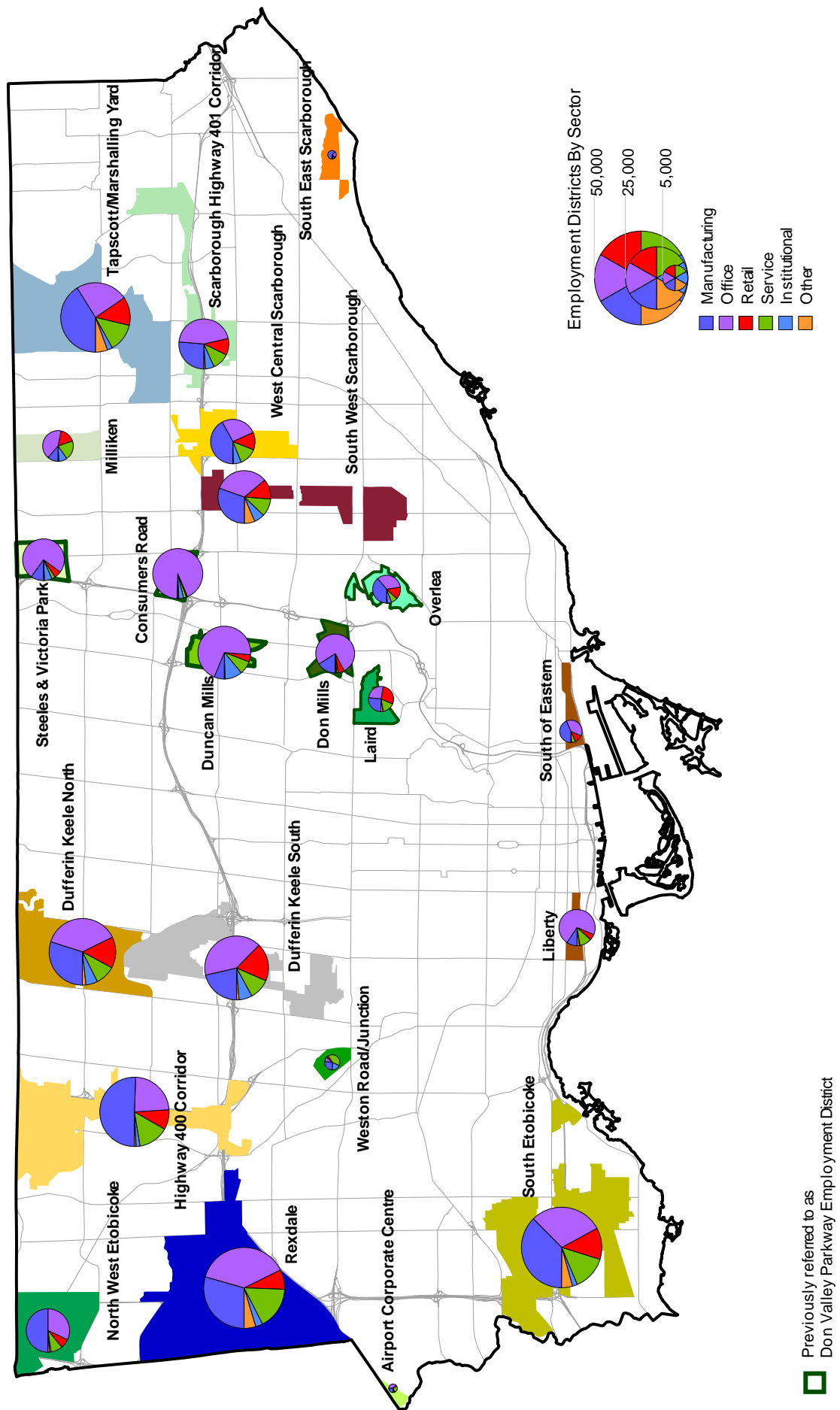


Rexdale is home to 40,790 jobs or 10.4% of employment found in the Employment Districts. It is dominated by both Office and

Manufacturing sectors. In the last five years, this District shrunk by 13.4%, losing 6,300 jobs. This loss has been largely due to some major employers shedding employment but staying in the District. As well, a couple of large firms have moved outside of the City while a few mid-sized firms have gone out of business. For the second consecutive year, employment in Rexdale increased, growing 3.2% and adding 1,280 jobs

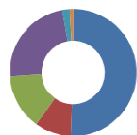
showing a steady recovery after the economic downturn. Similarly, the downward trend in the Office sector has reversed since 2012, which added 1,340 jobs or 9.4% in just one year. Since 2012, the Office sector has become the largest sector in the District, replacing the Manufacturing sector, which has not recovered since the global recession of 2008. The Manufacturing sector continued its

## Map 2: Employment Districts, City of Toronto



downward trend in 2013, declining 4.3% and losing 540 jobs.

### 3. Highway 400 Corridor



The Highway 400 Corridor contains 32,490 jobs or 8.3% of jobs found in the Employment Districts. The

District lost 1,060 jobs or 3.1% of its jobs in the last year. Just over half of all jobs in the District (50.6%) reside in the Manufacturing sector. The Processed Goods subsector makes up more than half of the Manufacturing jobs in the District. The Manufacturing sector declined by 400 jobs this year (2.4%). In the last five years, the sector has experienced a net loss of 1,000 jobs. The Office sector is the second largest sector in the District. Office employment has declined in the last year by 11.4% or 970 jobs; over the last five years the sector as shrunk 1.9%.

### 4. Tapscott/Marshalling Yard



Tapscott/Marshalling Yard is home to 7.7% of the total employment found in Employment Districts, accounting

for 31,440 jobs. District employment has increased 1.6% in the last year, gaining 480 jobs. This District has remained relatively stable over the last five years. The Manufacturing sector is the largest in the District and comprises 4 of every 10 jobs. Over the past five years, Manufacturing employment has declined by 11.4% or 1,670 jobs. However, over 2013 the Manufacturing sector made modest gains in employment, growing by 1.8% or 230 jobs. The Service sector has seen major gains in the last five years, increasing by 38.7% or 1,160 jobs. The Office sector is the second-largest sector in the District and grew by 110 jobs in 2013, showing modest growth after two consecutive years of employment losses.

### 5. Dufferin Keele North



This District contains 30,350 jobs or 8.0% of all jobs in the Employment Districts.

Employment decreased by 730 jobs or 2.4% over the last year. The District has lost only 430 jobs (1.4%) overall since 2008, showing a relatively stable employment count with only small fluctuations over the last five years. The District is led by the Office sector, consisting of 11,450 jobs or 37.7% of District employment, followed by the Manufacturing sector with 9,100 jobs or 30.0% of District employment. In 2013, Office sector employment declined by 10.3% with 1,320 jobs lost while the Manufacturing sector employment grew by 5.8% or 500 jobs. Over the last five years, all sectors lost employment with the exception of the Service and Institutional sectors which grew by 260 and 410 jobs respectively.

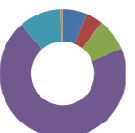
### 6. Dufferin Keele South



This District contains 26,400 jobs and 6.7% of all Employment District jobs. Employment has continued to

grow in 2013 gaining 1,300 jobs and growing by 5.2%. All sectors in the District saw modest increases in employment with the exception of the Service sector which lost 80 jobs. The Office sector continues to be the largest sector in the District, accounting for four out of every ten jobs and 10,800 jobs in total. The sector grew by 620 jobs in 2013. The Manufacturing and Retail sectors are next in size with 5,640 and 5,070 jobs respectively.

### 7. Duncan Mills



The Duncan Mills Employment District accounts for 4.9% of the employment found in the Employment Districts, containing

19,090 jobs. Over the last five years, the District added 1,330 jobs and added just over 510 jobs (2.7%) in the past year. Every sector saw gains in employment for the second consecutive year. The Manufacturing sector saw the largest growth with a 9.9% increase in employment, almost offsetting its decline of 10.8% over the last five years. The Office sector is the dominant sector in the District, comprising 70.1% of all employment.

19,090 jobs. Over the last five years, the District added 1,330 jobs and added just over 510 jobs (2.7%) in the past year. Every sector saw gains in employment for the second consecutive year. The Manufacturing sector saw the largest growth with a 9.9% increase in employment, almost offsetting its decline of 10.8% over the last five years. The Office sector is the dominant sector in the District, comprising 70.1% of all employment.

### 8. South West Scarborough



South West Scarborough contains 4.8% of the employment found in Employment Districts, or 19,030

jobs. In 2013, the District grew by 360 jobs or 1.9%. The District's employment has fluctuated over the last five years with a net loss of 140 jobs or just 0.7%. The Office sector is the largest sector in the District, followed closely by the Manufacturing sector, with 6,350 and 5,820 jobs respectively. All sectors have grown modestly over 2013 with the exception of the Service sector which lost 80 jobs or 3.8%. The Office sector saw the greatest net growth, gaining 260 jobs and growing 4.3%.

### 9. Consumers Road



There are 17,660 jobs in the Consumers Road Employment District, representing 4.5% of all Employment District

jobs. Over the last five years, this Employment District has seen a 0.7% loss in employment, with 120 fewer jobs. In 2013, the District showed modest growth with an additional 170 jobs. Employment in the District is dominated by the Office sector with 9 out of every 10 jobs (93.1%). This sector is dominated by the Business Services and the Finance, Insurance and Real Estate subsectors, together comprising more than half of all Office employment.



## 10. Scarborough Highway 401 Corridor



This District contains 4.3% of the employment found in the Employment Districts, a total of 16,990 jobs, up a modest 180 jobs this year. The District has seen a net loss of 1,090 jobs over the last five years (-6.0 %). While the Office sector remains the largest sector, it is not as prominent as it once was. It now represents 45.0% of the District's employment, down from 53.5% just five years ago and a loss of 2,030 jobs or -21.0%. Meanwhile, the Manufacturing sector remains the second-largest sector and has seen healthy gains in the last five years, adding 1,040 jobs and growing by 30.0%. The Manufacturing sector lost 130 jobs last year. The Service and Retail sectors are the next largest sectors with 1,870 and 1,840 jobs respectively. In the last five years, the Service sector has grown by a modest 90 jobs or 4.8% while the Retail sector has shrunk by 70 jobs or 3.7%.

## 11. West Central Scarborough



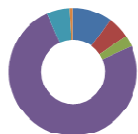
There are currently 14,270 jobs in West Central Scarborough, which amounts to 3.6% of employment within the Employment Districts. Since 2008, employment has declined by 2,340 jobs or 14.1% with 460 jobs lost in 2013 alone. The Manufacturing sector is the largest sector in the District with 6,020 jobs or 42.2% of employment. Over the last five years, Manufacturing employment fell by 2,310 or 27.7%. In 2013, the Manufacturing sector lost 620 jobs or 9.3%. The only sector to experience growth over 2013 was the Office sector, which grew 14.1% or 460 jobs.

## 12. North West Etobicoke



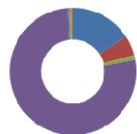
This Employment District is home to 13,450 jobs or 3.4% of all Employment District employment. Over the last five years, the District experienced a loss of 180 jobs or 1.3%, with the Office sector gaining 1,030 jobs or 32.1%. In the past year, the District gained 450 jobs, with the Manufacturing sector accounting for 220 of those jobs. It is also the sector that makes up half of all jobs in the District or 6,750 jobs. Overall, the District made gains in 2013. The Office sector holds 4,250 jobs in the District, and grew by 134 jobs (3.3%) in the past year.

## 13. Steeles/Victoria Park



Steeles/ Victoria Park contains 13,020 jobs or 3.3% of all employment found in Employment Districts. This District lost employment over the last five years, down 1,120 jobs or 7.9% of its 2008 total. While other sectors experienced employment loss, the Retail and Institutional sectors gained 35.1% and 33.6% employment respectively. In 2013, this District lost 250 jobs or 1.9% from 2012. The Office sector represents 74.9% of all employment activity in the District. Finance, Insurance and Real Estate activities comprise 51% of all Office employment. The Office sector is the largest sector in the District, and sustained the largest sectoral loss, of 350 jobs.

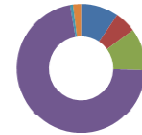
## 14. Don Mills



Don Mills contains 11,550 jobs, representing 2.9% of all Employment District jobs. Over the past five years, while the Office sector experienced an all-time high of 8,830 jobs, the Manufacturing, Retail and Institutional sector suffered record

low employment, with 1,830, 590 and 80 jobs respectively. Within the Office sector, the top five employers are in the Utilities, Personnel Services and Manufacturing subsectors. With the net loss of 3.2% or 390 jobs over the past five years, all sectors experienced job loss except for the Office sector with a 11.6% growth or 920 job gain. In the last year, the District underwent a decrease of 440 jobs or 3.6%.

## 15. Liberty



The Liberty Employment District is home to 9,450 jobs, representing 2.4% of all Employment District jobs. From 2008 to 2013, employment in this District increased by a stunning 2,190 jobs, with the most significant increase of 730 jobs in the Service sector. The Manufacturing sector has dropped steadily over the past five years, with the low of 890 jobs in 2013. In 2013, the District added 1,150 jobs or 13.9 %. Liberty's dominant employment sector is Office with 6,780 jobs or seven in ten jobs in the District. The Business Services subsector represents 3,870 jobs or 57.1% of all Office employment in the District.

## 16. Milliken



The Milliken Employment District contains 7,550 jobs or 1.9% of all Employment District jobs. The majority of employment belongs to the Office sector, with 3,160 jobs or 41.9% of all jobs in the District. This sector gained 250 jobs between 2012 and 2013, increasing by 3.4%. The biggest growth contributor is the Service sector, with 180 jobs added and reaching 1,540 in 2013, its all-time high in five years. The Manufacturing sector continued its downward trend and lost 34.7% of its total employment over the last five years.

## 17. Overlea



The Overlea Employment District represents 1.6% of all employment in the Employment Districts and 6,150 jobs. In

2013, the District experienced a slight drop in employment of 60 jobs or 1.0%. The Manufacturing sector is the largest sector with 2,400 jobs or 39.0% of all jobs in the District. The Processed Goods Processing and Product Assembly are the two subsectors that represent 78.6% of the jobs in the Manufacturing sector. Over the last five years, employment in all of the sectors in Overlea fluctuated with no steady trend of growth or loss, though it lost 460 jobs overall or 7.0% of its jobs.

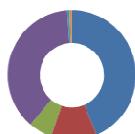
## 18. Laird



The Laird Employment District is home to 4,960 jobs or 1.3% of all employment in the Employment

Districts. Though its employment increased by 13.2% or 580 jobs last year, the District lost 200 jobs, shrinking by 3.9% over the last five years. In 2013, the Retail and Manufacturing sectors were important contributors to the District's job composition, each contributing 28% of all jobs. The Service sector grew by 500 jobs in the past year, totalling 790 jobs. The Rental Services subsector contributed 300 jobs (38.0%) of the Service sector.

## 19. South of Eastern

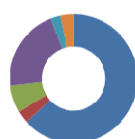


There are 4,280 jobs in the South of Eastern Employment District, which amounts to 1.1% of the total employment

within all Employment Districts. Over the last five years, this District has lost 1,240 jobs, a 22.5% decline, with a drop in employment in all sectors except for the Other sector

which gained 71.4% but just 10 jobs in 2013. The Manufacturing sector is the dominant sector with the most employment, 1,870 jobs or 43.7% and gained 15 jobs in the past year. The Manufacturing sector is almost exclusively represented by the Printing, Reproduction, Data Processing and Sorting subsector with 1,800 jobs, about 96.3% of total Manufacturing employment. The biggest growth contributor in 2013 is the Office sector which added 320 jobs, a growth of 24.6%.

## 20. Weston Road/Mount Dennis



The Weston Road / Mount Dennis Employment District is home to 1,940 jobs, representing 0.5% of all Employment

District jobs. Over five years, employment in this smaller District increased by 960 jobs or 97.3%. Since the economic downturn of 2008, this District has seen healthy and consistent growth in all sectors with the exception of the Office sector which lost 120 jobs. The Service sector is also the largest employment sector in the District, representing 40% of all employment activity in the District and 780 jobs in 2013.

## 21. South East Scarborough



There are 980 jobs in the South East Scarborough Employment District, which amounts to 0.3% of the total

employment within all Employment Districts. The District experienced a decline of 40 jobs or 3.8% between 2008 and 2013. The Manufacturing sector is the largest in the District with 620 jobs. The majority of its jobs are found in the Processed Goods subsector with 340 employees representing 54.5% of Manufacturing employment. Over the past five years, all sectors in the District experienced job growth except for the Manufacturing sector.

## 22. Airport Corporate Centre



The Airport Corporate Centre is part of a much larger "Airport node" associated with Pearson International Airport, most of

which is in the City of Mississauga. It is the District that contains the least number of jobs with 890 jobs, making up only 0.2% of all employment in Toronto Employment Districts. In 2013, the District saw a loss of 350 jobs or 28.1%. Most of the loss is from the Manufacturing sector with a drop of 230 jobs or 51.0%, with just 220 jobs remaining. It is the all-time low in the Manufacturing sector over the last five years. The Office sector is the prevailing sector with 330 jobs or 37.6% of all the jobs in the District.

## 23. Other Employment Related Lands



The Other Employment Related Lands include all other designated employment lands in the City. They

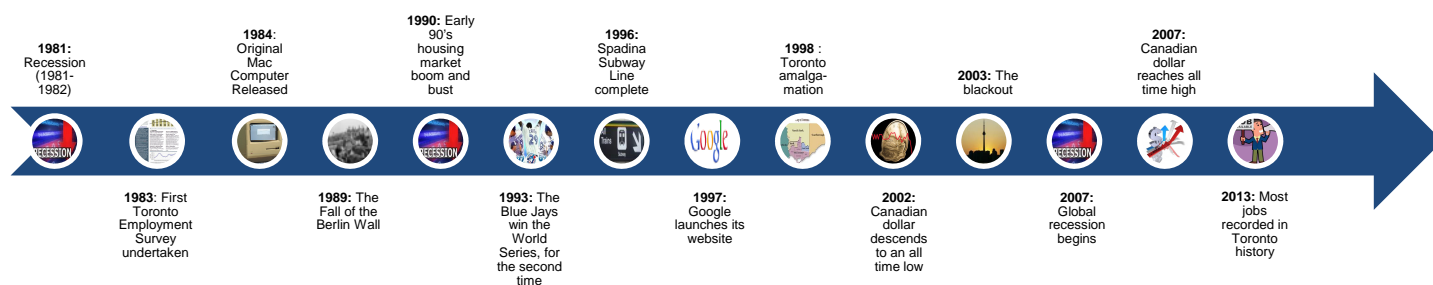
account for 29,720 jobs in the City of Toronto, representing 7.6% of all Employment District jobs. Over 2013, these lands gained 240 jobs or 0.8% while over the last five years these lands gained 2,500 jobs growing by 9.2%. These lands are comprised primarily of Office, Manufacturing and Service sector employment. The Office sector is the largest sector containing 8,960 jobs and representing 30.0% of all jobs in the Other Employment Related Lands. The Office sector has grown by 2,000 jobs over the last five years growing by 28.7% and just 1.9% in the last year. The Manufacturing sector is the second largest sector representing 29.1% of all jobs found in the Other Employment Related Lands. The sector has lost employment over the last five years, shrinking by 6.8%.

**Table 6: Total Employment in Employment Districts by Sector, 2010-2013**

Employment Districts	Sector	Manufacturing				Retail				Service			
		2010	2011	2012	2013	2010	2011	2012	2013	2010	2011	2012	2013
South Etobicoke		16,000	16,420	15,980	15,470	4,340	4,390	5,040	5,210	5,420	5,260	5,450	5,650
Rexdale		13,430	13,310	12,560	12,030	2,540	2,540	2,710	3,200	7,090	6,690	6,750	6,890
Highway 400 Corridor		15,180	15,810	16,840	16,440	3,060	3,180	2,920	3,010	4,670	4,540	4,510	4,560
Tapscott/Marshalling Yard		12,890	12,530	12,710	12,940	4,080	4,270	4,100	4,160	2,910	4,090	4,170	4,180
Dufferin Keele North		8,630	9,050	8,600	9,100	4,720	4,710	4,670	4,600	2,790	2,870	2,870	2,940
Dufferin Keele South		4,920	5,100	5,250	5,640	4,550	4,950	4,880	5,070	2,820	2,830	2,860	2,780
Duncan Mills		940	1,060	1,070	1,180	700	800	800	830	1,300	1,300	1,500	1,550
South West Scarborough		5,650	5,970	5,770	5,820	2,210	2,310	2,270	2,320	2,110	2,070	2,160	2,070
Consumers Road		110	100	40	80	110	130	130	120	380	400	350	350
Scarborough Highway 401 Corridor		3,260	4,580	4,610	4,490	1,760	1,740	1,900	1,840	1,560	1,820	1,840	1,870
West Central Scarborough		6,880	6,630	6,640	6,020	2,000	1,970	1,900	1,830	2,180	2,320	1,920	1,820
North West Etobicoke		7,420	6,410	6,530	6,750	890	870	920	940	1,340	1,120	1,180	1,170
Steeles & Victoria Park		1,520	1,160	1,270	1,290	420	620	710	740	360	360	380	370
Don Mills		2,590	1,950	2,070	1,830	830	750	780	590	160	140	150	140
Liberty		1,070	1,050	950	890	360	430	460	510	1,050	900	900	1,010
Milliken		1,010	930	920	860	1,220	1,260	1,210	1,250	1,280	1,350	1,360	1,540
Overlea		2,650	2,700	2,490	2,400	900	900	900	860	590	400	520	470
Laird		1,470	1,570	1,360	1,340	1,160	1,110	1,140	1,390	270	310	280	790
South of Eastern		2,120	1,860	1,860	1,870	530	550	550	500	390	330	210	250
Weston Road/Mount Dennis		400	310	410	520	70	60	80	90	790	800	820	780
South East Scarborough		700	610	600	620	20	20	30	30	30	40	90	70
Airport Corporate Centre		470	440	450	220	0	0	30	40	190	230	240	230
Other Employment Related Lands		9,570	9,080	8,690	8,660	2,970	2,790	3,060	2,940	7,880	7,520	7,860	7,650
All Employment Districts		118,880	118,630	117,670	116,460	39,440	40,350	41,190	42,070	47,560	47,690	48,370	49,130
Rest of the City		10,620	9,970	10,530	9,740	101,060	101,250	102,110	122,730	103,340	107,810	109,930	115,370
City Total		129,500	128,600	128,200	126,200	140,500	141,600	143,300	164,800	150,900	155,500	158,300	164,500

Employment Districts	Sector	Office				Institutional				Other				Total			
		2010	2011	2012	2013	2010	2011	2012	2013	2010	2011	2012	2013	2010	2011	2012	2013
South Etobicoke		13,310	11,420	11,590	12,090	820	740	720	840	1,060	1,680	1,610	1,820	40,950	39,910	40,390	41,080
Rexdale		13,500	13,090	14,240	15,580	1,300	1,190	1,120	1,190	2,140	2,160	2,110	1,910	40,000	38,980	39,490	40,800
Highway 400 Corridor		7,710	8,610	8,550	7,580	480	440	480	610	360	240	240	280	31,460	32,820	33,540	32,480
Tapscott/Marshalling Yard		9,340	7,760	7,510	7,620	730	660	730	740	460	1,650	1,740	1,800	30,410	30,960	30,960	31,440
Dufferin Keele North		13,330	13,680	12,770	11,450	1,420	1,600	1,610	1,740	650	530	560	530	31,540	32,440	31,080	30,360
Dufferin Keele South		9,960	9,850	10,190	10,800	1,540	1,670	1,670	1,770	200	210	260	340	23,990	24,610	25,110	26,400
Duncan Mills		13,400	13,100	13,100	13,370	1,500	1,300	1,900	2,060	0	100	100	100	17,840	17,660	18,470	19,090
South West Scarborough		5,650	6,190	6,090	6,350	1,260	1,270	1,220	1,240	1,130	1,180	1,160	1,230	18,010	18,990	18,670	19,030
Consumers Road		17,880	16,900	16,320	16,440	440	450	480	550	140	160	170	130	19,060	18,140	17,490	17,670
Scarborough Highway 401 Corridor		8,330	7,420	7,290	7,640	1,060	970	1,000	980	120	140	170	190	16,090	16,670	16,810	17,010
West Central Scarborough		3,810	3,840	3,250	3,710	480	460	830	830	140	160	180	70	15,490	15,380	14,720	14,280
North West Etobicoke		2,890	4,100	4,110	4,250	130	160	110	180	160	150	150	170	12,830	12,810	13,000	13,460
Steeles & Victoria Park		9,300	9,510	10,090	9,740	660	690	710	750	160	160	120	130	12,420	12,500	13,280	13,020
Don Mills		8,070	8,350	8,820	8,830	130	100	90	80	130	90	80	90	11,910	11,380	11,990	11,560
Liberty		4,940	5,580	5,790	6,780	30	50	70	70	110	120	130	190	7,560	8,130	8,300	9,450
Milliken		2,900	3,170	3,070	3,160	580	630	660	650	80	90	80	90	7,070	7,430	7,300	7,550
Overlea		1,840	1,710	1,930	2,060	290	300	300	300	10	60	80	70	6,280	6,070	6,220	6,160
Laird		1,700	1,480	1,530	1,290	40	40	20	40	50	40	50	120	4,690	4,550	4,380	4,970
South of Eastern		1,500	1,200	1,300	1,610	90	30	50	30	20	30	10	20	4,650	4,000	3,980	4,280
Weston Road/Mount Dennis		160	150	180	190	300	330	360	360	0	0	0	0	1,720	1,650	1,850	1,940
South East Scarborough		200	200	220	210	20	30	20	20	10	30	30	30	980	930	990	980
Airport Corporate Centre		320	410	440	330	30	30	30	30	30	40	40	40	1,040	1,150	1,230	890
Other Employment Related Lands		8,200	8,340	8,790	8,960	640	590	700	820	300	480	410	700	29,560	28,800	29,510	29,730
All Employment Districts		158,240	156,060	157,170	160,040	13,970	13,730	14,880	15,880	7,460	9,500	9,480	10,050	385,550	385,960	388,760	393,630
Rest of the City		465,060	471,840	480,930	496,660	199,530	206,070	203,520	206,820	33,040	34,400	35,720	36,550	912,750	931,340	942,840	969,920
City Total		623,300	627,900	638,100	656,700	213,500	219,800	218,400	222,700	40,500	43,900	45,200	46,600	1,298,300	1,317,300	1,331,600	1,363,550

## A Thirty-Year Retrospective



### Toronto's Employment Landscape from 1983 to 2013

In May 1983, the Metropolitan Toronto Planning Department launched the first annual Toronto Employment Survey, spanning the former Cities of North York, Toronto, Scarborough, Etobicoke, York and the Borough of East York.

Over the course of the last 30 years, the City and the world changed considerably. The Toronto Employment Survey began on the heels of the 1981-1982 recession, which lasted 18 months and saw Canada's GDP decline by 6.7% during this period. The Berlin Wall fell, computers became household devices and the Internet was born. The TTC completed work on the Spadina Subway Line as well as the Sheppard Subway Line. The City weathered two more economic

recessions and one housing market bust in the early 1990s.

Through all of these events and many more, Toronto has remained an attractive place for employers and employees alike. Over three decades, the number of jobs in the City grew by 259,800 or by nearly one quarter (23.5%). The Office sector has consistently remained Toronto's largest sector with 48.0% of jobs in the City today, up from 41.0% in 1983 (see Figure 18).

The Toronto economy has changed over thirty years. For example, the top five private sector employers in Toronto in 1983 were: Robert Simpson Co Ltd., Bell Canada, IBM Canada, T. Eaton Company and CIBC. In 2013, the top five private sector employers are: RBC, CIBC/Wood Gundy, TD/Canada Trust, Scotia/ ScotiaMcLeod and

BMO. The shift away from long-known names in sectors from retailing, manufacturing and utilities is apparent, as is the fact that the largest private sector employers are currently banks with their related financial service components.

Changes in employment and land use activity throughout the City have been monitored through the Toronto Employment Survey. Over 30 years, hundreds of Toronto Employment Surveyors have made more than 2.3 million visits to business establishments across the City, fostering long-standing relationships with Toronto's employers, businesses and employment associations. In doing so, the Toronto Employment Survey has been helping to inform land use planning, infrastructure investment and service delivery to the public for over three decades.

Figure 18: Toronto Employment By Six Sectors, 1983-2013

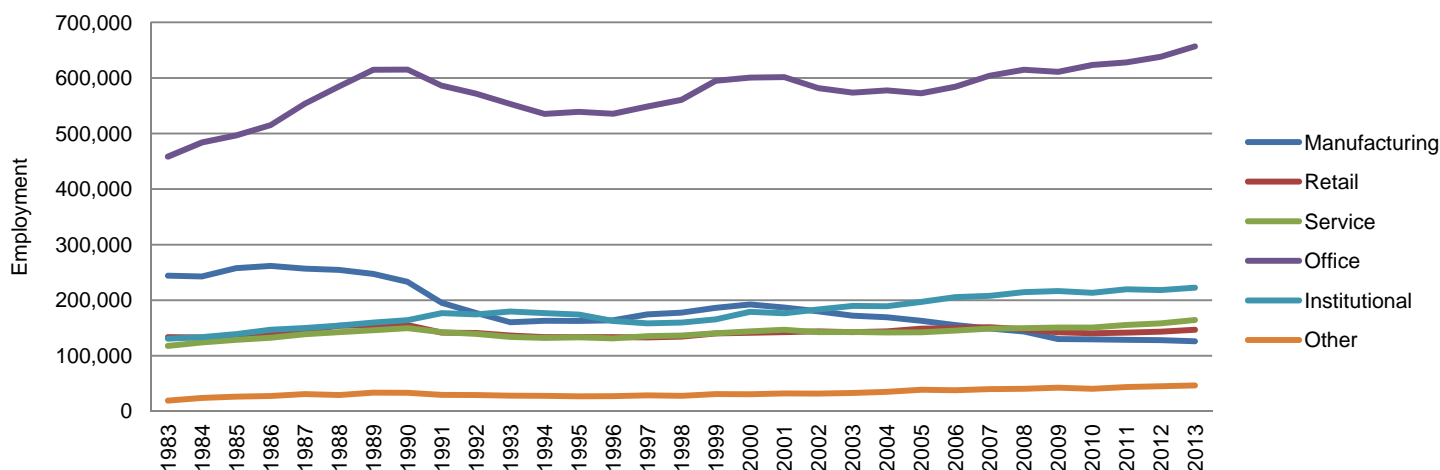
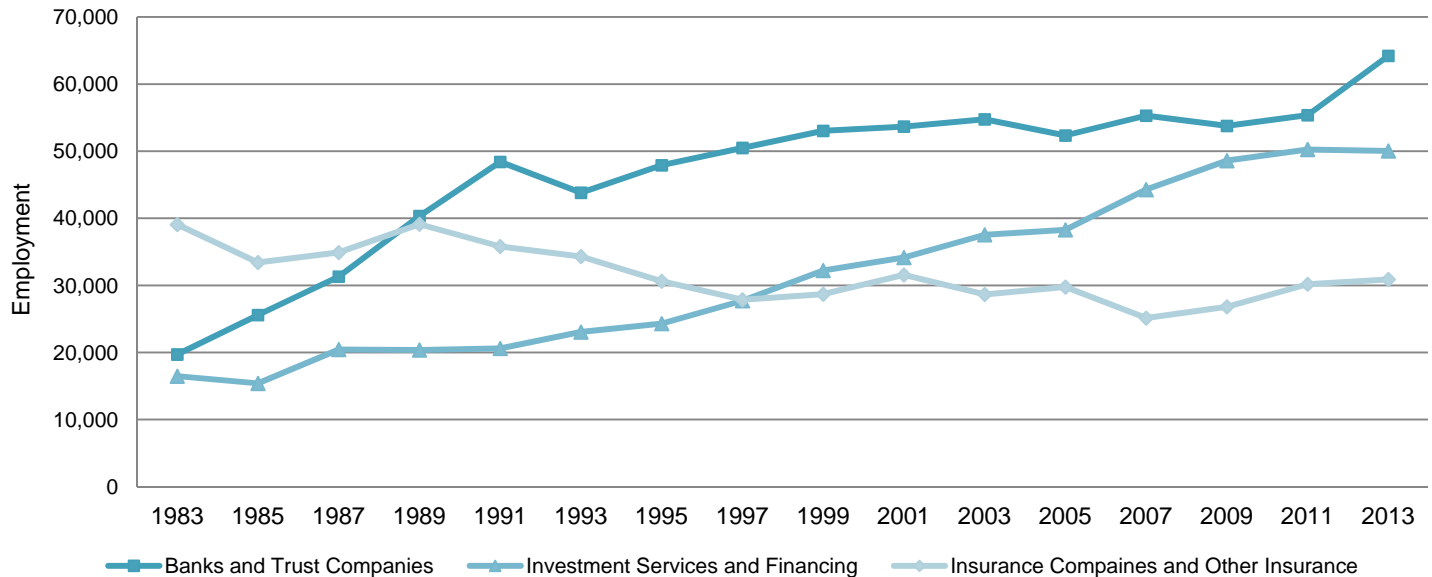




Figure 19: Banks, Finance and Insurance Employment



## Office Employment and the Importance of the Financial Sector

The growth of the Financial Sector has been one of the key drivers of Office employment in Toronto. Total employment in the Financial sector has risen from 95,550 jobs in 1983 to 160,400 thirty years later and almost a quarter (24.4%) of all Office jobs in the City (see Figure 19).

Office employment in the Banking subsector alone accounts for 64,215 jobs and 9.8% of Office employment across the City in 2013. In 1983, when the Toronto Employment Survey was first launched, the 19,710 Office jobs in the Banking sector accounted for just 4.3% of the City's total Office employment. The Banking subsector's employment has grown at an annual growth rate of 6.1%. By comparison, the City's Office employment, over the same period, grew by 1.2% annually.

The Financial sector is more than just the banking industry. The Financial Services subsector includes investment dealers; money managers; mutual fund dealers; loan, finance and mortgage brokers; and pension

funds and other sources of capital. Together, these services add a further 50,040 employees (as of 2013) to this sector. Interestingly, this subsector grew at half the rate of banking employment, at 3.8% annually over the past 30 years, but this rate was still over three times that of the entire Office employment sector. Combined with banking office employment, today there are 114,250 employees in the banking and financial services industry, or 17.4% of all Office employment in the City.

The importance of the Banking and Financial Services subsectors is evident in the Downtown. As of 2013, Banking Office employment totalled 48,840 jobs while the Other Financial Services adds an additional 38,010 jobs. Together, this totals 86,850 office jobs, or 27.9% of the Downtown's Office employment. When the Toronto Employment Survey was commenced in 1983, these two sectors accounted for 13.9% of Downtown's Office employment. Interestingly, the growth in these sectors in Downtown has been lower than the growth rates for the same sectors for the City as a whole, though they are higher than for total Office employment. Banking employment in the Downtown grew

by 4.2% annually over the 30-year period, while Financial Services employment grew at 3.3% annually. Growth in Downtown office employment over the same period was 1.4%.

In absolute terms, the Banking and Financial Services sector grew by 78,060 employees since 1983. Of this total, 58,270 jobs (74.6%) were in the Downtown. Of the remaining 19,790 new employees added since 1983, 4,900 employees (6.3%) were accounted for in the City's four Centres, with most of this growth taking place in the North York Centre.

## Restructuring of the Financial Sector

The growth of employment in the banking sector since 1983 may be surprising to some. No new Canadian banks have entered the Canadian market during this time, other than specialized niche operations. Instead, employment growth has come about due to the changing functions that today's banking sector performs. For example, today's banks incorporate personal and property insurance operations, which they did not in 1983. Thus, some of the growth in the

Banking sector has come at the expense of the Insurance sector, which has declined by 8,170 jobs and 230 establishments across the City since 1983. As well, banks have incorporated formerly independent investment dealers, adding to the employment growth in the Banking sector, at the expense of growth in the Finance sector.

One of the key drivers for change, beginning in the 1980s, was the growth of worldwide banks, such as Deutsche Bank (Germany), Barclays (United Kingdom), Bank of America (United States) and UBS (Switzerland). Canadian banks are major employers in Toronto. Canadian banks have weathered the global economic slowdown well, and the performance and stability of the Banking sector has been well regarded amongst the OECD countries. Toronto is in many ways the financial capital of Canada. However, on the world stage, Canadian banks are mostly mid-sized. In the 1980s and today, Canadian banks are not found among the world's top 25 largest banks, when ranked by value of assets held. Canadian banks were at a competitive disadvantage both on the world stage, and at home, as many of the world's largest banks set up locations in Toronto in the late 1980s and 1990s. The domestic banks were not able to offer the range and depth of services to an increasingly global-looking group of clients.

During the 1990's the banks responded by entering new fields: amalgamating with trust companies, buying formerly independent investment dealers, and expanding into the United States. Spatially, many Banking, Insurance and Financial Service firms were increasingly located in the Downtown. Other financial firms, such as mutual fund dealers, which often had a large back-office component, were located outside of the Downtown e.g. North York Centre.

Another subsector of the Banking sector which has experienced change is branch banking (see Figure 20). This employment is in addition to the bank employment quoted above. As automated teller machines (ATMs) became the norm in the 1980s, some forecasts predicted the end of the traditional bank branch. While the number of branches across the City did fall, as shown in Figure 20, their number has remained relatively constant over the past dozen years. Throughout the entire period, the number of employees per bank branch stayed constant, at around 19-21 employees per branch. While today's bank branch has fewer tellers than existed in the 1980s, there are more employees offering specialized services to individuals, selling a wide range of investment, mortgage and insurance products, and to businesses, providing business loans and early-stage business financing.

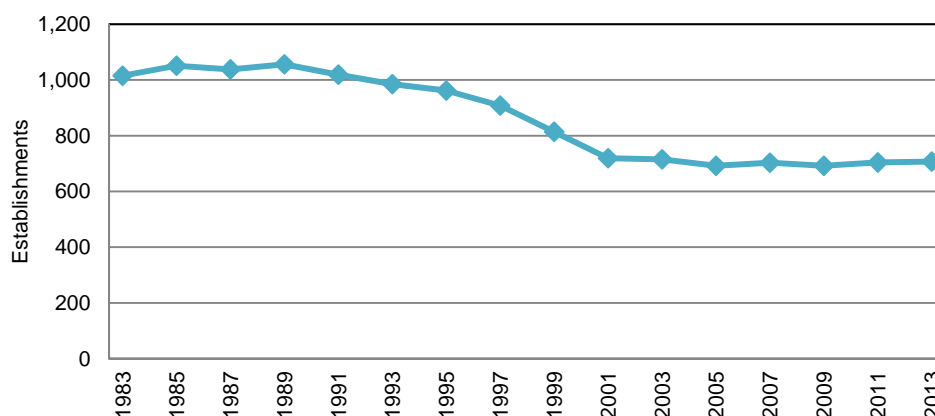
Map 3 shows that the locations of Financial establishments are not only located in the bank towers at King and Bay Street. In 2013, there were 100 Banking sector office locations in the Downtown. While there is clustering around the King St and Bay St. intersection, some of these office locations are found as far north as Bloor Street.

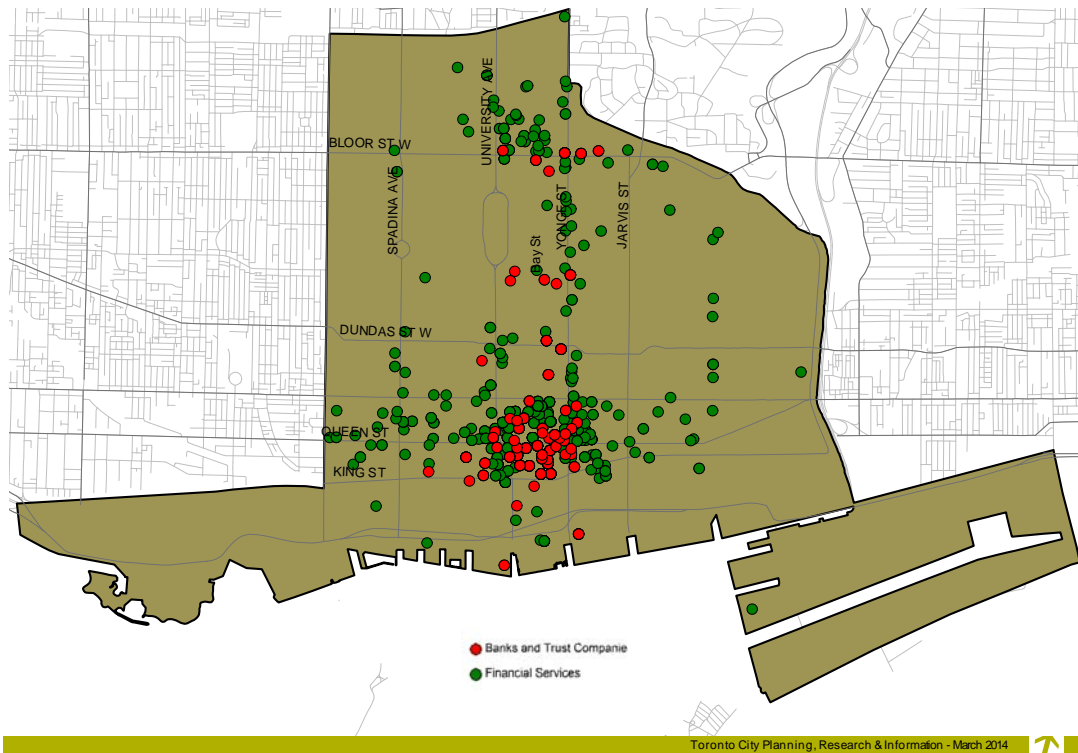
This sector, like all sectors, will continue to change structurally and perhaps spatially in the future. Change is expected to come from:

- New firms offering products which were previously the domain of banks, such as President's Choice Financial;
- The splintering of the home mortgage market, as home buyers move to non-bank sources (such as mortgage brokers) to finance their home purchases;
- The blurring of distinctions between banks, investment dealers, mutual fund companies and insurance companies, as each firm attempts to enter new areas of business.

The Financial sector continues to restructure and evolve, creating new lines of business and new employment opportunities and building on highly-specialized skills and services. Toronto has remained competitive in the global financial services industry. This competitiveness has resulted in increasing demand for office space in Downtown and the expansion of the Financial Core south of the railway corridor. Elements of Financial Services employment has also recentralized to the City's Centres, as well as to other nodes in the larger urban region. As the sector continues to evolve, it will continue to impact commuting patterns and the urban structure of the City.

**Figure 20: Bank Branch Establishments in Toronto, 1983-2013**





Toronto City Planning, Research & Information - March 2014

## The Evolution of the Manufacturing Sector

Since 1983, all employment sectors grew with the exception of the Manufacturing sector which today stands at just half of its 1983 size, shrinking 48.3% and losing 117,900 jobs. However, the Manufacturing sector still comprises 9.3% of all jobs in Toronto.

A key feature of the change in Toronto's economy is the gradual but steady decline in Manufacturing employment. This change is not specific to Toronto but has been experienced by many North American cities over a long period of time. Manufacturing establishments, like any business, are constantly changing in response to changes in industrial processes, consumer demand and government regulation. These changes have occurred over a period far longer than just the 30 years covered by the Toronto Employment Survey. A major change in both the use and location of Manufacturing establishments that had unintentional impacts on cities

throughout North America, was the development of the safety elevator by Elisha Otis in the 1850s. This enabled the vertical use of buildings for manufacturing purposes for the first time. The impacts of this innovation can still be seen in the existing multi-storey industrial buildings along Spadina Avenue. Since then, changes in the Manufacturing sector have included:

- The decline of company towns, complete with the provision of worker housing, with the corresponding rise of manufacturing in cities which could accommodate both uses;
- The growing popularity of assembly lines, leading to linear buildings, and thus locations with larger amounts of less expensive land;
- The growing importance of airfreight and containerized shipping after WWII, stressing locations near airports, and the growth of major container ports in North America that could handle larger ships, with a newly

developed road transportation system to deliver products by truck from either of these break-of-bulk facilities;

- The rise of just-in-time (JIT) delivery of inputs to the manufacturing process, eliminating much of the need for warehouses and lowering costs, but necessitating accurate scheduling of materials brought by truck and rail, and thus changes to Toronto's transportation infrastructure;
- Establishments choosing to locate near their employees, who were choosing suburban locations in which to live, driving the suburbanization of the Toronto region;
- Beginning in the late 1970s, the freer movement of goods and services between countries as tariff walls were removed;
- The early 1980s were a period of high interest rates and recessions, challenging some firms such as Massey Ferguson, as did new technologies, which affected

Kodak, and have lead to significant employment restructuring and urban redevelopment in Toronto;

- The early 1990s saw internationally-based companies making global location decisions, which often means that existing manufacturing facilities no longer have to be located where they "always were" or near population centres, such as the Molson and Labatt breweries in this City;
- This century's multiple recessions have led to global retrenchment and a refocusing by many firms on cost containment and thus on consolidation and relocation of facilities, affecting the distribution of industrial employment and land use in Toronto.

The Manufacturing sector remains a vital and major component of the City's diverse economy, requiring the availability of sufficient employment lands to accommodate and grow these uses.

## The Evolution of the Retail and Service Sectors

Toronto's Retail and Service sectors have maintained a stable share of employment over the decades, each constituting on average 11.5% of employment in Toronto. This belies the constant change in the factors driving Retail location, change which has restructured the Retail sector and the use of land in the City, creating suburban shopping plazas, enclosed malls, regional shopping centres and large single-store formats:

- Stores begin to explore the chain format in the 1950s, with multiple locations, often in newly developed suburbs or the suburban plaza, which soon become the enclosed plaza of the 1960s through to the 1980s;
- Chains are well suited to the new shopping malls, working with developers in taking multiple locations at one time, and

providing a newly affluent and mobile population with familiarity and the lower prices of store brands (as sale and discounted items are no longer looked upon with disdain);

- The traditional enclosed shopping mall, anchored by two or more department stores, is re-imagined beginning in the 1990s as open air formats, linear groupings of larger stores and lifestyle-type centres as mini-department stores e.g. Towers, Woolco bought by WalMart in 1994, disappear as consumers look for different shopping experiences;
- New stores, often from the United States, presage the end of "store loyalty" built over decades, and department stores such as Eaton's, Simpsons and Woodwards, merge and close. These new stores are attracted to both malls and strong retail strips such as along Bloor Street, Yonge Street, and Queen Street West;
- Larger format stores, "big boxes", offering lower prices but fewer ancillary services such as delivery and repairs, take their place, built on economies of scale. These stores are located in suburban or ex-urban locations with cheaper land costs, simple and cheaper building types e.g. one-storey linear formats, and substantial surface parking. They streamline their operations with just-in-time delivery, tight inventory controls e.g. stores no longer close one or two days a year to take inventory. These formats may replace or involve the consolidation of smaller formats.

This constant restructuring of Retail and Service locations and their formats occurs within the City's urban fabric, altering the distribution of economic activity, land use patterns, and the transit and transportation choices of Toronto residents and businesses.

## The Evolution of the Centres

The City's four Centres, Scarborough, North York, Yonge-Eglinton, and Etobicoke, are focal points of the City's urban structure. They are central places with high transit accessibility where jobs, housing, services and activities are concentrated in dynamic mixed use settings. They represent decades of urban planning policy matched with substantial investments in public transit infrastructure, and have become destinations for people from across the City and outlying suburban areas. The Centres play a key role in the regional structure and are identified as Urban Growth Centres by the Provincial Growth Plan for the Greater Golden Horseshoe. Employment within the Centres has intensified as they have evolved over time.

### Centres Employment 1983 to 2013

The Centres are, in many ways, a microcosm of the City as a whole. Total employment in the Centres, (see Figure 21), follows much the same pattern as has the City, as shown in Figure 1 on page 2. Employment rose during the 1980's, reaching a peak in the 1989-1991 period. It declined during the economic slowdown of the mid-1990's growing again to reach an all-time high in 2013.

Today, the distribution of sectoral employment in these Centres reflects their unique role in the City's urban structure (see Figure 22). The Office sector is the largest employment category in both the Centres and the City. Office employment is concentrated in the Centres and comprises 75.4% of total centre employment, compared to 48.2% of the City. The largest difference is found in the Manufacturing sector. Due to the mixed use function and density of the Centres, Manufacturing



is under-represented, at 0.9% of Centre employment compared to 9.3% of the entire City's employment. The Institutional sector is under-represented in the Centres at 4.8% of Centre employment versus 16.3% of the City's total employment. The proportion of Retail, Service, and Other sectors in the Centres, comprised of population-serving activities, very closely match the employment percentages found for these same sectors city-wide.

The Centres' growth rate over the past 30 years has exceeded that of the City as a whole. The Centres, in total, have had an annual compound growth rate of 2.0% and an increase of 36,615 employees while the City, over the same period, has had an annual compound growth rate of 0.7% or 259,855 employees. This relatively high growth rate in the Centres has been due to the growth in the Office sector which grew at an annual compound growth rate of 2.7% 33,682 employees at a time when the City's office employment was growing at 1.2% annually or 198,280 employees. The other sectors in the Centres account for a far smaller percentage of overall employment and grew - or, in the case of Manufacturing employment, declined - at annual rates roughly comparable to those found in the City as a whole.

## Etobicoke Centre

The Etobicoke Centre, with its roots 100 years ago in the shops of Islington Village, and more recently the extension of the Bloor-Danforth subway line, has seven different areas within the 169 hectares of the Centre. Tom Riley Park / Mimico Creek and the central Apartment Neighbourhood are open spaces and a residential apartment area respectively. Islington Village is a main street, while Bloor/Islington "...encompasses the office core of Etobicoke Centre. A tightly knit collection of high-rise office and residential buildings is centred on the

North-East quadrant of the Bloor/Islington intersection".<sup>10</sup>

The Etobicoke Centre saw the bulk of its Office employment growth take place in the Bloor/Islington area in the 1983-1989 period, when 2,620 office employees were added in the space in only six years. This growth occurred mostly by the efforts of one developer (Harold Shipp) in what was then known as the Shipp Centre (now the Sun Life Centre) on Bloor Street, which had its earliest phases occupied in the 1983-1987 period.

The Centre's three other areas, Dundas West, Fieldway Road Area, and the

Dundas / Kipling / Bloor "Six Points Interchange", will present opportunities for future commercial development and employment growth.

## North York Centre

In 1997, North York Council approved the North York Centre secondary Plan, OPA 447 to the North York Official Plan. The basis for redevelopment focused on the North York Centre being a major centre within the metropolitan region. The Centre would contain a mix of Office, Retail, Service and Other sectors.<sup>11</sup>

Figure 21: Toronto Centres Employment, 1983-2013

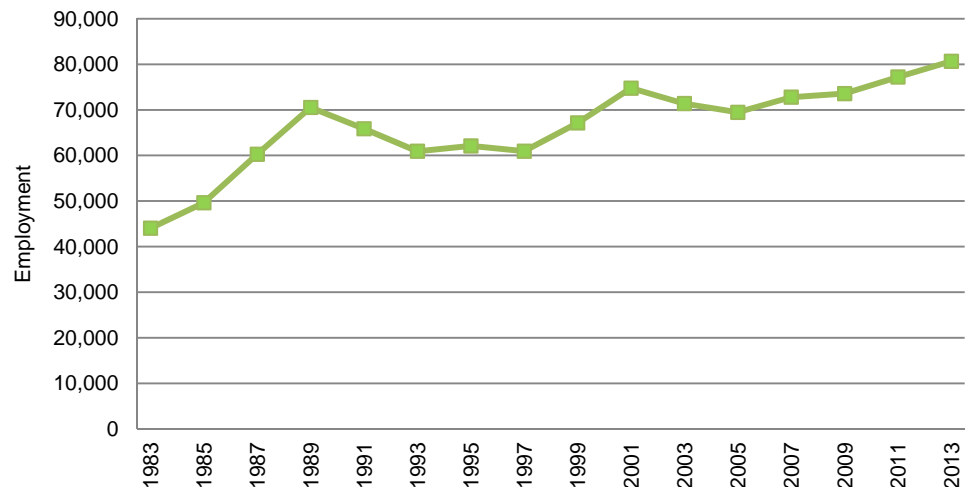
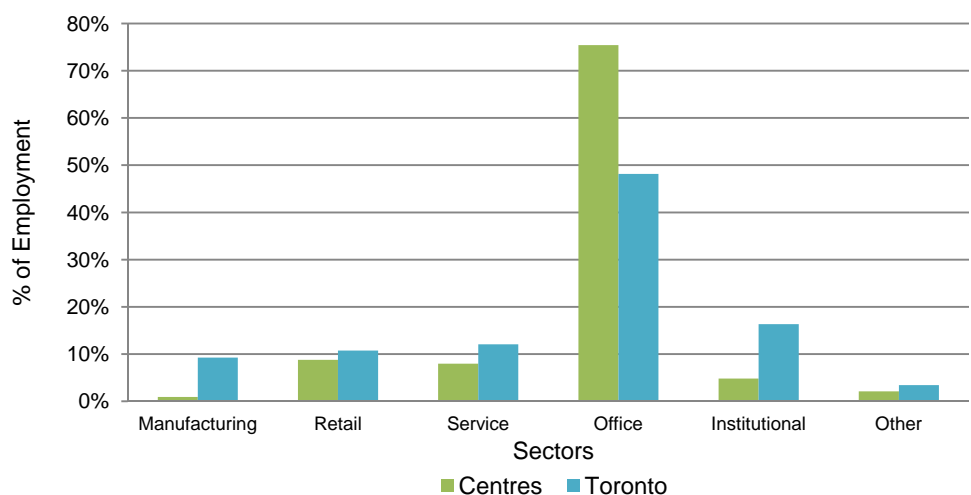


Figure 22: Employment by Six Sectors, 2013



<sup>10</sup> Etobicoke Centre Secondary Plan, November 2002, p. 7.

<sup>11</sup> North York Community Council Staff Report, North York Centre Secondary Plan Monitoring Report, May 11, 2001.

The Centre has largely achieved these goals. At 35,350 employees today, it is the largest Centre overall, as well as the Centre with the largest amount of Office sector employment.

In the North York Centre, where Office sector employment rose by 19,450 employees over the 30-year period, Office sector growth was accommodated in over a dozen office buildings. The earliest years of the employment survey saw the occupation of 90 Sheppard Ave East and the Yonge/Sheppard Centre office buildings. The rest of the 1980s saw major buildings at 4950 Yonge Street (the Madison Centre), 40 Sheppard West and the three-phased North York City Centre development on Yonge Street and Park Home Avenue, which together added about 100,000 m<sup>2</sup> of office space. Development in this Centre continued into the early 1990s, with the Yonge Norton Centre coming on stream in 1991 and in 1992, the second phase of the North American Life Centre at Yonge and Finch as well as the Creditel Building on Sheppard West.

### Scarborough Centre

Scarborough Town Centre, as it was known, was designated in 1968 as an area of institutional, cultural and business uses.<sup>12</sup> The area was chosen because it was central to Scarborough and was removed from residential communities. Its focus was, and continues to be, the Scarborough Town Centre Shopping Mall and the Scarborough Civic Centre. As the core of an employment corridor along Highway 401, the Centre has become a destination for the surrounding communities, with a mix of retail and government services, and a variety of recreation, educational and community services. Today, the Centre has 5,550 Retail and Service sector jobs, more than any other Centre.

For many years, the Centre was dominated by government uses including the Civic Centre and the federal government buildings and development activity was gradual. The Scarborough Rapid Transit line spurred significant commercial and residential development within the Centre.

In the Scarborough Centre area, much of the office growth of 6,230 employees over the 30-year period has been accommodated by the three-phased Consilium Office Project. The first phase at 100 Consilium Place, occupied in 1985, followed by 200 Consilium Place, and with the final phase at 300 Consilium being occupied in 1990. Taken together, these three buildings added about 100,000 m<sup>2</sup> of office space to the Scarborough Centre.

### Yonge-Eglinton Centre

The Yonge-Eglinton Centre, and its surrounding area, is a mature urban area, increasingly punctuated by substantial new residential development. In regards to employment activity, the Secondary Plan notes the low-rise character of the retail shopping districts, sets out that new commercial development should be compatible with the existing scale of buildings, and that redevelopment of commercial lands should not encroach upon the adjacent residential neighbourhoods.<sup>13</sup>

In the Yonge-Eglinton Centre, Office employment rose by 5,549 employees since 1983. Growth has occurred primarily, but not exclusively, in many smaller buildings, often with space of under 10,000 m<sup>2</sup>. Buildings meeting this description include 1, 40, 110 and 245 Eglinton Ave East, and 118 Eglinton Ave West — all of which became occupied in the

1983-1989 period. Retail and Service employment, in its 265 establishments, has stayed mostly constant over the past 30 years at around the 2,500-3,000 employee mark; it stands at 2,440 employees in 2013. The Yonge Eglinton Centre and Canada Square complexes, and many of the nearby properties, have had a series of renovations over the years, increasing their relationship to the street and contributing to the vitality of the area as a whole.

The Centres will continue to evolve as central places with continuing investments in high-order public transit. Significant commercial and residential development, coupled with high-quality public realm and pedestrian spaces, will continue to create attractive and vital places to work and to live.

### Looking Back, Looking Forward

As the Toronto Employment Survey programme enters its fourth decade, it will continue to be a key information source in monitoring this dynamic city's economic growth and progress in achieving the objectives of the City's Official Plan and City Council's Strategic Plan as well as the objectives of the Provincial Growth Plan for the Greater Golden Horseshoe.

The Toronto Employment Survey: helping us to plan a great city, together.

<sup>12</sup> Scarborough Centre Secondary Plan Directions Report, June 2002, page 1.

<sup>13</sup> Final Recommendations, *Yonge-Eglinton*, June 1980, pages i and ii.

## How the Information on Employment is Collected by the City of Toronto

The Toronto Employment Survey has successfully marked its thirty-first year. Since 1983, the Survey has been conducted to monitor economic activity, provide information for policy and decision-making and offer additional context for the planning of municipal infrastructure and services. Based on the use of a consistent coding system of parcel uses and occupant activities, it provides a rich resource of time-series data for the longitudinal analysis of employment and employment activity in the City. In 2011, for the first time in the Survey's history, employment activity was classified by NAICS (North American Industry Classification System) codes. This is an addition to the occupant activity code standard of the Regional Information Systems Working Group of the Regional Planning Commissioners Ontario, which has been used and updated over the past three decades. The use of NAICS will enable comparison of employment activity across municipalities, provinces, and other countries.

Between May and August, a team of surveyors visit all business establishments located in

commercial, industrial and institutional and mixed use areas throughout the City of Toronto. In 2013, employment data was acquired from 91.0% of business establishments that were identified. This marks a decrease over 2012's response rate of 93.8%. Data collected include the number of full-time and part-time employees, the primary type of employment activity taking place, and the length of time the business has been at that location. In the case of major, multi-branch employers, the information is collected through a questionnaire mailed to the primary contact at the head office.

The result is a rich dataset which provides a valuable profile of the economic activity across the City of Toronto. This survey does not capture people who work from home, or who have "no usual place of work" e.g. contract workers, and many involved in the film industry and other activities that are not place-specific on a daily basis. These results will necessarily differ with the results of the new voluntary National Household Survey, conducted for the first time in 2011, and was released in 2013.

## About Employment Districts & Other Employment Related Lands

On December 18, 2013, Council enacted Amendment 231 of the Official Plan regarding *Economic Health and Employment Lands Policies and Recommendations on Conversion Requests*. Among other items, OPA 231 amends Policy 2.1.2 of the Official Plan by deleting the term *Employment Districts* and replacing it with *Employment Areas*. Map 2 of the Official Plan, which depicts the Employment Districts, was replaced by a new Map 2 showing Employment Areas and a different geography of land use designations.

Pending Provincial approval of OPA 231, Employment Districts, as they are described in this and prior Bulletins, will change. In the interest of providing a thirty-year profile of employment and Employment Districts in Toronto, this Bulletin includes a final summary of each Employment District. To reflect the change of geographies in this bulletin, all other designated employment lands not included in Employment Districts are reported as *Other Employment-Related Lands*. These lands are included in our analysis of Employment Districts as a whole and are also profiled on pages 12 to 18.

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