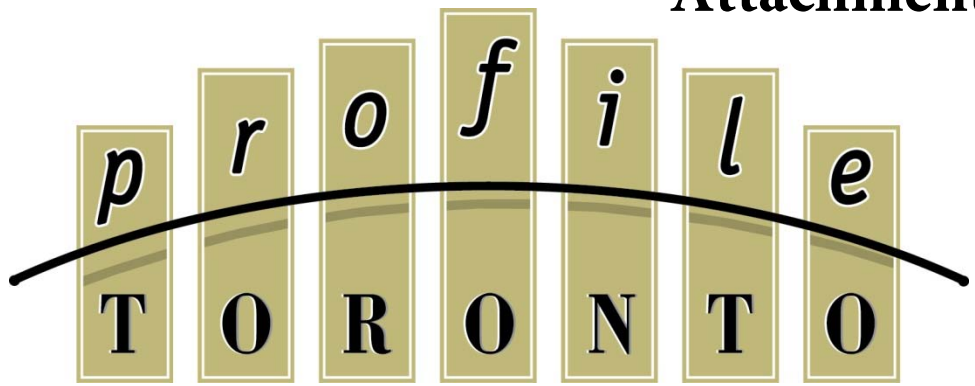




This bulletin summarizes the highlights of the 2015 City of Toronto annual Employment Survey, marking its 33rd consecutive year.

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

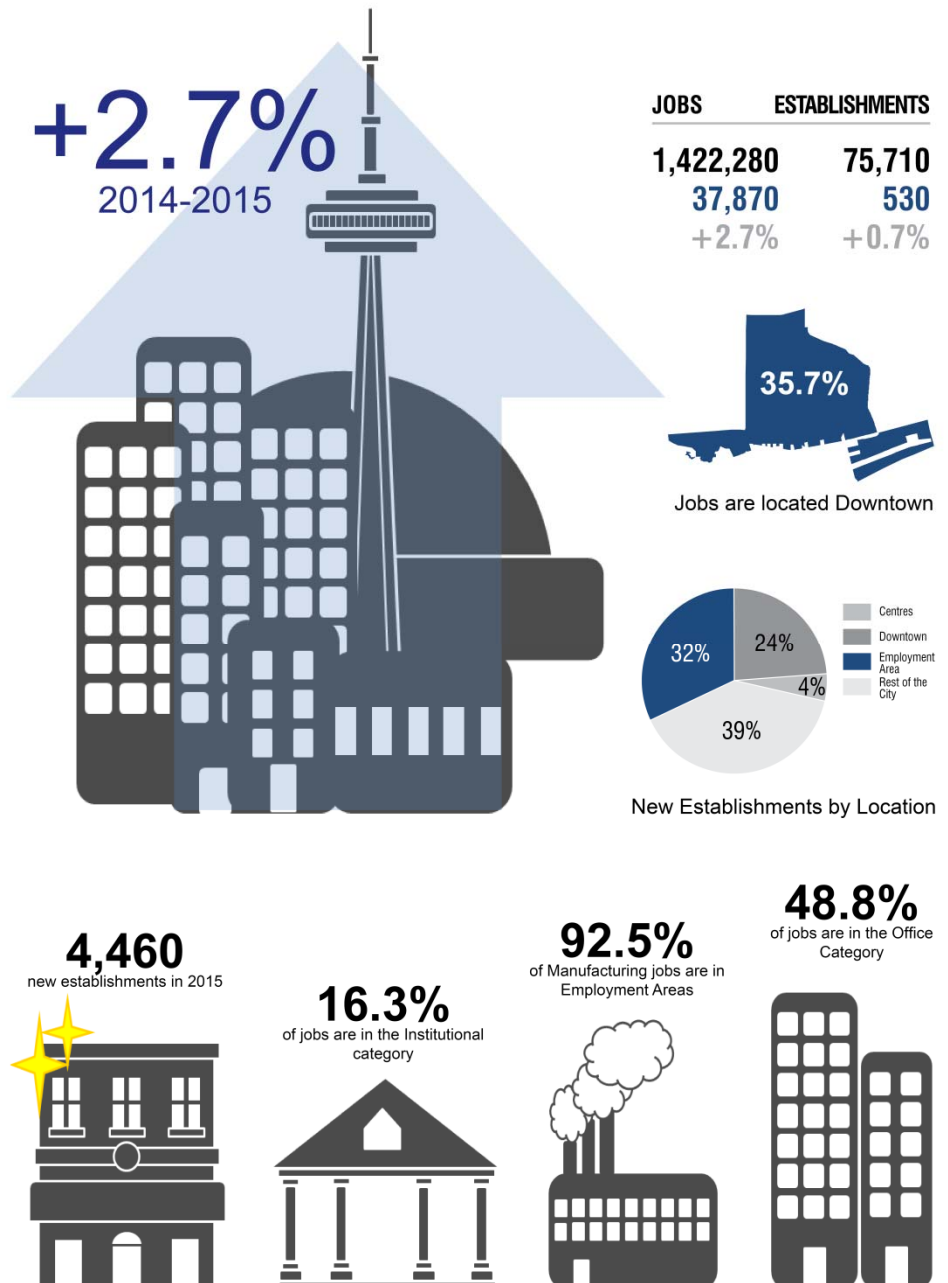
For more information, please visit us at www.toronto.ca/demographics/surveys



Highlights

- The 2015 survey counted 1,422,280 jobs, an increase of 37,870 jobs or 2.7% from Toronto's overall employment base in 2014.
- Full time employment has surpassed the 1 million mark for the ninth consecutive year.
- Part-time jobs increased by 7.3% from 2014, an addition of 344,350 jobs.
- The Office category remains the largest sector in Toronto, accounting for almost 1 out of every 2 jobs.
- The survey counted 75,710 establishments in 2015, a net gain of 530 establishments.
- In 2015, approximately 587,490 jobs were located in Toronto's Downtown and Centres, 41.3% of all jobs city wide.
- North York Centre, with 35,000 jobs, remains Toronto's largest employment Centre after Downtown.
- Yonge-Eglinton Centre has Toronto's highest employment density with nearly 30,000 jobs per km².
- In 2015, there were approximately 407,420 jobs in Toronto's Employment Areas, 28.6% of jobs in Toronto.
- 83.1% of all Manufacturing category establishments and 91.2% of all Manufacturing category jobs, are in Employment Areas.
- The Manufacturing category added 20 new establishments in 2015.

Toronto Employment Survey 2015



Introduction

The City of Toronto, at 634.5 km², is home to 2.8 million people, making it Canada's largest city and the fourth largest urban area in North America.¹ Toronto has 8.2% of Canada's workforce and is a major national economic driver.^{2,3} The City's gross domestic product (GDP) is 155.9 billion dollars annually and accounted for 26.0% of Ontario's GDP and 9.5% of Canada's output in 2014.^{4,5} From 2014, Toronto's GDP grew by 3.4%, outpacing Ontario's rate of growth of 2.3%.

In 2015, the Toronto Employment Survey counted 1,422,280 jobs in the City of Toronto, adding 37,870 jobs or 2.7% to Toronto's employment base (see Figure 1). This is Toronto's second-highest growth rate over the last ten years. Toronto's growth in the last five years has been especially high. Over the past decade, the City's total employment has grown

by 12.7%, or 160,070 jobs (see Table 1).

This bulletin summarizes the results of the 2015 Toronto Employment Survey. It highlights the key city-wide trends, findings by employment category and emerging patterns in the Centres, Downtown and Employment Areas. The results from the Employment Survey are used to gauge the City's economic and investment health and to monitor the progress of Official Plan policies.

The survey results are also used for the forecasting and planning of infrastructure and services. This annual survey provides key insights into Toronto's business climate and economic growth. Toronto's 33rd Employment Survey was undertaken in the summer of 2015.

Map 1 shows the distribution of employment across the City, with distinct concentrations in the

Downtown, Centres and Employment Areas, demonstrating their continued vitality.

TORONTO AT A GLANCE

2.8M	PEOPLE
1.4M	JOB
8.2%	OF CANADA'S WORKFORCE
9.5%	OF CANADA'S GDP
3.4%	GDP GROWTH IN 2014
4TH	CITY IN NORTH AMERICA

2015	% JOBS	ESTABS
OFFICE	49%	38%
INSTITUTIONAL	16%	8%
SERVICE	12%	24%
RETAIL	10%	20%
MANUFACTURING	9%	7%
OTHER	4%	3%

Toronto's Share of the Provincial GDP

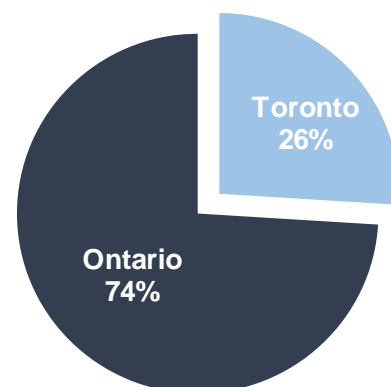
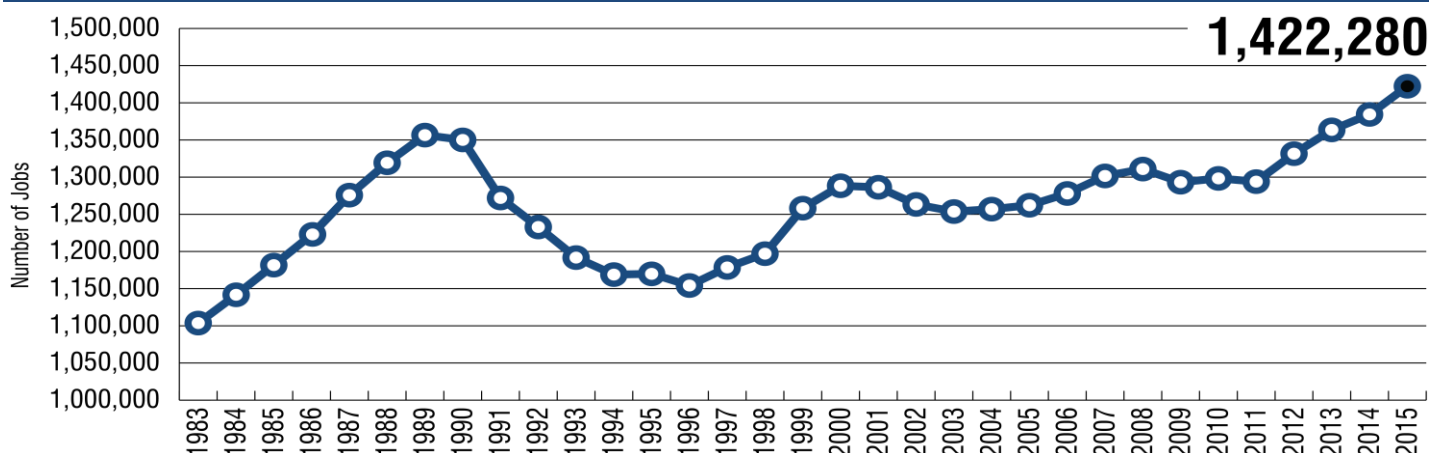


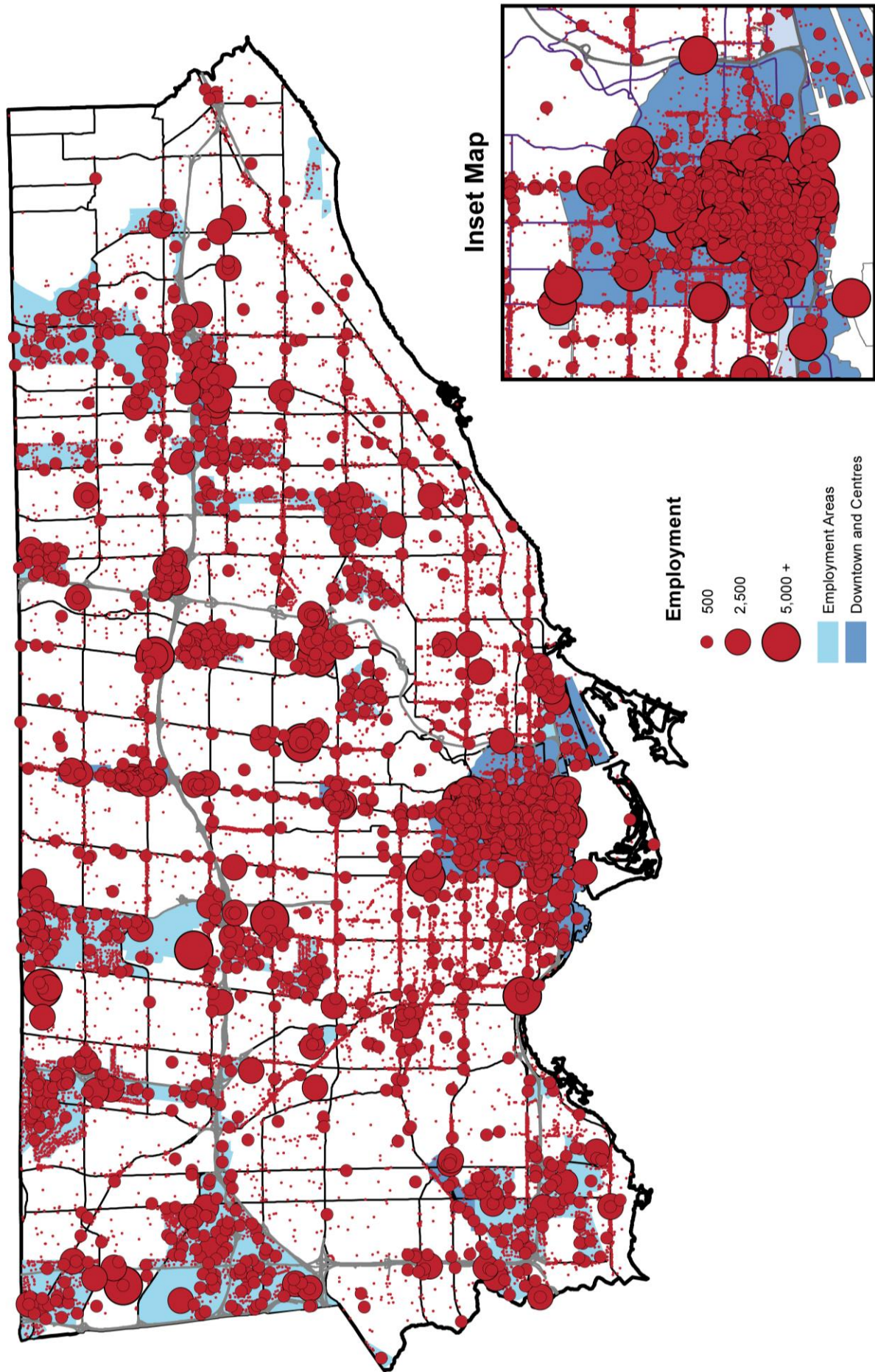
Table 1: Total Employment, 2005, 2014, 2015

Employment	Total Number of Employees			Net Change	Growth Rate %	Net Change	Annual Growth Rate %
	2005	2014	2015	2005-2015		2014-2015	
Full-time	988,420	1,063,550	1,077,930	89,510	9.1%	14,380	1.4%
Part-time	273,790	320,860	344,350	70,560	25.8%	23,490	7.3%
Total	1,262,210	1,384,410	1,422,280	160,070	12.7%	37,870	2.7%

Note: Numbers have been rounded to the nearest ten.

Figure 1: Total Employment City of Toronto, 1983-2015





Key City-Wide Trends

Economic Climate

Although Canada experienced a technical recession in the first five months of 2015, national economic output began to grow again by July, expanding 0.8% from July to August.⁶ Stronger U.S. demand, along with cheaper fuel and commodities, lower interest rates and a weaker currency appear to have helped export-oriented industries and consumer-driven service providers.⁷

Many goods-producing industries are flourishing – particularly export-oriented manufacturers of industrial machinery and computer equipment, chemicals, plastics and medical equipment, as well as materials for residential construction. The service sector continues to create jobs at a healthy 1.2% rate, tracking consumer spending in retail trade and financial services.⁸ These trends should bode well for Toronto's economy in 2016.

Number of Establishments

In 2015, the Employment Survey identified 75,710 business establishments in the City of Toronto (see Figure 2). After steadily declining during the 2008-2009 global recession, the number of businesses in Toronto began to grow again in 2012. This trend has continued through 2015. The City added 530 businesses (0.7%) in 2015, to reach a total of 2,140 establishments adding 2.9% over the last five years. The current number of businesses is higher than Toronto's pre 2008-2009 high of 75,570.

Toronto's employment grew more quickly, adding 37,870 jobs (2.7%). As a result, the average number of people employed per establishment in Toronto increased to 18.8 in 2015 from 18.4 in 2014. The number of "large" establishments, those with more than 100 employees, has grown by 35 or 1.7% this year. Currently, 2.8% of employers in Toronto have more than 100 employees.

Manufacturing

Manufacturing category employment has declined over the last decade, reflecting a similar decline internationally as the North American economy continues to shift from a goods-producing economy to a service-based economy. Toronto's categorical composition reflects an evolving urban economy which continues to be competitive in a changing national and global market.

The decline of Manufacturing establishments in Toronto has slowed since the economic downturn of 2008. In 2014, this decline halted and in 2015, the Manufacturing category grew by 20 establishments (0.4%). In 2015, surveyors recorded a total of 5,030 Manufacturing establishments, representing 6.6% of the City's total. Of all new establishments to the City in 2015, 5.0% are part of the Manufacturing category, representing 1,320 Manufacturing jobs.

Figure 2: Total Number of Establishments, 1983 2015

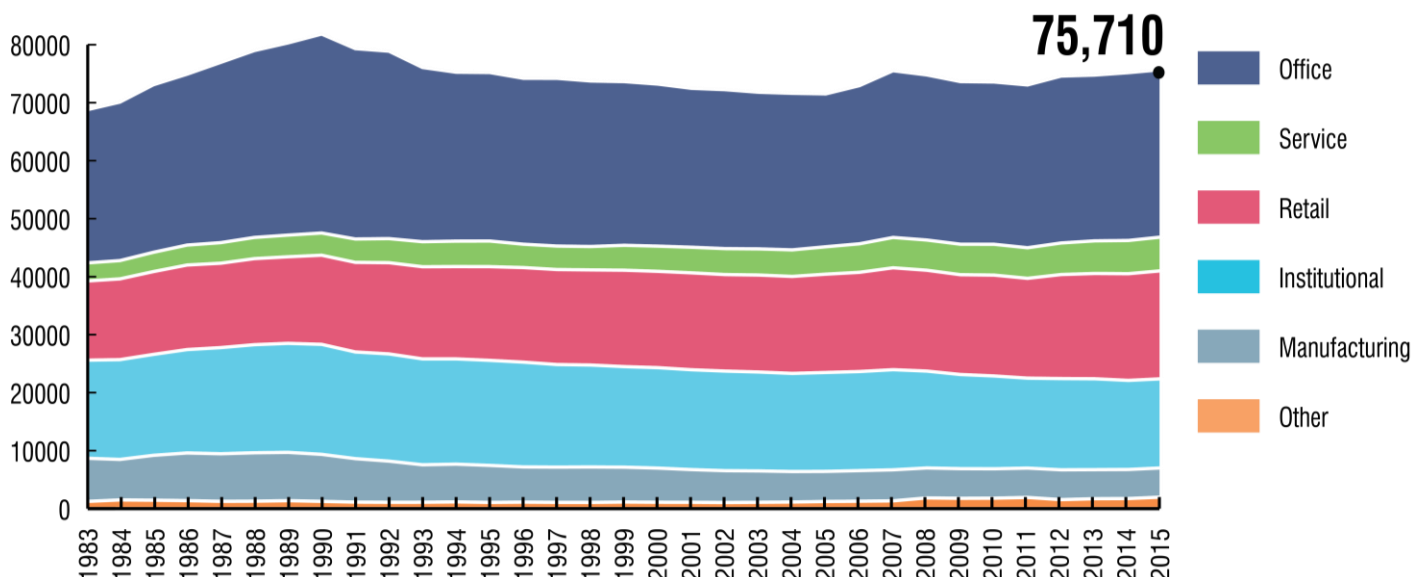
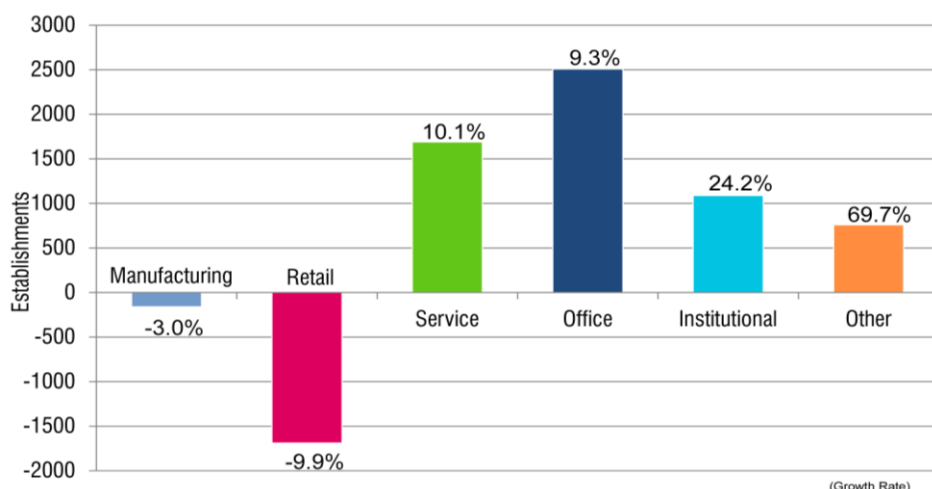


Figure 3: Change in Number of Establishments, 2005-2015



Office

In 2015, the Office category was the largest, representing 38.1% or 28,870 establishments in the City. While this category saw the largest net gain of employment in 2015, it alone lost establishments, down by 70 (0.2%). This trend points to an increase in the number of employees per establishment – as the average number of people employed per Office establishment increased over the last year from 22.9 to 24.

Retail

Since 2005, the Retail category (15,370 establishments) has lost 1,690 establishments (9.9%). The Retail category also recorded the largest net loss of employment of any category during this period, outpacing the Manufacturing category's loss of 160 establishments (3.0%; see Figure 3). In 2015, the number of Retail establishments was flat with an increase of 10 establishments (0.1%).

Since 2007, the number of Retail establishments in Toronto has been declining. However, despite this decline, retail employment has grown, increasing by 4,800 jobs (3.4%) between 2010 and 2015. These two trends have resulted in an increase in the average number of employees per

Retail establishment and appear to reflect the continued growth of larger retail formats. From 2005-2015, the average number of employees per Retail store increased from 8.7 to 9.5. Most of this increase occurred over the last five years.

Full-Time, Part-Time and the Retail Category

Of the 1.42 million jobs in the City, 75.8% are classified as full-time jobs. Full time employment increased 1.4% in 2015 (see Figure 4). In comparison, 24.2% of jobs in Toronto are classified as part-time (less than 30 hours per week). Part time employment increased 7.3% in 2015. The proportion of jobs that are categorized as part-time have increased steadily over thirty years, almost double the 12.4% of 1985, an increase of 217,960 part-time jobs. Since 2010, part-time employment has increased by 60,670 jobs (21.1%).

JOB

1,422,280
37,870
+2.7%

ESTABLISHMENTS

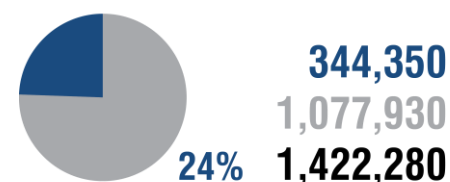
75,710
530
+0.7%

Figure 4: Full Time and Part Time Employment in Toronto, 2015

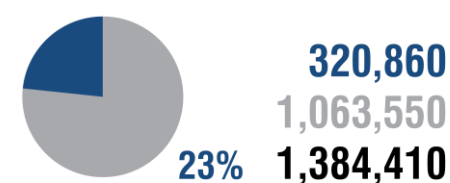
TOTAL EMPLOYMENT

Part time share of employment

2015



2014



2005

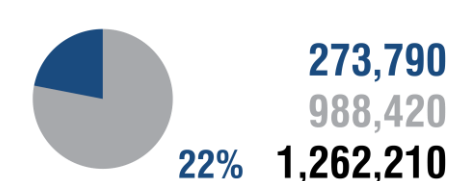


Figure 5: Number of Employees per Establishment, 1983 2015

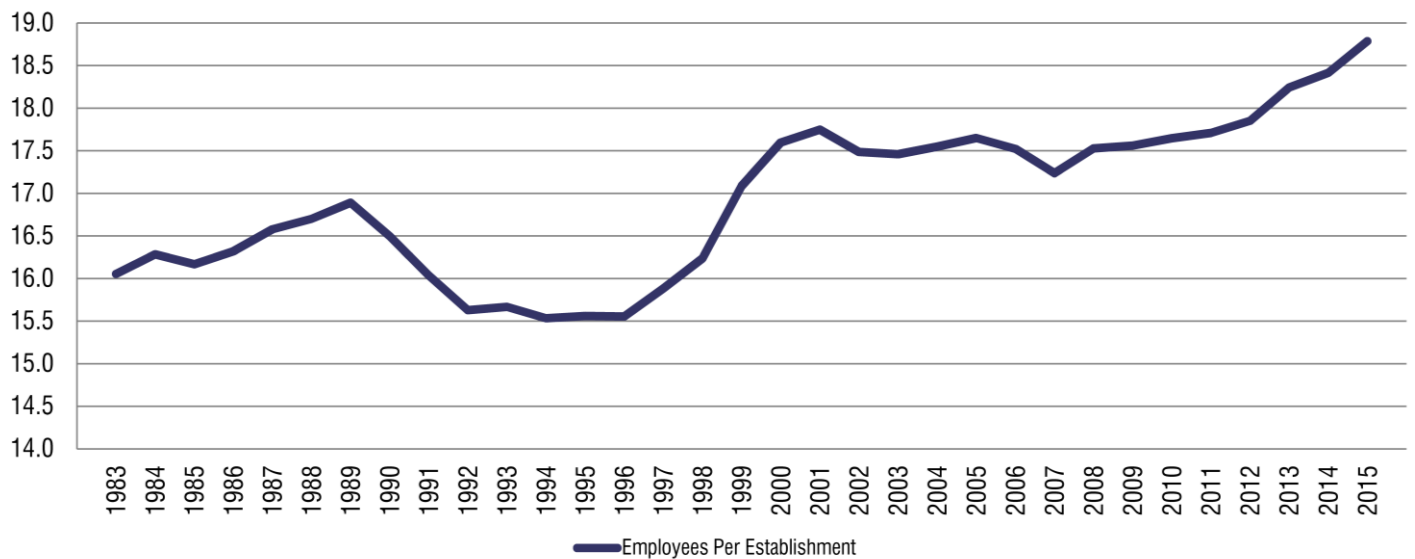
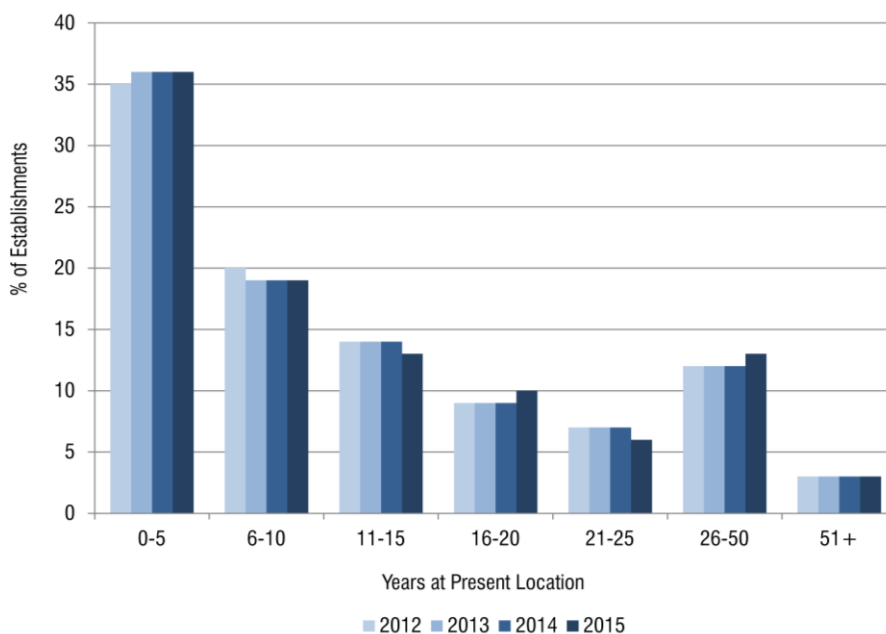


Figure 6: Longevity of Existing Establishments



This trend can be seen clearly in the Retail category. The share of part-time in Retail has increased steadily from 1984 to in 2015. Today, nearly half of all Retail jobs are part-time (47.1%; see Figure 5). Stable employment, in the form of permanent full-time jobs with benefits, has declined significantly over this period.

Longevity

Toronto remains an attractive place for new start-ups and for business relocations. In 2015, 36.9% of Toronto's business establishments were less than 5 years old (in the same location, see Figure 6).

Over one fifth of the City's establishments (21.6%) have remained in the same location for 20 years or longer, while nearly one-third (31.3%) of establishments have been located in Toronto for sixteen years or longer, showing a great degree of long-run stability of the local economy despite recessions, economic slumps and continued suburbanization of employment in the areas outside the City.

Table 2: New Establishments, 2014 2015

Location	2014	2015	Category	2014	2015
Centres	190	200	Manufacturing	230	220
Downtown	1,110	1,070	Retail	830	800
Employment Area	1,570	1,430	Service	1,220	1,080
Rest of the City	2,160	1,760	Office	2,150	1,780
			Institutional	350	230
			Other	250	340
City Total	5,030	4,460	City Total	5,030	4,450

Note: Totals differ due to rounding to the nearest 10.

New Establishments in the City



In 2015, the Toronto Employment Survey counted more than 4,460 establishments (5.9%) of the City total that were new to the City over the past year (see Table 2). New establishments decreased from 2014, when 5,030 new establishments were counted. Note that new establishments include not only new business start-ups but also include firm relocations and new locations of existing firms such as banks and coffee shops. Of the 4,460 newly located establishments, more than half (56.1%) were located in Downtown and Employment Areas, with 1,070 and 1,430 establishments respectively. Another 200 new establishments are located in the Centres and the balance of 1,760 establishments are located elsewhere in the City (see Figure 7).

The greatest proportion of new establishments has emerged in the Office category and accounts for 39.9% of all new

Figure 7: New Establishments by Location, 2015

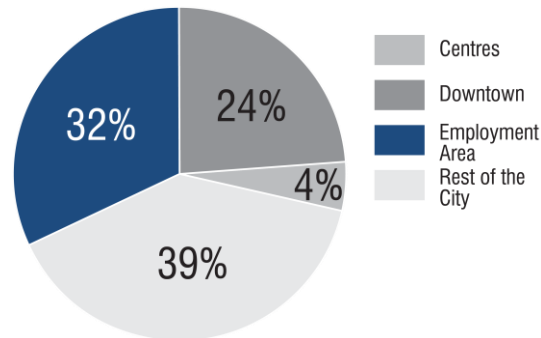
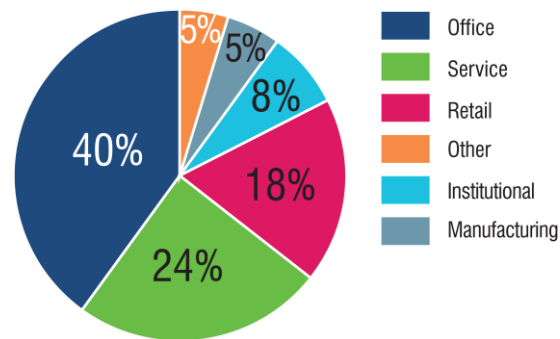


Figure 8: New Establishments by Category, 2015



establishments in 2015. The Service category followed with 24.3% of new establishments (see Figure 8).

Retail category establishments represented 18.0% of new establishments and 800 Retail jobs, followed by the Other and Institutional categories with 7.7% and 5.1% respectively, demonstrating the diversity of businesses that the City attracts.

Despite broader declines in North American manufacturing, Toronto remains an attractive location for industrial establishments with 220 new Manufacturing establishments choosing to locate in Toronto in 2015, representing 1,320 Manufacturing jobs.

Figure 9: Change in Total Employment by Category, 2015

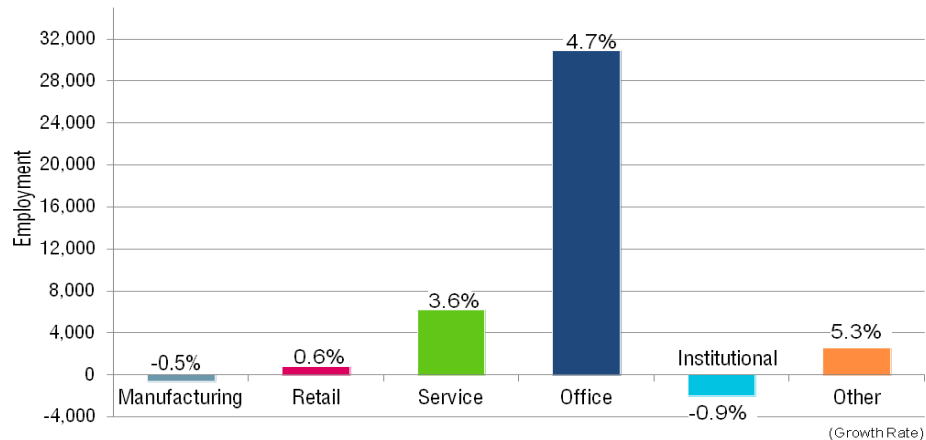


Table 3: Employment by Category, 2005, 2010, 2014, 2015

Employment	Total Number of Employees				Net Change	Growth Rate %	Net Change	Growth Rate %	Net Change	Growth Rate %
	2005	2010	2014	2015	2005-2015		2010-2015		2014-2015	
Manufacturing	163,070	129,530	124,610	124,000	-39,070	-24.0%	-5,530	-4.3%	-610	-0.5%
Retail	148,760	140,540	144,540	145,340	-3,420	-2.3%	4,800	3.4%	800	0.6%
Service	142,200	150,890	170,630	176,850	34,650	24.4%	25,960	17.2%	6,220	3.6%
Office	572,410	623,320	662,970	693,880	121,470	21.2%	70,560	11.3%	30,910	4.7%
Institutional	196,940	213,490	233,730	231,740	34,800	17.7%	18,250	8.5%	-1,990	-0.9%
Other	38,830	40,530	47,920	50,470	11,640	30.0%	9,940	24.5%	2,550	5.3%
Total	1,262,210	1,298,300	1,384,400	1,422,280	160,070	12.7%	123,980	9.5%	37,880	2.7%

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

Toronto Employment by Category

Over the last year, the number of jobs in Toronto have increased by 2.7%, representing 37,870 jobs.

The Office category remains Toronto's largest, accounting for nearly half (48.8%) of all jobs found in Toronto (see Figure 9), growing 4.7% and adding 30,910 jobs from 2014 (see Table 3). The Institutional category is Toronto's second largest employment category, with 16.3% of the City's jobs.

The Institutional category lost more jobs than any other category with over 2015, a decline of 1,990 jobs or 0.9% (see Figure 10). The Service category represents 12.4% of the City's jobs and grew by 6,220 jobs or 3.6%. The Manufacturing category contains 8.7% of jobs in Toronto, making it

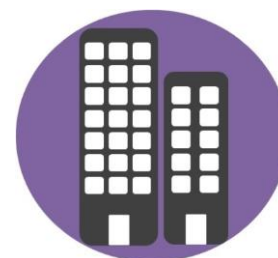
the second smallest category in the City. From 2014, the category lost 610 jobs, a decline of 0.5%. The Retail category grew slightly from 2014, adding 800 jobs or 0.6%.

The smallest category in Toronto is the Other category, which includes entertainment venues, community and recreational uses. It represents 3.5% of jobs in the City and was the fastest growing category in Toronto over 2015, growing by 5.3% and adding 2,550 jobs.

The Past Decade

Over the decade, the number of jobs in Toronto has grown from 1.26 million to 1.42 million jobs, an increase of 12.7%. All categories with the exception of Manufacturing have grown over the last ten years.

The Office Category



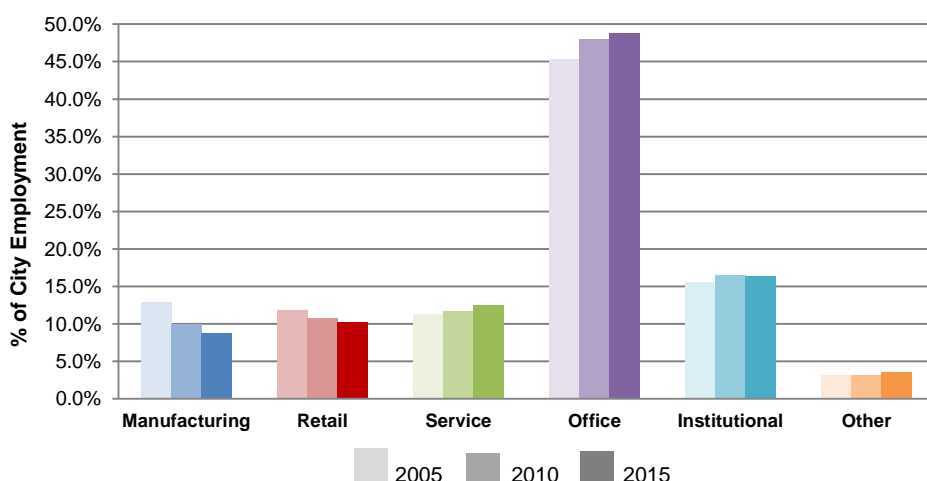
Nearly half of all jobs in Toronto reside in the Office category, representing 48.8% of Toronto's jobs. The Office category has been Toronto's predominant category for over thirty years. Over the last ten years, Toronto employment has continued to concentrate in the Office category, adding 121,470 jobs and growing by 21.2%. Over the last five years, the Office category has grown steadily from 623,320 jobs in 2010 to 693,880 jobs in 2015, adding 70,560 jobs and growing by 11.3%.

The Institutional Category



The Institutional category has been Toronto's second largest employment category for over

Figure 10: Category Change Over Time, 2010-2015



twenty years, overtaking the Retail category in 1984 and the Manufacturing category in 1992. Currently, the Institutional category represents 16.3% of Toronto's employment. Over the last decade, the Institutional category has added 34,800 jobs, growing by 17.7%. Since 2010, the Institutional category has grown by 18,250 jobs or 8.5%; however, over 2014 the Institutional category lost employment, declining by 1,990 jobs (0.9%).

The Service Category



The Service category represents 12.4% of Toronto's employment. Over the last ten years, the category has maintained its share of employment in Toronto. Since 2005, the Service category has added 34,650 jobs, growing by 24.4%. Most of this growth has occurred over the last five years, as jobs increased by 25,960 (17.2%). From 2014, the category added 6,220 jobs.

The Retail Category

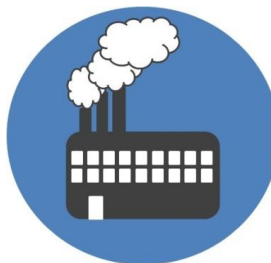


Toronto's Retail category changed significantly since 2005. At that time, the Retail category was growing. During the global

recession Retail employment declined sharply, losing more than 10,990 jobs between 2007 and 2010. By 2011, the category began to recover and has grown steadily since that time. From 2014, the category gained 800 jobs, growing by 0.6%. In 2015, the Retail category accounted for 10.2% of all employment in Toronto.

Retail category employment has not fully recovered from the recessions of 1991-1992 and 2007-2008. From 2005 to 2015, the Toronto Employment Survey recorded a decline of 3,420 Retail jobs (2.3%). Over the past twenty years, the category has restructured to reduce its reliance on labour through changes to its built form, use of technology and service delivery methods.

The Manufacturing Category



The Manufacturing category, once Toronto's second largest employment category, is today Toronto's second smallest category. Manufacturing employment continues to decline, likely as a result of the evolution of the North American economy from goods production to services. Toronto's employment in the Manufacturing category is primarily concentrated in the Processed Goods Processing and the Product Assembly subcategories, accounting for 65.6% of Manufacturing employment in Toronto.

Manufacturing employment declined by 39,070 (24%) from

2005-2015. Over the last five years, this decline slowed, totaling 5,530 jobs lost (4.3%). In 2015 the Manufacturing category lost just 610 jobs or 0.5%, with the number of Manufacturing establishments increasing modestly over the last year.

The Other Category



The Other category is Toronto's smallest employment category. This category includes entertainment venues, community and recreation uses. This category grew strongly, adding 11,640 jobs (30%) over the last decade. Over the last five years, the category has added 9,940 jobs (24.5%). In 2015, the Other category was the fastest growing category in Toronto adding 2,550 jobs (5.3%).

Employment by Economic Sector

In 2011, City Planning incorporated the North American Industry Classification System (NAICS) into the data collection processes 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.

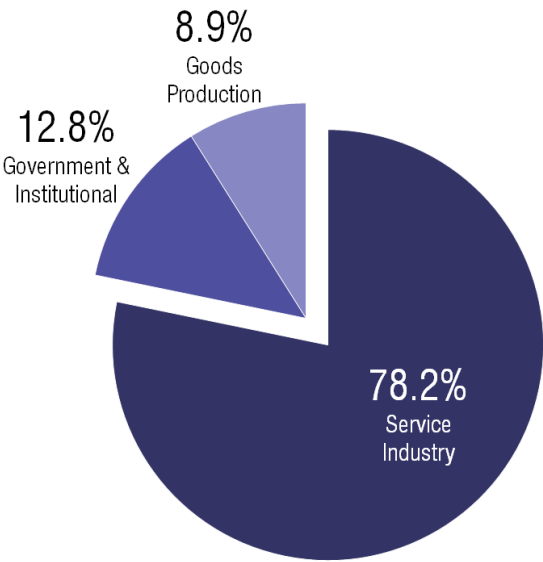
Coding the data to the lowest, most detailed level enables it to

be aggregated to higher levels during analysis and for comparative purposes. The NAICS coding for establishments is now quite stable, enabling comparisons over time as well as comparisons to other municipalities in Canada and elsewhere. In 2015, the Employment Survey was extremely successful in coding Toronto's establishments with 99.7% of businesses assigned a full 6-digit code.

Major Industry Sectors

At the broadest level of analysis, NAICS sectors can be broken down into three major industries: Goods Producing; Service-Based; and Government and Institutional (see Figure 11). More than three quarters (78.2%) of all jobs in the City are in Service-Based Industries while 12.8% of employment is in Government and Institutional-Based industries. The remaining 8.9% of jobs in the City are in the Goods Producing industries.

Figure 11: 2015 Employment by Major Economic Sector

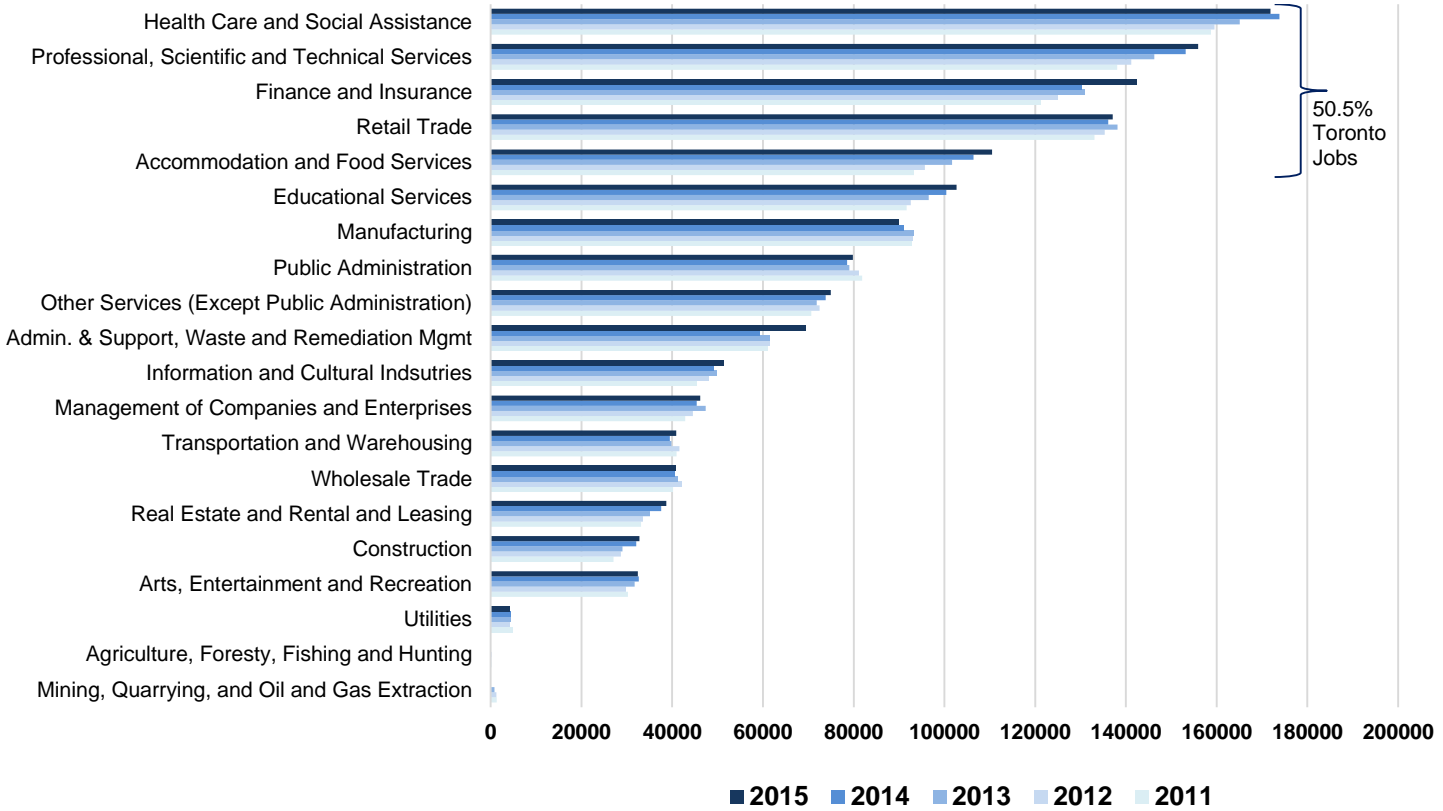


Both the Service and the Government and Institutional industries experienced growth over 2015. Service- Based Industries grew by 3.2%, adding 34,440 jobs, while Government and Institutional industries grew by 3,440 jobs or 1.9%. Goods Producing Industries remained

stable, losing nominal employment over 2015, declining by 0.2% or 250 jobs.

Since 2011, when the Employment Survey began recording NAICS data, all major industries have grown. Service-Based industries have grown the

Figure 12: 2015 Employment by Economic Sector



most, gaining 103,480 jobs and growing by 10.3%. Government and Institutional industries have grown over 2011, adding 8,870 jobs and growing by 5.1% while Goods Producing industries grew slightly, adding 890 jobs or 0.7%.

NAICS

The North American Industry Classification System (NAICS) classifies the economy into 20 major sectors. In 2015, over half (50.5%) 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 (see Figure 12).

The top five categories are: Health and Social Assistance; Professional, Scientific and Technical Services; Finance and Insurance; Retail Trade; and Accommodation and Food Services.

From 2014, the Finance and Insurance sector saw the greatest net gains in employment, growing by 11,960 jobs (9.2%). This sector was also the fastest growing sector between 2011 and 2015, adding 21,080 jobs (17.4%). The Finance and Insurance sector is currently the third largest sector in Toronto, representing 10.0% of all jobs. If the sector's current rate of growth continues (9.2% per year), the Finance and Insurance sector is poised to become the second largest sector in Toronto and would surpass the Professional, Scientific and Technical Services sector's employment in 2016.

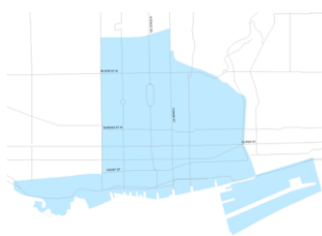
The Administrative and Support, Waste Management and Remediation Services sector saw significant net gains since 2014, growing by 10,000 jobs (16.8%) in just one year. This sector's rate of growth was slower between 2011 and 2015 growing by 8,350 jobs

(13.7%). This spike in employment growth from 2014 is directly related to the Pan Am and Parapan Am Games, which took place in Toronto over the summer of 2015. Establishments in this sector added thousands of employees to their firms to manage additional work and security demands during the games. This sector is expected to decline over 2016 back to pre-2015 levels.

The Health Care and Social Assistance sector lost the most jobs among sectors from 2014. The sector declined by 2,000 jobs (1.2%). However since 2011, the sector grew by 13,120 jobs (8.3%). As such, the Health Care and Social Assistance sector remains Toronto's largest NAICS sector accounting for 12.1% of jobs citywide.

Employment in Downtown and the Centres

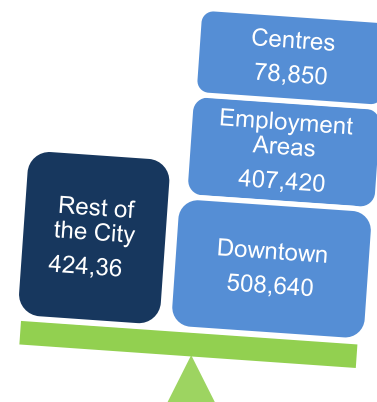
Downtown



Toronto's Downtown is a local and national economic hub. It contains 508,640 jobs within 21.4km². The Downtown accounts for 35.7% of Toronto's jobs with 23,740 jobs per km². Employment in the Downtown increased by 25,930 jobs (5.4%) from 2014 and grew by 75,830 jobs (17.5%) from 2010 to 2015 (see Table 4, page 7). Downtown continues to attract new establishments and in 2015, 32.0% of business establishments new to Toronto chose to locate in Toronto's Downtown.

The Office category is the largest category in the Downtown, accounting for two of every three jobs (66.4%). The next largest category is Institutional, which accounts for 13.1% of employment. Over 2015, the Office category grew by 21,950 jobs (6.9%).

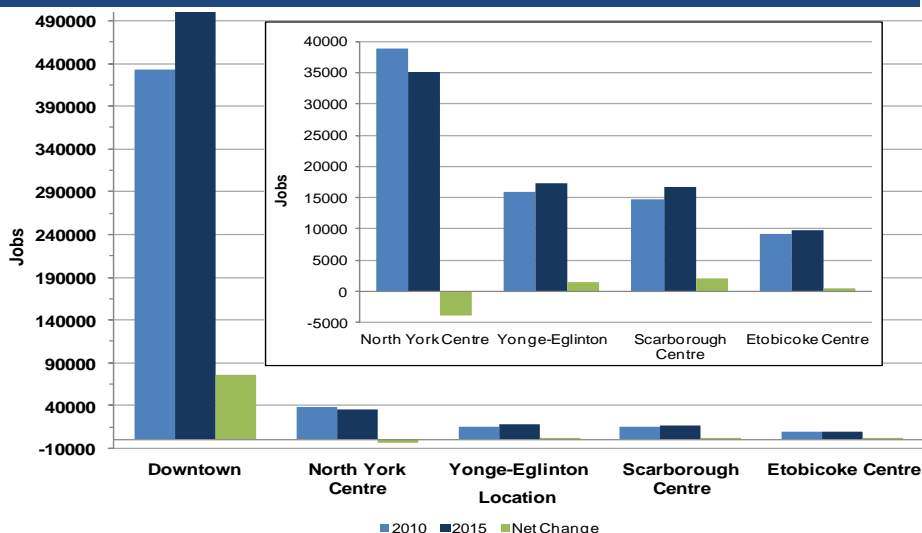
The smallest category is Manufacturing, representing just 0.9% of employment in the Downtown. For the first time since 2012, Manufacturing employment in Downtown grew by 300 jobs (7.1%). Since 2010, all categories have experienced some growth with the exception of Manufacturing which lost 850 jobs (15.7%). The Service category was the fastest growing category between 2010 and 2015, growing by 11,420 jobs (26.8%) in Downtown. The Culture & Community category showed strong growth, adding 4,120 jobs and growing by 26.9% over the last five years.



The Centres

Overall, the Centres are home to 78,850 jobs, 5.5% of employment in the City. Over the last year, employment in the Centres declined by 810 jobs (1.0%). This decrease is partly attributable to employment losses in Yonge-Eglinton Centre. All other Centres experienced modest employment growth. Over the last decade, the Centres have grown by

Figure 13: Net Change in Centres Employment, 2010 2015



10,850 jobs (15.8%). Over the last five years, the Centres have grown by 330 jobs (0.4%, see Figures 13 and 14). In the Centres, employment is predominantly office-related with Office category jobs accounting for nearly three quarters (74.6%) of all employment in the Centres (see Figure 15).

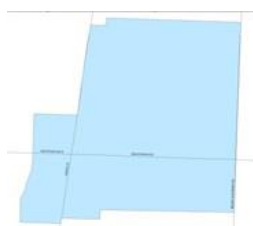
North York Centre



North York Centre is Toronto's largest Centre and is home to 35,000 jobs, 2.5% of jobs in the City. From 2010 to 2014, employment in the Centre has declined steadily, losing 3,790 jobs (9.8%). From 2014, employment in North York Centre increased for the first time since 2009, gaining 170 jobs (0.5%). The Office category is the largest category in North York Centre, representing 81.7% of employment, or 28,590 jobs.

From 2014, North York Centre's Office category lost 90 jobs (0.3%), its fifth consecutive year of declines. Over the last five years, the Office employment has declined by 12.4%, a loss of 4,040 jobs. The Retail category grew the most from 2014, growing by 160 jobs (10.8%). Both the Service and Other categories saw very modest net employment gains of 50 and 80 jobs respectively. Both the Manufacturing and Office categories lost employment.

Yonge-Eglinton



Yonge-Eglinton Centre is the second largest Centre in Toronto and contains the highest density of employment in the City of Toronto with nearly 30,000 jobs per square kilometer. The Centre contains 17,390 jobs or 1.2% of employment in the City. From 2014, employment in this Centre declined by 1,620 jobs (8.5%). However, over the last five years, Yonge-Eglinton has grown by 9.8%, adding 1,550 jobs.

Employment in the Yonge-Eglinton Centre is mainly Office-related, accounting for nearly 8 out of every 10 jobs (77.1%). Over the last five years, the Office category has increased, growing 11.7% over five years but has declined by 11.7% in the last year. Only the Manufacturing, Service and Retail categories achieved modest employment growth in the last year, with all other categories showing modest losses since 2014.

A portion of Yonge-Eglinton Centre's employment loss is due to the renovation and expansion of 2300 Yonge Street, where employment decreased by 850 jobs due to the construction and renovation of 2300 Yonge Street. This construction is expected to add an additional 19,700m² of Office space and an additional 3,960 m² of Retail Space⁹.

Figure 14: Net Change in Centres Employment, 2010 2015

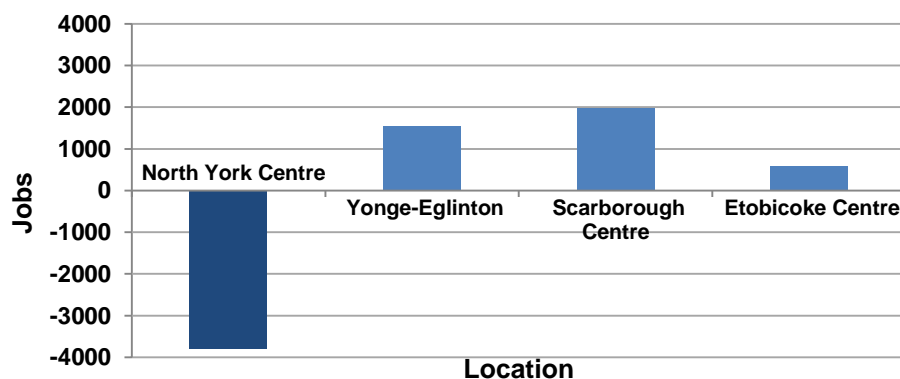
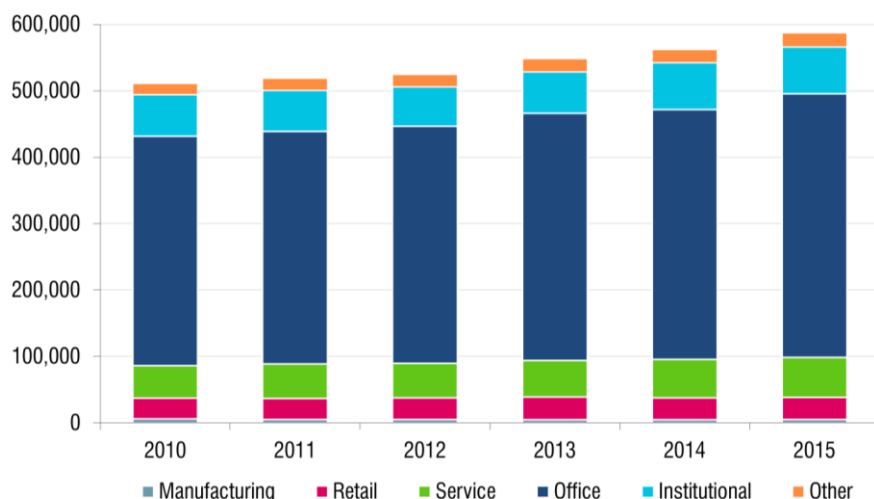
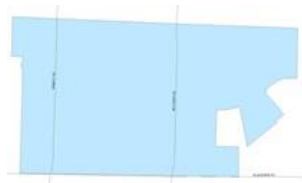


Figure 15: Total Employment in Downtown and Centres by Six Categories, 2010-2015



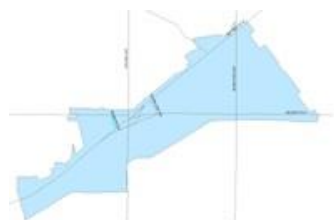
Scarborough Centre



Scarborough Centre contains 16,690 jobs, or 1.2% of employment found in Toronto. In 2015, Scarborough Centre gained 250 jobs, growing by 1.5%. Over the last five years, employment in Scarborough Centre grew by 13.5%, adding 1,990 jobs. The majority of employment in Scarborough Centre is Office-related. However, unlike North York and Yonge-Eglinton Centres, Scarborough Centre has greater categorical diversity. The Office category in Scarborough

represents almost 6 out of every 10 jobs (59.6%), followed by the Retail category with 21.9% of jobs in the Centre.

Etobicoke Centre



Etobicoke Centre is the smallest Centre in Toronto. It is home to 9,770 jobs, representing just 0.7% of employment in Toronto. Etobicoke Centre saw employment growth over 2015, adding 390 jobs and growing by 4.2%. Over the last five years, the Centre has gained 580 jobs, growing by 6.3% since 2010. Similar to Toronto's other Centres,

7 out of every 10 jobs (70.4%) are in the Office category, representing 6,880 jobs in Etobicoke Centre.

Employment Areas



Employment Areas 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 categorical breakdowns of the Employment Areas identified in the City's Official Plan at the time of the 2015 Employment Survey. The lands represented by the Employment Areas are structural elements of Toronto's economic future in order to ensure a stable environment for investment and to maintain and grow the City's revenue base.

Table 4: Total Employment In Centres and Downtown, 2005-2015

	2010	2011	2012	2013	2014	2015	2010-2015		2014-2015	
							Net Change	% Change	Net Change	% Change
Downtown	432,810	441,920	446,840	467,820	482,710	508,640	75,830	17.5%	25,930	5.4%
North York Centre	38,790	36,520	36,060	35,350	34,830	35,000	-3,790	-9.8%	170	0.5%
Yonge-Eglinton	15,840	16,820	17,740	19,760	19,010	17,390	1,550	9.8%	-1,620	-8.5%
Scarborough Centre	14,700	15,030	15,400	16,870	16,440	16,690	1,990	13.5%	250	1.5%
Etobicoke Centre	9,190	8,840	8,660	8,690	9,380	9,770	580	6.3%	390	4.2%
Downtown and the Centres	511,330	519,130	524,700	548,490	562,370	587,490	76,160	14.9%	25,120	4.5%
Rest of City	786,970	774,830	806,870	815,060	822,020	834,790	47,820	6.1%	12,770	1.6%
City Total	1,298,300	1,293,960	1,331,570	1,363,550	1,384,390	1,422,280	123,980	9.5%	37,890	2.7%

Note: Numbers have been rounded to the nearest ten. Centres are in descending order by size of employment base.



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 Infrastructure¹⁰

The Provincial Growth Plan for the Greater Golden Horseshoe was

amended in 2013 with revised forecasts. The City of Toronto is forecasted to reach employment of 1,640,000 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%.¹¹ Employment Areas and employment-related lands are important to Toronto's economic health and achieving the forecasted growth.

Currently, 22,200 establishments are located in Toronto's Employment Areas. This accounts for more than a quarter (29.3%) of all business establishments in the City and accounts for 407,420 jobs, or 28.6% of all jobs in Toronto. Further, 83.1% of all Manufacturing establishments are in Employment Areas, accounting for 91.9% of all Manufacturing

jobs in Toronto. Over the last ten years, 160 Manufacturing establishments closed their doors in Toronto, and with them 39,070 Manufacturing jobs were lost from Toronto.

The continued loss of Manufacturing category 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 Area can destabilize it, 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 Areas is imperative.

Table 5: Total Employment in Employment Areas, 2010-2015

	2010	2011	2012	2013	2014	2015	2010-2015		2014-2015	
							Net Change	% Change	Net Change	% Change
1. South Etobicoke	40,960	39,820	40,390	41,080	41,040	41,840	880	2.1%	800	1.9%
2. Rexdale	40,000	38,940	39,510	40,790	40,730	39,860	-140	-0.4%	-870	-2.1%
3. Highway 400 Corridor	31,470	32,810	33,540	32,490	32,430	32,720	1,250	4.0%	290	0.9%
4. Dufferin Keele North	31,540	32,430	31,080	30,350	30,850	30,980	-560	-1.8%	130	0.4%
5. Tapscott/Marshalling Yard	30,420	30,950	30,960	31,440	30,900	30,440	20	0.1%	-460	-1.5%
6. Dufferin Keele South	23,990	24,610	25,100	26,400	27,100	26,620	2,630	11.0%	-480	-1.8%
7. Duncan Mills	17,900	17,560	18,580	19,090	19,110	20,200	2,300	12.8%	1,090	5.7%
8. South West Scarborough	18,020	18,990	18,670	19,030	19,240	20,000	1,980	11.0%	760	4.0%
9. Consumers Road	19,040	18,140	17,490	17,660	18,080	19,690	650	3.4%	1,610	8.9%
10. Scarborough Highway 401 Corridor	16,080	16,670	16,820	16,990	17,210	17,120	1,040	6.5%	-90	-0.5%
11. North West Etobicoke	12,810	12,820	13,010	13,450	14,320	15,580	2,770	21.6%	1,260	8.8%
12. Don Mills	11,910	11,390	11,990	11,550	11,140	14,290	2,380	20.0%	3,150	28.3%
13. West Central Scarborough	15,490	15,360	14,730	14,270	13,790	14,010	-1,480	-9.6%	220	1.6%
14. Steeles & Victoria Park	12,420	12,500	13,270	13,020	12,360	12,600	180	1.4%	240	1.9%
15. Liberty	7,550	8,140	8,300	9,450	11,240	9,780	2,230	29.5%	-1,460	-13.0%
16. Milliken	7,070	7,430	7,300	7,550	8,030	7,650	580	8.2%	-380	-4.7%
17. Overlea	6,270	6,090	6,220	6,150	6,370	6,770	500	8.0%	400	6.3%
18. Laird	4,680	4,550	4,390	4,960	5,620	5,560	880	18.8%	-60	-1.1%
19. South of Eastern	4,650	4,000	3,970	4,280	4,190	5,330	680	14.6%	1,140	27.2%
20. Weston Road/Mount Dennis	1,730	1,650	1,850	1,940	2,520	2,410	680	39.3%	-110	-4.4%
21. South East Scarborough	970	920	980	980	970	990	20	2.1%	20	2.1%
22. Airport Corporate Centre	1,040	1,140	1,230	890	900	880	-160	-15.4%	-20	-2.2%
23. Other Employment Related Lands	29,540	28,780	29,480	29,720	30,610	32,100	2,560	8.7%	1,490	4.9%
All Employment Areas	385,550	385,690	388,860	393,530	398,750	407,420	21,870	5.7%	8,670	2.2%
Rest of the City	912,750	908,270	942,710	970,020	985,640	1,014,860	102,110	11.2%	29,220	3.0%
City Total	1,298,300	1,293,960	1,331,570	1,363,550	1,384,390	1,422,280	123,980	9.5%	37,890	2.7%

Note: Numbers have been rounded to the nearest ten. Areas are in descending order by size of employment base.

Official Plan Amendment 231

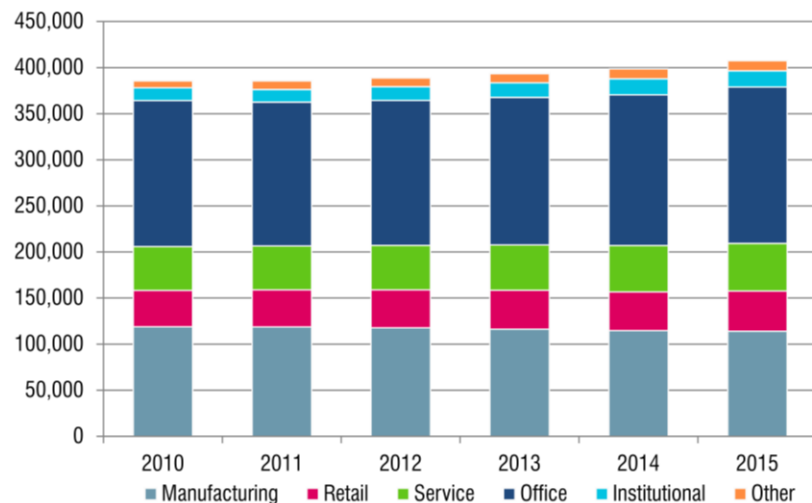
On December 18, 2013, Council enacted Amendment 231 of the Official Plan (OPA 231) regarding *Economic Health and Employment Lands Policies and Recommendations on Conversion Requests*. OPA 231 amends Policy 2.1.2 of the Official Plan by deleting the term *Employment Districts* and replacing it with *Employment Areas*.

Map 2 of the Official Plan, which depicts the Employment Districts, was replaced by a new Map 2 showing Employment Areas and the Official Plan was amended with new land use designations. In the interest of maintaining longitudinal comparability, this bulletin includes the historic geographies of the pre-existing Employment Districts, now identified as *Employment Areas*. To reflect the change of geographies all other designated Employment Areas not included in the Employment Districts are reported as 'Other Employment Related Lands' These lands are included in our analysis of the Employment Areas as a whole and are also profiled in the following pages.

Employment Area Activity Overview

Toronto's Employment Areas contain 407,420 jobs, or 28.6% of all jobs found in the City (see Table 5). Employment Areas continue to attract new businesses, with 32.1% of new establishments in the City locating in Employment Areas from 2014. Of those 1,430 new establishments in Employment Areas, 165 were Manufacturing establishments. In fact, nearly four of every five new Manufacturing establishments in Toronto located in Employment Areas.

Figure 16: Total Employment In Employment Areas by Category



Employment Areas are particularly important to the Manufacturing category. 83.1% of all Manufacturing establishments in the City are in Employment Areas and represent 91.9% of all Manufacturing jobs. From 2014, Toronto added 20 Manufacturing establishments, for a total of 5,030 establishments. However, the number of Manufacturing jobs declined by 610 (0.5%). Since 2010, Toronto has lost 40 Manufacturing establishments (4.3% of the category) and 5,530 Manufacturing jobs. Nearly one third of all Employment Area jobs are in the Manufacturing category, a total of 113,960 jobs (see Figure 16).

Nearly a quarter (24.4%) of all Office category employment is in Employment Areas, some 169,470 jobs. The Office category is now the largest category in the Employment Areas, representing 41.6% of jobs. The Office category saw a net increase of 5,570 jobs (3.5%) over 2015; this is a greater rate of Office growth than the Centres saw over the year. In the last five years, the Office category grew by 11,260 jobs (7.1%).

The third largest category is the Service category, representing 12.7% of Employment Area jobs and is followed closely by the Retail category, comprising 10.7% of Employment Area jobs. The Service category has continued to grow, adding 1,620 jobs last year and 4,260 jobs (9.0%) over the past five years.

From 2014, the Retail category grew by 1,610 jobs (3.9%). Over the last five years, the Retail category has grown consistently, adding 4,070 jobs (10.3%). The Institutional and Other categories are the smallest categories in the Employment Areas with 17,770 and 10,930 jobs respectively. Both of these categories saw employment growth over 2015, adding a combined 7,180 jobs to the Employment Areas.

Core and General Employment Areas

OPA 231, Section 4.6 categorizes Employment Areas into two different designations: Core Employment Areas and General Employment Areas. Core Employment Areas are locations where primary employment uses are permitted. They are, for the most part, geographically located within the interior of Employment

Areas. Uses that would attract the general public into the interior of employment related lands and possibly disrupt industrial operations are not generally permitted in the Core Employment Areas and instead, are located in General Employment Areas.

General Employment Areas are usually located on the periphery of Employment Areas on major roads where retail stores, service shops and restaurants can serve workers in the Employment Areas and would also benefit from visibility and transit access to draw the broader public.

Core Employment Areas

In 2015, 63.4% of Employment Area jobs were located in Core Employment Areas. The Manufacturing category is the most prominent category in Core Employment Areas representing 39.1% of employment; totaling

97,510 jobs and accounting for 78.6% of all Manufacturing jobs the City (see Figure 17).

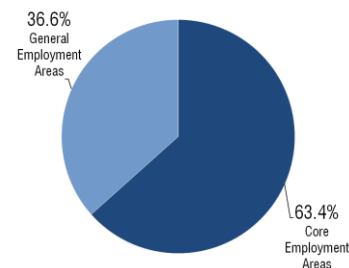
The Office category follows closely, with 34.5% of jobs in Core Employment Areas. Together these categories comprise 73.6% of jobs found in Core Employment Areas, a total of 183,580 jobs.

General Employment Areas

The categorical composition of jobs located within General Employment Areas is more diverse. The employment found in General Employment Areas supports the Core Employment Area industry functions and serves as a buffer between sensitive land uses such as residential and heavy industrial land uses located in the Core Employment Areas.

The Office category is the most prominent category in General Employment Areas representing

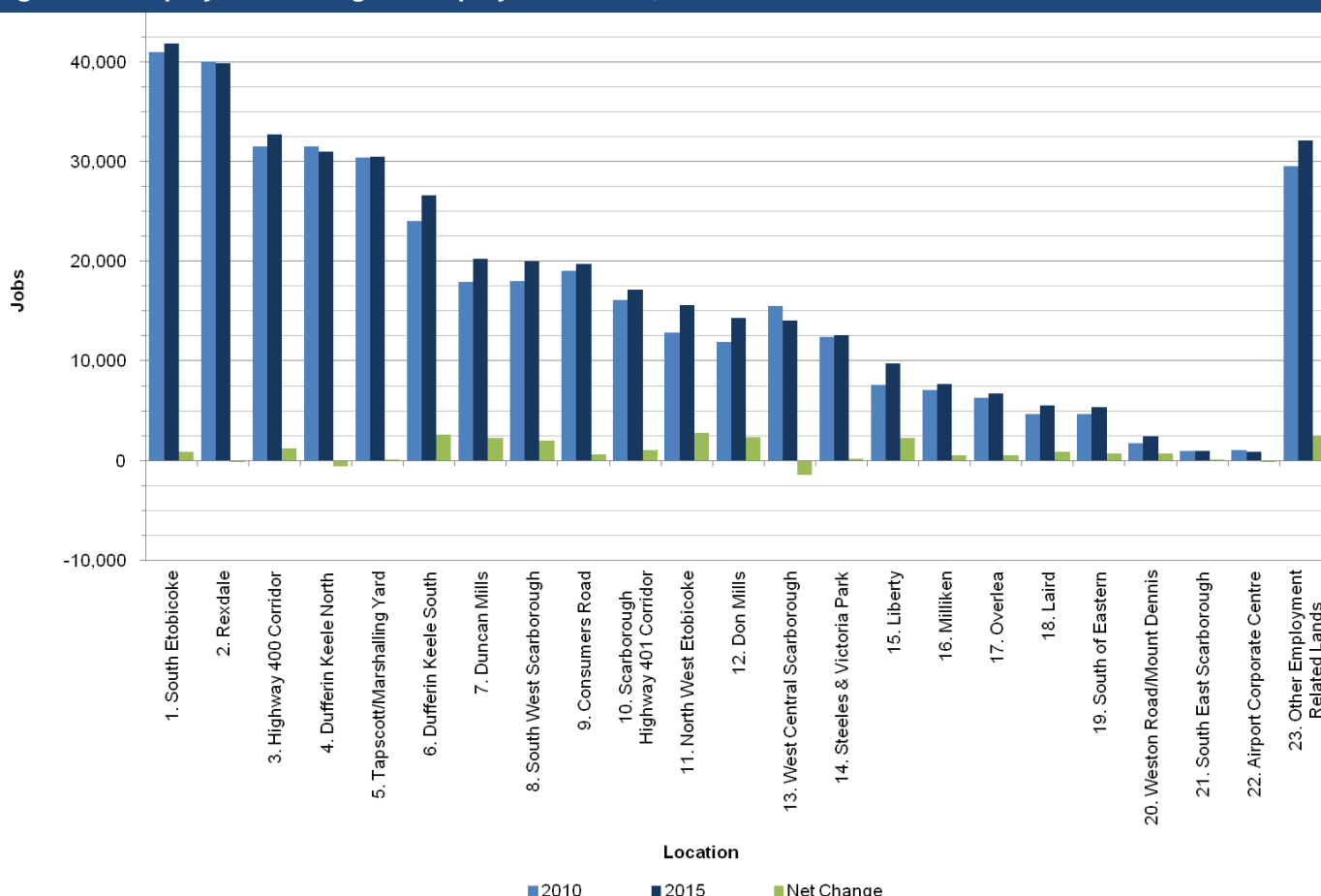
Figure 17: Core and General Employment, 2015

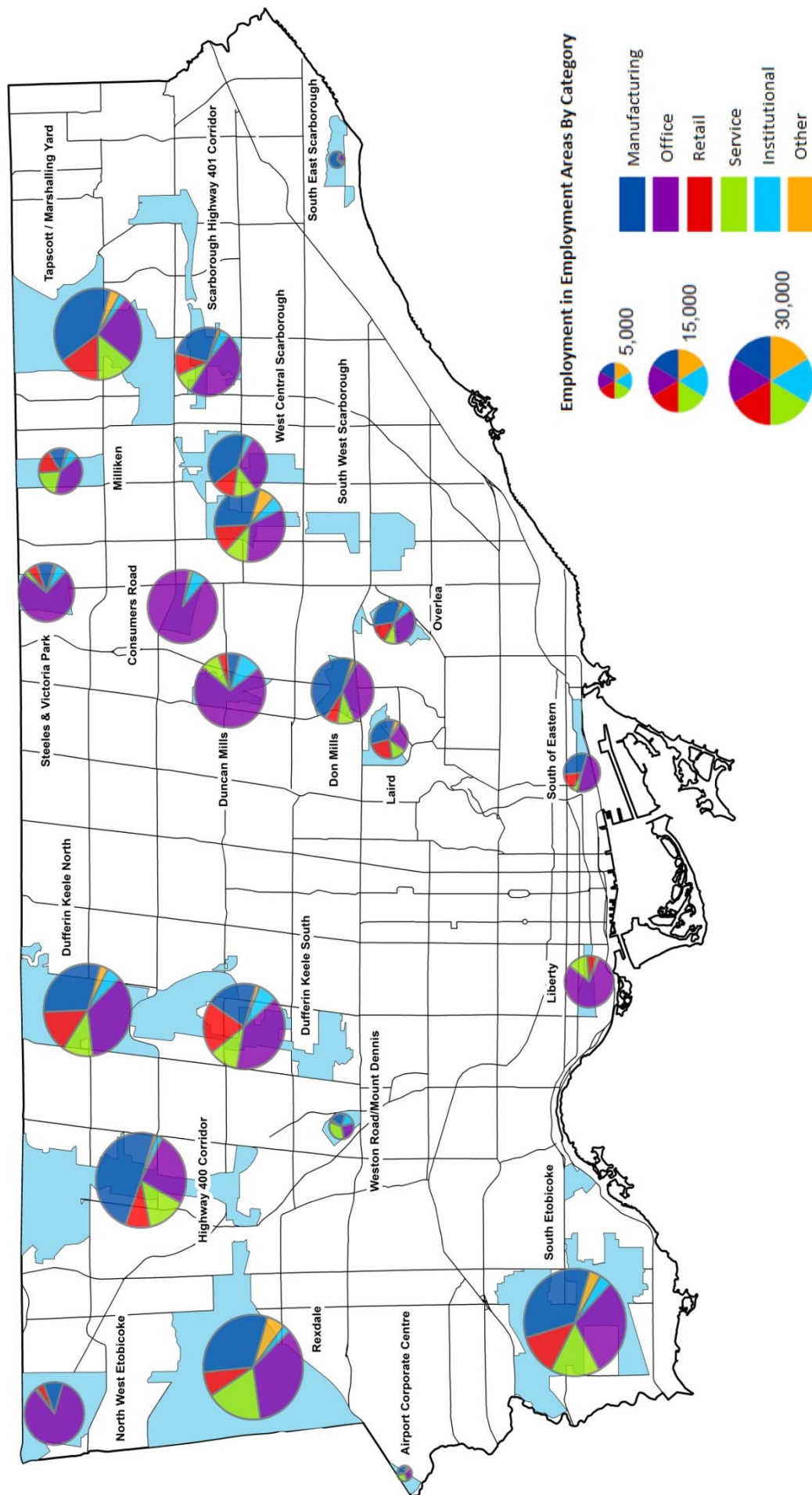


52.4% of jobs located in General Employment Areas. Retail is the next most prominent category comprising 17.2% of jobs. The Service and Manufacturing categories represent 11.4% and 10.8% of jobs located in General Employment Areas respectively.

The following section presents trends of the Employment Areas in descending order of employment base (see Figure 18). Employment Areas by category for 2012 to 2015 are profiled in Table 6 on page 25.

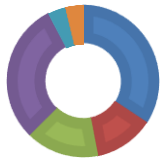
Figure 18: Employment Change in Employment Areas, 2010-2015





Employment Areas

1. South Etobicoke

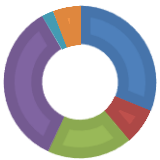


The South Etobicoke Employment Area is Toronto's largest concentration

of employment outside of Downtown, containing 41,840 jobs (10.3%) of all Employment Area employment. Employment has increased in the Area by 1.9% over the past year and 2.1% over the past five years. Manufacturing is the largest category in the Area, accounting for 34.2% of jobs.

Employment in this category decreased over the past five years, declining by 1,680 jobs (10.5%). However, over the past year, the Manufacturing category gained 580 jobs, growing by 4.2%. The Office category is the second largest category in the Area, accounting for 30.0% of employment. Over the past five years, employment in this category has fluctuated, falling from 2009 to 2011 then rising from 2011 to 2014. In 2015, the Office category lost 300 jobs for a decrease of 2.3%. The Institutional category has seen the largest percentage increase over the last five years, increasing from 820 jobs in 2010 to 1,630 in 2015.

2. Rexdale

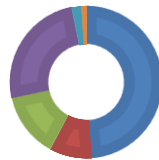


Rexdale is home to 39,860 jobs, accounting for 9.8% of all employment found in the

Employment Areas. Its share of Employment Area employment has decreased from 11.4% in 2009, when Rexdale was the largest Employment Area in the City with 44,690 jobs. Over the last year, employment in the Area decreased by 2.1% or 870 jobs.

The Office category is the largest category in the Area, accounting for 34.8% of employment. Since 2014, the Office category has lost 480 jobs, declining by 3.3%. Manufacturing is the second largest category in the Area, accounting for 31.2% of jobs. This category lost 260 jobs in 2015. Since 2010, Manufacturing employment has declined by 1,010 jobs or 7.5%. Rexdale has the largest number of Service category jobs of all Toronto Employment Areas with 7,220. In 2015, the Service category remained stable adding just 10 jobs, an increase of 0.1%.

3. Highway 400 Corridor

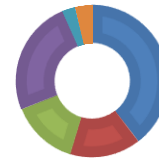


The Highway 400 Corridor contains 32,720 jobs, or 8.0% of employment found in the

Employment Areas. Since 2010, total employment in the Area has increased by 1,250 jobs or 4.0%. From 2014, the Area experienced an increase of 290 jobs, growing by 0.9%. The Area contains the highest number of Manufacturing category jobs of all Employment Areas with 16,040, representing 12.9% of all Manufacturing employment in the City. Manufacturing category jobs account for 49.0% of employment in the Highway 400 Corridor. Over the last year, the Manufacturing category lost 190 jobs or 1.2%. However, since 2010, the Manufacturing category has grown by 5.7% or 860 jobs. The Processed Goods Processing and Product Assembly subcategories account for 75.6% of the Area's Manufacturing category employment. The Office category accounts for 25.2% of employment in the Area. Over the last five years, this category added 540 jobs, an increase of 7.0%. The Retail category

experienced the largest percentage employment change over the last year, growing by 200 jobs or 7.5%.

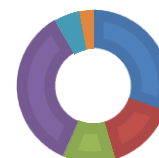
4. Tapscott-Marshalling Yard



There are 30,440 jobs in Tapscott-Marshalling Yard, accounting for 7.5% of all

employment found in the Employment Areas. The Area declined by 460 jobs in 2015, declining by 1.5%. Since 2010, total employment in the Area has remained stable, growing by just 20 jobs or 0.1%. The Manufacturing category is the largest category in the Area, accounting for 39.6% of employment. In the past five years, the Area has lost 850 jobs, declining by 6.6%. From 2014, the Manufacturing category declined by 3.9%, a loss of 490 jobs. The Office category represents nearly one quarter of all jobs in Tapscott – Marshalling Yard (24.7%). Over the last five years, the Office category lost 1,830 jobs, declining by 19.6%. From 2014, the Office category lost 410 jobs and declined by 5.2%. The Retail and Service categories in Tapscott-Marshalling Yard are significant and account for 15.1% and 14.3% of employment in the Area respectively. The Service category in particular has increased in importance over the past five years, adding 1,430 jobs for an increase of 49.1%.

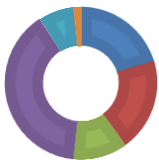
5. Dufferin Keele North



Dufferin Keele North contains 7.6% of employment found in the Employment Areas, with a total of 30,980

jobs. Over the past year, the Area added 130 jobs, an increase of 0.4%. Over the last five years, the Employment Area lost 560 jobs, declining by 1.8%. The Office category and Manufacturing category are the largest categories in the Area, accounting for 35.1% and 30.3% of employment respectively. Since 2010, Manufacturing category employment has increased by 8.9%, adding 770 jobs. The Office category, in contrast, lost 2,450 jobs since 2010, a decrease of 18.4%. In fact, the Office category was the only category to lose employment from 2014, down by 720 jobs and 6.2%. In the past five years, the Service category has increased in importance in Dufferin Keele North, adding 660 jobs, an increase of 23.7%.

6. Dufferin Keele South

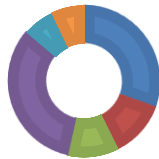


Dufferin Keele South is home to 26,620 jobs, accounting for 6.5% of Employment Area

employment. A decrease of 480 jobs or 1.8% was recorded in the Employment Area in 2015. Dufferin Keele South has grown by 2,630 jobs in the past five years, increasing by 11.0% overall. The Office category is the largest category in Dufferin Keele South, representing 39.2% of employment, followed by the Manufacturing category with 20.4% and the Retail category at 19.8%. Over the last five years, the Office category has added 470 jobs, growing by 4.7%. From 2014, the Office category declined by 4.9%. The Manufacturing category had a net gain of 500 jobs between 2010 and 2015. From 2014, however, the Manufacturing category lost 290 jobs, declining 5.1% in just one year. While the Manufacturing

and Office categories declined since 2014, the Retail and Service categories grew, adding 210 and 150 jobs respectively. Employment in the Retail category has grown by 15.6% in the last five years, increasing by 710 jobs.

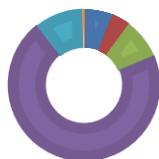
7. South West Scarborough



There are 20,000 jobs in South West Scarborough, accounting for 4.9% of jobs found in the

Employment Areas. An increase of 4.0% or 760 jobs was recorded in the Employment Area in 2015. Since 2010, the Area has grown by 1,980 jobs or 11.0%. Employment in South West Scarborough is mainly in two categories, the Office category and the Manufacturing category, accounting for 32.8% and 30.5% of jobs in the Area respectively. Office category employment reached 6,570 jobs in 2015, the highest number of jobs recorded in the past five years, increasing by 9.1% or 550 jobs since 2014. Since 2010, the Office category has grown by 920 jobs or 16.3%. Manufacturing category employment has grown over the past five years, adding 450 jobs and growing by 8.0%. Over the last year, the Manufacturing category gained 260 jobs, growing by 4.5%. The Institutional category was the only category to lose employment from 2014, losing 200 jobs or 13.2%.

8. Duncan Mills

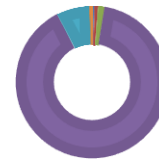


Duncan Mills contains 5.0% of employment found in the Employment Areas, with a total of 20,200

jobs. Employment grew from 2014 with 1,090 additional jobs recorded. The Employment Area

is heavily dominated by the Office Category, accounting for 70.7% of its employment. The Institutional category and the Service category account for 10.3% and 8.6% of employment respectively. All categories showed growth over the last five years. Office category employment grew by 6.7% or 990 jobs. In comparison, the Manufacturing category has grown by 30.9%, adding 290 jobs. The Institutional category has grown by 780 jobs or 35.3% since 2010 and contains the largest concentration of Institutional Category employment in the Employment Areas. Service category employment has increased by 32.1%, adding 420 jobs over the last five years.

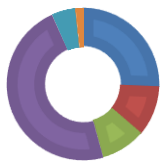
9. Consumers Road



The Consumers Road Employment Area contains 19,690 jobs or 4.8% of

employment found in the Employment Areas. From 2014, employment grew significantly, adding 1,610 jobs or 8.9%. The Consumers Road Employment Area contains 17,700 Office category jobs, the highest of any Employment Area in the City. Office category jobs account for nine out of ten jobs in this employment in the Area. The largest Office subcategories in the Area are Finance, Insurance and Real Estate and Business Services, together accounting for 52.7% of total employment. Since 2010, employment in the Office category has declined modestly losing 180 jobs or 1.0%. The Retail and Institutional categories saw modest gains in employment from 2014 adding 30 and 70 jobs respectively. Both the Service and Other categories remained stable, neither gaining nor losing employment from 2014.

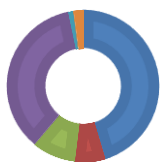
10. Scarborough Highway 401 Corridor



The Scarborough Highway 401 Corridor is home to 17,120 jobs, representing

4.2% of Employment Area employment. In 2015, 90 fewer jobs were recorded in the Employment Area, a decrease of 0.5%. Since 2010, employment has increased, adding 1,040 jobs and growing by 6.5%. The Office category accounts for 47.5% of jobs in the Employment Area and is the largest employment category. Office category employment has fluctuated over the past five years, with a net loss of 190 jobs since 2010 after adding 190 jobs in the past year. The Manufacturing category is the second largest category in the Area, accounting for 4,390 jobs or 26.6% of employment. In the past five years, this category has added 1,130 jobs, increasing by 34.7%. After a modest loss of 130 jobs or 2.9% in 2015.

11. North West Etobicoke

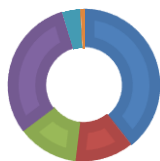


There are 15,580 jobs in North West Etobicoke or 3.8% of all jobs in the Employment

Areas. Over the past year, total employment in the Area increased by 8.8%, adding 1,260 jobs. Since 2010, total employment in North West Etobicoke has increased significantly, adding 2,770 jobs and growing by 21.6%. This Area contains a diversity of jobs across industry categories. The Manufacturing category is the largest category in the Area, accounting for 45.3% of employment. The Processed Goods Processing subcategory accounts for 63.2% of

Manufacturing employment in the Area. The Office category is the second largest category in the Area with 35.8% of employment, followed by the Service category with 9.1% and the Retail category at 6.6%. Since 2010, North West Etobicoke has lost 360 Manufacturing jobs, a decrease of 4.9%. However, the Manufacturing category grew by 620 jobs or 9.6% in 2015. Over the last five years, 2,680 Office category jobs were added to the Employment Area, an increase of 92.7%. This past year saw the addition of 350 Office category jobs, an increase of 6.7%.

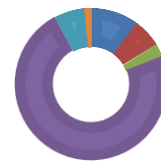
12. West Central Scarborough



West Central Scarborough contains 3.4% of employment found in the Employment Areas, a total

of 14,010 jobs. Employment in the Area increased over the last year, adding 220 jobs in 2015. Over the past five years, West Central Scarborough has lost 1,480 jobs, decreasing by 9.6%. All categories except for the Office and Service categories have lost employment in the past five years. The Manufacturing category remains the largest category in the Area, despite losing 19.9% of employment since 2010. It accounts for 5,510 jobs or 39.3% of employment in the Employment Area. Over the same period, the Office category added 470 jobs for a total of 4,280 jobs and now comprising 30.5% of jobs found in West Central Scarborough Employment Area. In 2015, a 5.2% increase in Office category employment was recorded, adding 210 jobs.

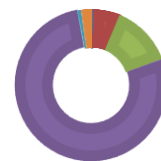
13. Steeles & Victoria Park



Steeles & Victoria Park is home to 12,600 jobs or 3.1% of Employment Area employment.

The Area added 240 jobs in 2015, growing by 1.9%. Since 2010, total employment in Steeles & Victoria Park has grown modestly, by 180 jobs and growing 1.4%. The Office category is the largest employment category in the Area by a significant margin, accounting for 73.1% of jobs. Since 2010, the Office category has declined by just 1.0% or 90 jobs. From 2014, the Office category grew by 130 jobs or 1.4%. The Manufacturing category is the second largest category in the Steele & Victoria Park Employment Area and accounts for 10.2% of employment in the Area totaling 1,290 jobs. Manufacturing category employment has decreased by 15.1% in the past five years, with a loss of 230 jobs.

14. Liberty

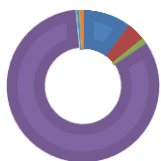


The Liberty Employment Area contains 2.4% of employment found in the Employment

Areas, with a total of 9,780 jobs. In 2015, Liberty recorded a loss of 1,460 jobs. Over the past five years, the Area has added 2,230 jobs, an increase of 29.5%. The Office category is the largest employer in Liberty, accounting for 77.7% of jobs, followed by the Service category with 13.1% and the Retail category at 5.8%. Since 2010, Office category employment has increased by 53.8%, adding 2,660 jobs. The Retail and Service categories have both grown since 2010, increasing by 58.3% and 21.9%

respectively. Manufacturing category employment has decreased sharply since 2010, declining by 1,020 jobs or 95.3%. Most of the manufacturing decline was represented by a loss of 840 jobs over the last year. The Business Services subcategory, part of the Office category, is the largest subcategory in the Area, accounted for 60.1% of employment.

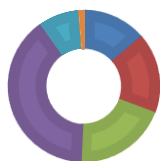
15. Don Mills



The Don Mills Employment Area contains 14,290 jobs, or 3.5% of jobs found in the Employment

Areas. Over the past year, employment in the Area grew by 28.3%, adding 3,150 jobs, overall, the greatest increase of any Employment Area in 2015. The Office category is the largest category in Don Mills, accounting for 82.9% of employment. In the past five years, this category has increased, growing by 46.8% or 3,780 jobs. In 2015, Office category had 11,850 jobs, the highest number of Office category jobs ever recorded in Don Mills, growing by 40.9% in just one year, adding 3,440 jobs. The Manufacturing category and Retail categories are the second and third largest categories in the Area, accounting for 10.3% and 3.9% of employment respectively. Over the past five years, employment in both categories has decreased. Manufacturing category employment has decreased by 43.2% or 350 jobs and Retail category employment has decreased by 32.5% or 270 jobs.

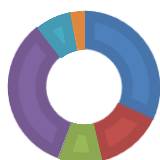
16. Milliken



Milliken is home to 7,650 jobs, accounting for 1.9% of jobs found in the Employment

Areas. In 2015, the Area recorded a loss of 380 jobs or 4.7% but had a net gain of 580 jobs (8.2%) since 2010. Milliken Employment Area has a diverse range of employment. The Office category is the largest category in the Area and accounts for 39.5% of employment. The Service category follows with 20.0% of jobs. The Retail category represents 17.0% of jobs found in the Area with the Manufacturing, Institutional and Other categories make up the balance of employment. The Office category was the only category to lose employment from 2014, declining by 580 jobs or 16.1%. As Office category employment has increased, Manufacturing category employment in the Area has decreased. The Manufacturing category recorded the greatest rate employment growth in the Employment Area from 2014, adding 90 jobs and growing by 9.4%. Over the last five years, the Manufacturing category has remained stable, growing by 40 jobs (4.0%). Since 2010, all employment categories recorded growth with the Service category experiencing the greatest gains, growing by 250 jobs or 19.5%.

17. Overlea

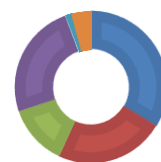


There are 6,770 jobs found in the Overlea Employment Area, accounting for

1.7% of employment in the Employment Areas. Over the past year, employment in Overlea increased by 400 jobs or 6.3%.

Employment in Overlea is mainly in the Office and Manufacturing categories, accounting for 33.8% and 32.0% of employment respectively. In 2014, employment in the Office category surpassed the Manufacturing category for the first time. The Office category is down by 1.7% or 40 jobs. The Office category still remains the largest category in Overlea, growing by 450 jobs or 24.5%. This year, Manufacturing added 50 jobs, growing by 2.4%. Over the last five years, the Manufacturing category was the only category to decline with 480 jobs lost, decreasing by 18.1%. The Office sector saw the greatest gains over the last five years, growing by 24.5%, adding 450 jobs.

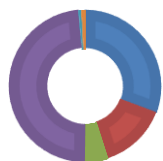
18. Laird



The Laird Employment Area contains 5,560 jobs, or 1.4% of employment found in the

Employment Areas. Since 2010, the Area has experienced significant growth, adding 880 jobs, an increase of 18.8%. However, the 2015 survey recorded a decline of 1.1% or 60 jobs. The Manufacturing category and Office category are the largest categories in the Area, accounting for 33.6% and 24.6% of employment respectively. In 2015, Manufacturing category employment grew by 3.3%, adding 60 jobs to the Area. Since 2010, the Manufacturing category has grown by 27.2% or 400 jobs. From 2014, the Office category lost 30 jobs, shrinking by 2.1%. Since 2010, the Office category has lost 330 jobs, declining by 19.4%. Over the past five years, the Service category has seen significant growth, increasing by 166.7% or 450 jobs.

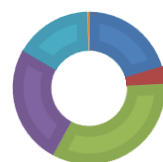
19. South of Eastern



The South of Eastern Employment Area contains 5,330 jobs, accounting for 1.3% of

employment found in the Employment Areas. Employment recorded in this Area grew significantly, adding 1,140 jobs (27.2%) in the past year and 680 (14.6%) jobs in the past five years. From 2014, South of Eastern saw a significant categorical shift. The Office category became South of Eastern's largest category, replacing manufacturing, accounting for 48.3% of jobs. Since 2010, the Office category has grown by 1,080 jobs or 72.0%. The majority of this growth occurred from 2014 when the Office category grew by 1,010 jobs or by 64.3% in just one year. The Manufacturing category became the Employment Area's second largest category in 2015 accounting for 30.7% of employment. This trend typifies Manufacturing category employment losses citywide over the last five years. Since 2010, the Manufacturing category in the Area lost 480 jobs, shrinking by 22.6%. From 2014, 230 Manufacturing jobs were lost. The Retail category accounts for a significant portion of employment in South of Eastern, 14.4% of employment. From 2014, the Retail category grew by 71.1%, adding 320 jobs.

20. Weston Road/Mount Dennis

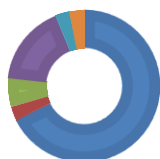


The Weston Road/Mount Dennis Employment Area is home to 2,410 jobs and 0.6% of

jobs found in the Employment Areas. This year, a loss of 110

jobs was recorded, a decrease of 4.4%. Weston Road/Mount Dennis is the only Employment Area where the Service category is the largest category in the Employment Area, accounting for 33.8% of employment, some 810 jobs. Over the past twenty-five years, Office category employment has decreased from 2,710 jobs to 610 jobs, while Service category employment has increased from 0 to 810 jobs, 800 of which are in the Terminal and Dispatch subcategory accounts for 796 of the Area's 810 Service category jobs. The Manufacturing category is the third largest in the Area, accounting for 20.4% of jobs. Over the five years, the Office category was the fastest growing category in Weston Road/Mount Dennis. Office category employment almost tripled, growing by 281.3% or 450 jobs and the Institutional category grew by 90 jobs, an increase or 30.0%.

21. South East Scarborough

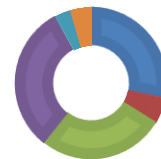


Employment in this Area has contracted over time. There are 990 jobs found in the South East

Scarborough Employment Area, representing 0.2% of Employment Area employment. This year 20 additional jobs were recorded in the Employment Area, an increase of 2.1%. The Manufacturing category is the dominant category in South East Scarborough, accounting for 67.7% of employment, or 670 jobs. The Processed Goods Processing and the Raw Material Processing subcategory account for 85.2% of Manufacturing employment in the Area, representing 550 jobs. The Manufacturing category gained 80 jobs (13.6%) over the past year but lost 30 jobs (4.3%) over the

past five years. From 2014, the Manufacturing and Institutional categories were the only categories to record employment increases, adding 80 and 10 jobs respectively.

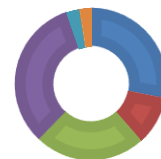
22. Airport Corporate Centre



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 and contains 34,540 jobs.¹² The Toronto portion is the smallest Employment Area in Toronto and contains 0.2% of employment found in all Employment Areas, a total of 880 jobs. Over the past five years, employment in the Area has decreased by 15.4%. Employment losses in the Manufacturing category and Office categories are largely responsible for this decrease. The Raw Material Processing subcategory accounts for 230 of the Area's 250 Manufacturing jobs. In 2013, the Office category surpassed the Manufacturing category as the largest employment category in the Area, accounting for 31.5% of employment. The Service category accounts for 240 jobs, or 27.0% of employment in the Area.

23. Other Employment Related Lands



Other Employment Related Lands include all designated Employment Areas in the

City that do not fall within one of the twenty-two Major Employment Areas. They account for 7.9% of Employment Area employment and contain 32,100 jobs. This

year's employment total is the highest recorded in the last five years, increasing by 1,490 jobs or 4.9% since last year. Office, Manufacturing and Service category jobs account for the majority of employment in the Other Employment Related Lands. Over the last five years, Office category employment has seen the largest increase, growing by 27.8% or 2,280 jobs. The Office category accounts for 32.6% of their employment. The Manufacturing category accounts for 28.0% of jobs and has declined by 6.0% of its total in the past five years. In 2015, a modest increase of 150 jobs was recorded in the Manufacturing category. In 2015, Service category employment grew by 3.7% or 270 jobs and accounts for 23.6% of jobs in the Other Employment Related Lands.

Insights

Every year, the survey examines some particular features of employment in Toronto. This year, we examined Office employment in the Financial Core; and Industry Clusters throughout the City.

Focus on Offices in the Financial Core

Toronto's Financial Core, traditionally centered at the King and Bay Streets intersection continues to experience economic growth and change (see Map 3). In the context of Downtown Toronto's recent pace of growth and development, the Financial Core is an area of intensive study for employment trends.

The Financial Core Office category has performed well over the last decade (see Table 7). The Financial Core's growth rate is comparable to that of the City overall during this period, less than that of Downtown Toronto

(see Table 8). Total Financial Core Office category employment (excluding bank branches and office uses in retail concourses) was 93,660 in 2015, an increase of nearly 10,000 jobs over the previous decade, with most of this growth occurring in the last five years. During this period, only one new office building was constructed, the first phase of the Bay-Adelaide Centre, which contributed approximately 3,400 new jobs. The Finance, Insurance and Real Estate (FIRE) subcategory of the

Office Employment, Core South

	2005	2010	2015
Total Office Employment	83,740	85,590	93,660

Office Employment Growth, Toronto

	2005-2015	2010-2015
City	12.7%	9.5%
Downtown	31.3%	17.5%
Financial Core	11.8%	9.4%



Map 3: Offices in the Financial Core



Office category is the largest Office employment subcategory, today; employing 57,350 people, or just over 61% of the Financial Core's total employment. FIRE employment has grown by nearly 8,300 jobs (16.9%) since 2005. The number of establishments in this subcategory has increased from 490 jobs in 2005 to 590 in 2015, a growth rate of 20.5%.

The next largest subcategory is Business Services, including Law Firms, Accountants, Consultants and Advertising. The number of Business Services establishments decreased from 640 firms in 2005 to 510 in 2015. Together FIRE and Business Services account for almost 85,000 Office jobs in the Financial Core, or 90% of Core Office employment in 2015. The remainder are scattered across several categories.

Office category employment is increasing south of Front Street (South Financial Core). With the completion of new office towers on York Street, the RBC Phase 3 tower (Waterpark Place) and the Southcore Financial Centre, in 2015 the Toronto Employment Survey counted 20,610 Office employees working in 150 firms in the area's office buildings.

Outside of Downtown and North York Centre, the area south of Front Street is the largest concentration of Office category employment found in the City, more than any other Centre or Employment Area. Overall, FIRE and Business Services subcategories account for 13,816 employees, or 76.3% of the employment found in the Downtown south. Of the subcategories, the largest is the offices of banks and trust companies with 4,100 jobs, or 20.0% of total Office category employment in the area.

Toronto Employment by Industry Cluster

Toronto's size, density and proximity to the United States support concentrations of industrial activities not seen elsewhere in Canada. Toronto's Employment Areas support these activities by providing large contiguous areas for goods production, facilitating industry concentrations separated from sensitive uses within the City's borders. Toronto is home to several clusters of related industries.

Clusters are geographic concentrations of inter-related firms and institutions in the same economic field.¹³ They include firms that share buyer/supplier relationships, competing businesses and institutions that provide specialized services and training to a particular industry.

In 2014, the Toronto Employment Bulletin investigated the relative concentration of 19 traded clusters in Toronto and compared them to the national average, along with the total employment in each cluster and the change in the share of Toronto's employment over the last three years.¹⁴ This analysis can be found on pages 23 to 25 of the 2014 Toronto Employment bulletin.

In 2015, the Toronto Employment Bulletin mapped three selected industry clusters to investigate patterns of dispersal throughout the City: the Automotive cluster, the Information and Communications Technology (ICT) Services cluster and the Logistics cluster (see Maps 4, 5, & 6).

The Automotive cluster is less concentrated in the City than in Canada's economy. This means that Resource-based clusters are less concentrated in the City compared to Canada as a whole. Map 4, demonstrates that this resource-based cluster tends to locate within Toronto's Employment Areas, particularly, the Core Employment Areas where Manufacturing related employment activities are encouraged. Conversely, the ICT Services cluster which is largely a service-based cluster tends to locate in a pattern that concentrates Downtown and in the Centres, with the remainder distributing across the Employment Areas.

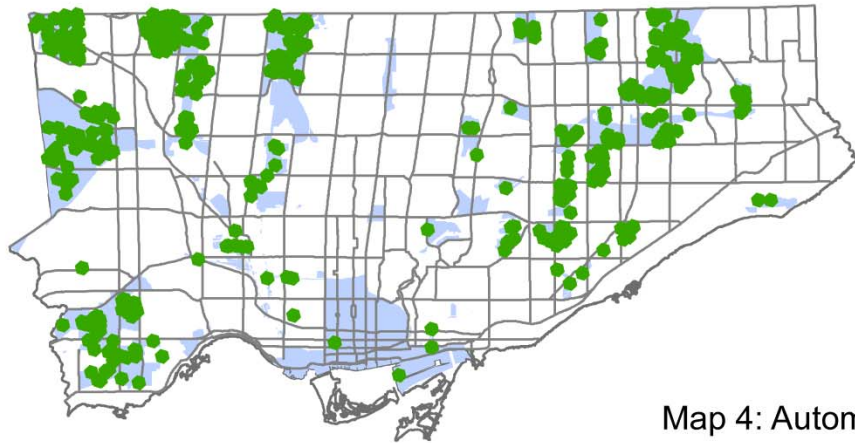
Lastly, the Logistics clusters' dispersal pattern locates its employment more evenly across Employment Areas, Downtown and the Centres.

Table 6: Total Employment in Employment Areas by Sector, 2012-2015

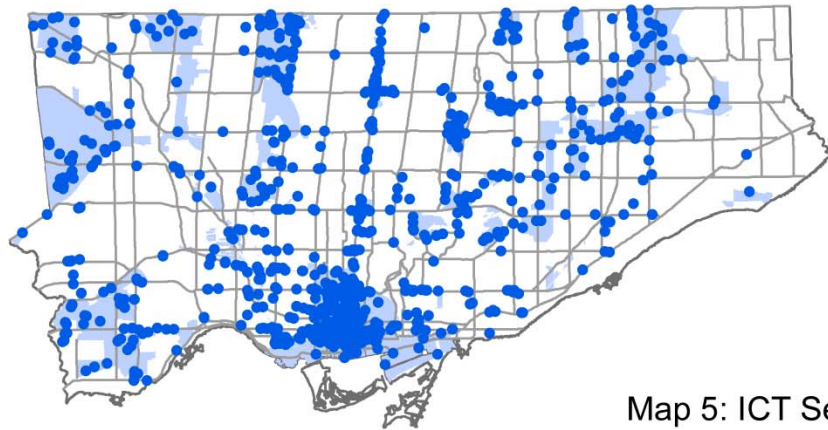
Employment Areas	Category	Manufacturing				Retail				Service			
	Year	2012	2013	2014	2015	2012	2013	2014	2015	2012	2013	2014	2015
South Etobicoke		15,980	15,470	13,740	14,320	5,040	5,210	5,180	5,320	5,450	5,650	5,900	6,490
Rexdale		12,560	12,030	12,680	12,420	2,710	3,200	3,060	3,050	6,750	6,890	7,210	7,220
Highway 400 Corridor		16,840	16,440	16,230	16,040	2,920	3,010	2,680	2,880	4,510	4,560	4,500	4,530
Dufferin Keele North		8,600	9,100	9,180	9,400	4,670	4,600	4,630	4,650	2,870	2,940	3,020	3,450
Tapscott/Marshalling Yard		12,710	12,940	12,530	12,040	4,100	4,160	4,340	4,610	4,170	4,180	4,300	4,340
Dufferin Keele South		5,250	5,640	5,710	5,420	4,880	5,070	5,050	5,260	2,860	2,780	2,930	3,080
Duncan Mills		1,070	1,180	1,170	1,230	830	830	810	810	1,530	1,550	1,650	1,730
South West Scarborough		5,770	5,820	5,840	6,100	2,270	2,320	2,350	2,430	2,160	2,070	2,250	2,170
Consumers Road		40	80	100	80	130	120	120	150	350	350	290	290
Scarborough Highway 401 Corridor		4,610	4,490	4,520	4,390	1,900	1,840	1,780	1,820	1,840	1,870	1,880	1,630
North West Etobicoke		6,530	6,750	6,440	7,060	920	940	1,010	1,030	1,180	1,170	1,240	1,420
Don Mills		2,070	1,830	1,820	1,470	780	590	580	560	150	140	160	200
West Central Scarborough		6,640	6,020	5,690	5,510	1,900	1,830	1,740	1,770	1,920	1,820	1,730	1,790
Steeles & Victoria Park		1,270	1,290	1,220	1,290	710	740	700	750	380	370	410	360
Liberty		950	890	900	50	460	510	540	570	900	1,010	1,320	1,280
Milliken		920	860	960	1,050	1,210	1,250	1,250	1,300	1,360	1,540	1,460	1,530
Overlea		2,490	2,400	2,120	2,170	900	860	930	970	520	470	520	630
Laird		1,360	1,340	1,810	1,870	1,140	1,390	1,330	1,300	280	790	820	720
South of Eastern		1,860	1,870	1,870	1,640	550	500	450	770	210	250	240	270
Weston Road/Mount Dennis		410	520	540	490	80	90	90	90	820	780	770	810
South East Scarborough		600	620	590	670	30	30	40	30	90	70	60	60
Airport Corporate Centre		450	220	250	250	30	40	40	50	240	230	230	240
Other Employment Related Lands		8,680	8,660	8,850	9,000	3,060	2,940	3,200	3,340	7,860	7,650	7,320	7,590
All Employment Areas		117,660	116,460	114,760	113,960	41,220	42,070	41,900	43,510	48,400	49,130	50,210	51,830
Rest of the City		10,580	9,730	9,850	10,040	102,090	104,740	102,640	101,830	109,930	115,380	120,420	125,020
City Total		128,240	126,190	124,610	124,000	143,310	146,810	144,540	145,340	158,330	164,510	170,630	176,850

Employment Areas	Category	Office				Institutional				Other				Total			
	Year	2012	2013	2014	2015	2012	2013	2014	2015	2012	2013	2014	2015	2012	2013	2014	2015
South Etobicoke		11,590	12,090	12,830	12,530	720	840	1,260	1,630	1,610	1,820	2,140	1,540	40,390	41,080	41,040	41,840
Rexdale		14,240	15,580	14,360	13,880	1,120	1,190	1,210	970	2,110	1,910	2,200	2,320	39,510	40,790	40,730	39,860
Highway 400 Corridor		8,550	7,580	8,130	8,250	480	610	630	680	240	280	260	340	33,540	32,490	32,430	32,720
Dufferin Keele North		12,770	11,450	11,600	10,880	1,610	1,740	1,580	1,680	560	530	840	920	31,080	30,350	30,850	30,980
Tapscott/Marshalling Yard		7,510	7,620	7,920	7,510	730	740	830	820	1,740	1,800	970	1,110	30,960	31,440	30,900	30,440
Dufferin Keele South		10,190	10,800	10,970	10,430	1,670	1,770	2,080	2,010	260	340	370	430	25,100	26,400	27,100	26,620
Duncan Mills		13,150	13,370	13,280	14,270	1,910	2,060	2,120	2,070	90	100	80	80	18,580	19,090	19,110	20,200
South West Scarborough		6,090	6,350	6,020	6,570	1,220	1,240	1,510	1,310	1,160	1,230	1,270	1,430	18,670	19,030	19,240	20,000
Consumers Road		16,320	16,440	16,150	17,700	480	550	1,300	1,370	170	130	110	110	17,490	17,660	18,080	19,690
Scarborough Highway 401 Corridor		7,290	7,640	7,950	8,140	1,000	980	800	850	170	190	270	290	16,820	16,990	17,210	17,120
North West Etobicoke		4,110	4,250	5,220	5,570	110	180	200	180	150	170	210	320	13,010	13,450	14,320	15,580
Don Mills		8,820	8,830	8,410	11,850	90	80	90	100	80	90	80	120	11,990	11,550	11,140	14,290
West Central Scarborough		3,250	3,710	4,070	4,280	830	830	510	540	180	70	60	120	14,730	14,270	13,790	14,010
Steeles & Victoria Park		10,090	9,740	9,080	9,210	710	750	790	820	120	130	170	170	13,270	13,020	12,360	12,600
Liberty		5,790	6,780	8,200	7,600	70	70	70	80	130	190	220	200	8,300	9,450	11,240	9,780
Milliken		3,070	3,160	3,600	3,020	660	650	650	650	80	90	100	100	7,300	7,550	8,030	7,650
Overlea		1,930	2,060	2,330	2,290	300	300	310	520	80	70	150	200	6,220	6,150	6,370	6,770
Laird		1,530	1,290	1,400	1,370	20	40	40	80	50	120	220	230	4,390	4,960	5,620	5,560
South of Eastern		1,300	1,610	1,570	2,580	50	30	30	40	10	20	20	40	3,970	4,280	4,190	5,330
Weston Road/Mount Dennis		180	190	590	610	360	360	530	390	0	0	0	10	1,850	1,940	2,520	2,410
South East Scarborough		220	210	190	170	20	20	20	30	30	30	60	30	980	980	970	990
Airport Corporate Centre		440	330	310	280	30	30	30	30	40	40	40	40	1,230	890	900	880
Other Employment Related Lands		8,790	8,960	9,540	10,480	690	820	840	920	400	700	870	780	29,480	29,720	30,610	32,100
All Employment Areas		157,220	160,040	163,720	169,470	14,880	15,880	17,430	17,770	9,460	10,050	10,710	10,930	388,860	393,530	398,750	407,420
Rest of the City		480,900	496,640	499,250	524,410	203,540	206,840	216,300	213,970	35,700	36,590	37,210	39,540	942,710	970,020	985,640	1,014,860
City Total		638,120	656,680	662,970	693,880	218,420	222,720	233,730	231,740	45,160	46,640	47,920	50,470	1,331,570	1,363,550	1,384,390	1,422,280

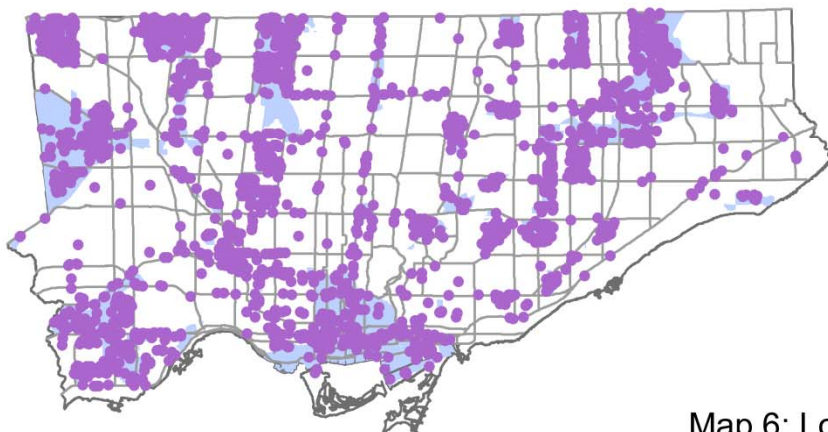
Note: Numbers have been rounded to the nearest ten. Areas are in descending order by size of employment base.



Map 4: Automotive Cluster



Map 5: ICT Services Cluster



Map 6: Logistics Cluster

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

The Toronto Employment Survey has successfully marked its thirty-third 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 enables 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 2015, employment data was acquired from 89.3% of business establishments that were identified. This marks a decrease over 2014's response rate of 90.1%. 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 voluntary National Household Survey, conducted in 2011, and released in 2013.

End Notes

- ¹ City of Toronto, Economic Development & Culture.
- ² All data in this Bulletin are from the Toronto Employment Survey unless otherwise indicated.
- ³ Labour Force Survey, Statistics Canada. February 2015.
- ⁴ City of Toronto, Economic Development & Culture.
- ⁵ The Conference Board of Canada.
- ⁶ Statistics Canada, CANSIM Table 379-0031 2015.
- ⁷ Focus, BMO Capital Markets Oct 2, 2015.
- ⁸ Focus, BMO Capital Markets Oct 2, 2015.
- ⁹ Land Use Information System II, Toronto City Planning Division, Research & Information, last accessed November 16, 2015
- ¹⁰ Ontario. Ministry of Infrastructure. *Places to Grow*. Web page at <https://www.placestogrow.ca/index.php>, last updated February 14, 2014.
- ¹¹ Ontario. Ministry of Infrastructure. *Growth Plan for the Greater Golden Horseshoe*, Schedule 3, 2013.
- ¹² Mississauga Employment Survey, 2015. <http://www.mississauga.ca/portal/residents/publicationsopendatacatalogue> , last accessed November 16, 2015.
- ¹³ Porter, Michael. 1998. Clusters and the new economic competition. *Harvard Business Review*, November-December, 1998.
- ¹⁴ Cluster definitions based on: Spencer, Gregory M., Tara Vinodrai, Meric S. Gertler, and David A. Wolfe. 2010. Do clusters make a difference? Defining and assessing their economic performance. *Regional Studies* 44:6: 697-715. Cluster definitions available at: Spencer, G. and Vindorai, T. 2005. Cluster, Muster or Bluster? An Inductive Approach to Measuring Clusters in Canada. University of Toronto: Innovation Systems Research Network, at <http://sites.utoronto.ca/isrn/publications/NatMeeting/index.html#nat05> .

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