



STAFF REPORT ACTION REQUIRED

2014 Toronto Employment Survey

Date:	January 26, 2015
To:	Planning and Growth Management Committee
From:	Chief Planner & Executive Director, City Planning Division
Wards:	All
Reference Number:	P:\2015\Cluster B\PLN\PGMC\PG15016

SUMMARY

The attached bulletin summarizes the results of the 2014 Toronto Employment Survey by highlighting the key findings and trends pertaining to employment by sector, the longevity of establishments, and employment activity in the Centres, Downtown and Employment Districts.

Toronto's economy has performed well over the past year. The recovery from the impacts of the global recession continues, with employment reaching 1,384,390 jobs; a net addition of 20,850 jobs since 2013 and 127,450 jobs over the past decade. The City experienced a 1.5% increase in employment this past year, exceeding both the national and provincial growth rates.

The number of establishments surveyed in 2014 was 75,180, a net gain of 430 or 0.6% since 2013. Of the total, 5,030 establishments were new to the City in 2014.

RECOMMENDATIONS

The Chief Planner and Executive Director, City Planning recommends that:

1. The Planning and Growth Management Committee receive this report for information.

Financial Impact

There are no financial impacts arising from this report.

ISSUE BACKGROUND

Since 1983, an annual survey has been conducted of Toronto businesses 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 activity in the City.

The results of the survey are used by City Planning and other City Divisions to monitor the progress of Official Plan policies and the City's economic and investment health. It also is used in proactive policy development for decision making, as an aid in labour force development efforts, and to provide background information for forecasting and the planning of City infrastructure and services. This annual survey offers timely insight into the business climate across Toronto to facilitate, accelerate and achieve economic growth. This summary of a key measure of the City's economic health was taken during the summer of 2014.

COMMENTS

Total Employment:

- The survey counted 1,384,390 jobs.
- Toronto's overall employment in 2014 rose by 1.5% or 20,850 jobs from 2013. Full-time employment has continued to stay above the 1 million mark for the eighth year, growing by 15,390 to 1,063,540. Part-time jobs increased by 5,450 to 320,860 this past year.

Employment by Sector:

- In 2014, Toronto's employment sectors grew versus 2013 with the exception of the Manufacturing and Retail sectors. Office employment continued its rebound from a low of 584,150 in 2006 to 662,970 in 2014, an increase of 6,290 jobs over 2013.
- The Office sector remains the largest source of employment in Toronto, representing nearly half of all jobs (47.9%), followed by the Institutional (16.9%), Service (12.3%), Retail (10.4%), Manufacturing (9.0%), and Other (3.5%) sectors, reflecting the diverse nature of the Toronto economy.

Number of Establishments:

- The number of establishments surveyed in 2014 was 75,180, a net gain of 430.
- Of the total number of establishments, 5,030 were new to the City in 2014. Of the new establishments, 57.2% are located within the Downtown (1,110), Centres (190) and Employment Districts (1,570).

Downtown and Centres:

- In 2014, there were approximately 562,370 jobs in Toronto's Downtown and Centres or 40.6% of all jobs in the City.
- Etobicoke Centre was the only Centre to gain employment in 2014, adding 690 jobs, growing by 7.9%. North York Centre remains Toronto's largest employment centre outside the Downtown with 34,830 jobs.
- Employment in the Downtown and the Centres in 2014 was 13.7% higher than it was five years ago, a net increase of 67,680 jobs.

Employment Districts

- In 2014, there were approximately 398,750 jobs in Toronto's Employment Districts or 28.8% of all jobs in the City. This is an increase of 1.3% or 5,220 jobs over 2013.
- Thirteen of these Districts posted increases in jobs over 2014, while six Districts decreased and four Districts showed no significant net change.
- Nearly thirty percent of all Employment District jobs are in the Manufacturing sector, totalling 114,780 jobs, down 1,690 jobs since 2013.
- The Office sector within the Employment Districts experienced a net gain of 3,660 jobs since 2013.
- The Retail sector has gained employment over the last five years, up 2,020 jobs while the Service sector has also continued to grow, adding 2,880 jobs or 6.1% over the past five years.
- Since 2009, overall employment in all Employment Districts has grown by 1.6%, adding 6,190 jobs.

Clusters

- Toronto is home to several significant clusters of related industries that add to Toronto's overall economic diversity and resilience within the Canadian economy.
- Toronto has strong and growing economic clusters in Business Services, Finance, Creative and Cultural activities and Information and Communication Technology.
- Despite the gradual decline in Manufacturing employment, the City has maintained a nationally significant specialization in Manufacturing.

Data Collection

- In 2014, employment data was acquired from 90.1% of business establishments that were identified. This is a decrease from the 2013 response rate of 91.0%.
- This is the fourth year of assigning complete NAICS industry codes to each business establishment in the City. The exercise was largely successful with 99.8% of businesses assigned a full 6-digit code.

The continuation of the annual Toronto Employment Survey is important for planning and economic development purposes, providing a longitudinal dataset for time-series analysis of employment and land use change in the City. Now in its fourth decade, the 2015 survey programme will commence in May and will be completed by September, 2015.

CONTACT

Kerri A. Voumvakis, Director
Strategic Initiatives, Policy & Analysis
City Planning Division
Tel: 416-392-8148
Fax: 416-392-3821
Email: kvoumva@toronto.ca

Michael Wright, Manager
Research and Information
City Planning Division
Tel: 416-392-7558
Fax: 416-392-3821
Email: mwright@toronto.ca

SIGNATURE

Jennifer Keesmaat, M.E.S, MCIP, RPP
Chief Planner & Executive Director
City Planning Division

ATTACHMENTS

Attachment 1: 2014 Toronto Employment Survey

P:\2015\Cluster B\PLN\PGMC\PG15016