



STAFF REPORT ACTION REQUIRED

2015 Toronto Employment Survey

Date:	January 18, 2016
To:	Planning and Growth Management Committee
From:	Chief Planner and Executive Director, City Planning Division
Wards:	All
Reference Number:	P:\2016\ClusterB\PLN\PGMC\PG16012

SUMMARY

The attached bulletin summarizes the results of the 2015 Toronto Employment Survey. The bulletin highlights the survey's key findings and counts of employment and business establishments in the City of Toronto for 2015, as well as the type and longevity of establishments and employment activity in the Centres, Downtown and Employment Areas.

Toronto's economy has performed well over the past year. The recovery from the impacts of the global recession continues, with employment in the City reaching 1,422,280 jobs, a net increase of 37,870 jobs (2.7%) from 2014, exceeding both the national and provincial growth rates. The survey counted 75,710 business establishments in 2015, a net gain of 530 (0.7%) from 2014. In 2015, 4,460 establishments were new to the City.

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, the City has conducted an annual survey 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. Using a consistent coding system of land parcel uses and occupant activities, the survey provides 33 years 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 City's economic and investment health and review the progress of Official Plan policies. Survey data are also used in proactive policy development for decision making, as an aid in labour force development efforts and to help develop forecasts and plan City infrastructure and services. This report summarizes the Toronto Employment Survey results, collected between May and August of 2015.

COMMENTS

Total Employment

- The survey counted 1,422,280 jobs.
- Toronto's overall employment increased by 37,870 jobs (2.7%) from 2014.
- Full-time employment increased by 14,380 jobs (1.4%) from 2014. At 1,077,930 jobs, full time employment has stayed above the 1 million mark for the ninth consecutive year.
- Part-time employment increased by 23,490 jobs (7.3%) to 344,350 jobs from 2014.

Employment by Category

- From 2014, five of six of the City's employment categories grew (only the Institutional category lost jobs).
- The Office category continues to be Toronto's the largest employment category, with nearly half of all jobs (48.8%), followed by the Institutional (16.3%), Service (12.4%), Retail (10.2%), Manufacturing (8.7%) and Other (3.5%) categories.
- Office employment, increased by 30,910 jobs (4.7%) to 693,880 jobs from 2014, and continues to rebound from its 2006 low of 584,150 jobs.

Number of Establishments

- In 2015, the survey counted 75,710 establishments, a net gain of 530 (0.7%).
- 4,460 establishments were new to the City in 2015. Of these, 60.6% are located within the Downtown (1,070), Centres (200) and Employment Areas (1,430).

Downtown and Centres

- In 2015, there were approximately 587,490 jobs in Toronto's Downtown and Centres (41.3% of all jobs in the City).
- From 2014, Yonge-Eglinton Centre was the only Centre to lose employment, shrinking by 1,620 jobs (8.5%).
- From 2010 to 2015, employment in the Downtown and the Centres grew by 76,160 jobs (14.9%).

Employment Areas

- In 2015, 407,420 jobs were in Toronto's Employment Areas (28.6% of the City's jobs). This is an increase of 8,670 jobs (2.2%) from 2014.
- In the last year, eleven of the 22 Employment Areas surveyed posted increases in jobs, while eight decreased and three Areas showed no significant changes.
- Nearly 27.9% of all Employment Area jobs are in the Manufacturing category, totalling 113,960 jobs, down 800 jobs since 2014.
- From 2014, the Office category within the Employment Areas increased by 5,750 jobs (3.5%).
- From 2014, the Retail category within the Employment Areas increased by 1,610 jobs (3.9%).
- Since 2010, overall employment in all Employment Areas has grown by 5.7%, adding 21,880 jobs.

Offices in the Financial Core

- Toronto's office financial core, centred at King and Bay, continues to experience economic growth, adding almost 10,000 new jobs (11.8%) from 2005 to 2015 for a total of 93,660 jobs (excluding bank branches and office uses in retail concourses).
- In 2015, the survey counted 20,610 office jobs in the office area south of Front Street. This area is now the largest concentration of office employment outside of the Downtown and North York Centre.

Data Collection

- In 2015, employment data was acquired from 89.3% of identified business establishments. This is a decrease from the 2014 response rate of 90.1%.
- This is the fifth year of assigning complete North American Industry Classification System (NAICS) codes to each business establishment in the City. The exercise was largely successful with 99.8% of businesses assigned a full 6-digit NAICS 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 2016 survey programme will commence in May and will be completed by September, 2016.

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SIGNATURE

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ATTACHMENT

Attachment 1: 2015 Toronto Employment Survey

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