

This bulletin summarizes the findings of the 2017 Toronto Employment Survey. This information resource presents a picture of Toronto's economy based on annual citywide surveys of businesses. For more information, please visit us at: www.toronto.ca/city-government/data-research-maps/research-reports/planning-development/



February 2018

Survey Highlights

2017 employment	1,518,560
employment increase	57,550
employment growth	3.9%
business establishments	75,620
new business establishments	4,540
new manufacturing jobs	8,260
manufacturing job growth	6.7%
new office employment	26,250
office job growth	3.7%
service-based employment	77.5%
downtown job increase	33,280
downtown job growth	6.5%

Toronto Employment Survey 2017

A Dynamic City

Toronto's high quality of life and economic opportunities have made it one of the fastest growing cities in North America. Managing this growth while improving the city's liveability and prosperity is a key objective of city building in Toronto.

Toronto's competitive, diverse and connected economy also reflects its location within the broader regional economy of southern Ontario. Building on these competitive advantages will help meet the changing economic conditions of the future and create a vibrant city and region.

The Toronto area continues to prosper. Between 2011 and 2016, Toronto GDP is estimated to have grown 3.5% per year, outpacing the average annual growth rates of both Ontario (2.1%) and Canada (1.8%).¹

The 2017 Toronto Employment Survey counted 1,518,560 jobs, an increase of 57,550 jobs or 3.9% from 2016.

In Toronto, growth is managed through the Provincial Growth Plan for the Greater Golden Horseshoe and Toronto's Official Plan. The Growth Plan and its subsequent amendments direct municipalities to accommodate forecast growth strategically by building compact and complete communities, making better use of

land and infrastructure, and providing opportunities for employment growth and business location.

The Growth Plan (2017) forecasts 3.4 million people and 1.72 million jobs in the City of Toronto by 2041.

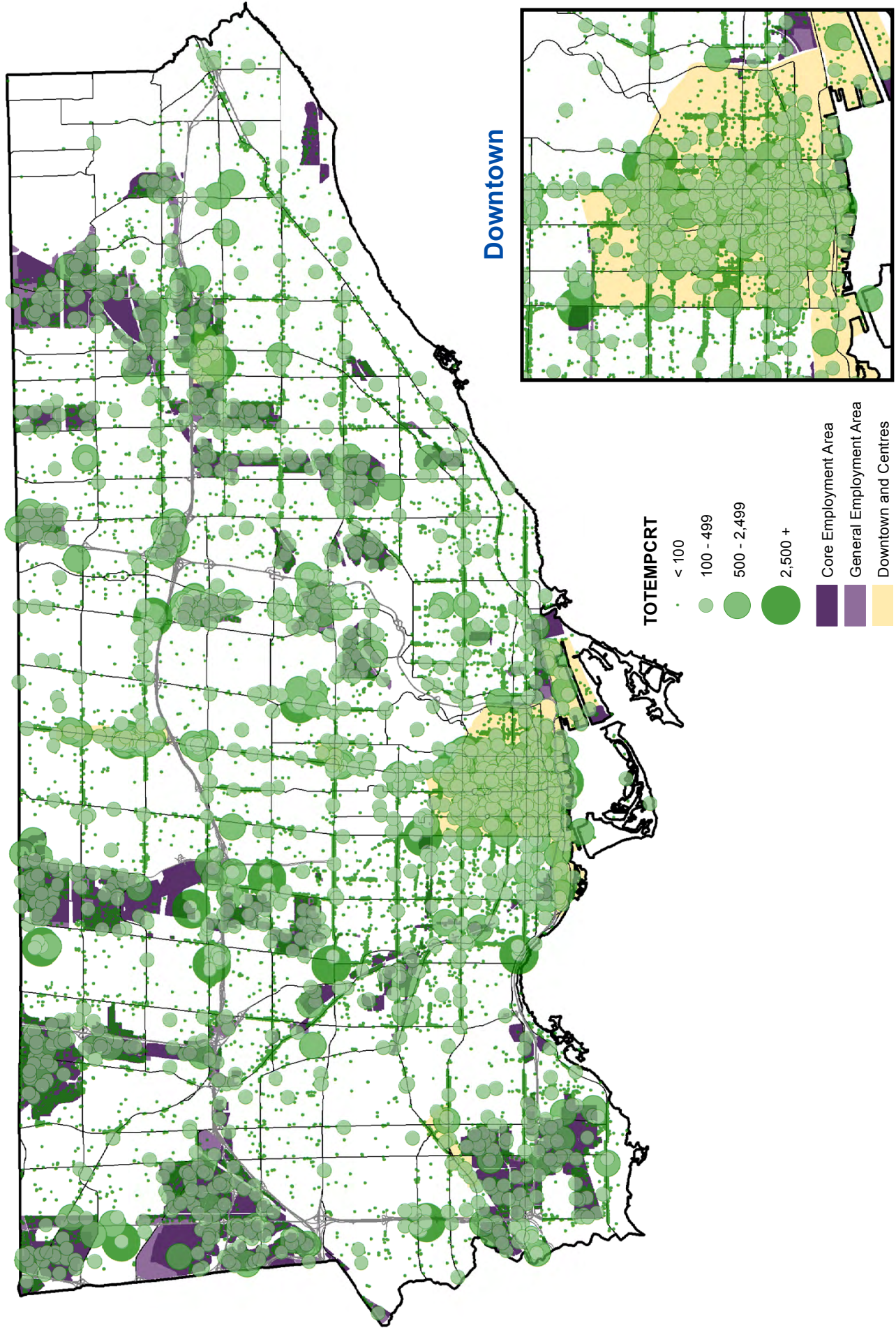
Toronto's Official Plan, which came into force in June 2006, guides development in the city. Its policies promote economic prosperity by supporting growth and managing land use change.

In directing employment growth to certain areas, including Downtown, the Centres, Mixed Use Areas and Employment Areas, the plan helps create complete communities, focus transit and infrastructure investments and protect locations to support economic connectivity, clusters and business growth.

The 2017 Toronto Employment Survey offers a detailed picture of Toronto's economy, highlighting key citywide trends and emerging patterns in Downtown, the Centres, Secondary Plan Areas and Employment Areas.

In 2017, the Survey acquired employment data from 88.8% of identified businesses establishments. Excluding home-based employment, the Survey estimates it surveys over 99% of Toronto's business establishments.

Map 1: Employment Concentrations, City of Toronto





Why a Survey Now?

The Toronto Employment Survey collects annual employment data from business establishments across the city. This information is used to measure the city's economic and employment structure and monitor the progress of Official Plan policies.

The continued collection of survey information enables the city to monitor long range economic trends citywide and emerging activity in areas designated for employment or business growth, including Downtown, the Centres, Secondary Plan Areas and Employment Areas (see Map 1).

The survey results allow more effective long range projection and planning for urban infrastructure and municipal services, and help monitor the city's progress toward its investment and fiscal goals.

What Data Was Collected?

The Toronto Employment Survey collects citywide business information through in-person visits on an annual basis. Between May and August, surveyors record the following information into a citywide dataset of businesses:

- primary type of employment activity
- full-time and part-time employee counts
- length of time 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.

Business and employment activity is classified by both NAICS (North American Industry Classification System) and the Land Use Activity Codes of RISWG (Regional Information Systems Working Group of the Regional Planning Commissioners of Ontario) codes to allow comparisons to other jurisdictions.

In 2017, employment data was acquired from 88.8% of identified businesses establishments. In 2016 the response rate was 88.5%.

Survey Geography

The survey conducts in-person business establishment interviews in commercial, industrial, institutional and mixed use areas across the city, including:

- Major office and service clusters in the Downtown and Centres
- Employment Areas designated for employment use and business growth
- Mixed Use Areas in Downtown, the Centres, Secondary Plan areas, along the Avenues and throughout the city
- Institutional precincts containing health or education uses
- Retail malls and power centres
- Community and local retail uses in residential areas including private schools and community uses.

Employment activities that are "footloose" or not place-specific on a daily basis are captured at head or reporting offices when the data is available.

In 2017, the Survey explored how to better capture home-based and volunteer work through a pilot project (see Special Topics, below).

Toronto's 2017 employment growth of 57,550 jobs or 3.9% was the highest since 1999, when employment grew by 5.1%

City Employment Overview

Riding the global growth wave

In 2017, the Toronto Employment Survey recorded 1,518,560 jobs in the City of Toronto, a gain of 57,550 jobs or 3.9% from 2016. This is above Toronto's five-year compound employment growth rate of 2.7%, and the strongest since 1999, when employment grew by 5.1%.

According to the International Monetary Fund's *World Economic Outlook October 2017*, Toronto's employment growth (roughly Q3 2016 through Q2 2017) aligned with strong economic output from both Canada (3.8% nominal) and the U.S. (3.9%) and with a global upswing in economic activity projected to reach 3.6% in 2017 and 3.7% in 2018.²

Services-driven economy

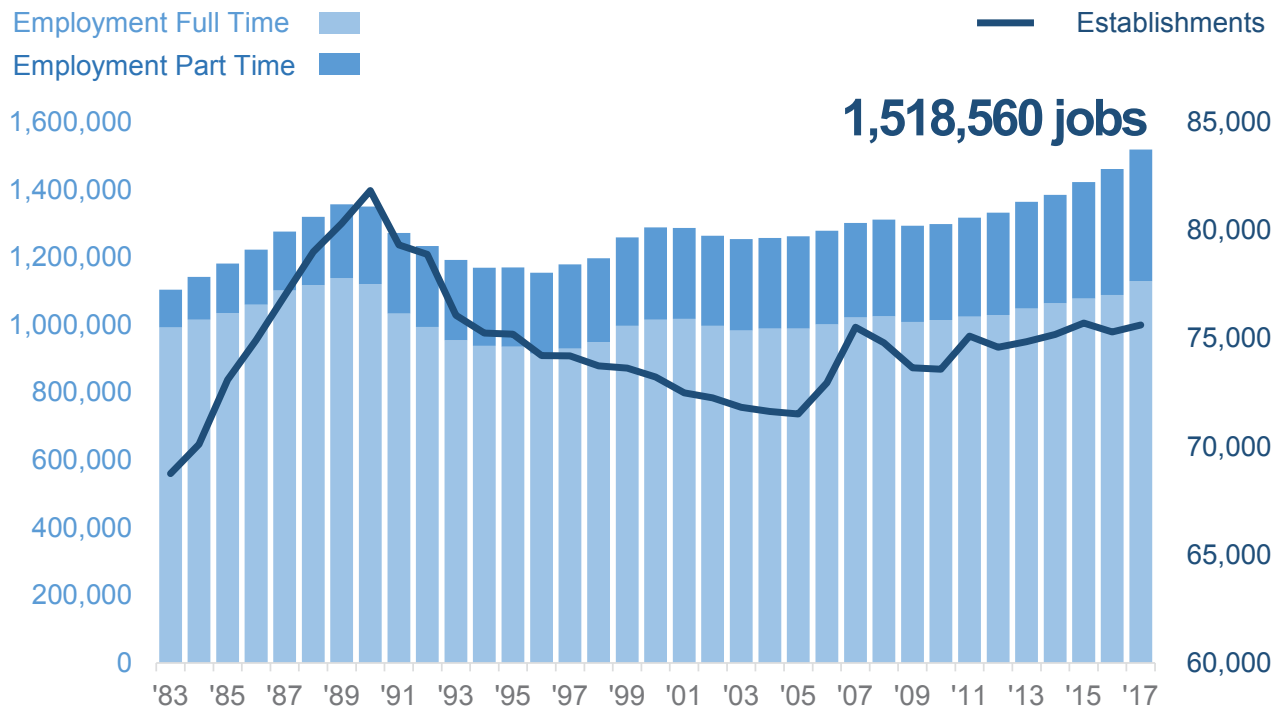
Economic output from service-producing industries has continued to outpace that from goods-producing industries. Overall, Canadian service-based output from Q3 2016 through Q2 2017 grew 3.1%, above the 5-year (2.3%) and 10-year (2.0%) trends.

Surprisingly, Canadian goods-producing during the same period grew 5.9%, significantly above the 5-year (1.8%) and 10-year (1.0%) growth rates.

Business and consumer outlook

The consumer confidence index surveys consumer optimism about current economic conditions, and is an indicator of near-term sales for consumer products companies. The index stood at 100.9 in July 2017, up from 100.0 in 2016 and 99.0 in 2012.³

Figure 1: Full and Part-Time Employment in the City of Toronto, 1983-2017



Note: See Appendix, Table 2: Total Employment

The business confidence index is based on enterprises' assessment of production, orders and stocks, as well as its current position and expectations for the immediate future, and provides a qualitative index on economic conditions. The index was 100.3 in July 2017, above the 2016 level of 99.6 and slightly higher than the level of 100.0 in 2012.⁴

Strong full-time job growth

Full-time employment (74.3% of total) kept pace with city job growth, adding 41,180 jobs (3.8%) from 2016. Part-time employment (25.7% of total) added 16,370 jobs (4.4%) from 2016.

Despite the 2016-2017 trend, the total share of part-time employment in the city has grown on average by 2.4% per annum between 2012 and 2017 (see Table 2, Appendix).

Office led employment gains

Toronto's office category added 26,250 jobs, half of new jobs, and grew by 3.7% from 2016. Office continues to be

the city's largest employment category and growth driver with 740,180 jobs (48.7% of the city total). Office employment has increased on average by 3.1% annually since 2012.

Broad category gains

The city's remarkable employment growth was also shared by the Manufacturing, Services, Retail and Community and Entertainment categories, significantly outpacing their 5-year trends. Institutional employment, Toronto's second largest base (16.4% of jobs), was the only category to underperform its 5-year growth trend.

Improved survey coverage

In 2017, improvements were made to the employment reporting process, most notably in the Community and Entertainment category.

Also, by working closely with major employers, the Survey was able to more thoroughly count employees with a non-regular or varying place of work.

Full-time employment kept pace with city job growth, adding 41,180 jobs (3.8%) from 2016

Figure 2: 2016-2017 Job Increase by Category

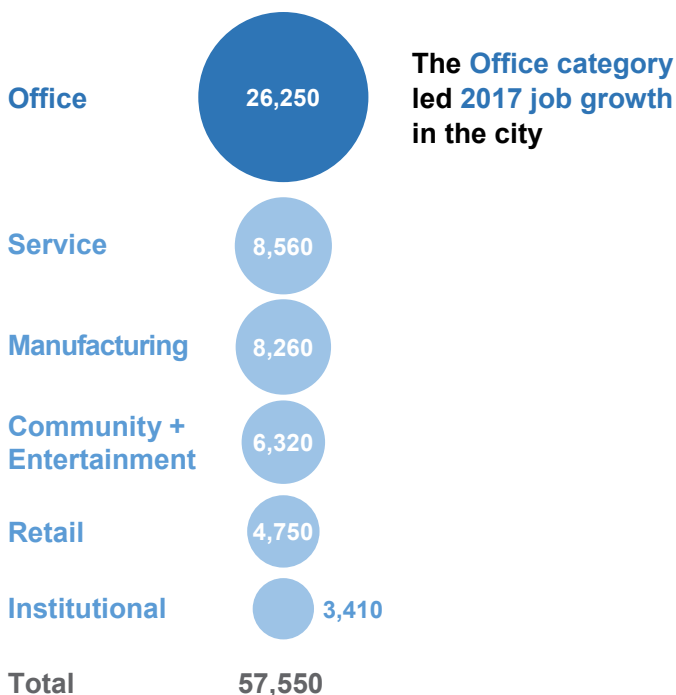


Figure 3: 2017 Employment Growth by Category

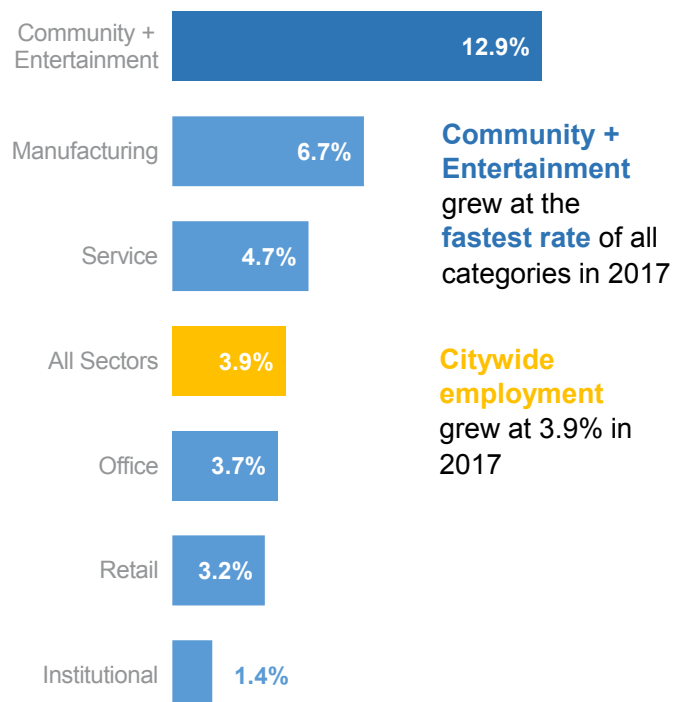


Figure 4: Total 2017 Employment by Category



Key Citywide Trends

Manufacturing

Despite a long-term secular shift from goods to services production in Toronto's economy, manufacturing employment grew at a remarkable rate, adding 8,260 jobs or 6.7% from 2016.

Processed Goods Processing led category job growth, with food and chemical product processing sub-categories each adding more than 1,000 jobs. Warehousing employment also added 850 jobs.

The city's manufacturing establishments grew at an above-average rate (1.4%), adding 70 businesses. The average number of employees per establishment increased to 27 from 25 in 2016.

Potential industry factors contributing to this growth include a competitive tax environment, a lower Canadian dollar, an improving export environment, decreased fuel and transportation costs, and higher capital investment in machinery and equipment.⁵

Demand for industrial space in Toronto increased, with the industrial vacancy rate falling to 0.6% in Q2 2017 from 1.0% in Q2 2016, well below the 1.7% vacancy rate in the Greater Toronto Area.⁶

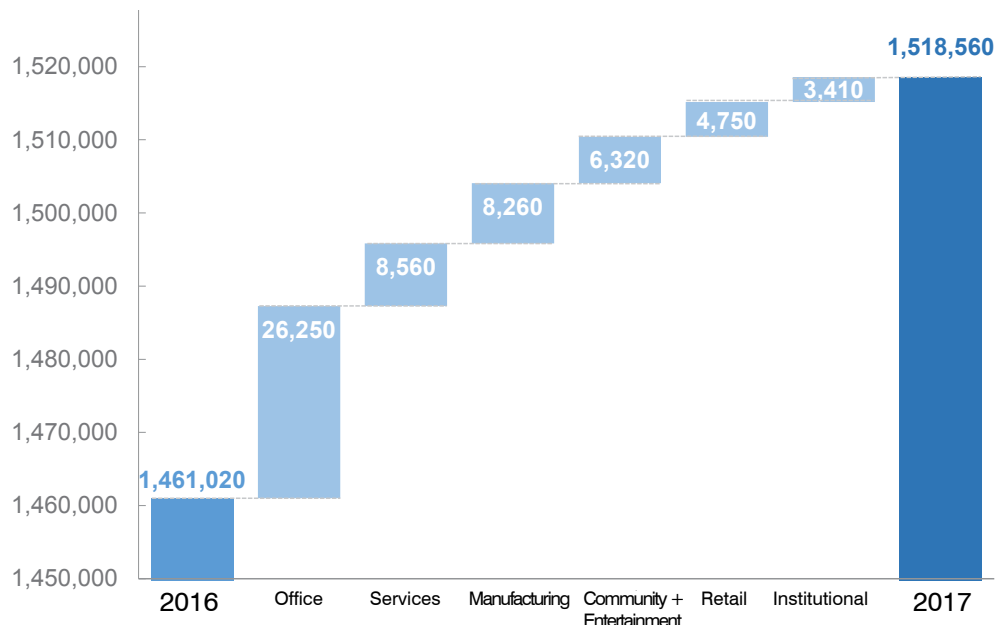
Office Trends

Strong Office employment growth continued in 2017, adding 26,250 jobs or 3.7%. The largest components of Office employment growth included Business Services (11,450 net jobs added) and Finance, Insurance and Real Estate (8,090 net jobs added), comprising 74.5% of Office employment growth.

The top three subcategories of net Office employment growth in 2017 were Management Consultants, Business Consultants, Market Research, Call Centres (9,780 jobs), Real Estate, Rental and Leasing (6,090 jobs) and Banks and Trust Companies (4,930 jobs).

The city's office market continues to grow, having added more than 1.15 million square metres of office space

Figure 5: 2016-2017 Employment Growth Share by Category



from projects of over 50,000 square metres alone between 2012 and 2016.⁷

Demand for office space remains high. Vacancy rates in the downtown decreased to 3.8% in Q2 2017, the lowest rate among major office markets in North America.⁸

Retail Trends

Retail employment grew at an above-average rate in 2017, adding 4,750 jobs or 3.2%. Structural trends in the retail sector have resulted in slower annual growth since 2012 (1.2%). Factors potentially influencing this trend include growing consumer use of online channels, increasing automation in retail environments, and concentration of retailing in fewer, larger locations.⁹

Ongoing trends in expansions and upgrades to retail environments appear to be continuing from 2016, which saw the renovation of major retail centres such as the Eaton Centre and Yorkdale Mall. Further large-scale mixed use redevelopments are currently proposed for Yorkdale Mall, Bayview Village,

Agincourt Mall and Galleria Mall, as retailers leverage these locations by adding additional retail space with new office and residential components.

Community and Entertainment Trends

Toronto's smallest employment category, Community and Entertainment, was the city's fastest-growing in 2017, adding 6,320 jobs to grow by 12.9%.

A third of growth came in 2017 from the construction sub-category. The city gained more than 2,300 construction jobs in 2017 as Toronto's real estate cycle continued. More than half of these jobs were located in Downtown.

Sports and entertainment venues also added significant growth. BMO Field and the Air Canada Centre added 2,300 net new jobs in 2017. Employment growth at these venues has coincided with the success and increased season length of the city's major league sports teams.

Manufacturing employment grew at a remarkable rate, adding 8,260 jobs or 6.7% from 2016

Strong office employment growth continued in 2017, adding 26,250 jobs or 3.7%

Figure 6: Components of Office Employment Growth 2016-2017

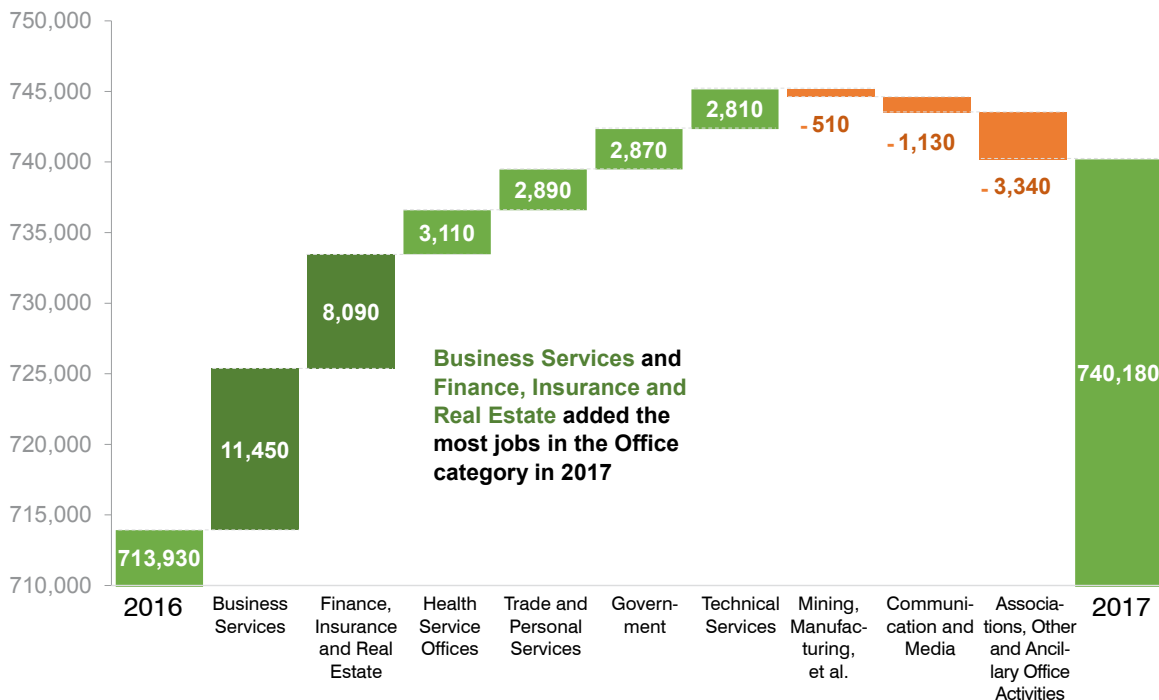


Figure 7: Total 2017 Establishments by Category



Business Establishments

In 2017, the Survey counted 75,620 business establishments in the city, a net increase of 340 establishments or 0.5%. Since 2012, the number of business locations in Toronto grew on average 0.3% annually, although the business count declined slightly in 2016.

Net gains in establishments included Office (300) and Service (250) and Manufacturing (70). Net total establishment counts decreased in Retail (140) and Community and Entertainment (140).

New Establishments in the City

The net change in business locations is the result of a greater number of establishment openings and closures. New establishments in particular include both new business starts as well as existing firm relocations and new locations.

City-wide, the Survey counted 4,540 new business establishments, 6% of the 2017 total. Of these new locations, the Survey counted 1,470 (32.4%) in Employment Areas, 1,240 (27.3%) in the Downtown and Centres, and 1,830 (40.3%) in the rest of the city. Overall, the share of new establishments locating in these areas increased by 3.6% from 2016 (see Table 3, Appendix).

Office (39%) led the share of new establishments in 2017 survey counts, followed by Service (24.2%) and Retail (16.1%). Despite secular global trends, Toronto remains an attractive location for industrial establishments, adding 220 new manufacturing establishments and 1,220 manufacturing jobs in 2017.

In 2017, the Community and Entertainment category had the greatest share of new establishments (20.3%), with one in five establishments being new.

Figure 8: Establishments in the City of Toronto, 1983-2017

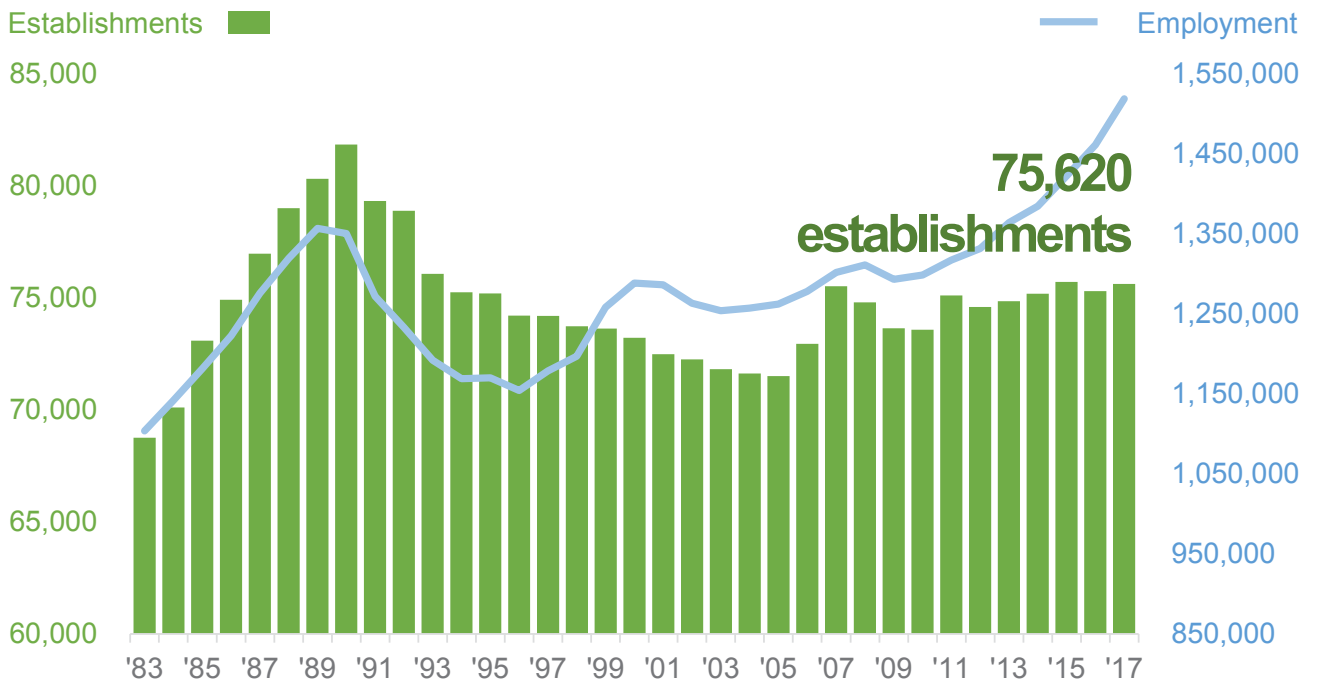
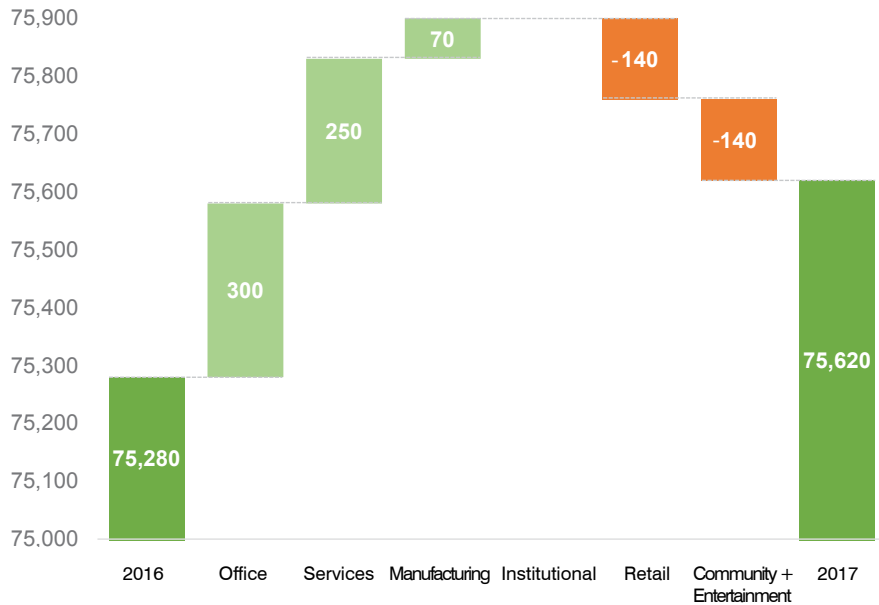


Figure 9: Net Establishment Change by Category 2016-2017



Despite a secular decline in industrial production, Toronto added 220 new manufacturing establishments and 1,220 manufacturing jobs in 2017

Figure 10: New Establishments by Category 2016-2017



Figure 11: Location of New City Establishments

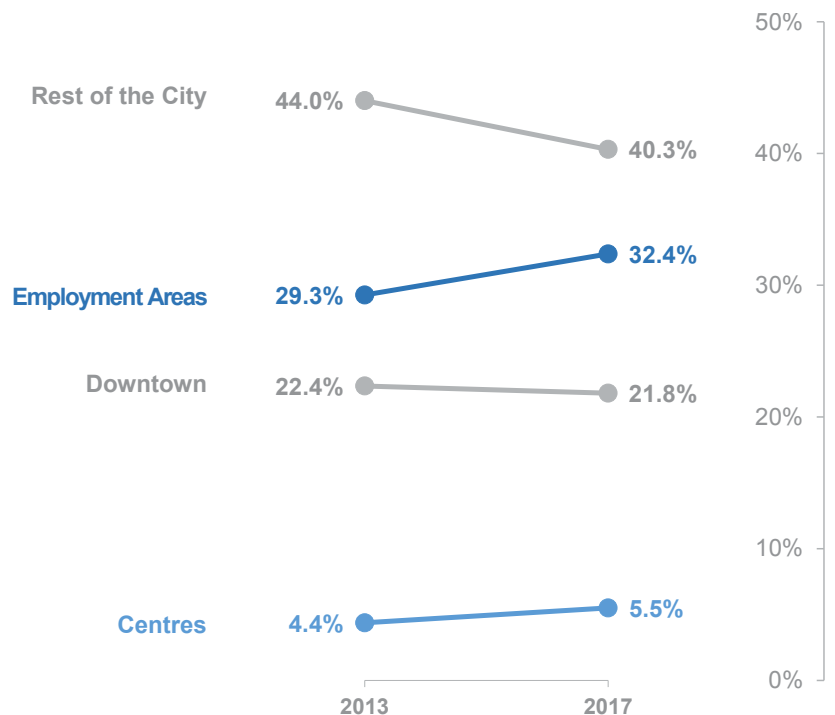
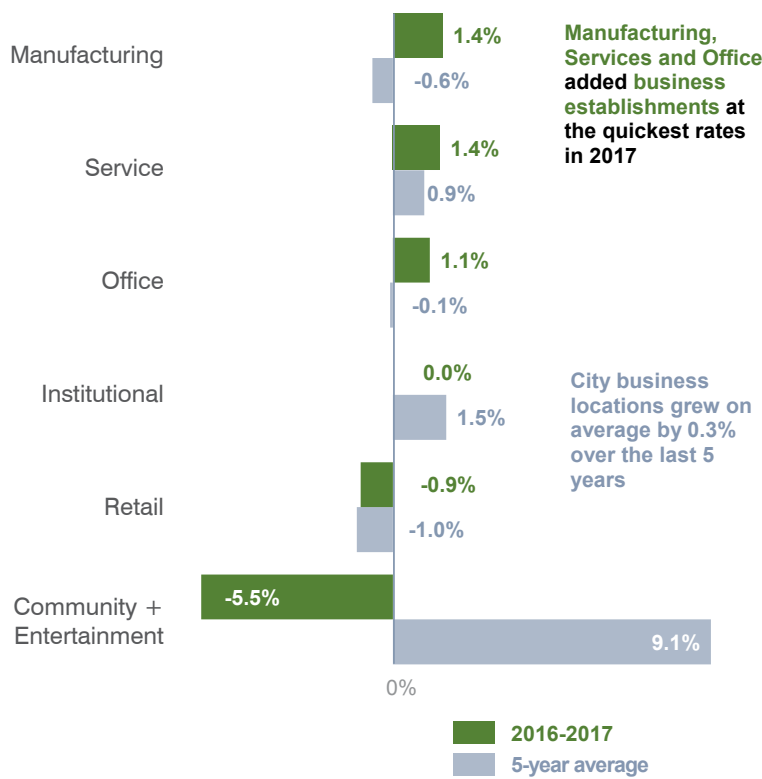


Figure 12: Net Establishment Growth vs. 5-Year Average



Employees per Establishment

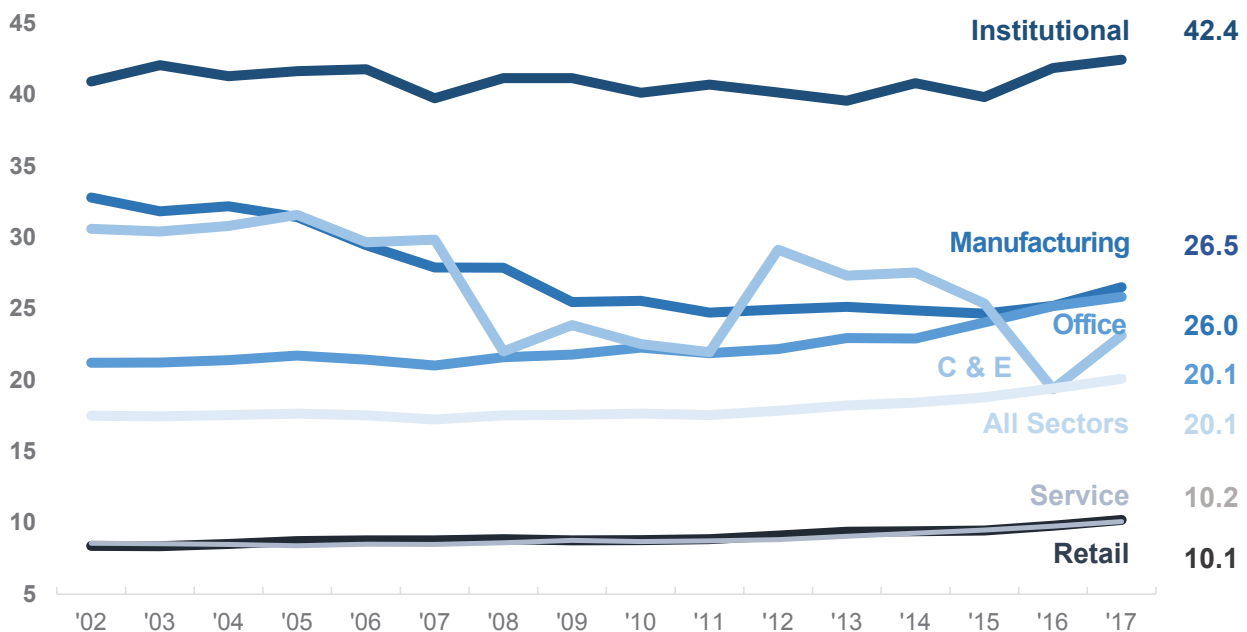
In 2017, the average number of employees per establishment increased to 20.1. This metric has increased steadily at a rate of 2.4% annually from 17.9 in 2012. The increase is partly due to the slower relative increase in business locations compared to employment growth.

This effect accelerated in 2017, particularly among fast-growing employment categories with lower rates of business location expansion. These included Community and Entertainment (19.2%), Manufacturing (5.2%), and Retail (4.2%).

Despite this, Office (3.2%) and Service (2.7%) have led increases in average employees per establishment since 2012.

In 2017, the number of large businesses (with 100 or more

Figure 13: Employees per Establishment, 2000-2017



employees) increased by 105 (4.7%), faster than the overall establishment increase (0.4%), to comprise 3.1% of Toronto's establishments.

Longevity

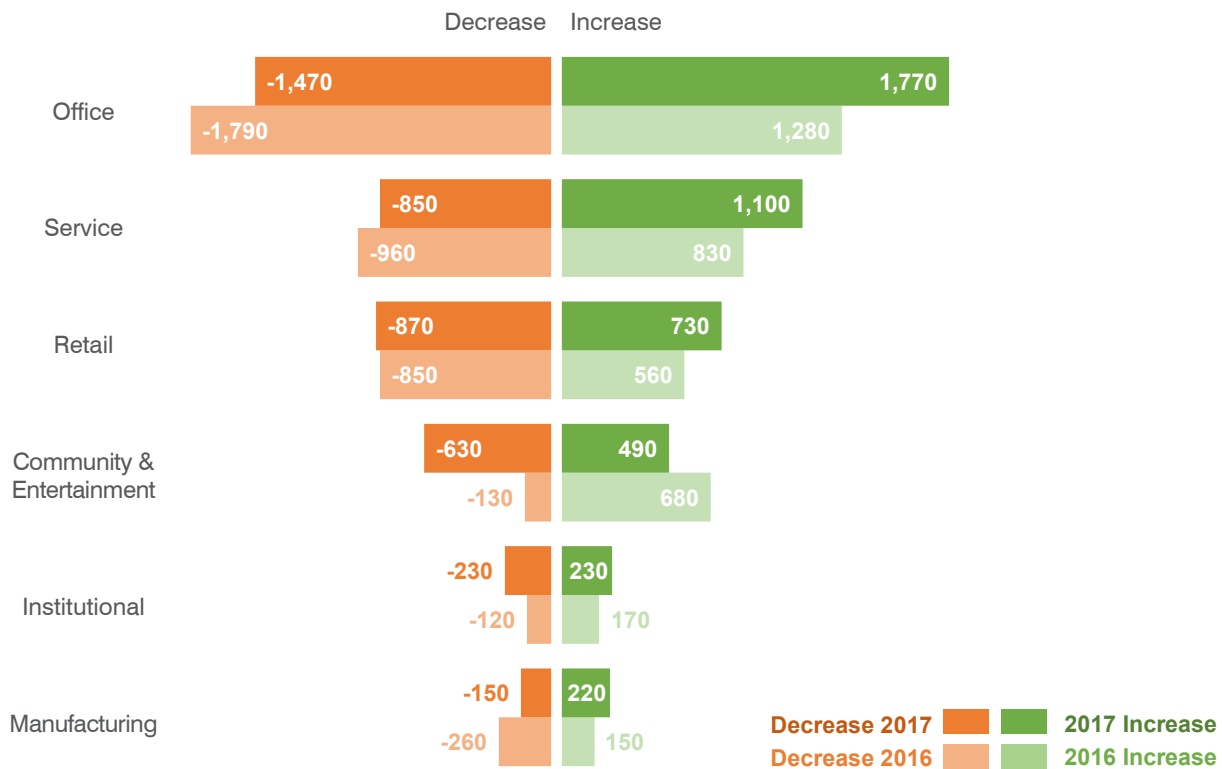
Changes in the longevity of business establishments or locations can offer insights in to the economic health of a city or region. In 2017, 35.8% of Toronto's business establishments were less than 5 years old (in the same location); some 31.4% of establishments reported being at the same location for 6 to 15 years.

Overall, 32.8% of the city's establishments have remained in the same location for more than fifteen years. This breadth of business location tenure demonstrates a strong degree of stability in the local economy despite economic cycles and recessions.

Figure 14: Longevity of City Establishments



Figure 15: Change in City Establishment Count, 2017 vs. 2016



Toronto's top employment categories are Office (48.7%), Institutional (16.4%) and Service (12.5%)

Employment Categories

The Survey utilizes six employment categories to reflect the underlying land use activities of employment across the city. All categories except Institutional experienced above-average growth in 2017 (see Table 4, Appendix).

City Employment and Establishment Share

Toronto's top employment categories are Office (48.7), Institutional (16.4%) and Service (12.5%). Employment in these categories has grown at or above the city's average growth rate over the last five years.

The remaining shares of city employment are Retail (10.0%), Manufacturing (8.7%) and Community and Entertainment (3.7%). While Retail and Manufacturing employment has lagged Toronto employment growth

over the last five years, Community and Entertainment (formerly the Other category) has been Toronto's fastest-growing category, averaging 4.2% growth over the last five years.

Toronto's establishment categories are similarly structured, with Office (37.9%), Service (24.8%) and Retail (19.8%) making up the largest shares, followed by Institutional (7.8%), Manufacturing (6.6%) and Community and Entertainment (3.2%). Service and Retail establishments have a greater share of establishments, having on average fewer employees per business location (10 employees per establishment) when compared to Institutional establishments (42 employees per establishment).

Structural Change

In 2017, Toronto employment increased by 57,550 or 3.9%, above

Figure 16: City Share of Employment by Category in 2017

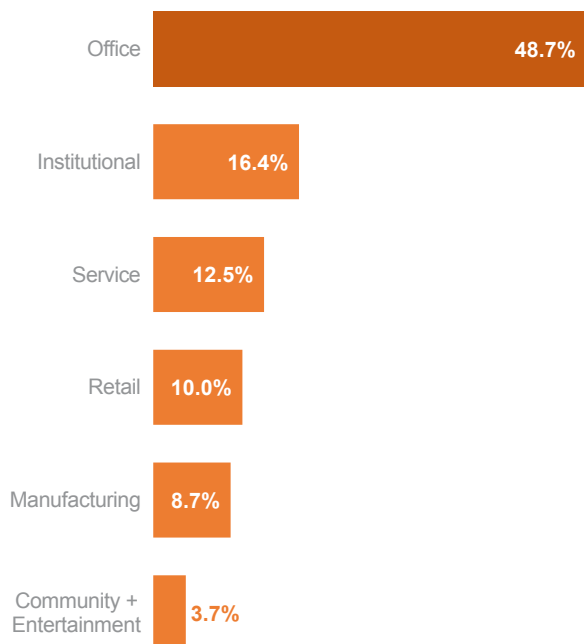
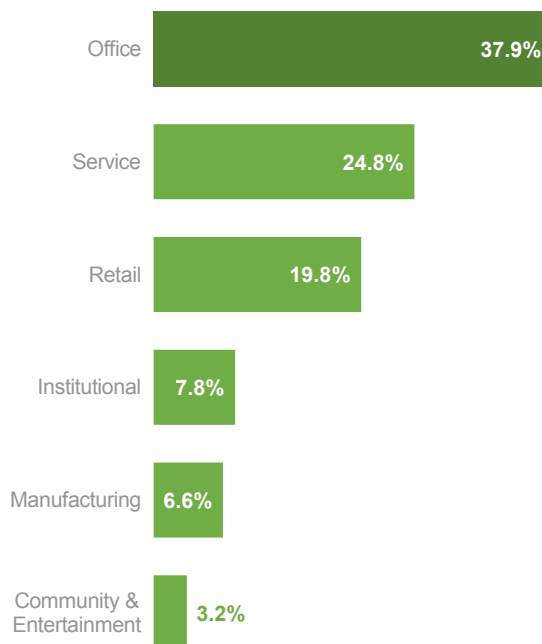


Figure 17: City Share of Establishments by Category in 2017



the city's five-year (2.7%) and ten-year (1.6%) compound annual growth rates.

Over the 10-year period 2007-2017, four categories have grown faster than the city average: Office, Institutional, Service, and Community and Entertainment.

Category Totals

Office has led overall employment growth, adding 135,950 jobs since 2007 and growing annually at 2.1%.

Institutional, while slower-growing, has added 41,340 jobs since 2007 and grown annually at 1.8%.

Service has been the second-fastest growing employment category since 2007, adding 40,230 jobs and growing at 2.4% annually.

Community and Entertainment, despite being the smallest category, grew the fastest since 2007, adding 15,510 jobs and growing annually at 3.3%.

Retail employment has changed significantly since 2007. The category declined steeply from 2007 to 2010, shedding 10,990 jobs, resulting in marginal average annual growth (0.1%) since 2007. Since 2012, Retail employment growth has lagged most other categories, although it grew strongly in 2017, adding 4,750 jobs.

Manufacturing employment grew strongly in 2017, adding 8,260 jobs. Despite this turnaround, Manufacturing has experienced a long-term decline in growth, having lost 16,910 jobs (-11.3%) since 2007, or -1.2% per annum (see Table 4 in Appendix).

Community and Entertainment has been Toronto's fastest-growing category, averaging 4.2% growth over the last five years

Figure 18: 2016-2017 Employment Growth vs. 5-Year Average

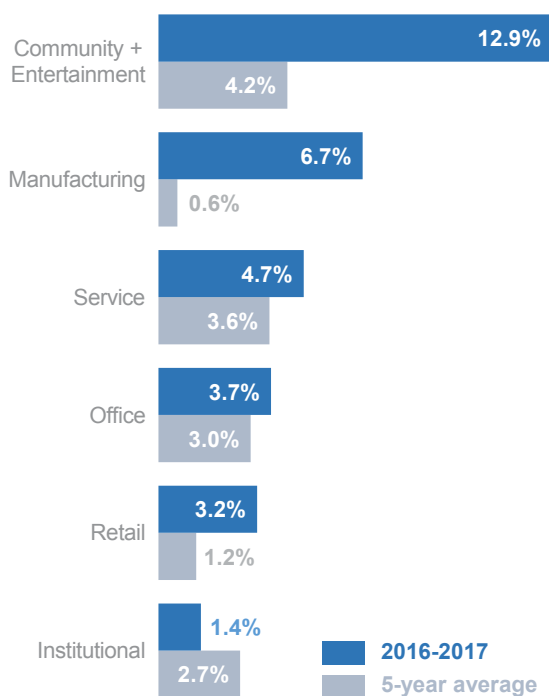
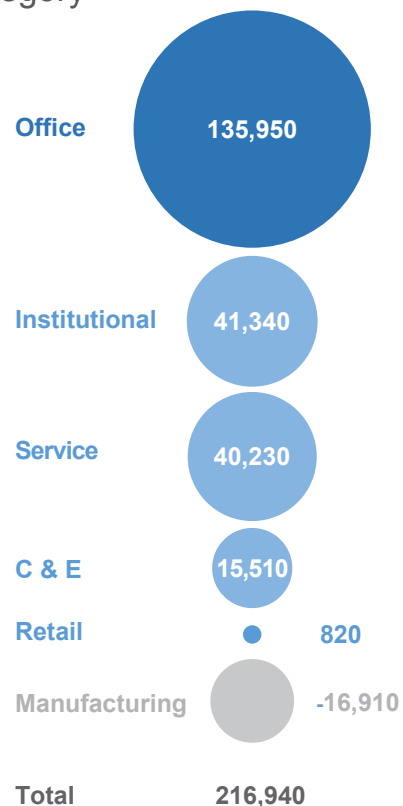


Figure 19: 2007-2017 Job Growth by Category



Service-based industries make up 77.5% of employment in Toronto's economy

Employment by NAICS Economic Sector

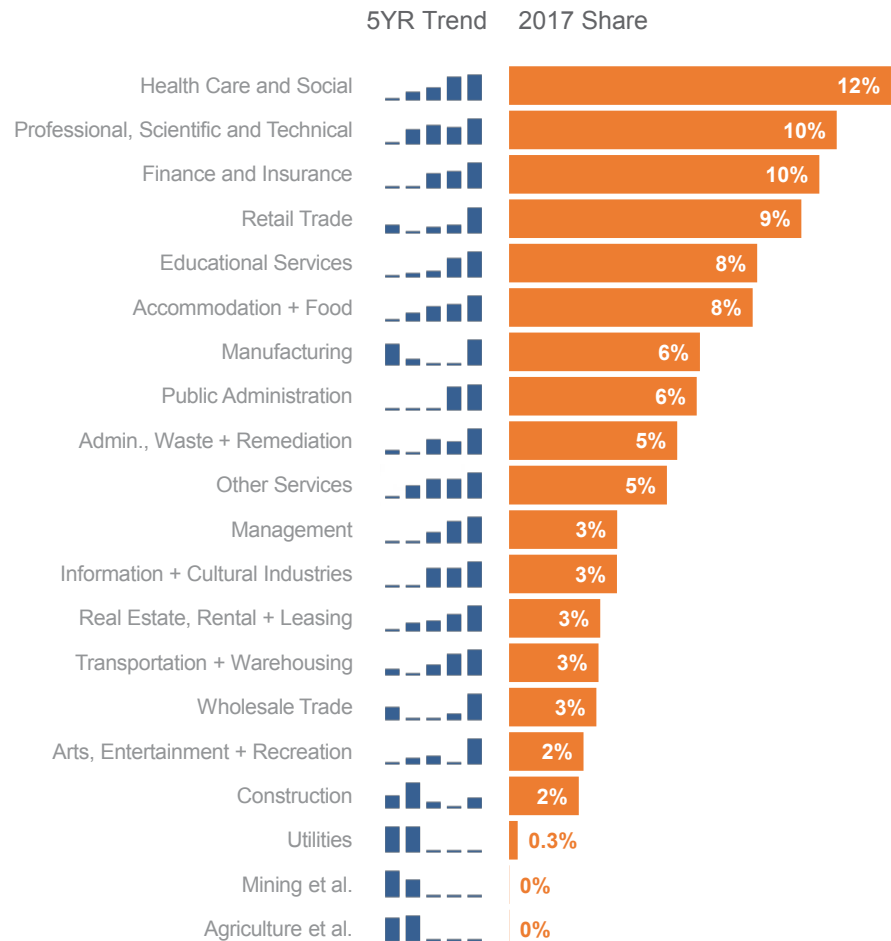
In 2011, the Survey incorporated the North American Industry Classification System (NAICS) into its data coding. While the employment categories, through activity codes, profile the land use and occupancy in the city, NAICS offers additional detail about the structure of the economy. As a coding standard across North America, NAICS also allows for more accurate analysis and comparison of Toronto's results with other jurisdictions. In 2017, the Survey was extremely successful in coding Toronto's establishments with 98.4% of businesses assigned a full 6-digit code.

Toronto's Economy

Three major sectors make up the employment shares of Toronto's economy: Service-Based industries (77.5%), Government and Institutional industries (13.9%) and Goods Producing industries (8.6%).

Since 2012, annual growth in Government and Institutional (3.9%) and Service-Based jobs (3.0%) have offset employment losses in Goods Production (-0.9%). Total 5-year employment net change was 187,060 jobs added, including Service-Based (156,160 jobs) Government and Institutional (36,940 jobs) and Goods Producing industries (a loss of 6,010 jobs).

Figure 20: City Employment by NAICS Sector



In 2017, Service-Based work led growth adding 44,750 jobs (4.4%). Government and institutional added 7,920 jobs (3.9%). Goods Producing industries added 5,050 jobs (4.0%), reversing the five year trend of decreasing employment.

Major Sectors

NAICS classifies the economy into 20 major sectors. In 2017, 49.8% of all jobs in Toronto were in the top five NAICS sectors. Three of these five sectors have increased their shares of total employment since 2012: Finance and Insurance (0.6%), Health Care and Social Assistance (0.6%) and Educational Services (0.9%).

In 2017, the top sectors for job growth included Administrative and Support, Waste Management and Remediation Services (adding 8,410 net jobs or 12.4%), Finance and Insurance (adding 7,350 net jobs or 5.1%) and Educational Services (adding 6,610 net jobs or 5.8%). See Figure 40, Appendix.

Toronto's largest NAICS sector is Health Care and Social Assistance, comprising 185,010 or 12.2% of city employment. It grew by 1.4%, adding 2,620 jobs.

Since 2012, additional sectors have experienced high annual growth rates and five-year employment increases:

- Real Estate, Rental and Leasing added 10,270 jobs since 2012, averaging 5.4% annual growth
- Management added 12,010 jobs since 2012, averaging 5.3% annual growth
- Educational Services added 26,990 jobs since 2012, averaging 5.2% annual growth
- Administrative and Support, Waste Management and Remediation Services added 15,060 jobs since 2012, averaging 4.5% annual growth
- Finance and Insurance added 25,920 jobs since 2012, averaging 3.9% annual growth
- Arts, Entertainment and Recreation added 6,130 jobs since 2012, averaging 3.8% annual growth.

In 2017, the top sector for job growth was Administrative and Support, Waste Management and Remediation Services (adding 8,410 net jobs or 12.4%)

Figure 21: Employment by NAICS Sector, 2012-2017

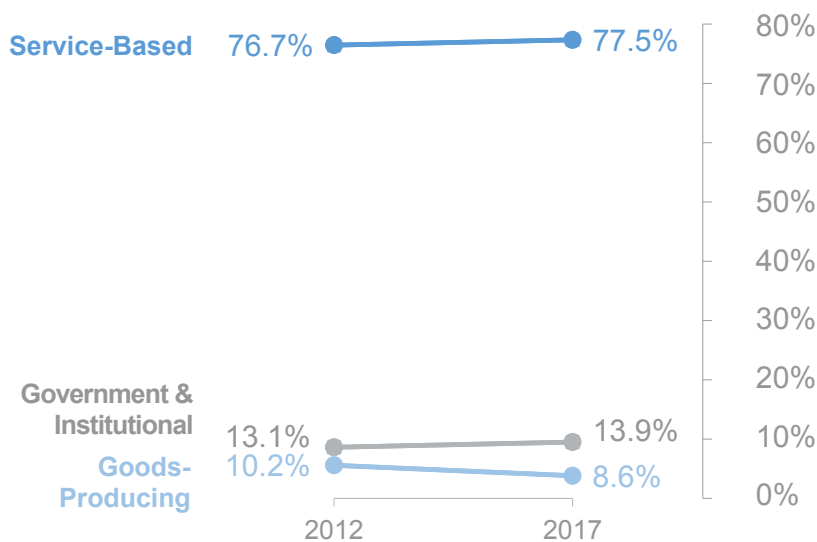


Figure 22: Establishments by Major by NAICS Sector, 2012-2017

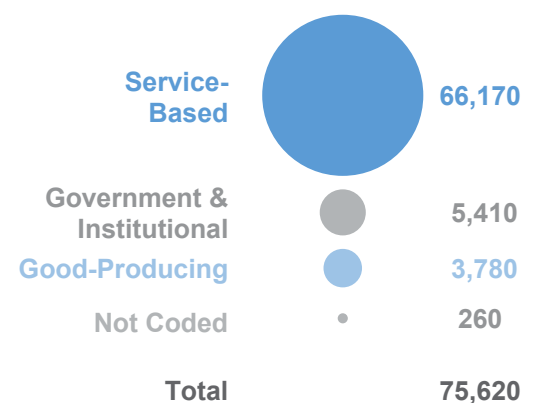
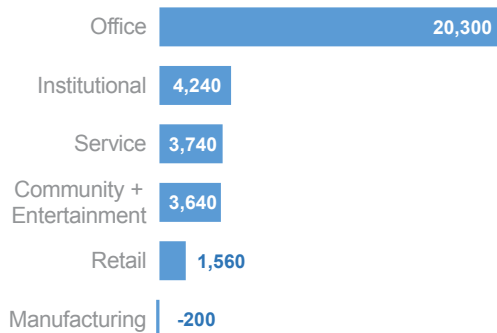


Figure 23: Downtown Employment Change

Downtown Employment Change 2016-2017



Urban Economic Structure

Toronto's Official Plan directs both employment and residential growth towards specific areas of the city, including Downtown, the Centres, and Employment Areas (see Map 2). Together, these areas form the backbone of the city's urban economic structure. They are connected by transit and transportation arteries, maximizing existing infrastructure and services in order to best accommodate growth. The Official Plan also identifies 34 Secondary Plan areas, many of which are experiencing rapid growth through intensification.

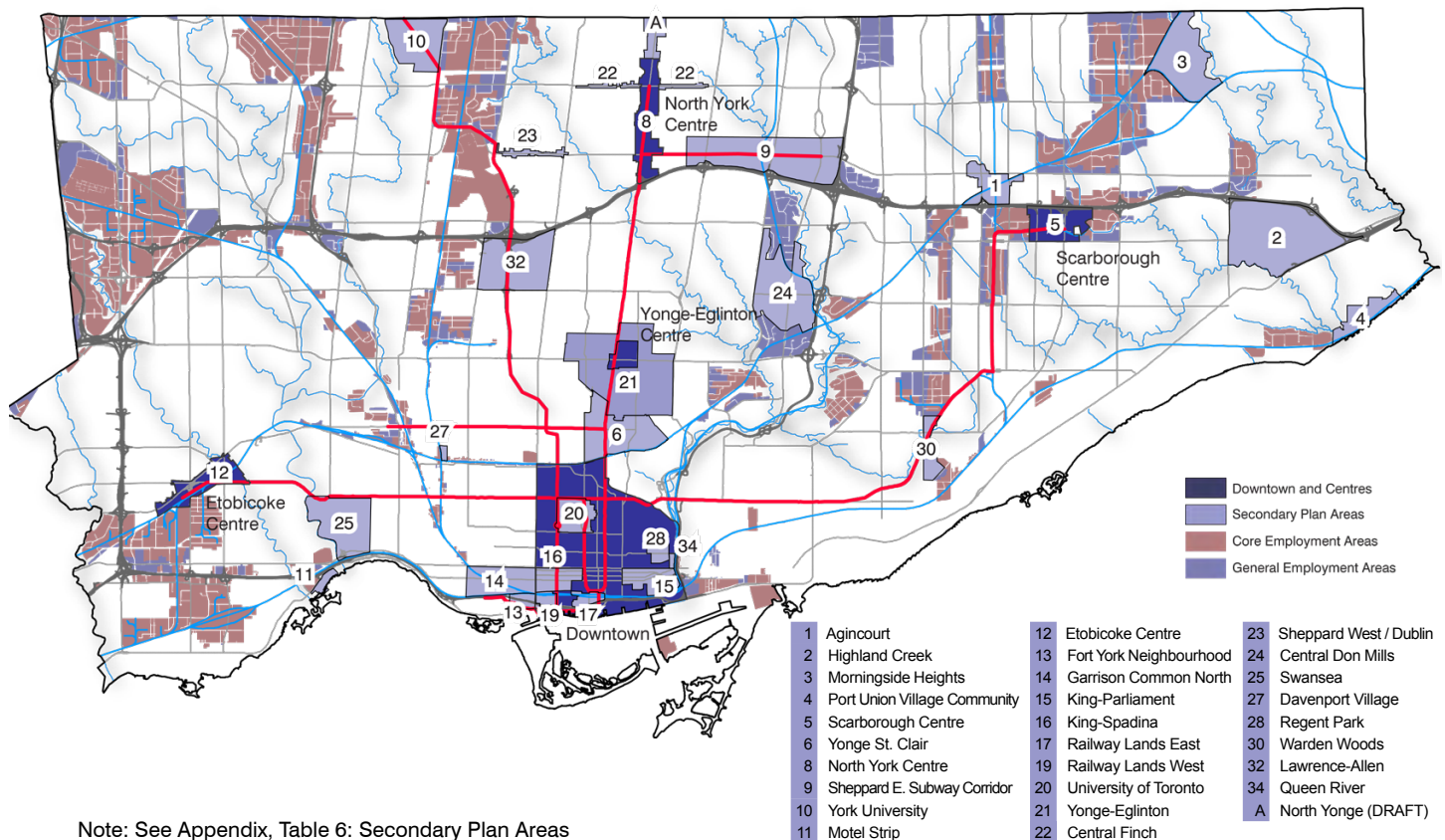
Downtown, the Centres and many Secondary Plan areas are Mixed Use Areas and encourage

both residential and employment growth. Employment Areas are designated primarily for employment-related land uses.

The Places to Grow Act is the Provincial legislation that governs planning for growth and development in a way that supports economic prosperity, protects the environment and helps communities achieve a high quality of life in Ontario. The Places to Grow Act also enables the development of regional growth plans that guide government investments and policies, such as the Growth Plan for the Greater Golden Horseshoe, 2017 ("Growth Plan").

The Growth Plan reinforces Toronto's Official Plan by enabling the identification of Strategic Growth Areas. These areas

Map 2: Urban Economic Structure



Note: See Appendix, Table 6: Secondary Plan Areas

are planned to accommodate intensification and higher densities of both population and employment. Strategic Growth Areas include Urban Growth Centres, Major Transit Station Areas, and infill sites such as brownfields or greyfields.

Toronto contains five Urban Growth Centres: Downtown, Etobicoke Centre, North York Centre, Scarborough Centre, and Yonge-Eglinton Centre. These are defined as existing or emerging downtown areas, and targeted to achieve minimum densities of 400 residents and jobs combined per hectare by 2031.

Employment in the Downtown

Toronto's Downtown is a local and national economic hub. It contains 544,480 jobs within 21.4km², accounting for 35.9% of Toronto's jobs with an average employment density of 25,433 jobs per km² (254 jobs per hectare).

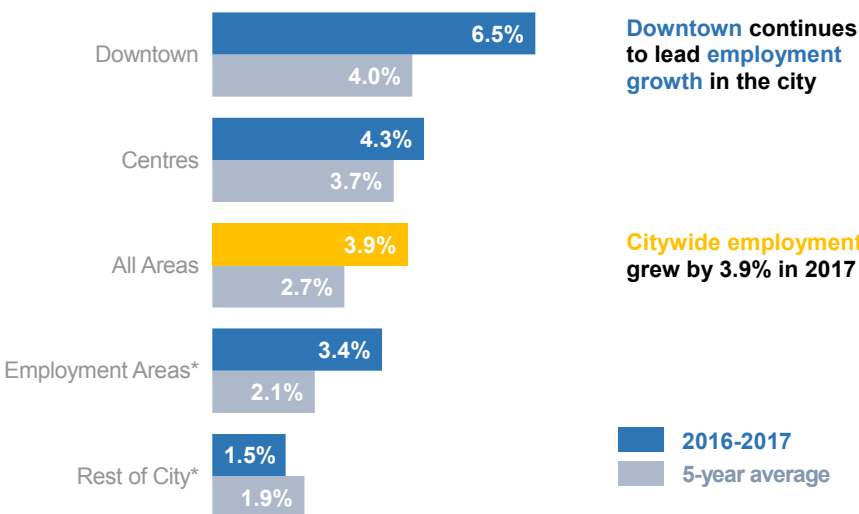
Downtown Employment

In 2017, employment in Downtown increased by 33,280 jobs or 6.5%. The Downtown has grown at an average annual rate of 4.0% since 2012, adding a total of 97,650 jobs since that time. This growth rate is above the city's mean of 2.7% over the last five years (see Table 5, Appendix).

Office employment comprises 64.9% of Downtown employment. Office added 20,300 jobs in 2017, growing at 6.1%. Other fast growing categories included Service (6.8%), Institutional (5.8%), Community and Entertainment (20.1%) and Retail (5.7%). Collectively these categories added 13,180 jobs. Downtown Manufacturing decreased by 200 jobs.

Downtown continues to attract new establishments. In 2017, 17.5% of new business establishments were counted in the Downtown.

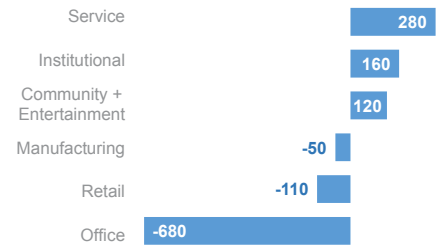
Figure 24: Employment Growth vs. 5-Year Average



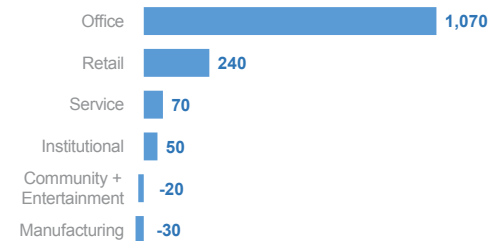
* Areas compared to 4-year compound annual growth rate due to data limits

Figure 25: The Centres Employment Change

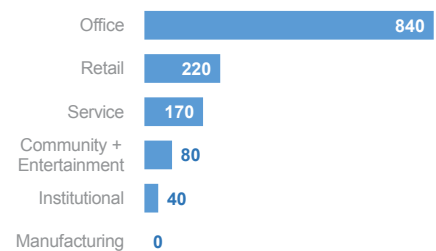
North York Employment Change 2016-2017



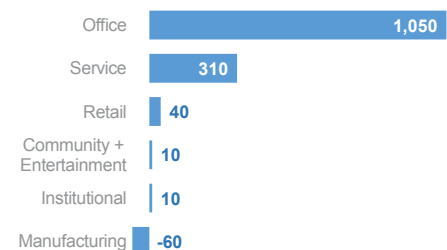
Scarborough Employment Change 2016-2017



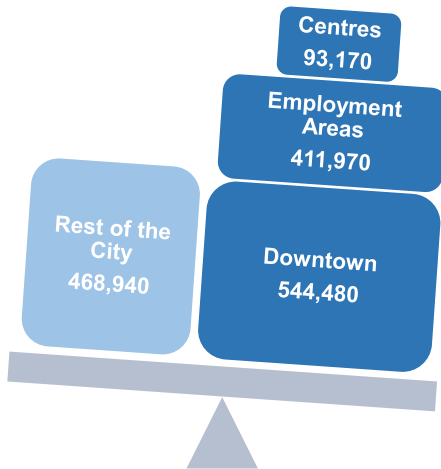
Yonge-Eglinton Employment Change 2016-2017



Etobicoke Employment Change 2016-2017



The Centres are home to 93,170 jobs or 6.1% of employment in the city.



The Centres

The four Centres are home to 93,170 jobs or 6.1% of employment in the city. In 2017, the Centres together added 3,820 jobs (4.3%), well above the citywide average. Since 2012, employment in the Centres has grown by 15,330 jobs. This results in an annual growth rate of 3.7%, well above the city average (2.7%).

Growth in 2017 was focused in Scarborough (1,390 jobs), Yonge Eglinton (1,350 jobs), and Etobicoke Centres (1,370 jobs). North York lost 280 jobs. 6 in 10 net new jobs in the Centres in 2017 were Office (59.7%), followed by Service (21.7%), Retail (10.5%), Institutional (6.8%) and Community and Entertainment (5.0%). Manufacturing lost 140 jobs. Office comprises 77.8% of all employment in the Centres.

North York Centre

North York Centre is Toronto's largest Centre with 40,050 jobs, comprising 2.6% of jobs in the city. Despite declining slightly (0.7%) in 2017, North York Centre has grown annually at 2.1%

since 2012.

More than 8 in 10 jobs in North York Centre is Office, representing 33,490 jobs (83.6%).

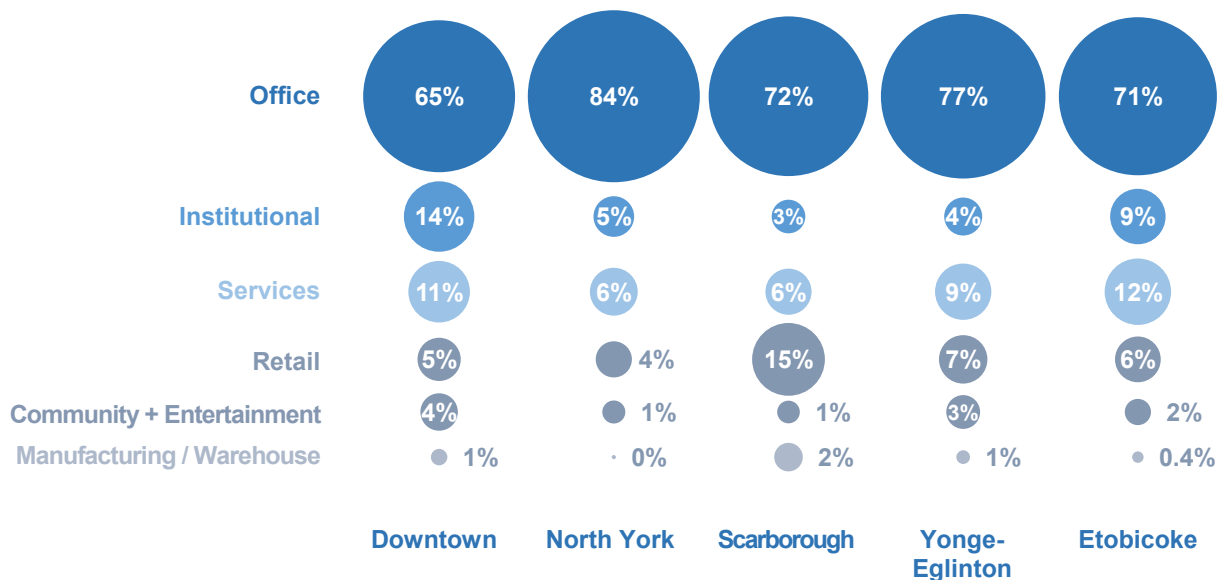
In 2017, North York Centre saw net decreases in Office (2% or 680 jobs), Retail (110 jobs) and Manufacturing (50 jobs). Employment grew in Service (280 jobs), Institutional (160 Jobs), and Community and Entertainment (120 jobs). Since 2012, North York Centre employment increases were mostly in Office, which added 3,440 jobs.

Scarborough Centre

Scarborough Centre is the second largest Centre in Toronto with 23,450 jobs, or 1.5% of the City's total. In 2017, employment grew by 6.3%, adding 1,390 jobs or 6.3%. Since 2012, Scarborough Centre added 8,060 jobs to grow annually at 8.8%.

Most of Scarborough's growth over the past year was in Office (1,070 jobs or 6.8%), followed by Retail (240 jobs), Service (70 jobs) and Institutional (50 jobs). Since 2012, Office grew by 8,240 jobs.

Figure 26: Downtown and Centres, Share of Employment by Category in 2017



Yonge-Eglinton Centre

Yonge-Eglinton Centre hosts 18,850 jobs or 1.2% of the city's total, and contains the highest density of employment of any Centre with over 31,000 jobs per square kilometre. In 2017, employment in this Centre increased by 1,350 jobs or 7.7%. Over the last five years, employment in Yonge Eglinton has grown annually by 1.2% to add 1,110 jobs.

Over three-quarters (76.6%) of employment in Yonge-Eglinton Centre is Office. The Office employment category added 840 jobs (6.2%) in 2017, followed by Retail (220 jobs), Service (170 jobs) and Community and Entertainment (80 jobs).

Etobicoke Centre

Etobicoke Centre is the smallest Centre in Toronto, but grew the fastest of all Centres in 2017 (14.4%) to add 1,370 jobs. The Centre has 10,820 jobs total, representing 0.7% of employment in Toronto.

Most employment is Office (70.6%), followed by Service (12%) and Institutional (9%). Office employment grew by 1,050 jobs (15.9%) in 2017. Since 2012, Office added 1,570 jobs, followed by Service (300 jobs) and Retail (40 jobs).

Figure 28: Downtown + Centres Growth 2016-2017 vs. 5-Year Average

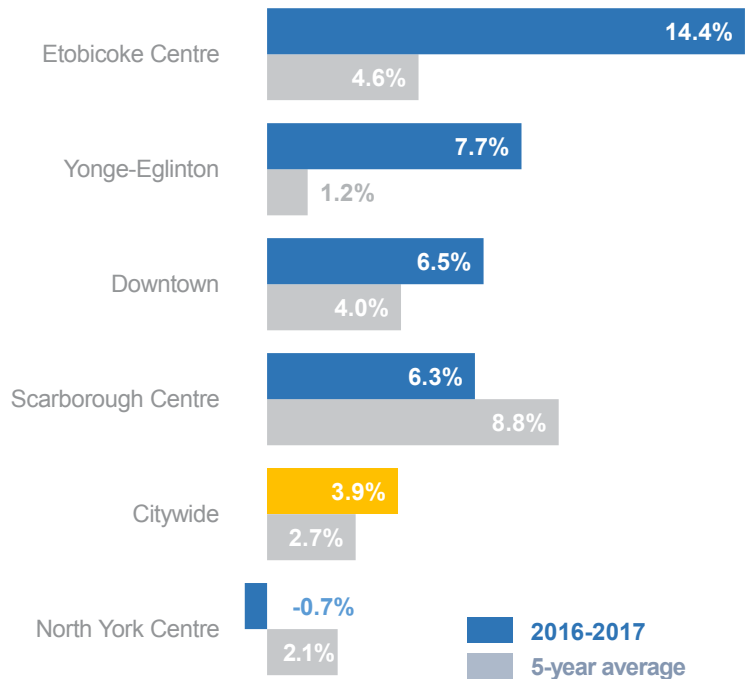
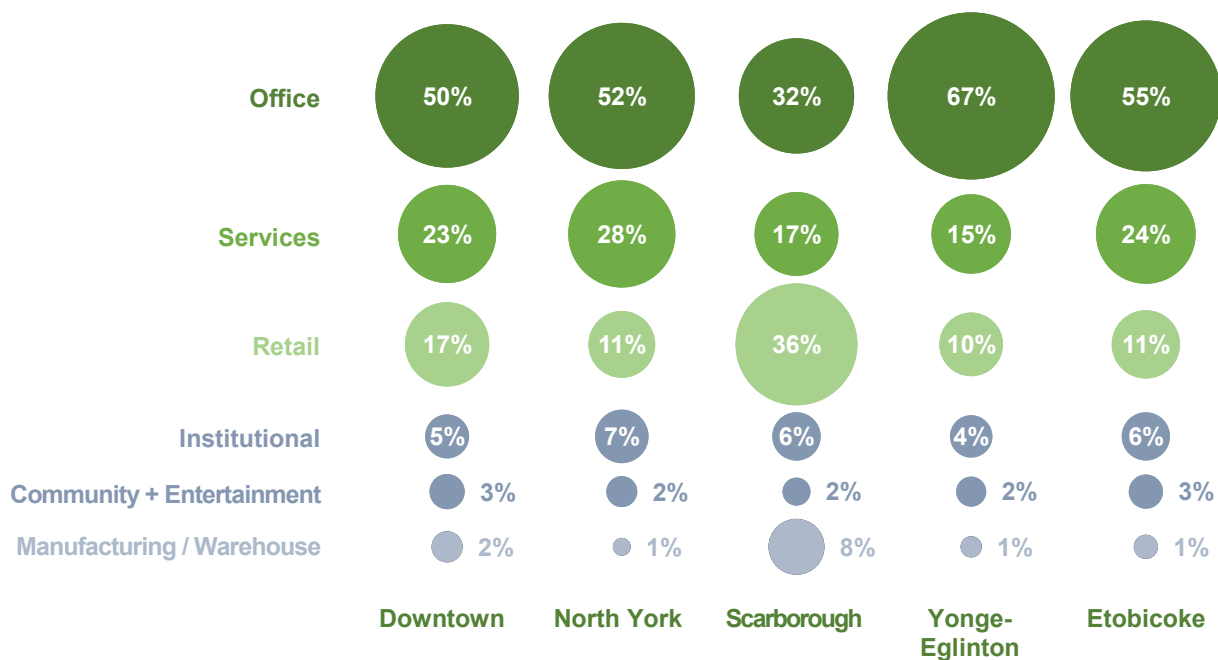


Figure 27: Downtown and Centres, Share of Establishments by Category in 2017



Secondary Plan areas contain 317,130 jobs, 20.9% of city employment

Employment in Secondary Plan Areas

With 20.9% of all employment (317,130 jobs), Secondary Plan areas reflect much of the city's recent urban growth. In 2017, Secondary Plan employment grew by 21,030 jobs or 7.1%, well above the city average growth rate of 3.9%.

The Official Plan contains Secondary Plans to manage growth and change in specific parts of the city. Secondary Plan areas contain a range of land use designations and cover diverse geographic areas across Toronto, including parts of Downtown, the Centres, and Employment Areas. As a result, the employment and establishment data in Secondary Plan

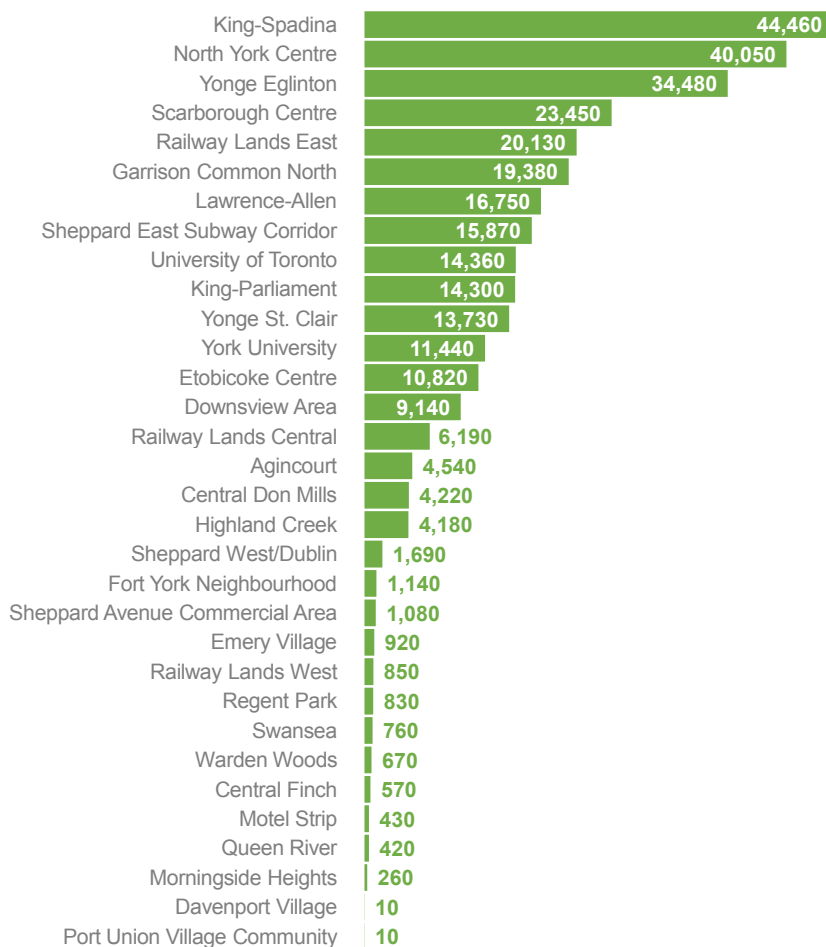
areas should be understood in relation to the City as a whole, rather than compared to data for Downtown, the Centres, or Employment Areas.

Also, the Secondary Plan areas for the Downtown, North York Centre and Yonge Eglinton Centre differ from the areas of the Centres and Downtown designated in the Official Plan. Employment and establishment data differ from the Downtown and Centres information in these areas.

Secondary Plan Employment

Secondary Plan employment includes 24.1% of all Office employment in the city, as well as 26.3% of all Community and Entertainment employment in the city (see Table 6, Appendix).

Figure 29: Secondary Plan Areas, 2017 Employment



Note: See Appendix, Table 6: Secondary Plan Areas

More than half (51.3%) of employment within Secondary Plan areas is concentrated in the five largest areas by employment. This distribution of employment reflects the success of the Official Plan's growth management policies in directing growth to appropriate areas.

Top areas by employment

The largest Secondary Plan areas (those with 10,000 or more employees) are generally situated in or near Downtown, the Centres, along the city's rapid transit network, or around major post-secondary institutions.

In these areas, Office is the predominant employment category, with four exceptions: Sheppard East Subway Corridor and Lawrence-Allen have mostly Retail employment due to the presence of the Yorkdale and Lawrence Square shopping centres, and both York University and University of Toronto have predominantly Institutional employment.

All of these Secondary Plan areas have added jobs over the past year, with the

exception of North York Centre and Yonge St. Clair. Combined, the largest Secondary Plans added 17,130 jobs (81.5% of all growth in Secondary Plan areas).

Smaller Secondary Plan areas

Smaller Secondary Plan areas (under 10,000 employees) are comprised of smaller geographic areas further from Downtown, but still contain significant concentrations of employment. While many of these areas have a predominant share of Office employment, Service employment is predominant in Motel Strip, Railway Lands West, Queen River, and Port Union Village Community. Also, Institutional employment is the main category in Highland Creek and Fort York Neighbourhood, while Manufacturing employment is the most prevalent category in Downsview and Warden Woods.

Smaller Secondary Plan areas accounted for 18.6% of all Secondary Plan area employment growth over the past year through adding 3,900 new jobs.

In 2017, Secondary Plan employment grew by 21,030 jobs or 7.1%, above the city growth rate of 3.9%

Figure 30: Secondary Plan Employment

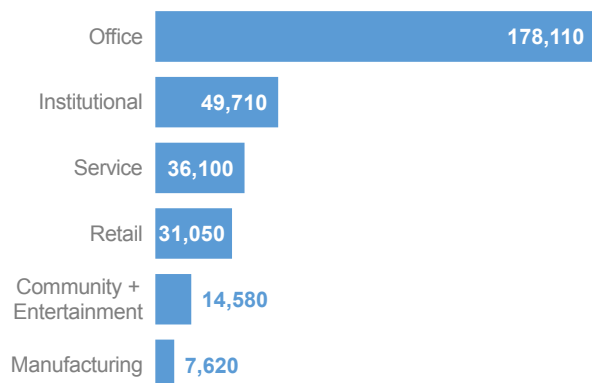
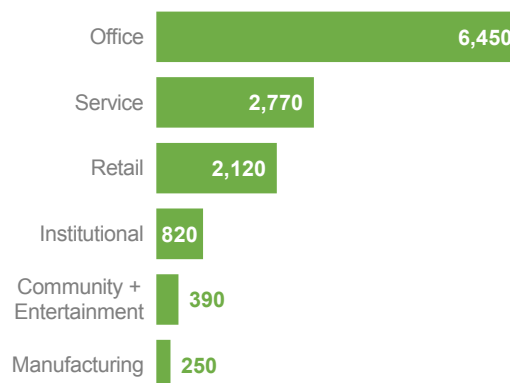


Figure 31: Secondary Plan Establishments



Toronto's Employment Areas contain 27.1% of all jobs and 29.2% of all business establishments

Employment Areas

Toronto's Employment Areas are a key part of the city's land use framework and are designated for employment use and growth. These areas are important as regionally and globally competitive locations for national and international business as well as areas for business formation.

Employment Areas are generally occupied by manufacturing, warehousing and product assembly activities as well as commercial business parks. They provide a broad range of job opportunities for Toronto residents and the regional labour force, and help ensure a stable environment for investment and to maintain and grow the city's revenue base.

Map 3 shows the location and boundaries of the Employment

Areas identified in the City's Official Plan at the time of the 2017 Toronto Employment Survey. Overall, 29.2% of all establishments (22,080 locations) and 27.1% of all jobs (411,970 jobs) are located in Toronto's Employment Areas.

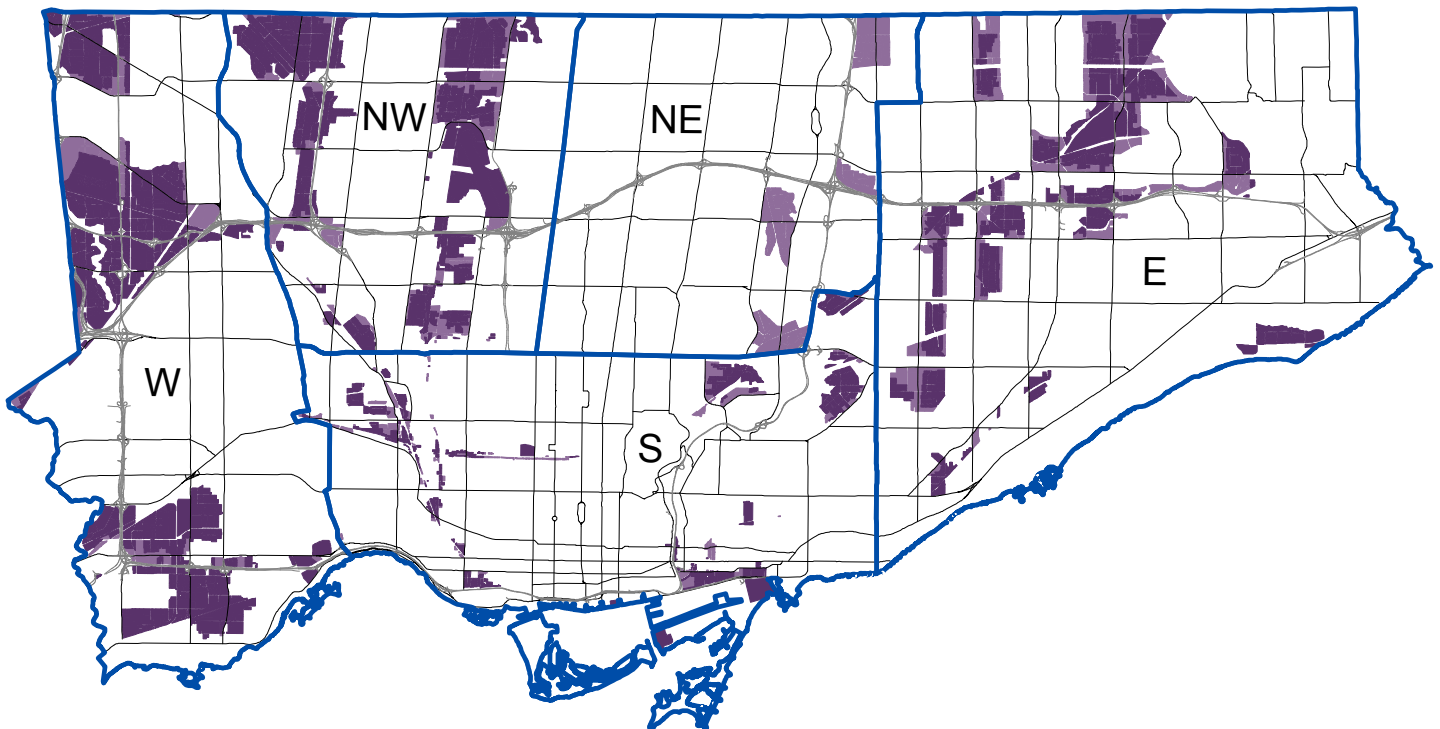
Employment Areas are particularly important to the Manufacturing sector, with 79.4% of Manufacturing establishments and 92.3% of all Manufacturing jobs located in Toronto's Employment Areas (see Map 4).

Employment Areas continue to attract new businesses, with 1,470 or 29.9% of new establishments in the city locating in Employment Areas in 2017.

Regional Employment Policies

In 2017, the Growth Plan released employment growth forecasts for the City of Toronto. Employment is forecast to grow to 1,720,000 jobs by 2041.

Map 3: Toronto's Employment Areas and Employment Monitoring Areas



If the average rate of employment growth continues (2.7% annually over the last five years), Toronto will achieve Growth Plan forecasts by 2022, almost twenty years before the target. Given the pace of Toronto's employment growth relative to the forecast, the Province can be expected to undertake another review of Growth Plan targets.

The Growth Plan also provides for an Official Plan designation for Prime Employment Areas, to protect land for consumptive or low density employment uses such as manufacturing, warehousing, goods movement or utilities.

Often, industrial and other impactful employment uses have few alternative locations in the city due to the potentially negative impacts of their activities on residential and other sensitive land uses. Conflicts related to

the conversion of employment lands to residential or other sensitive uses can destabilize an entire area, resulting in employment loss and erosion of available areas for business formation or expansion.

Official Plan Amendment 231

On December 18, 2013, Council adopted Amendment 231 of the Official Plan (OPA 231). OPA 231 amends Policy 2.1.2 of the Official Plan by deleting the term Employment Districts and replacing it with Employment Areas. As a result, the Survey began reporting on Employment Areas in 2016 (including data to 2013). See Tables 7 and 8 in the Appendix.

Core and General Employment Areas

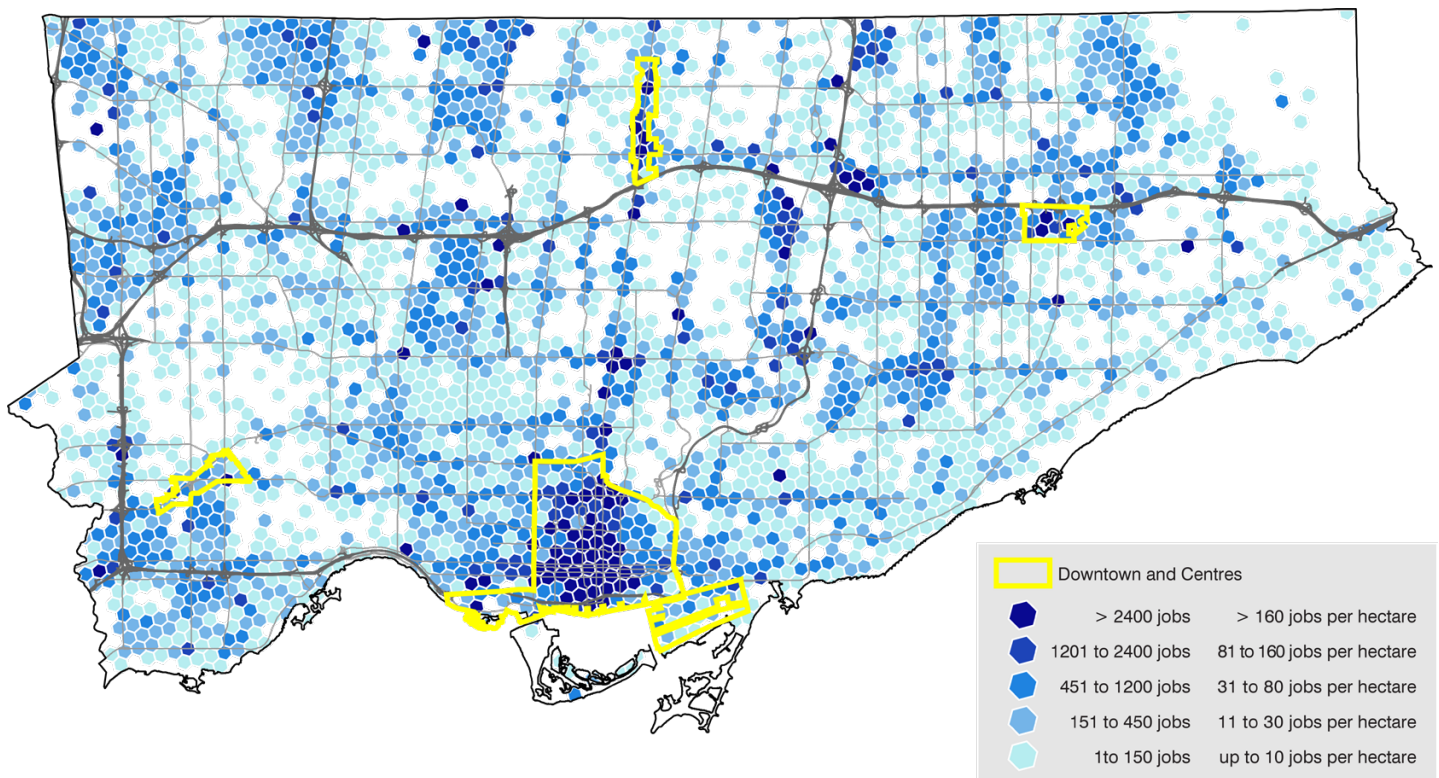
Section 4.6 of OPA 231 differentiates Core and General Employment Areas.

These designations came into force by an order of the Ontario Municipal Board on December 20, 2016.

Core Employment Areas 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 lands and possibly disrupt industrial operations are not generally permitted in Core Employment Areas.

General Employment Areas are often located on the periphery of Employment Areas, along major roads. This designation provides for retail stores, service shops and restaurants. These areas have increased visibility and transit access to draw the broader public.

Map 4: Toronto's Employment Density



Employment Area Sector Activity

Core Employment Areas accommodate most of Toronto's jobs in Manufacturing, Transportation and Warehousing, and Construction

Manufacturing employment is the top sector across Employment Areas, making up 20.7% of all jobs (85,320 jobs), followed by employment in Wholesale and Retail Trade (16.5% or 67,775 jobs) and Professional, Scientific and Technical Services (10.1% or 41,644 jobs).

Employment Areas accommodate important concentrations of jobs citywide in several sectors, led by employment in Manufacturing (92.3%), Utilities (89.7%), Transportation and Warehousing (76.9%) and Construction (72.2%).

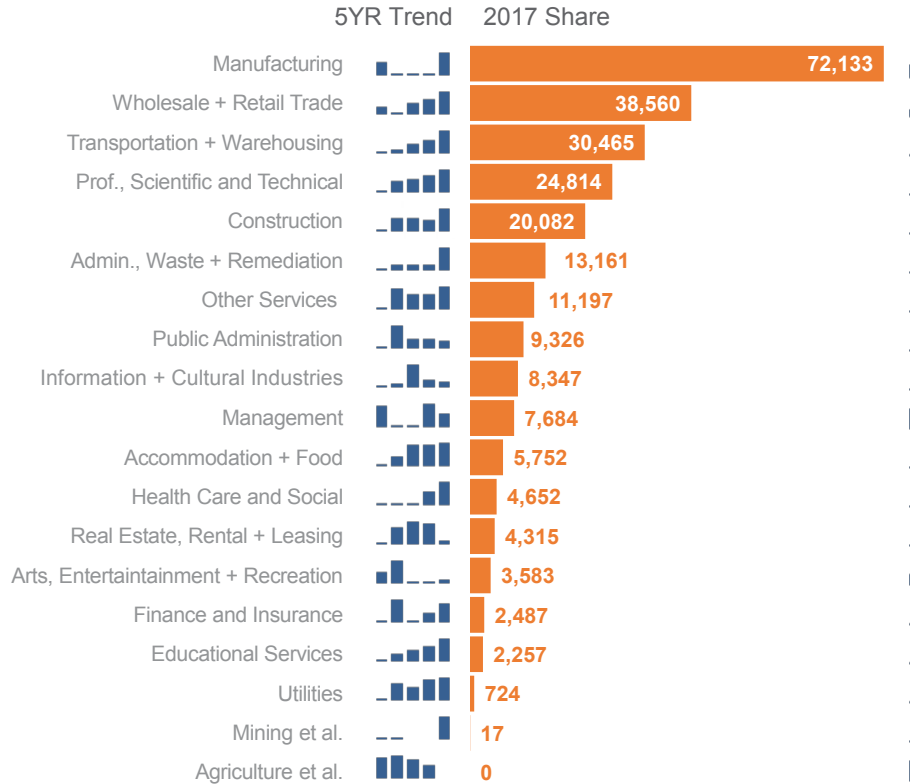
Core Employment Area Activity

Core Employment areas continue to host land consumptive land uses. In 2017, these areas led Employment Area jobs in Manufacturing (27.8% or 72,133 jobs), Wholesale and Retail Trade (14.9% or 38,560 jobs) and Transportation and Warehousing (11.7% or 30,465 jobs).

Core Employment Areas are leading locations citywide for employment in Manufacturing (78%), Transportation and Warehousing (70.2%) and Construction (59.5%).

Figure 32: Core Employment by NAICS 2017

92.3% of Toronto's Manufacturing jobs are in Toronto's Employment Areas



General Employment Area Activity

General Employment Areas provide support activities for Core Employment Areas and help buffer heavy industrial uses from surrounding areas.

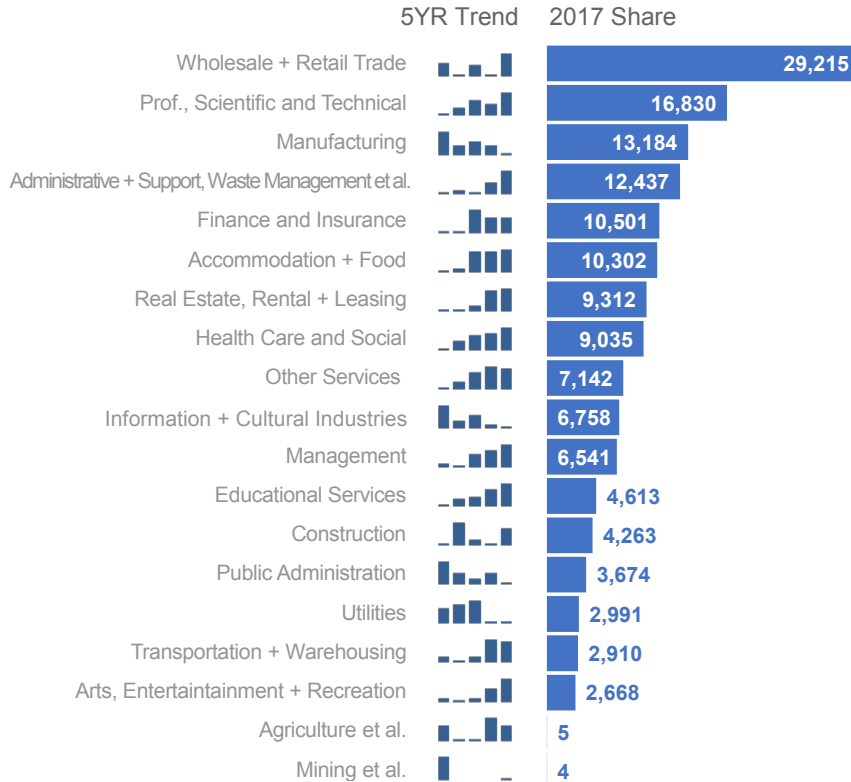
Sectoral employment in General Employment Areas is led by Wholesale and Retail Trade, having 19.2% of employment areas jobs (29,220 jobs), followed by Professional, Scientific, and Technical Services (11.0% or 16,830 jobs) and Manufacturing (8.7% and 13,180 jobs).

General Employment Areas are leading locations citywide for employment in Utilities (78%), Real Estate and Rental and Leasing (21.1%) and Wholesale and Retail Trade (15.9%).

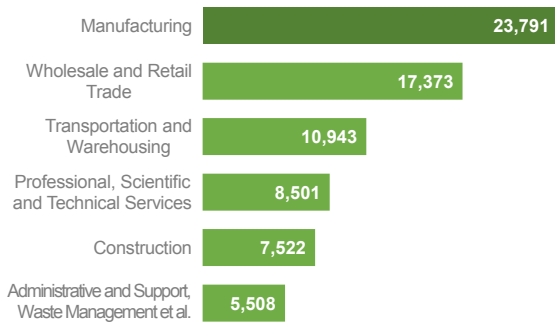
Administrative and Support, Waste Management and Remediation Services (16.3%) and Manufacturing (14.3%) also have significant shares of jobs citywide.

In 2017, employment in Toronto's Employment Areas grew by 3.4%, adding 13,620 jobs

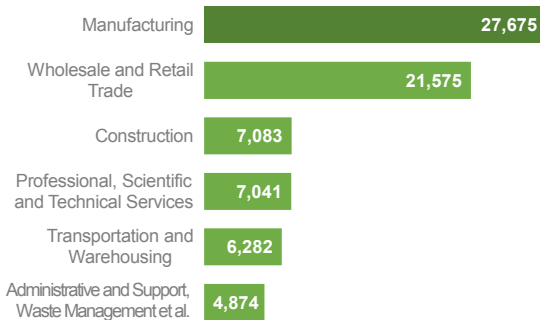
Figure 33: General Employment by NAICS 2017



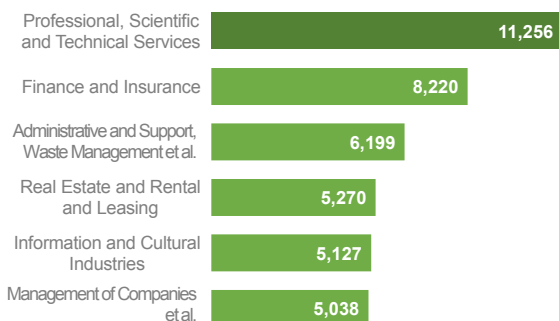
West EMA - Top 6 NAICS Sectors 2017



Northwest EMA - Top 6 NAICS Sectors



Northeast EMA - Top 6 NAICS Sectors



Employment Monitoring Areas

In 2016, five Employment Monitoring Areas (EMAs) were created to analyze broader trends in Employment Area activity across the city (see Map 3, page 22).

In 2017, employment grew by 3.4% in all EMAs, above the average annual growth rate of 2.1% since 2013.

West

The West EMA approximates the former municipality of Etobicoke. 25% of Employment Area jobs (102,800 jobs) are in the West EMA. Of these, 89.6% are within Core Employment Areas. In 2017, West EMA employment grew 3.6%, adding 3,550 jobs, growing by 8.0% or 7,640 jobs since 2013.

The West EMA partly encompasses the Airport Corporate Centre surrounding Pearson International Airport. This employment node is the second largest employment concentration in Canada after Toronto's downtown.

Top employment sectors in the West EMA include Manufacturing (23.1%), Wholesale and Retail Trade (16.9%) and Transportation and Warehousing (10.6%).

In 2017, the Manufacturing sector grew the quickest in the West EMA, adding 1,420 jobs or 6.4%. Since 2013, the Construction sector grew the most, growing by 5.0% annually, adding 1,340 jobs.

Northwest

The Northwest EMA approximates the western part of the former municipality of North York.

23.5% of Employment Area jobs (96,940 jobs) are in the Northwest EMA. 75.7% of these jobs are within Core Employment Areas. In 2017, Northwest EMA employment grew by 3.8%, adding 3,560 jobs, growing by 8.1% or 7,240 jobs since 2013.

Top employment sectors in the Northwest EMA include Manufacturing (28.5%), Wholesale and Retail Trade (22.3%) and Professional, Scientific and Technical Services (7.3%).

In 2017, the Manufacturing sector grew the quickest in the Northwest EMA, adding 1,010 jobs or 3.8%. Since 2013, the Professional, Scientific and Technical Services sector grew the most, growing by 16.8% annually, adding 1,020 jobs. Transportation and Warehousing followed close behind, adding 1,010 new jobs and growing 19.1% since 2013.

Northeast

The Northeast EMA spans the eastern portion of the former municipality of North York.

About 15.8% of Employment Area jobs (65,050 jobs) are in the Northeast EMA. The Northeast EMA has no Core Employment Areas, but has broader sector diversity than the other EMAs. In 2017, Northeast EMA employment grew by 5.2%, adding 3,230 jobs, growing by 12.2% or 7,080 jobs since 2013.

Top employment sectors in the Northeast EMA include Professional, Scientific and Technical Services (17.3%), Finance and Insurance (12.6%) Administration, Support and Waste Services (9.5%).

In 2017, the relocation of a large security services firm added 1,200 jobs to Administration, Support and Waste Services. Also, the Professional, Scientific and Technical Services added 1,060 jobs through expanded establishments. Manufacturing lost 530 jobs since 2016 and 1,840 jobs or 31.1% since 2013, as the sector continues to centralize in Core Employment Areas.

East

The East EMA approximates the former municipality of Scarborough. 22.6% of Employment Area jobs (93,310 jobs) are in the East EMA. 60.6% of these jobs are within Core Employment Areas. In 2017, East EMA employment grew 1.2%, adding 1,110 jobs, growing by 3.3% or 2,980 jobs since 2013.

Top employment sectors in the East EMA include Manufacturing (23.9%), Wholesale and Retail Trade (19.0%) and Transportation and Warehousing (8.8%).

In 2017, the Manufacturing sector grew the quickest in the East EMA, adding 1,010 jobs or 3.8%. Since 2013, the Professional, Scientific and Technical Services sector grew the most, growing by 16.8% annually, adding

1,020 jobs. Transportation and Warehousing followed close behind, adding 1,010 new jobs and growing 19.1% since 2013.

South

The South EMA approximates the areas of the former municipalities of the City of Toronto, York, and East York.

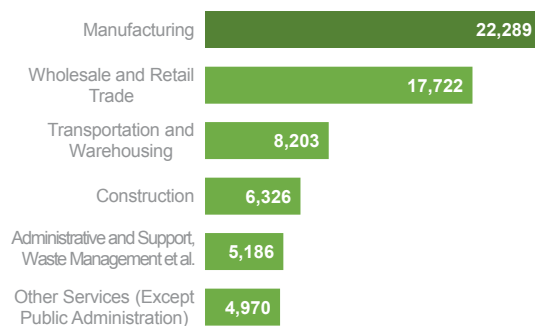
Some 13.1% of Employment Area jobs (53,860 jobs) are in the South EMA. 69.8% of these jobs are within Core Employment Areas. In 2017, South EMA employment grew by 4.2%, adding 2,180 jobs, growing by 15.9% or 7,390 jobs since 2013.

Top employment sectors in the South EMA include Professional, Scientific and Technical Services (18.9%), Wholesale and Retail Trade (13.9%) and Manufacturing (13.6%). Transportation and Warehousing also has a 13.6% employment share.

The Professional, Scientific and Technical Services sector has grown significantly since 2013, adding 3,320 jobs (48.3%), including 1,480 jobs in 2017.

The trend of office-based, skilled employment locating in the South EMA contrasts with decreasing employment in Wholesale and Retail Trade (a decrease of 400 jobs or 5.2% since 2013). Manufacturing in the South EMA has been flat (net decrease of 70 jobs or 0.9% since 2013), while growing slightly in 2017 (240 jobs or 3.3%).

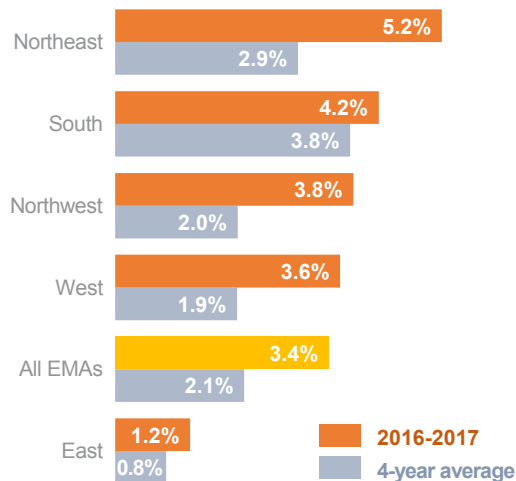
East EMA - Top 6 NAICS Sectors



South EMA - Top 6 NAICS Sectors



Figure 34: Employment Growth by EMA 2017 vs. 4-Year Average



Special Topic: Home-Based and Volunteer Pilot

Office establishments in the Downtown pilot area were the most likely to have home-based employment (32.1%).

Establishment Basis of Survey

As an establishment-based survey, the Survey collects information annually through field visits to business establishments and asks for information about the number of employees who are working in the business location. As such, it differs from place-of-work information captured by the Statistics Canada Census instrument, which only records an individual's primary occupation, not secondary employment activities.

As a result, the Survey is not designed to capture the full extent of home-based employment, or employment that is "footloose," not place-specific on a daily basis.

Home-based and volunteer employment pilot studies

While a certain share of home-based and footloose employment is captured by the Survey directly through head or district office reporting, research has been undertaken to explore how to expand its coverage to capture additional employment.

In 2017, the Survey included two pilot studies to study counts of home-based and volunteer employment. The counts of home-based employees and volunteers were not included in the total employment information for 2017, given the preliminary nature of the pilot study.

The pilots were conducted in four geographically distinct areas of the city. These areas included a Downtown area with primarily office-based employment, a suburban part of Scarborough with mostly community and institutional establishments, a predominantly retail area in central Toronto, and a manufacturing area in North York.

Occupants were asked whether they had any home-based employees, and if so, the total number; as well as whether there were volunteers, such as interns, and the total number if applicable.

Home-Based Employment Results

A total of 1,070 establishments were surveyed in the four areas of the pilot studies. The overall response rate was 86.0%, with 920 of 1,070 establishments providing responses.

About 14% of respondents overall (150 establishments) indicated that they had home-based employment. The highest rate of establishments with home-based employees was in

Figure 35: Establishment Categories with Home-Based Employees 2017

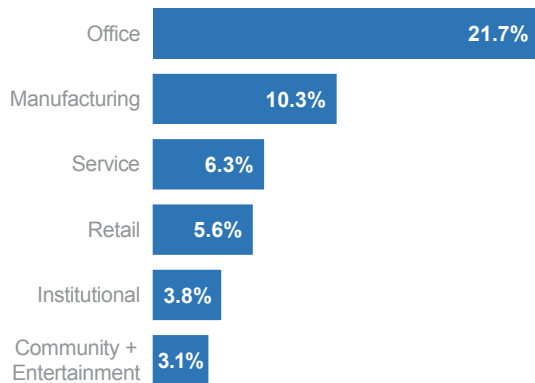
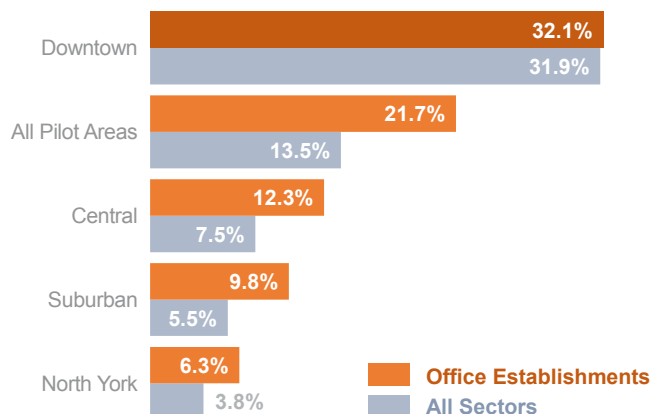


Figure 36: Office Establishments vs. All Sectors with Home-Based Employees 2017



the Downtown office area, 31.9% of respondents, followed by 7.5% of respondents in the central Toronto retail area, 5.5% of respondents in the Scarborough suburban area and 3.8% of respondents in the North York manufacturing area.

Despite these levels of establishments with home-based employees, the overall share of home-based employment relative to place-specific employment was low, at 2.4%, or 560 of 22,840 jobs. Individual areas ranged from a 4.3% equivalent share in the downtown office area to a 0.4% share in the North York manufacturing area.

Office establishments were more likely to have home-based employment. Some 21.7% of office establishments in pilot areas had employees working from home compared to 3.1% of Community and Entertainment establishments. In the Downtown pilot area, 32.1% of Office establishments reported home-based employment.

These findings suggest the importance of exploring home-based employment geographically, with a focus on Downtown, and by category, with a focus on the Office category.

Volunteer Activity

Of the 1,070 total establishments in the pilot areas, 70 or 6.5% stated that they had volunteers. The highest proportion of establishments with volunteers was in the community and institutional-oriented suburban area in Scarborough, with 12.0% of establishments reporting having volunteers. The lowest proportion was in the central retail area, where volunteers were recorded at only 3.5% of establishments. About 21.2% of Institutional establishments reported having volunteers. Only 1.0% of Manufacturing establishments reported having volunteers.

When compared to total employment,

the relative share of volunteers varied considerably by pilot area. In the suburban Scarborough area, the amount of volunteers relative to the area's total employment was 13.4%, while it was only 2.0% in the central retail area. The overall share of volunteers compared to total employment in the pilot areas was 4.4%.

These results indicate that any future study of volunteers in Toronto should focus on Institutional establishments across the city.

Institutional establishments were the most likely in the pilot areas to have volunteers (21.2%)

Figure 37: Establishments with Volunteers 2017

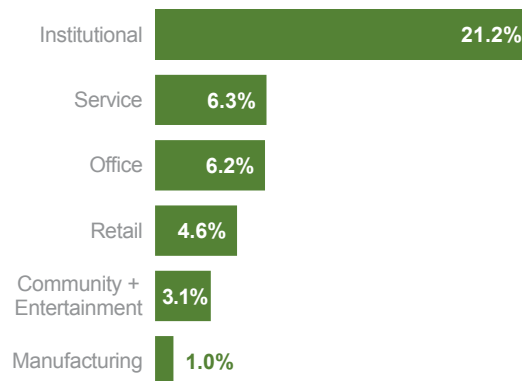
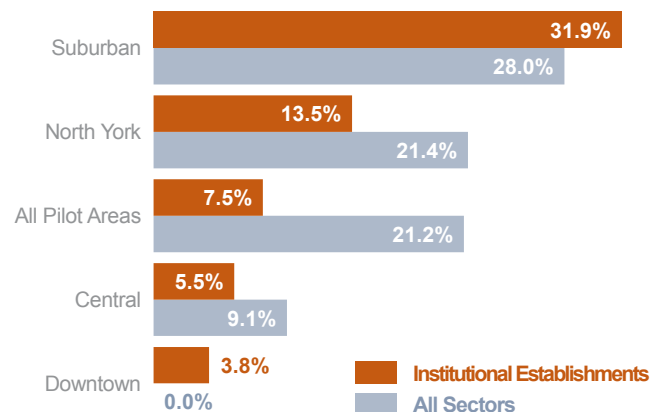


Figure 38: Institutional Establishments vs. All Sectors with Volunteers 2017



2016 Establishment Count Comparison

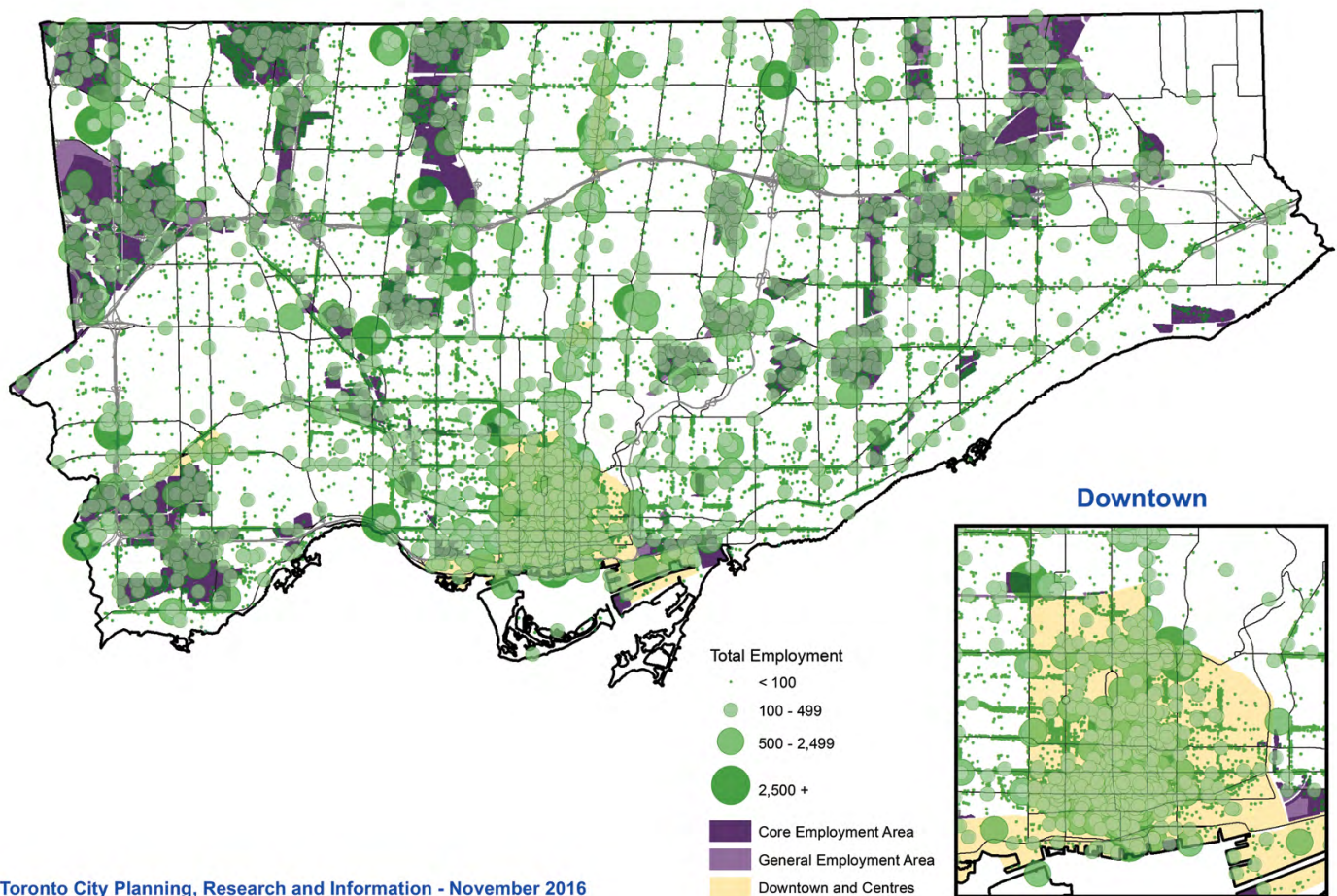
It is estimated that the Survey reported on 99.3% of business establishments outside of residential areas in 2016

To understand how to improve Survey coverage, the 2016 Toronto Employment Survey establishment locations were compared with Statistics Canada's *Business Patterns* and Environics Analytics' *Business Locations* data. Both datasets counted higher levels of business locations. The *Business Register* data set counted 18.7% more establishments than the Survey, while the *Business Locations* counted 11.1% more establishments than the Survey.

To explore this further, location mapping was undertaken to determine the geospatial distribution of *Business Locations* data. It can be seen that many establishments are located in residential areas (Neighbourhoods or Apartment Neighbourhoods as designated in Toronto's Official Plan), while most establishments the Survey tended are along main streets and in designated growth areas (Downtown, the Centres, and Employment Areas).

These findings suggest that many additional establishments not captured in the Survey are home-based.

Map 5: 2016 Employment Concentration



Toronto City Planning, Research and Information - November 2016

Bathurst and Lawrence Case Study

A case study was undertaken to examine *Business Locations* data in the Bathurst and Lawrence area to better understand establishments located in residential areas typically not captured by the Survey.

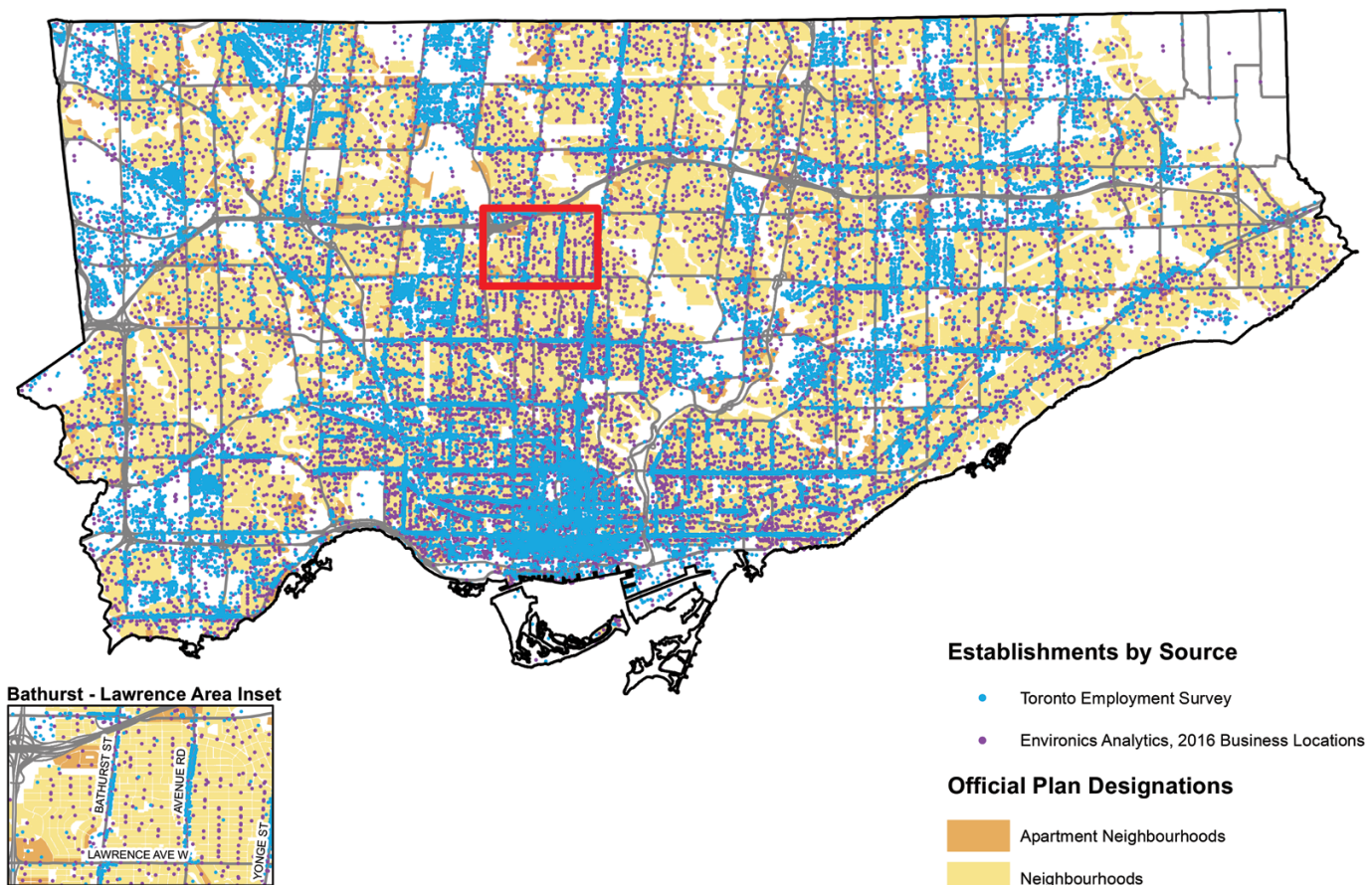
It was found that within residential structures, no signage or any other markers of employment activity were visible. As a result, these types of establishments would not normally be identified by field surveyors who survey visible places of work in commercial, industrial and institutional and mixed use areas.

Adjusting *Business Locations* establishment counts to remove those in residential areas, the results converged with the Survey, with the difference in total establishment counts dropping to 0.7% or 510 business locations (compared to 11.1% or 9,340 locations before adjustments).

These results indicate the Survey reported on 99.3% of business establishments outside of residential areas in 2016. Current survey practices are highly successful in capturing traditional business establishments but have limited success at capturing non-traditional and home-based employment.

Current survey practices have limited success at capturing non-traditional and home-based employment

Map 6: 2016 Establishment Locations



Between 2006 and 2016, Toronto's part-time employment increased at an annual rate of 3.0%, double the growth rate of total employment

Census 2016 Comparison

In 2017, Statistics Canada released the results of the 2016 Census. The Census Place Of Work data provide an opportunity to better understand the Survey results, by comparing reported usual Place Of Work data with the 2016 location-based employment counts from the Survey.

The 2016 long-form Census counted 1,443,680 employed people by reported place of work in Toronto. This count represents those reporting their usual place of work in Toronto. This includes those who reside in Toronto and work from home.

In comparison, the 2016 Toronto Employment Survey counted 1,461,020 jobs, slightly more overall employment than the Census (approximately 1%).

Counting Part-Time Employment

Historically, the Survey has counted fewer jobs than the Census. This undercount can be partly explained

by the observed presence of home-based employment.

The 2016 Census results indicate an emerging trend toward higher employment counts in the Survey. This may be due to the increasing share of part-time employment in Toronto. Since the Census counts an individual's primary employment, it does not capture secondary employment or additional jobs held by that person. The Survey, by capturing both full-time and part-time employment by location, more completely captures the full spectrum of work within the city.

The Trend Toward Part-Time Work

The increase in part-time work in Toronto is evident over the past decade. Between 2006 and 2016, part-time employment increased by 34.7% (96,140 jobs), an average annual growth rate of 3.0%, double the annual growth rate for total employment (1.3%). In 2016, 25.5% of jobs in the city were part-time, up from 21.7% in 2006 (see Table 1).

Table 1: Total Surveyed Employment, 2006 and 2016 (Toronto Employment Survey)

	Total Employment		Net Change	% Growth 2006-2016	Ann.Growth (CAGR)
	2006	2016			
Full-time	1,001,060	1,087,930	86,870	8.7%	0.8%
Part-time	276,950	373,090	96,140	34.7%	3.0%
Total	1,278,010	1,461,020	183,010	14.3%	1.3%
Part-time Share of Employment	21.7%	25.5%	52.5%		

Note: Numbers have been rounded to the nearest ten. Totals and sums may differ due to rounding.

Note: CAGR refers to the compound annual growth rate of employment 2006-2016

This trend suggests a structural shift in the local economy towards more precarious, part-time employment.

Sector Analysis

Breaking out total employment by NAICS helps to better understand sectoral differences between the Census and the Survey.

Since 2012, the Survey counts by NAICS has converged with the Census. This trend can be partly explained by improvements to the Survey’s data collection and verification processes, but also by the improved response rates and accuracy of the 2016 long-form Census compared to the 2011 National Household Survey (NHS).

Most NAICS sector counts from the Survey are within a 10% margin of error compared to the 2016 Census. These include: Manufacturing, Wholesale Trade, Retail Trade, Transportation and Warehousing, Real Estate, Educational Services, and Arts and Entertainment.

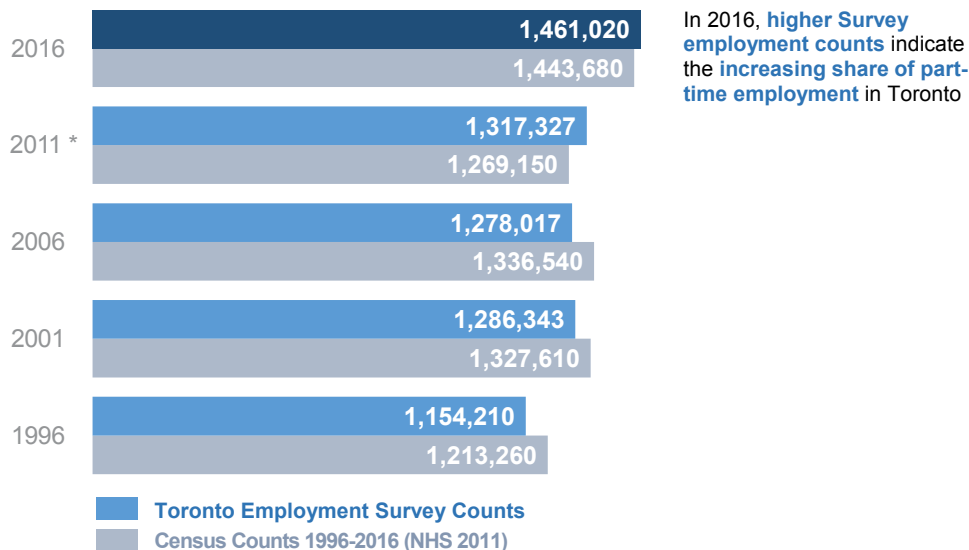
Improving sector counts from Survey include: Construction, Information and Cultural Industries, and Public Administration, due to continued coding improvements.

Sector Differences

Observed discrepancies have continued in the Management of Companies and Enterprises sector. While the Survey and the 2016 Census (and 2011 NHS) both utilize NAICS coding for Management of Companies and Enterprises, Statistics Canada employs a narrower definition for this sector, including only “holdings and other investment companies”. The Survey utilizes a broader definition that includes establishments that have been identified as Head Offices, resulting in higher employment counts for this sector. These higher counts in Management from the Survey may explain the lower figures for other sectors such as Finance and Insurance, Mining, Agriculture, and Professional, Scientific and Technical Services, may have been coded as Management under NAICS.

Most NAICS sector counts from the Survey are within a 10% margin of error compared to the 2016 Census

Figure 39: Survey Employment Counts vs. Census 1996-2016



* In 2011 the National Household Survey (NHS) replaced the Long-Form Census.

Appendices

Table 2: Total Employment - 2007, 2016, 2017

Employment	Total Number of Employees			Net Change 2007-2017	Growth Rate %	Net Change 2016-2017	Growth Rate %
	2007	2016	2017				
Full-time	1,021,320	1,087,930	1,129,110	107,790	10.6%	41,180	3.8%
Part-time	280,300	373,090	389,460	109,160	38.9%	16,370	4.4%
Total	1,301,620	1,461,020	1,518,560	216,940	16.7%	57,550	3.9%

Note: Numbers have been rounded to the nearest ten. Totals and sums may differ due to rounding.

Figure 40: Total Employment by Economic Sector 2013-2017

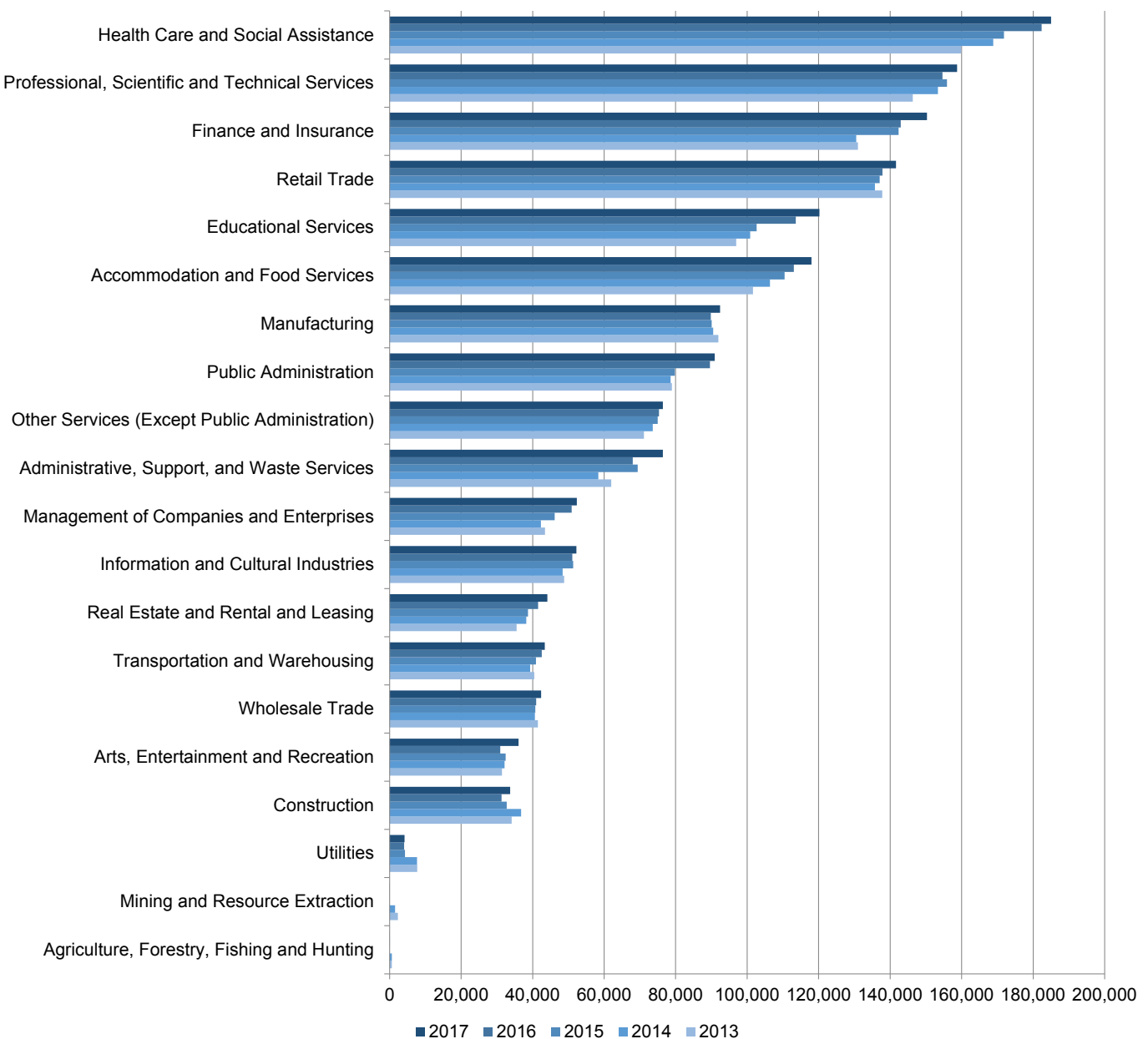


Table 3: New Establishments, 2016-2017

Location	2016	2017	Category	2016	2017
Centres	150	250	Manufacturing	150	220
Downtown	820	990	Retail	560	730
Employment Areas	1,090	1,470	Service	830	1,100
Rest of the City	1,610	1,830	Office	1,280	1,770
			Institutional	170	230
			Community & Entertainment	680	490
City Total	3,670	4,540	City Total	3,670	4,540

Note: Numbers have been rounded to the nearest ten.

Table 4: Employment by Category, 2007, 2012, 2016, 2017

Category	Total Number of Employees				Net Change	Growth Rate %	Net Change	Growth Rate %	Net Change	Growth Rate %
	2007	2012	2016	2017	2007-2017		2012-2017		2016-2017	
Manufacturing	149,160	128,240	123,990	132,250	-16,910	-11.3%	4,020	3.1%	8,260	6.7%
Retail	151,530	143,310	147,600	152,350	820	0.5%	9,040	6.3%	4,750	3.2%
Service	148,920	158,330	180,590	189,150	40,230	27.0%	30,820	19.5%	8,560	4.7%
Office	604,230	638,120	713,930	740,180	135,950	22.5%	102,060	16.0%	26,250	3.7%
Institutional	207,810	218,420	245,740	249,150	41,340	19.9%	30,730	14.1%	3,410	1.4%
Community & Entertainment	39,980	45,160	49,170	55,490	15,510	38.8%	10,330	22.9%	6,320	12.9%
Total	1,301,620	1,331,570	1,461,020	1,518,560	216,940	16.7%	186,990	14.0%	57,550	3.9%

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

Table 5: Total Employment in the Centres and Downtown, 2012-2017

Location	2012	2013	2014	2015	2016	2017	2012-2017		2016-2017	
							Net Change	%	Net Change	%
Downtown	446,840	467,820	482,710	508,640	511,200	544,480	97,650	21.9%	33,280	6.5%
North York Centre	36,060	35,350	34,830	35,000	40,320	40,050	3,990	11.1%	-280	-0.7%
Scarborough Centre	15,400	16,870	16,440	16,690	22,070	23,450	8,060	52.3%	1,390	6.3%
Yonge-Eglinton	17,740	19,760	19,010	17,390	17,510	18,850	1,110	6.3%	1,350	7.7%
Etobicoke Centre	8,660	8,690	9,380	9,770	9,460	10,820	2,170	25.0%	1,370	14.4%
Downtown and the Centres	524,680	548,480	562,370	587,480	600,550	637,650	112,970	21.5%	37,100	6.2%
Rest of City	806,890	815,370	822,020	834,800	860,470	880,910	74,020	9.2%	20,440	2.4%
City Total	1,331,570	1,363,850	1,384,390	1,422,280	1,461,020	1,518,560	186,990	14.0%	57,550	3.9%

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

Table 6: Secondary Plan Area Employment by 6 Sectors, 2017

No.	Secondary Plan Area	Manufacturing	Retail	Service	Office	Institutional	Community / Entertainment	Total
1	Agincourt	670	710	570	2,350	240	10	4,540
24	Central Don Mills	0	820	1,000	1,580	620	200	4,220
22	Central Finch	0	20	30	420	70	30	570
27	Davenport Village	0	0	0	10	0	0	10
7	Downsview Area	4,100	840	1,810	690	1,460	230	9,140
26	Emery Village	50	80	240	290	240	20	920
12	Etobicoke Centre	40	640	1,350	7,640	940	210	10,820
13	Fort York Neighbourhood	10	20	70	50	930	70	1,140
14	Garrison Common North	520	1,190	2,630	12,440	2,150	450	19,380
2	Highland Creek	0	90	360	320	3,020	390	4,180
15	King-Parliament	100	1,220	1,840	8,150	2,320	670	14,300
16	King-Spadina	470	3,130	7,670	30,200	920	2,070	44,460
32	Lawrence-Allen	20	6,980	1,750	4,810	2,620	580	16,750
3	Morningside Heights	0	0	0	0	170	90	260
11	Motel Strip	20	40	170	130	50	20	430
8	North York Centre	20	1,480	2,590	33,490	1,870	600	40,050
4	Port Union Village Comm.	0	0	10	0	0	0	10
34	Queen River	40	190	150	40	0	0	420
18	Railway Lands Central	0	100	1,750	3,360	20	960	6,190
17	Railway Lands East	270	390	2,100	12,960	20	4,390	20,130
19	Railway Lands West	0	180	310	150	20	200	850
28	Regent Park	0	120	60	350	160	140	830
5	Scarborough Centre	540	3,510	1,410	16,900	750	340	23,450
29	Sheppard Ave. Commercial Area	0	30	50	870	110	10	1,080
9	Sheppard E. Subway Corridor	10	4,480	1,620	5,380	4,060	330	15,870
23	Sheppard West/Dublin	0	440	350	670	220	10	1,690
25	Swansea	140	80	30	240	180	90	760
20	University of Toronto	30	200	470	1,640	11,470	550	14,360
30	Warden Woods	320	20	50	30	190	60	670
21	Yonge Eglinton	130	3,310	4,110	22,150	3,320	1,470	34,480
6	Yonge St. Clair	120	680	1,030	10,580	1,030	290	13,730
10	York University	0	60	520	220	10,540	100	11,440
All Secondary Plan Areas		7,620	31,050	36,100	178,110	49,710	14,580	317,130

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

Table 7: Total Employment in Employment Monitoring Areas and City by NAICS, 2013-2017

NAICS	All EMAs										Non Employment Areas							Total		
	2013	2014	2015	2016	2017	2013	2014	2015	2016	2017	2013	2014	2015	2016	2017	2013	2014	2015	2016	2017
Agriculture, Forestry, Fishing and Hunting	20	10	10	20	10	120	60	50	70	10	140	70	60	80	20	140	70	60	80	20
Mining, Quarrying, and Oil and Gas Extraction	200	0	0	0	20	620	70	20	20	0	820	70	20	20	20	820	70	20	20	20
Utilities	3,660	3,900	3,900	3,660	3,710	710	420	390	400	420	4,360	4,320	4,280	4,070	4,140	4,360	4,320	4,280	4,070	4,140
Construction	20,740	23,220	22,770	22,270	24,340	8,320	8,810	9,980	9,040	9,390	29,060	32,040	32,760	31,310	33,730	29,060	32,040	32,760	31,310	33,730
Manufacturing	86,320	83,660	83,910	83,310	85,310	7,080	7,280	6,160	6,500	7,120	93,390	90,940	90,070	89,810	92,430	93,390	90,940	90,070	89,810	92,430
Transportation and Warehousing	30,420	30,640	31,510	32,250	33,380	9,430	8,810	9,390	10,320	10,010	39,850	39,450	40,900	42,560	43,380	39,850	39,450	40,900	42,560	43,380
Information and Cultural Industries	16,010	15,350	17,020	15,450	15,110	33,760	33,840	34,300	35,670	37,120	49,770	49,190	51,310	51,120	52,230	49,770	49,190	51,310	51,120	52,230
Finance and Insurance	10,930	11,210	13,690	12,870	12,990	119,980	119,220	128,700	130,070	137,310	130,910	130,420	142,380	142,950	150,300	130,910	130,420	142,380	142,950	150,300
Real Estate and Rental and Leasing	9,810	10,260	11,130	13,420	13,630	25,300	27,280	27,580	28,120	30,500	35,110	37,550	38,710	41,540	44,130	35,110	37,550	38,710	41,540	44,130
Professional, Scientific and Technical Services	35,030	37,800	38,900	39,470	41,640	111,220	115,400	117,010	115,130	117,070	146,240	153,200	155,910	154,600	158,710	146,240	153,200	155,910	154,600	158,710
Management of Companies and Enterprises	12,290	11,030	12,600	13,960	14,220	35,090	34,400	33,560	36,990	38,150	47,380	45,430	46,160	50,940	52,380	47,380	45,430	46,160	50,940	52,380
Administrative & Support, Waste Mgt & Remediation	20,440	21,290	21,190	22,590	25,600	41,080	38,110	48,220	45,410	50,810	61,520	59,400	69,400	68,000	76,410	61,520	59,400	69,400	68,000	76,410
Educational Services	4,800	5,420	5,790	6,330	6,870	91,740	95,020	96,860	107,290	113,360	96,540	100,430	102,640	113,620	120,230	96,540	100,430	102,640	113,620	120,230
Health Care and Social Assistance	11,560	12,080	12,350	12,980	13,690	153,530	161,760	159,480	169,400	171,320	165,090	173,830	171,830	182,390	185,010	165,090	173,830	171,830	182,390	185,010
Arts, Entertainment and Recreation	5,930	6,200	5,590	5,840	6,250	25,790	26,400	26,860	25,120	29,780	31,710	32,600	32,440	30,950	36,030	31,710	32,600	32,440	30,950	36,030
Accommodation and Food Services	15,060	15,310	15,950	15,970	16,050	86,600	91,080	94,550	97,070	101,950	101,660	106,390	110,490	113,050	118,010	101,660	106,390	110,490	113,050	118,010
Other Services (Except Public Administration)	16,890	17,840	18,000	18,170	18,340	54,970	55,950	56,960	57,170	58,110	71,860	73,790	74,960	75,330	76,450	71,860	73,790	74,960	75,330	76,450
Public Administration	13,240	14,080	13,240	13,370	13,000	65,820	64,480	66,550	76,230	77,910	79,060	78,570	79,800	89,600	90,910	79,060	78,570	79,800	89,600	90,910
Wholesale and Retail Trade	66,260	65,160	66,490	66,320	67,780	113,020	111,480	111,340	112,520	116,120	179,280	176,640	177,820	178,830	183,890	179,280	176,640	177,820	178,830	183,890
Not Coded	70	60	90	110	30	40	20	230	150	60	100	70	330	260	90	100	70	330	260	90
Grand Total	379,650	384,500	394,100	398,350	411,970	984,210	999,900	1,028,180	1,062,670	1,106,530	1,363,850	1,384,390	1,422,280	1,461,020	1,518,560	1,363,850	1,384,390	1,422,280	1,461,020	1,518,560

Note: Numbers have been rounded to the nearest ten. Totals may differ from sums.

Table 8. Total Employment in Employment Monitoring Areas by Type of Employment Area and NAICS, 2013-2017

NAICS	EA Type	East EMA					Northeast EMA					Northwest EMA				
		2013	2014	2015	2016	2017	2013	2014	2015	2016	2017	2013	2014	2015	2016	2017
Agriculture, Forestry, Fishing and Hunting	Core	10	10	10	0	0	0	0	0	0	0	0	0	0	0	0
	General	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mining, Quarrying, and Oil and Gas Extraction	Core	0	0	0	0	10	0	0	0	0	0	0	0	0	0	10
	General	0	0	0	0	0	200	0	0	0	0	0	0	0	0	0
Utilities	Core	120	120	70	70	70	0	0	0	0	0	0	0	0	0	0
	General	390	470	400	570	570	2,690	2,570	2,720	2,230	2,260	100	190	150	160	160
Construction	Core	4,380	4,440	4,500	4,560	5,020	0	0	0	0	0	5,100	5,340	5,440	5,560	6,010
	General	1,300	1,430	980	1,000	1,300	820	1,070	1,040	1,160	1,200	1,150	1,300	1,260	1,030	1,070
Manufacturing	Core	18,290	18,340	18,050	17,620	17,970	0	0	0	0	0	25,320	24,690	24,620	25,050	26,080
	General	4,760	4,360	4,480	4,810	4,320	5,900	5,700	5,300	4,600	4,070	1,510	1,540	1,550	1,610	1,590
Transportation and Warehousing	Core	6,310	6,330	6,350	6,530	6,950	0	0	0	0	0	4,990	5,630	5,700	5,650	5,640
	General	830	810	950	1,310	1,250	590	550	590	620	620	280	360	390	380	640
Information and Cultural Industries	Core	3,080	2,820	2,950	2,800	2,500	0	0	0	0	0	840	630	620	530	960
	General	860	860	860	930	530	6,480	5,420	5,710	5,120	5,130	140	170	180	160	220
Finance and Insurance	Core	370	460	400	410	470	0	0	0	0	0	460	490	560	650	720
	General	1,220	1,420	1,400	1,580	1,560	6,780	6,370	9,420	8,270	8,220	480	460	470	390	350
Real Estate and Rental and Leasing	Core	590	610	770	760	740	0	0	0	0	0	860	900	970	1,050	990
	General	990	1,280	1,450	1,650	1,860	2,930	2,650	3,040	4,890	5,270	760	760	760	920	960
Professional, Scientific and Technical Services	Core	3,640	3,390	3,270	2,940	2,640	0	0	0	0	0	4,220	4,750	4,950	5,170	5,360
	General	1,480	1,630	1,840	2,020	2,020	9,640	10,390	11,050	10,200	11,260	1,800	1,700	1,600	1,760	1,690
Management of Companies and Enterprises	Core	2,910	2,860	2,930	2,940	2,500	0	0	0	0	0	1,030	940	890	1,120	1,060
	General	70	70	80	70	60	3,120	2,930	4,530	4,340	5,040	870	650	680	830	840
Administrative & Support, Waste Mgt & Remediation	Core	3,250	3,170	3,050	2,820	2,910	0	0	0	0	0	3,010	3,310	3,290	3,130	3,650
	General	1,630	2,050	1,740	2,070	2,280	4,520	4,460	4,670	4,930	6,200	920	1,010	1,010	1,240	1,220
Educational Services	Core	320	340	390	450	500	0	0	0	0	0	570	700	700	760	780
	General	1,110	1,190	1,230	1,400	1,530	1,420	1,690	1,790	1,950	2,060	440	470	480	550	530
Health Care and Social Assistance	Core	930	540	540	530	590	0	0	0	0	0	790	1,080	900	900	1,190
	General	3,110	2,920	2,760	3,010	3,040	2,520	3,380	3,530	3,420	3,530	1,630	1,350	1,440	1,430	1,560
Arts, Entertainment and Recreation	Core	160	150	200	210	240	0	0	0	0	0	1,080	1,520	800	780	550
	General	570	530	570	620	750	830	750	760	840	910	310	280	360	370	380
Accommodation and Food Services	Core	530	520	540	490	500	0	0	0	0	0	380	440	490	520	580
	General	3,010	2,860	3,010	3,040	3,210	1,990	2,060	2,170	2,020	1,780	1,930	2,040	2,090	2,170	2,180
Other Services (Except Public Administration)	Core	2,340	2,710	2,650	2,740	2,710	0	0	0	0	0	3,110	3,350	3,330	3,160	3,280
	General	2,100	2,280	2,370	2,410	2,260	1,870	1,840	1,980	2,040	2,180	1,170	1,240	1,400	1,440	1,300
Public Administration	Core	1,750	2,030	1,980	1,950	1,940	0	0	0	0	0	2,330	2,750	2,480	2,510	2,610
	General	1,120	1,080	910	870	770	1,640	1,430	1,460	1,650	1,590	1,390	1,260	1,240	1,230	1,200
Wholesale and Retail Trade	Core	7,400	7,640	7,770	7,910	8,230	0	0	0	0	0	13,690	13,510	13,700	13,800	13,910
	General	9,380	9,160	9,370	9,120	9,490	4,030	3,900	3,450	3,560	3,760	7,010	6,720	6,900	7,320	7,670
Not Coded	Core	30	30	30	10	10	0	0	0	0	0	10	10	10	30	10
	General	10	0	10	10	0	10	0	0	0	0	0	0	0	30	0
Total	Core	56,410	56,500	56,450	55,710	56,520	0	0	0	0	0	67,790	70,040	69,440	70,370	73,400
	General	33,930	34,370	34,410	36,490	36,790	57,970	57,160	63,190	61,820	65,050	21,910	21,500	21,950	23,020	23,550
Grand Total		90,330	90,870	90,860	92,200	93,310	57,970	57,160	63,190	61,820	65,050	89,700	91,540	91,400	93,390	96,940

Note: Numbers have been rounded to the nearest ten. Totals may differ from sums. Note: EA Type refers to Core and General Employment Areas (see Employment Areas, page 23).

Table 8. Total Employment in Employment Monitoring Areas by Type of Employment Area and NAICS, 2013-2017

NAICS	EA Type	West EMA						South EMA						All EMAs						
		2013	2014	2015	2016	2017	2018	2013	2014	2015	2016	2017	2018	2013	2014	2015	2016	2017	2018	
Agriculture, Forestry, Fishing and Hunting	Core	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	General	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mining, Quarrying, and Oil and Gas Extraction	Core	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	General	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Utilities	Core	310	500	510	590	610	610	50	50	40	40	50	50	480	670	620	700	720	720	
	General	0	0	0	0	0	0	10	10	10	10	10	10	3,180	3,230	3,280	2,960	2,990	2,990	
Construction	Core	5,990	6,830	6,650	6,620	7,210	7,210	1,520	2,140	2,240	1,780	1,840	1,840	16,980	18,750	18,830	18,520	20,080	20,080	
	General	200	220	280	280	310	310	290	460	390	280	380	380	3,760	4,470	3,940	3,750	4,260	4,260	
Manufacturing	Core	21,700	20,870	20,950	20,690	22,120	22,120	5,580	5,580	5,820	5,880	5,960	5,960	70,880	69,480	69,430	69,240	72,130	72,130	
	General	1,280	1,200	1,760	1,680	1,670	1,670	1,990	1,380	1,390	1,380	1,530	1,530	15,440	14,180	14,480	14,070	13,180	13,180	
Transportation and Warehousing	Core	9,550	9,380	10,080	10,020	10,690	10,690	7,080	6,970	6,900	7,100	7,180	7,180	27,940	28,310	29,030	29,300	30,470	30,470	
	General	740	550	460	510	250	250	40	60	80	120	150	150	2,480	2,330	2,480	2,950	2,910	2,910	
Information and Cultural Industries	Core	1,860	2,150	2,650	2,110	2,240	2,240	2,200	2,570	3,290	3,070	2,650	2,650	7,980	8,180	9,510	8,510	8,350	8,350	
	General	210	280	270	320	290	290	340	430	480	420	600	600	8,030	7,170	7,510	6,940	6,760	6,760	
Finance and Insurance	Core	1,220	1,570	1,000	1,140	1,220	1,220	50	60	90	60	70	70	2,100	2,590	2,050	2,260	2,490	2,490	
	General	240	250	220	240	230	230	100	120	130	140	140	140	8,830	8,620	11,640	10,610	10,500	10,500	
Real Estate and Rental and Leasing	Core	2,070	2,210	2,010	2,010	1,970	1,970	750	800	850	770	610	610	4,260	4,510	4,600	4,580	4,320	4,320	
	General	720	840	1,040	1,120	960	960	160	220	240	250	260	260	5,550	5,750	6,530	8,840	9,310	9,310	
Professional, Scientific and Technical Services	Core	7,210	7,790	8,130	8,560	8,370	8,370	5,880	6,800	6,730	7,250	8,450	8,450	20,950	22,730	23,080	23,920	24,810	24,810	
	General	170	160	130	120	130	130	990	1,190	1,210	1,450	1,740	1,740	14,080	15,070	15,820	15,550	16,830	16,830	
Management of Companies and Enterprises	Core	3,240	2,550	2,550	3,230	3,340	3,340	810	830	760	830	780	780	7,990	7,180	7,130	8,120	7,680	7,680	
	General	30	30	30	30	30	30	210	170	160	570	570	4,300	3,850	5,470	5,840	6,540	6,540		
Administrative & Support, Waste Mgt & Remediation	Core	4,300	4,390	4,180	4,890	5,310	5,310	1,010	1,090	1,400	1,080	1,290	1,290	11,570	11,970	11,920	11,920	13,160	13,160	
	General	160	140	180	140	200	200	1,630	1,660	1,680	2,290	2,540	2,540	8,870	9,320	9,270	10,670	12,440	12,440	
Educational Services	Core	330	410	440	480	540	540	220	240	360	310	440	440	1,440	1,680	1,880	2,000	2,260	2,260	
	General	120	130	130	140	190	190	280	250	280	290	310	310	3,360	3,740	3,910	4,330	4,610	4,610	
Health Care and Social Assistance	Core	1,580	1,690	1,860	2,240	2,340	2,340	400	410	440	560	530	530	3,690	3,730	3,740	4,220	4,650	4,650	
	General	240	250	270	280	280	280	370	440	620	630	630	630	7,870	8,350	8,610	8,760	9,040	9,040	
Arts, Entertainment and Recreation	Core	2,110	2,000	1,940	1,920	2,220	2,220	500	550	530	550	570	570	3,840	4,230	3,480	3,470	3,580	3,580	
	General	80	80	70	100	140	140	290	340	360	440	500	500	2,090	1,970	2,110	2,370	2,670	2,670	
Accommodation and Food Services	Core	3,690	3,800	3,880	3,840	3,790	3,790	670	700	790	850	880	880	5,270	5,450	5,700	5,700	5,750	5,750	
	General	1,630	1,560	1,580	1,600	1,650	1,650	1,240	1,340	1,400	1,440	1,490	1,490	9,790	9,860	10,250	10,270	10,300	10,300	
Other Services (Except Public Administration)	Core	3,850	3,850	3,750	3,680	3,910	3,910	1,190	1,230	1,220	1,370	1,300	1,300	10,490	11,140	10,960	10,950	11,200	11,200	
	General	280	310	320	340	360	360	980	1,040	980	990	1,050	1,050	6,400	6,700	7,040	7,220	7,140	7,140	
Public Administration	Core	2,950	3,460	2,900	2,970	2,760	2,760	1,920	1,890	2,060	1,980	2,020	2,020	8,960	10,130	9,420	9,410	9,330	9,330	
	General	140	210	210	200	110	110	0	0	0	0	10	10	4,280	3,950	3,820	3,960	3,670	3,670	
Wholesale and Retail Trade	Core	13,170	12,630	13,360	13,370	13,470	13,470	3,140	2,950	2,880	2,890	2,960	2,960	37,400	36,730	37,700	37,970	38,560	38,560	
	General	3,820	3,760	3,580	3,760	3,910	3,910	4,610	4,890	5,480	4,580	4,390	4,390	28,860	28,430	28,790	28,350	29,220	29,220	
Not Coded	Core	10	10	30	30	0	0	0	0	0	0	0	0	50	50	80	70	20	20	
	General	0	0	0	0	0	0	0	10	0	0	0	0	20	10	10	40	10	10	
Total	Core	85,120	86,090	86,870	88,400	92,090	92,090	32,960	34,880	36,390	36,380	37,580	37,580	242,280	247,500	249,140	250,860	259,580	259,580	
	General	10,050	9,980	10,520	10,860	10,710	10,710	13,510	13,990	14,880	15,300	16,290	16,290	137,370	136,990	144,960	147,490	152,390	152,390	
Grand Total		95,160	96,070	97,390	99,250	102,800	102,800	46,470	48,860	51,270	51,680	53,860	53,860	379,650	384,500	394,100	398,350	411,970	411,970	

Note: Numbers have been rounded to the nearest ten. Totals may differ from sums. Note: EA Type refers to Core and General Employment Areas (see Employment Areas, page 29).

Endnotes

1. Statistics Canada (2017). CANSIM Table 379-0031.
2. International Monetary Fund (2017). World Economic Outlook October 2017.
3. Organisation for Economic Co-operation and Development (OECD 2017). Consumer confidence index (CCI) indicator.
4. Organisation for Economic Co-operation and Development (OECD 2017). Business confidence index (BCI) indicator.
5. Canadian Manufacturers & Exporters. (2014). Regional Manufacturing Profile: Toronto-York-Durham Region.
6. CBRE Research (2017). Toronto Industrial MarketView, Q2 2017.
7. City of Toronto, City Planning Division, Research and Information (2017). How Does the City Grow, April 2017.
8. CBRE Research (2017). Toronto Office MarketView, Q2 2017.
9. The Brookings Institute (2017). Technology adoption powers shift in retail landscape, May 10, 2017.

Please direct information inquiries and publication orders to:

City Planning Division
Strategic Initiatives, Policy & Analysis
Research and Information
Metro Hall, 22nd Floor
Toronto, Ontario M5V 3C6

Tel: 416-392-8343
Fax: 416-392-3821
TTY: 416-392-8764
e-mail: cityplanning@toronto.ca
