



## REPORT FOR ACTION

### 2018 Toronto Employment Survey

**Date:** February 22, 2019

**To:** Planning and Housing Committee

**From:** Chief Planner and Executive Director, City Planning

**Wards:** All

#### SUMMARY

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The attached bulletin summarizes the results of the 2018 Toronto Employment Survey. The bulletin highlights the Survey's key findings and counts of employment and business establishments in the City of Toronto for 2018, as well as the type and longevity of establishments and employment activity in Downtown, the Centres, Secondary Plan Areas and designated Employment Areas.

Toronto's economy has performed strongly over the past year, as total employment in the City reached 1,523,180 jobs. Employment grew by 1.8% from 2017, an increase of 26,940 jobs. The Survey counted 75,680 business establishments in 2018, an increase of 60 (0.1%) from 2017. In 2018, 3,470 establishments were new to the City.

#### RECOMMENDATIONS

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

1. Planning and Housing Committee receive this report for information.

#### FINANCIAL IMPACT

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There are no financial impacts arising from this report.

#### DECISION HISTORY

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Since 1983, the City has conducted an annual survey of Toronto business establishments 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 thirty-six 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 to review the progress of Official Plan policies. Survey results are also used in proactive policy development, for decision-making, as an aid in labour force development efforts, to develop projections and to plan City infrastructure and services. This report summarizes the Toronto Employment Survey results collected between May and August of 2018.

## COMMENTS

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### Total Employment

- The Toronto Employment Survey counted 1,523,180 jobs.
- Toronto's overall employment increased by 26,940 jobs (1.8%) from 2017.
- Full-time employment increased by 15,580 jobs (1.4%) from 2017. At 1,147,260 jobs, full-time employment has surpassed the 1 million mark for the thirteenth consecutive year.
- Part-time employment increased by 11,360 jobs or 3.1% of the net increase in employment to 375,920 jobs from 2017.

### Employment by Category

- From 2017, five out of the City's six employment categories grew. Office employment grew by the highest rate, at 2.7%.
- The Office category continues to be Toronto's largest employment category, with nearly half of all jobs (48.1%), followed by the Institutional (16.6%), Service (12.6%), Retail (10.0%), Manufacturing (8.9%), and Community & Entertainment (3.7%) categories.
- Office employment increased by 18,990 net jobs (2.7%) to 733,080 jobs from 2017, the largest absolute increase of any category. A large majority of the increase was in the Finance, Insurance and Real Estate and Business Services sub-categories with a combined 30,600 jobs added (8.3% and 9.5% growth respectively), particularly in investment services and computer services.
- Manufacturing continued to reverse a historic trend of job loss prior to 2017, to increase by 3,460 net jobs (2.6%) to 135,710 jobs in 2018. Growth was led by the Processed Goods Processing sub-category, particularly at food and chemical products processing establishments.

### Number of Establishments

- In 2018, the Survey counted 75,680 establishments, an increase of 60 (0.1%) over 2017.
- A total of 3,470 establishments were new to the city in 2018. Of these, 57.9% are located within Downtown (760), the Centres (250) and within Employment Areas (1,000), and the rest are located elsewhere in the city.

## **Downtown and Centres**

- In 2018, there were approximately 646,790 jobs in Toronto's Downtown and Centres, representing 42.5% of all jobs in the city.
- From 2013 to 2018, Downtown and the Centres added 98,310 jobs, up 17.9%.

## **Secondary Plan Areas**

- In 2018, there were approximately 314,020 jobs in Toronto's thirty-two Secondary Plan areas or one fifth of all jobs in the City (20.8%).
- Half of the employment within Secondary Plan areas (50.3%) is concentrated in five areas: King-Spadina (45,940 jobs), North York Centre (34,910 jobs), Yonge Eglinton (34,100 jobs), Railway Lands East (22,640 jobs), and Garrison Common North (20,700 jobs).
- The Office category is the predominant employment category in Secondary Plan areas, representing approximately 173,920 jobs and 55.4% of their employment.

## **Employment Areas**

- In 2018, 417,470 jobs were in Toronto's designated Employment Areas or 27.5% of the city's jobs. This is an increase of 5,500 jobs (1.3%) from 2017.
- Since 2013, overall employment in the Employment Areas has grown by 10.0%, an added 37,830 jobs.
- Core Employment Areas contained 63.6% of all jobs in Employment Areas (265,700 jobs), while General Employment Areas contained 36.4% (151,770 jobs).
- Nearly 20.7% or 86,230 of all Employment Area jobs are in the Manufacturing sector. The sector has increased by 920 jobs since 2017.
- After Manufacturing, the next largest sectors in Employment Areas in 2018 were the Wholesale and Retail Trade sector (68,200 jobs), the Professional, Scientific and Technical Services sector (42,860 jobs), the Transportation and Warehousing sector (34,890 jobs), and the Administration and Support, Waste Management and Remediation Services sector (25,660 jobs).

## **Data Collection**

- In 2018, employment data was acquired from 86.0% of business establishments contacted through the Survey programme. This is a slight decrease from the 2017 response rate of 88.8%. Excluding home-based employment, the Survey reports on over 99% of Toronto's addressable business establishments.
- This is the eighth year of assigning complete North American Industry Classification System (NAICS) codes to each business establishment in the city. The exercise was highly successful with an average of 99.7% of businesses being assigned a NAICS code in 2018.
- As an establishment survey, the Survey focuses on collecting employment and land use data from business establishments visible from the street and which are located primarily in commercial, industrial, institutional and mixed use areas throughout Toronto.

## Restatement of Employment Counts in 2016 and 2017

- Based on information received in 2018, the Toronto Employment Survey is revising and restating total employment counts for the years 2016 and 2017 (see Figures 1 and 2, below).
- The restated employment counts removed 25,000 part-time employees, and added 4,400 occasional full-time workers, which were entered for the Toronto District School Board in the years 2016 and 2017.
- These revisions are the result of working collaboratively with the Toronto District School Board to better identify the work status of occasional teachers at the time of the survey.
- In addition, three minor corrections have also been made to the 2017 results:
  - a reduction in the full-time employment count by 455 jobs in the Retail category, due to one record being double-counted;
  - a reduction in the full-time employment count by 1,139 jobs in the Office category, due to one record which recorded employee shift cohorts incorrectly; and
  - a reduction in the new establishment count by 650 establishments, due to a methodological revision.
- The updated employment counts are available on the City's Open Data Portal <https://www.toronto.ca/city-government/data-research-maps/open-data/>

Figure 1. Toronto Employment Survey, Revised TDSB Reporting 2016-2017

	2016	2017
Original Reporting		
TDSB Full-Time Employment	32,430	32,680
TDSB Part-Time Employment	25,000	25,000
Total	57,430	57,680
Revised Reporting		
TDSB Full-Time Employment	32,430	32,680
TDSB Occasional Employment	4,400	4,400
Total	36,830	37,080

Figure 2. Toronto Employment Survey, Revised Citywide Reporting 2016-2017

	2016	2017
Original Reporting		
Citywide Full-Time Employment	1,087,930	1,129,110
Citywide Part-Time Employment	373,090	389,460
Total	1,461,020	1,518,560
Revised Reporting		
Citywide Full-Time Employment	1,092,700	1,131,690
Citywide Part-Time Employment	348,090	364,560
Total	1,440,790	1,496,250

## Hoteling Employment

- There are a number of shared work locations in the city which is another form of the sharing economy. These comprise office locations where the space and computer equipment are provided and maintained, and are rented out to individuals and groups.
- The Survey captures the permanent staff at the hoteling location, not the people utilizing the touchdown spaces. There may be hundreds of people who make use of a hoteling location for a few hours per week. Past interviews of some of these businesses have indicated it is difficult for them to report on occupancy e.g. average hours per space per week.
- Hoteling is similar to "work at home" employment, which is a small but growing component of the City's employment but is also not captured by the Survey. Work-at-home employment is counted by the Census; in 2016, 7.4% of the City's employed residents worked at home.

## Regional Employment Policies

- The Provincial Growth Plan for the Greater Golden Horseshoe includes an employment forecast for the City of Toronto of 1,720,000 jobs by 2041. Based on the growth employment growth rate over the past five years as indicated by the Toronto Employment Survey (2.2% per annum), Toronto is likely to achieve the Growth Plan forecasts between 2024 and 2026. The Provincial forecast would be achieved at least fifteen years before its horizon year. The Places to Grow Act requires that the Growth Plan forecasts be reviewed every five years. The next review was due to be launched in 2018, and will likely include a review of Toronto's forecasted employment.
- The Province recently circulated *Proposed Amendment 1 to the Growth Plan for the Greater Golden Horseshoe, 2017*. This proposed amendment includes a framework for provincially significant employment zones that would apply to employment areas. Under this proposal, provincially significant employment zones would be protected from conversion to non-employment uses, while other employment areas would be available for conversion outside of a municipal comprehensive review process.

## 2019 Toronto Employment Survey

- The continuation of the annual Toronto Employment Survey is important for planning and economic development purposes, as it provides an annual and longitudinal dataset for time-series analysis of employment and land use change in the City. Now in its fourth decade, the 2019 field Survey programme will commence in May and will be completed by September 2019.

## CONTACT

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## SIGNATURE

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City Planning Division

## ATTACHMENTS

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Attachment 1: Toronto Employment Survey 2018 Bulletin