PH3.4 - Attachment 1

This bulletin summarizes the findings of the 2018 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/

profile TORONTO

March 2019

Survey Highlights

2018 employment	1,523,180
employment increase	26,940
employment growth	1.8%
business establishments	75,680
new business establishments	3,470
new manufacturing jobs	3,460
manufacturing job growth	2.6%
new office employment	18,990
office job growth	2.7%
service-based employment	78.1%
downtown job increase	21,820
downtown job growth	4.0%

Toronto Employment Survey 2018

A Dynamic City

Toronto continues to be 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.

With its competitive, diverse and connected economy, Toronto is well-situated within the broader regional economy of southern Ontario. As economic conditions change over time, Toronto can build on these competitive advantages and create a vibrant city and region.

The Toronto area continues to prosper. From 2011 to 2016, Toronto GDP is estimated to have grown 3.2% per year, outpacing the average annual growth rates of both Ontario (2.1%) and Canada (1.8%).[1]

The 2018 Toronto Employment Survey counted 1,523,180 jobs, an increase of 29,940 jobs or 1.8% from 2017.

In Toronto, growth is managed through the Provincial Growth Plan for the Greater Golden Horseshoe and Toronto's Official Plan. The Growth Plan (2017) directs municipalities to accommodate forecasted 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.

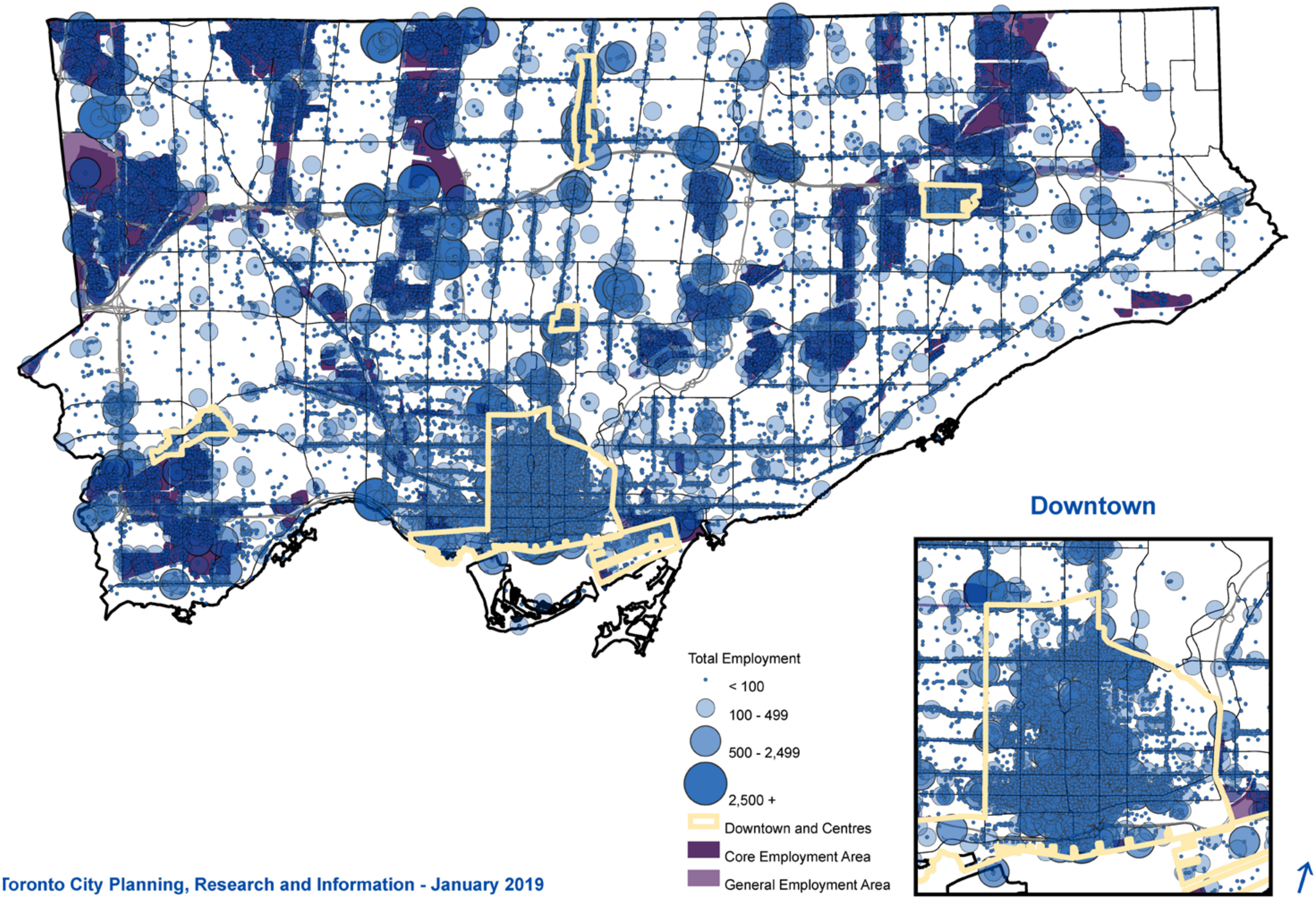
Toronto's Official Plan, which came into force in June 2006, and which has subsequently undergone thematic policy updates, guides development in the city. Its policies promote economic prosperity by supporting growth and managing land use change.

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 2018 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 2018, the Survey acquired employment data from 86% 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



Toronto City Planning, Research and Information - January 2019

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 projections 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) to allow comparisons to other jurisdictions.

In 2018, employment data was acquired from 86% of identified businesses establishments. In 2017 the response rate was 88.8%.

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.

2018 employment growth of 26,940 jobs or 1.8% was slightly below long term trends.

City Employment Overview

Strong urban growth

In 2018, the Toronto Employment Survey recorded 1,523,180 jobs in the City of Toronto, a gain of 26,940 jobs or 1.8% from 2017 (see Table 1). This is slightly below Toronto's five-year average employment growth rate of 2.2%, but above the city's 10-year average rate of 1.5%.

Toronto's employment growth from about Q3 2017 through Q2 2018 as measured by the Survey aligned with estimates of economic output from both Canada (2.2% of GDP)[2] and the U.S. (2.8%) in the same periods[3].

Exports driving growth

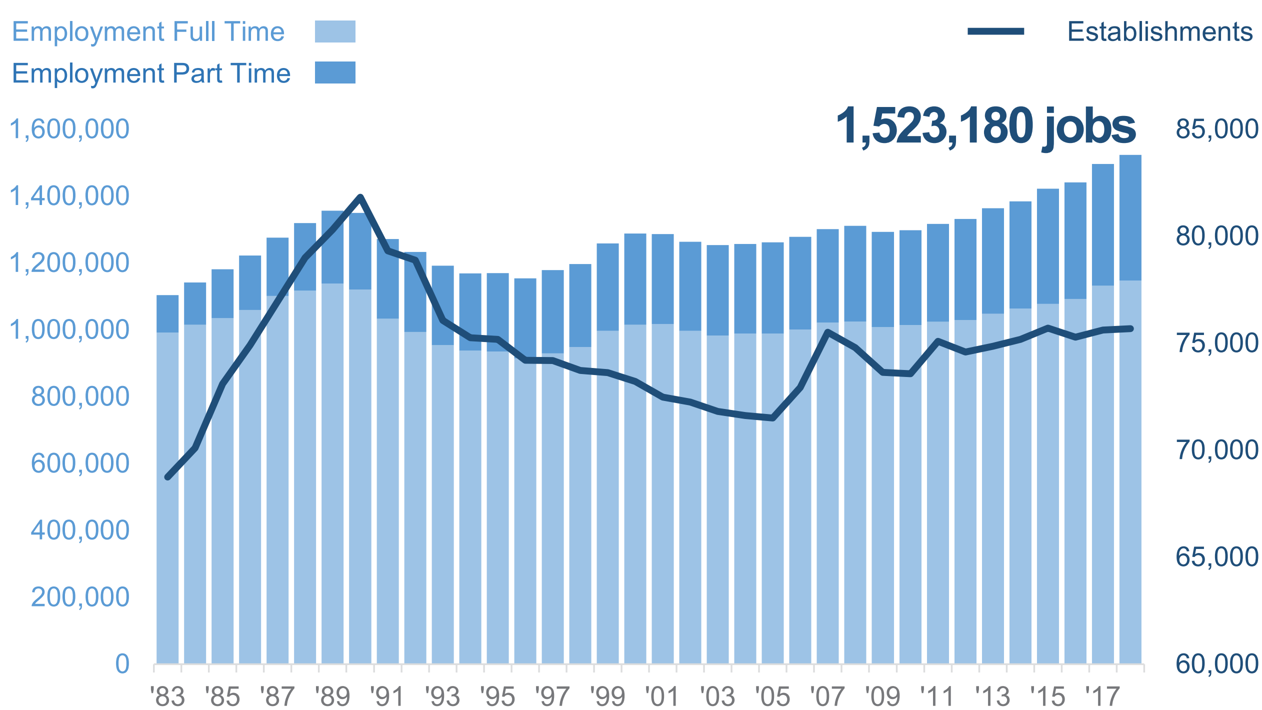
Canada-wide growth was balanced in 2018, with both services and goods-producing industries reaching 2.0% growth in economic output from Q3 2017 through Q2 2018. Real GDP growth increased from 0.4% quarterly growth in each of the 3 quarters from Q3 2017 to Q1 2018 to 0.7% in Q2 2018. Gains were driven mainly by an increase in export volumes, the largest gain since Q2 2014. Exports of goods, led by energy products, rose 3.6% after increasing 0.3% in the first quarter. Exports of services edged down 0.2%, the first decline since the fourth quarter of 2015.[4]

Business and consumer outlook

The OECD's 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 101.03 in July 2018, up from 100.78 in July 2017 and 99.78 in July 2013.[5]

The OECD's business confidence index is based on enterprises' assessment of production, orders and stocks, as well as its current position and expectations for the immediate

Figure 1: Full and Part-Time Employment in the City of Toronto, 1983-2018



Note: See Appendix, Table 2: Total Employment future, and provides a qualitative index on economic conditions. The index was 101.11 in July 2018, above the July 2017 level of 101.03 and slightly higher than the level of 99.93 in July 2013.[6]

Full-time job growth

Full-time employment (75.3% of total) grew more slowly than the city average, adding 15,580 jobs (1.4%) from 2017. Part-time employment (24.7% of total) added 11,360 jobs (3.1%) from 2017.

The 2017-2018 trend reflects a long-term increase in the share of part-time employment in the city. The share of part-time employment has grown on average by 1.2% per annum since 2008 (see Figure 1).

Office led employment gains

Toronto's Office category added 18,990 jobs, over half of new jobs, and grew by 2.7% from 2017. Office continues to be the city's largest employment category and growth driver with 733,080 jobs (48.1% of the city total). Office employment has increased on average by 2.2% annually since 2013.

Other category gains

The city's employment growth in 2018 was also shared by the Manufacturing, Service and Community and Entertainment categories. Institutional (Toronto's second largest base with 16.6% of jobs) and Retail employment showed little growth.

Improved survey coverage

In 2018, improvements were made to the employment reporting process, to improve sector coding and part-time counts.

Also, by continuing to work closely with major employers, the Survey has been able to improve the accuracy of counts of employees with a non-regular or varying place of work.

Full-time employment growth slowed in 2018, adding 15,580 jobs (1.4%) from 2017.

Table 1: Total Employment - 2008, 2017, 2018

Employment	Total Number of Employees			Net Change	Growth Rate %	Net Change	Growth Rate %
	2008	2017*	2018	2008-2018		2017-2018*	
Full-time	1,024,880	1,131,690	1,147,260	122,380	11.9%	15,580	1.4%
Part-time	285,970	364,560	375,920	89,950	31.5%	11,360	3.1%
Total	**1,310,850**	**1,496,250**	**1,523,180**	**212,330**	**16.2%**	**26,940**	**1.8%**

** 2016 and 2017 employment totals revised in 2018 based on updated employer information.*
Table numbers have been rounded to the nearest ten.

Manufacturing employment continued its strong growth in 2018, adding 3,460 jobs or 2.6% from 2017.

Key Citywide Trends

Manufacturing

Despite longer term trends toward services production in Toronto's economy, manufacturing employment continued its recent growth trend in 2018, adding 3,460 jobs or 2.6% from 2017 (see Table 2).

Manufacturing job growth was led by the Product Assembly group, with the Furniture and Fixtures Assembly sub-category and the Building Components and Containers Assembly sub-category each adding more than 600 jobs. In Raw Material Processing, the Food Processing sub-category also added over 500 jobs.

Potential industry factors contributing to this growth include an acceleration of household and business spending, strong exports growth, a robust housing market, and improved business confidence from the new USCMA trade pact. These trends appear to have peaked in Q2 2018, with recent indicators pointing to a moderate economic deceleration in Q3-Q4 2018 and continuing in 2019 and 2020, more in line with long-term trends.[7]

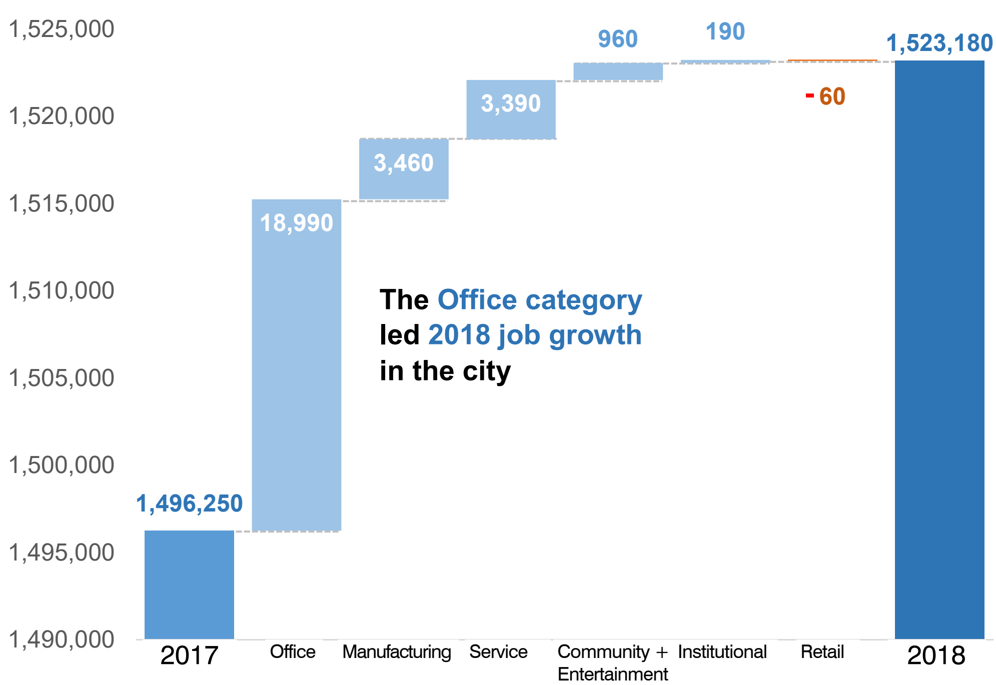
Demand for industrial space in Toronto remains high, with an industrial vacancy rate of 0.8% as of Q3 2018, below the Greater Toronto Area average vacancy rate of 1.0%.[8]

Office Trends

Office employment continued to grow in 2018, albeit more slowly, adding 18,990 jobs or 2.7% (see Figure 2). Continued growth trends were observed in Finance, Insurance and Real Estate, with 8.3% growth and 16,890 net jobs added, and Business Services, with 9.5% growth and roughly 13,710 net jobs added.

The top three subcategories of Office job growth in 2018 were Investment

Figure 2: 2017-2018 Employment Growth Share by Category



Services (6,120 jobs), Computer Services (6,060 jobs) and Banks and Trust Companies (4,120 jobs).

The city's office market continues to grow, having added almost 700,000 square metres of office space from large projects (over 50,000 square metres) alone between 2013 and 2017.[9]

Demand for office space remains high, particularly from technology companies in the downtown.[10] Office vacancy rates in the downtown decreased to 3.0% in Q3 2018, the lowest rate among major downtown office markets in North America for over a year.[11]

Retail Trends

Retail employment was stable in 2018, losing 60 jobs (0.0% growth). Structural trends in the retail sector that suggest this slowing growth include growing consumer use of online channels, increasing automation in retail environments, and concentration of retailing in fewer, larger locations.[12]

Retail employment trends showed strength over both the past five years (3.4%) and ten years (2.7%). Toronto is a popular destination for the expansion of international retail, having attracted more international retailers than any other North American city in both 2016 and 2017.[13] New entrants have been split between shopping mall locations, primarily at Yorkdale Mall, and various high street locations.[14]

Community and Entertainment Trends

Toronto's smallest employment category, Community and Entertainment, has been the city's fastest-growing in recent years, but grew modestly in 2018, adding 960 net jobs to grow by 1.7%.

A majority of growth in 2018 came from the Construction sub-category. The city gained more than 2,000 construction jobs in 2018 for the second consecutive year, pointing to a robust construction market.

Strong growth also occurred in the indoor entertainment, sporting and recreation. The Exercise Facility sub-category added more than 400 jobs to grow by 6.5%, and the Other Indoor Entertainment sub-category (which includes tourist attractions such as the CN Tower, Ontario Science Centre, and Harbourfront Centre) added over 300 jobs to grow by 18.4%.

Strong office employment growth continued in 2018, adding 18,990 jobs or 2.7% from 2017.

Table 2: Employment by Category, 2008, 2013, 2017, 2018

	Total Number of Employees				Net Change	Growth Rate %	Net Change	Growth Rate %	Net Change	Growth Rate %
Category	**2008**	**2013**	**2017***	**2018**	**2008-2018**		**2013-2018**		**2017-2018***	
Manufacturing	143,780	126,140	132,250	135,710	-8,070	-5.6%	9,570	7.6%	3,460	2.6%
Retail	147,770	146,840	151,890	151,830	4,060	2.7%	4,990	3.4%	-60	0.0%
Service	149,580	164,530	189,150	192,540	42,960	28.7%	28,010	17.0%	3,390	1.8%
Office	614,660	656,870	714,090	733,080	118,420	19.3%	76,210	11.6%	18,990	2.7%
Institutional	214,360	222,760	253,380	253,570	39,210	18.3%	30,810	13.8%	190	0.1%
Community & Entertainment	40,700	46,710	55,480	56,450	15,750	38.7%	9,740	20.9%	960	1.7%
Total	**1,310,850**	**1,363,850**	**1,496,240**	**1,523,180**	**212,330**	**16.2%**	**159,330**	**11.7%**	**26,940**	**1.8%**

** 2016 and 2017 employment totals revised in 2018 based on updated employer information.*
Table numbers have been rounded to the nearest ten. Totals and sums may differ due to rounding.

Despite a secular decline in industrial production, Toronto added 180 new manufacturing establishments in 2018.

Business Establishments

In 2018, the Survey counted 75,680 business establishments in the city, a net increase of 60 establishments or 0.1% (see Figures 3 and 4). Since 2013, the number of business locations in Toronto has grown on average 0.2% annually.

Net gains in establishments included Office (104), Service (53) Manufacturing (38), Institutional (38) and Community and Entertainment (13). Net total establishment counts decreased in Retail (-185). Please see Table 3.

New Establishments in the City

The net change in business establishments statistic measures business location openings and closures. New establishments include both new business starts as well as existing firm location openings.

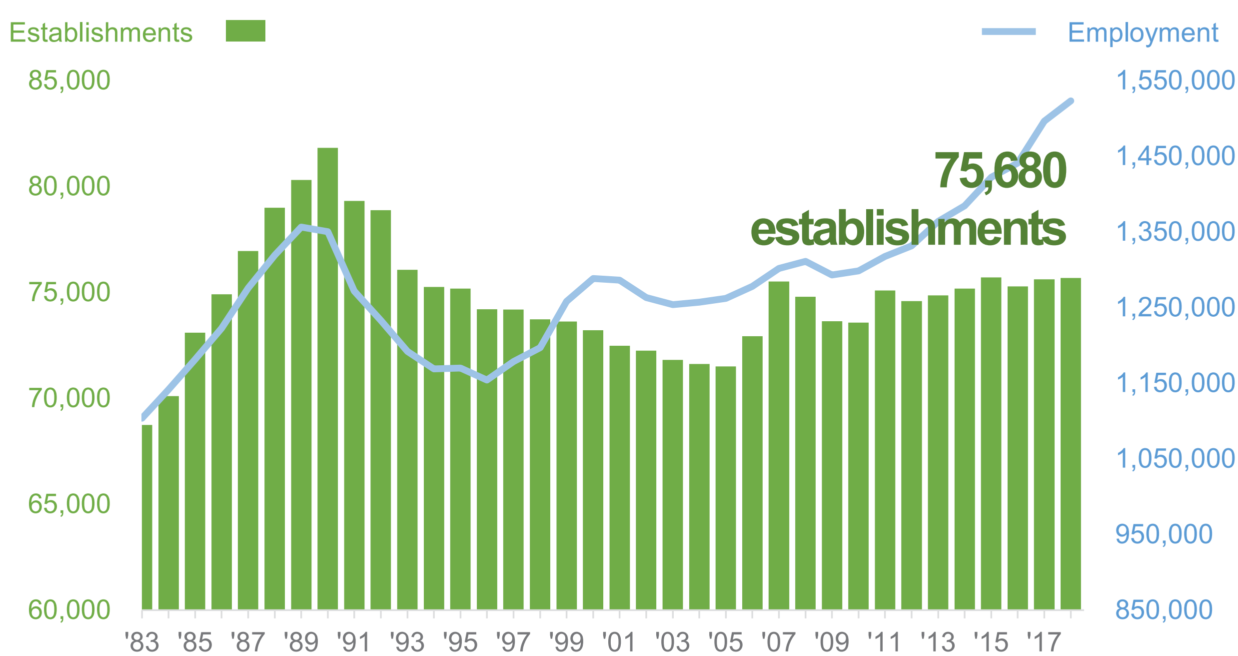
In 2018, the Survey implemented additional tracking of occupant moves, to more accurately distinguish establishment relocations from new location openings or closures.

Employees per Establishment

In 2018, the average number of employees per establishment increased to 20.1 (see Figure 7). This metric has increased steadily at a rate of 2.0% annually from 18.2 in 2013. The increase is partly due to the slower relative increase in business locations compared to employment growth. This effect continued in 2018, particularly among fast-growing employment categories with lower rates of business location expansion.

In 2018, the number of large businesses (with 100 or more employees) increased by 24 to 2,379. Toronto's large businesses make up 3.1% of Toronto's establishments.

Figure 3: Establishments in the City of Toronto, 1983-2018



Location of New Establishments

City-wide, the Survey counted 3,470 net new business establishments, 4.6% of the 2018 total. Of these new locations, the Survey counted 998 (28.8%) in Employment Areas, 765 (22%) in Downtown and 248 (7.1%) in the Centres. The remainder, 1,460 new establishments (42.1%), located in the rest of the city (see Figure 5).

Since 2014, the Centres' share of new establishments has increased the most (3.2%), while the rest of the city has seen a slight decrease in the share of new establishments (-1.6%).

Office (39.5%) led the share of new establishments in 2018, followed by Service (27.1%) and Retail (13.8%). Despite secular global trends, Toronto remains an attractive location for industrial establishments, adding 176 new manufacturing establishments and 3,460 manufacturing jobs in 2018.

Longevity

Changes in the longevity of business establishments at specific locations can offer insights in to the economic health of a city or region.

In 2018, 35.2% of Toronto's business establishments reported being at the same location for less than 5 years; some 31.7% of establishments reported being at the same location for 6 to 15 years (see Figure 6).

Overall, 33.2% 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 4: Total 2018 Establishments by Category

Table 3: New Establishments, 2017-2018

Location	2017*	2018
Centres	220	250
Downtown	870	760
Employment Areas	1,230	1,000
Rest of the City	1,570	1,460
City Total	**3,890**	**3,470**

Category	2017*	2018
Manufacturing	190	180
Retail	660	480
Service	980	940
Office	1,500	1,370
Institutional	170	170
Community & Entertainment	390	340
City Total	**3,890**	**3,470**

** 2017 establishment totals were updated in 2018 due to a methodological revision.*
Table numbers have been rounded to the nearest ten. Totals and sums may differ due to rounding.

Figure 5: Location of New City Establishments, 2014 to 2018

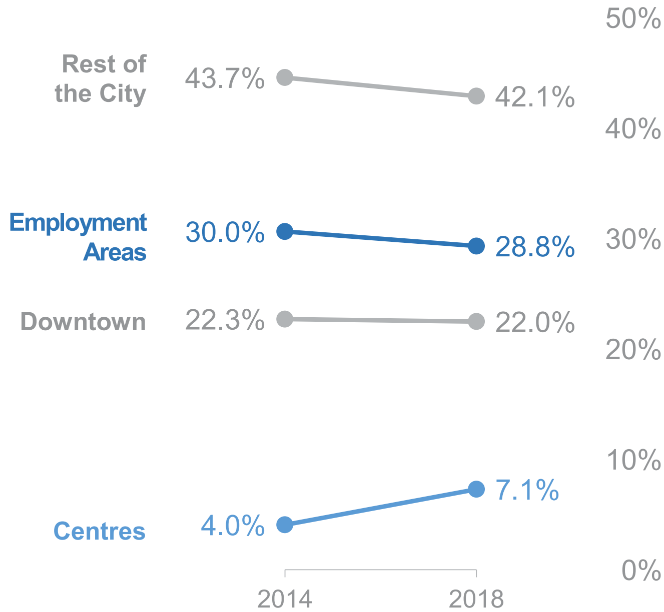


Figure 6: Longevity of City Establishments, 2014 to 2018

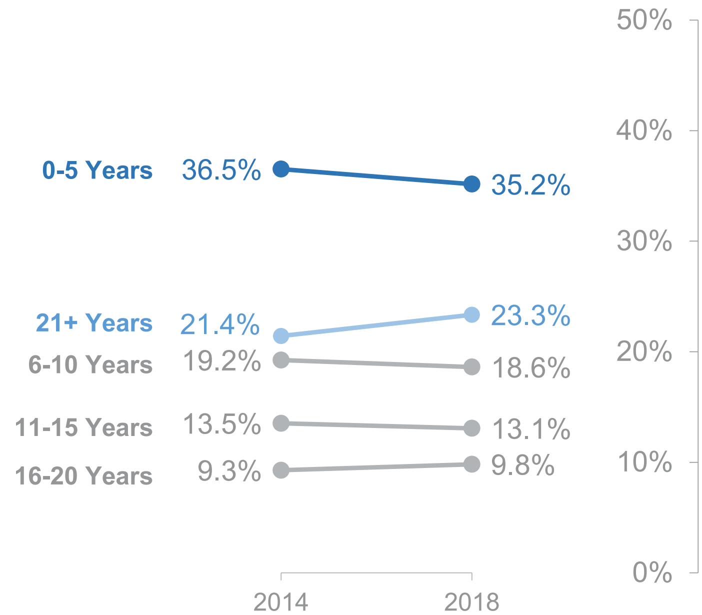
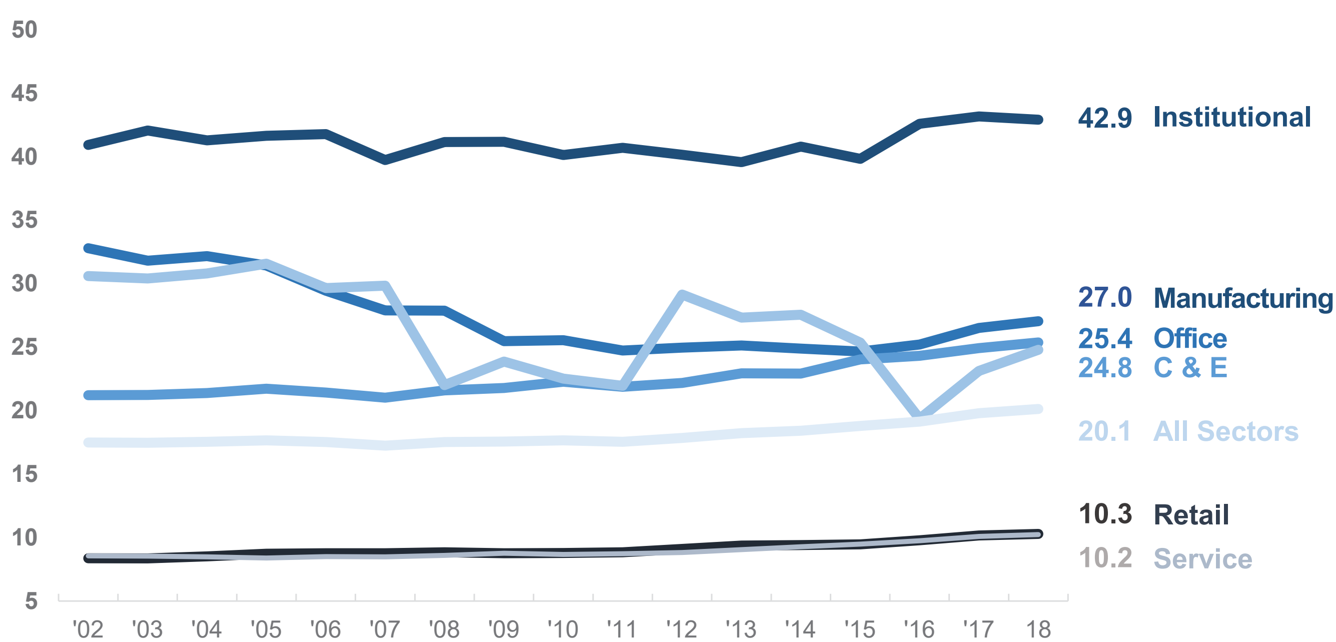


Figure 7: Employees per Establishment, 2002-2018



Employment Categories

The Survey utilizes six employment categories to reflect the underlying land use activities of employment across the city. In 2018, the Office and Manufacturing categories experienced above-average growth.

Structural Change

In 2018, Toronto employment increased by 26,940 or 1.8%, slightly below the city's five-year (2.2%) and above the ten-year (1.5%) compound annual growth rates.

Over the 5-year period from 2013 to 2018, three categories have grown faster than the city average: Institutional, Service, and Community and Entertainment (see Figure 8).

City Employment Share

Toronto's top employment categories (see Figures 9, 10 and 11) are Office (48.1%), Institutional (16.6%) and Service (12.6%). Employment growth in these categories contributed to over four-fifths of job growth in the city since 2013.

The remaining shares of city employment are Retail (10.0%), Manufacturing (8.9%) and Community and Entertainment (3.7%). While Retail and Manufacturing employment has lagged Toronto's job growth over the last five years, Community and Entertainment has been Toronto's fastest-growing category, averaging nearly 4% growth over the last five years.

Toronto's top employment categories are Office (48.1%), Institutional (16.6%) and Service (12.6%).

Figure 8: 2017-2018 Employment Growth vs. 5-Year Average

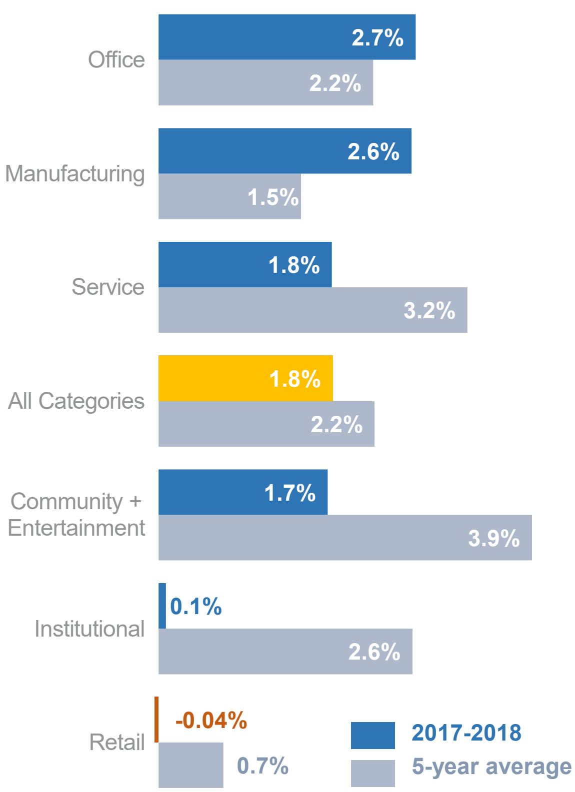
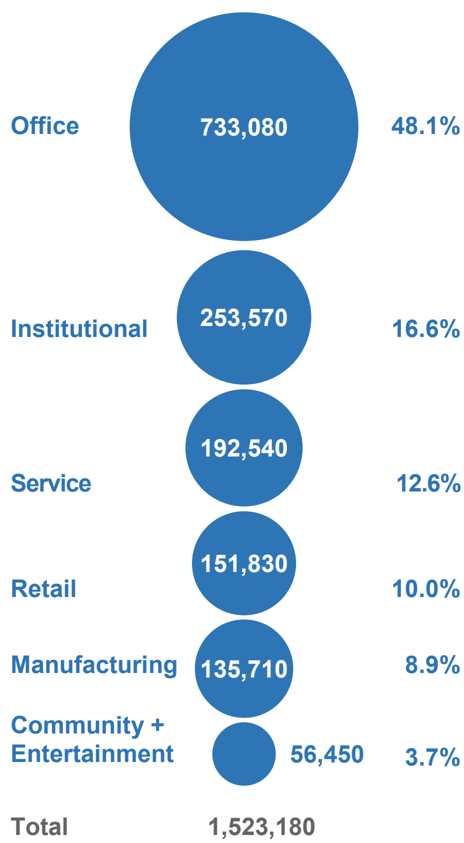


Figure 9: Total 2018 Employment by Category



City Establishment Share

Toronto's categories of business establishments (see Figures 12 and 13) are similarly structured, with Office (38%), Service (24.9%) and Retail (19.5%) making up the largest shares, followed by Institutional (7.8%), Manufacturing (6.6%) and Community and Entertainment (3.2%).

With fewer employees per location, Service and Retail establishments have a greater share of total establishments when compared to Institutional establishments.

Category Totals

Office has led overall employment growth, adding 76,210 jobs since 2013 and growing annually at 2.2%.

Institutional has added 30,810 jobs since 2013 and grown annually at 2.6%.

Service has been the second-fastest growing employment category since 2013, adding 28,010 jobs and growing at 3.2% annually.

Figure 10: 2017-2018 Job Increase by Category

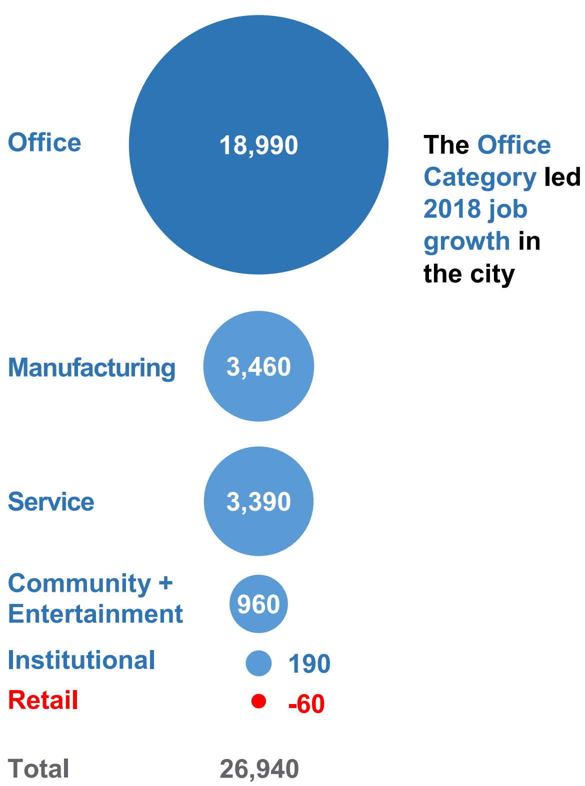
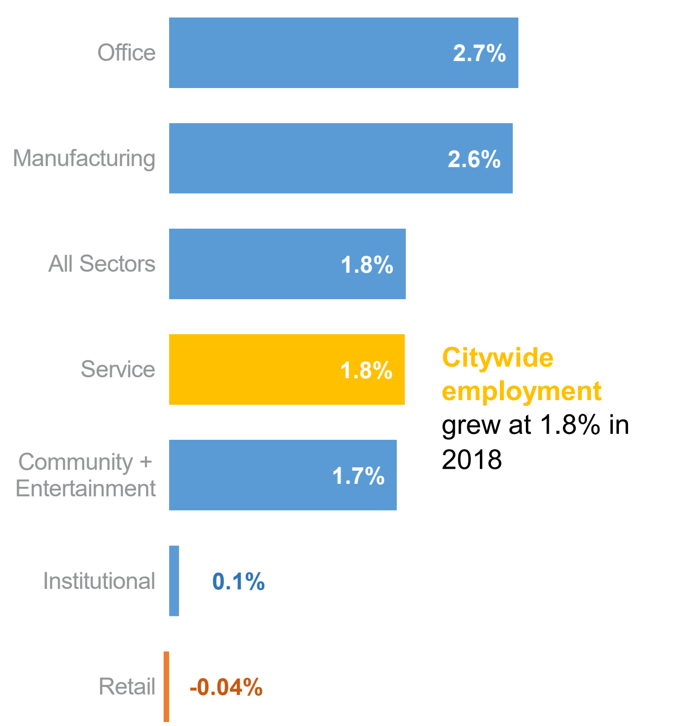


Figure 11: 2018 Employment Growth by Category



Community and Entertainment, despite being the smallest category, has grown the fastest since 2013, adding 9,740 jobs and growing annually at 3.9%.

Retail employment has changed significantly since 2008. The category declined steeply from 2008 to 2010, shedding 7,230 jobs. Since 2013, retail employment growth has lagged other categories, growing at 0.7% annually. The category lost 60 jobs in 2018.

Manufacturing employment continued to grow strongly in 2018, adding 3,460 jobs. While Manufacturing has experienced a long-term decline in growth, having lost 8,070 jobs since 2008, Manufacturing job growth has been notable in 2017 and 2018, adding over 8,260 jobs (6.7%) and 3,460 jobs (2.6%) in those years respectively.

Community and Entertainment has been Toronto's fastest-growing category over the last five years, averaging 3.9% annual employment growth since 2013.

Figure 12: City Share of Employment by Category in 2018

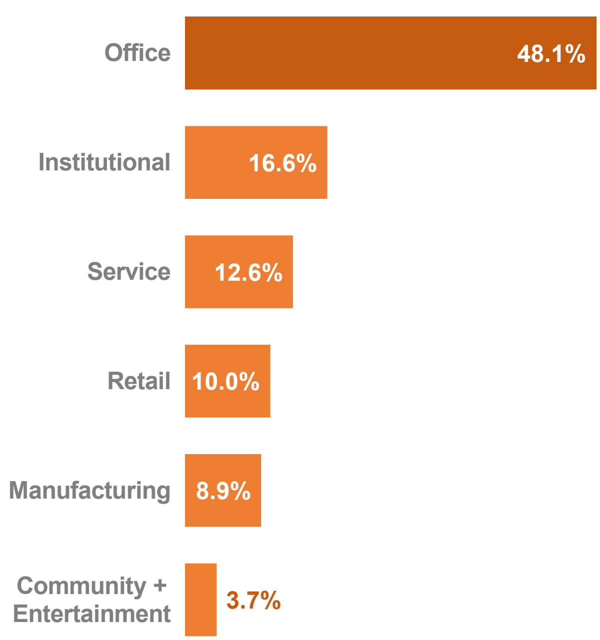
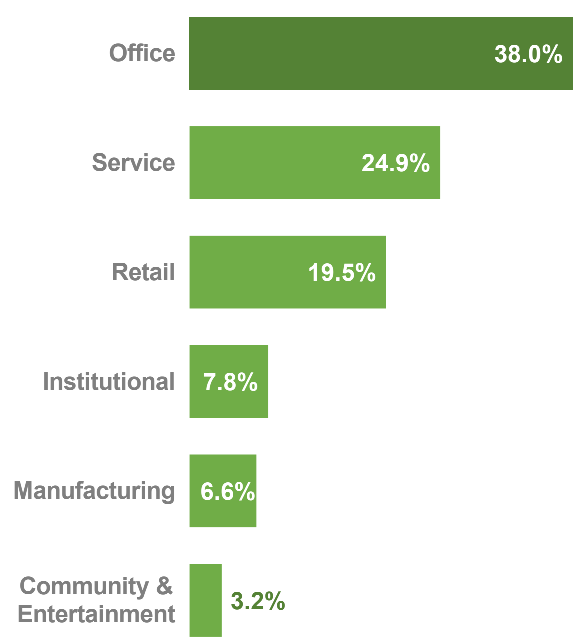


Figure 13: City Share of Establishments by Category in 2018



Service-based industries make up 78.1% 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.

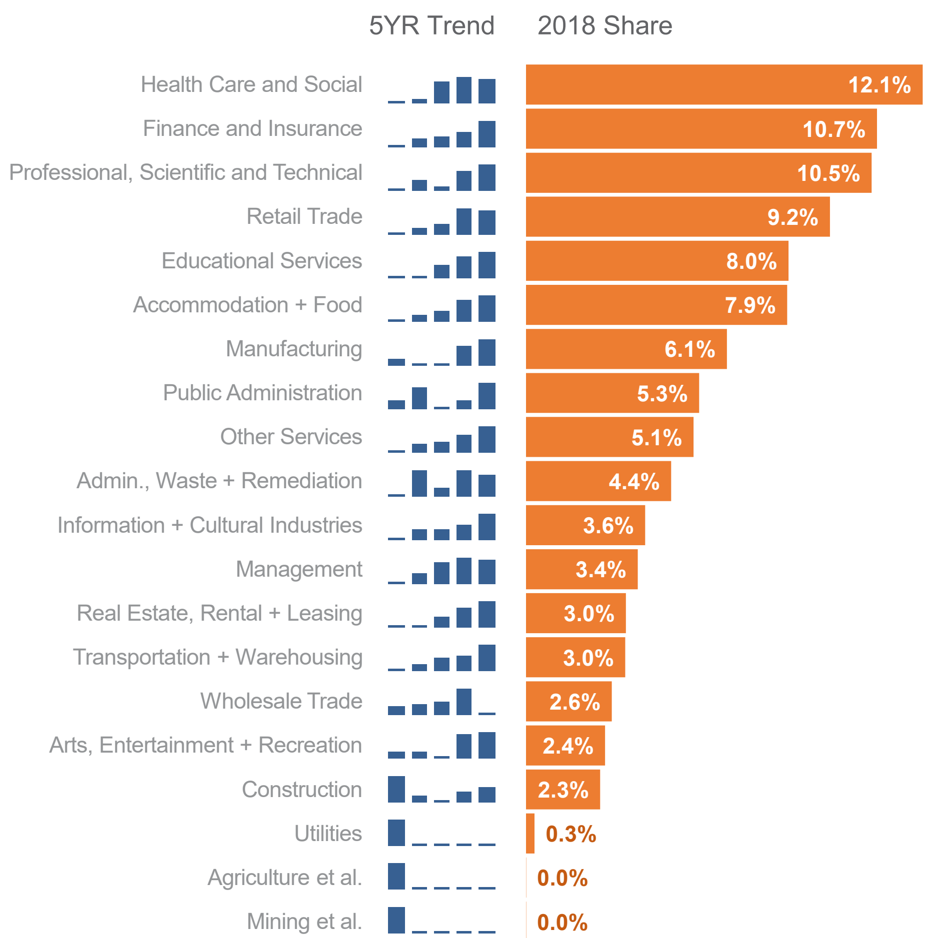
As a coding standard across North America, NAICS also allows for more accurate analysis and comparison of Toronto's results with other jurisdictions. In 2018, the Survey was extremely successful in coding Toronto's establishments with 98% of businesses assigned a full 6-digit code.

Toronto's Economy

Three major sectors make up the employment shares of Toronto's economy (see Figures 15 and 16): Service-Based industries (78.1%), Government and Institutional industries (13.3%) and Goods Producing industries (8.6%).

Since 2013, annual growth in Government and Institutional (2.8%) and Service-Based jobs (2.5%) have balanced employment losses in Goods Production (-0.8%). Total 5-year employment net change totaled 159,600 jobs added, including Service-Based (138,740 jobs) Government and Institutional (26,060 jobs) and Goods Producing industries (a loss of 5,150 jobs).

Figure 14: City Employment Share by NAICS Sector, 2018



In 2018, Service-Based employment led growth, adding 20,420 jobs (1.7%). Government and Institutional added 5,290 jobs (2.7%). Goods Producing industries added 1,190 jobs (0.9%), reversing the five year trend of decreasing employment.[15]

Major Sectors

The Survey uses NAICS to classify the economy into 20 major sectors. In 2018, 50.5% of all jobs in Toronto were in the top five NAICS sectors (see Figure 14). Two of these five sectors have increased their shares of total employment since 2013: Finance and Insurance (+1.1%) and Health Care and Social Assistance (+0.4%). In 2018, the top sectors for job growth included:

- Finance and Insurance (adding 12,430 net jobs or 8.3%)
- Educational Services (adding 3,490 net jobs or 3%)
- Accommodation and Food Services (adding 3,060 net jobs or 2.6%)
- Information and Cultural Industries (adding 3,030 net jobs or 5.8%).

Toronto's largest NAICS sector is Health Care and Social Assistance, comprising 183,900 or 12.1% of city employment. It decreased by 0.6%, losing 1,110 jobs.

Since 2013, additional sectors have experienced high annual growth rates and five-year employment increases:

- Real Estate, Rental and Leasing added 10,810 jobs since 2013, averaging 5.5% annual growth
- Educational Services added 24,750 jobs since 2013, averaging 4.7% annual growth
- Finance and Insurance added 24,750 jobs since 2013, averaging 4.7% annual growth
- Finance and Insurance added 31,760 jobs since 2013, averaging 4.4% annual growth
- Management of Companies and Enterprises added 8,380 jobs since 2013, averaging 3.6% annual growth
- Accommodation and Food Services added 15,060 jobs since 2013, averaging 4.5% annual growth
- Finance and Insurance added 19,430 jobs since 2013, averaging 3.6% annual growth.

In 2018, the top sector for job growth was Finance and Insurance, adding 12,430 net jobs or 8.3%.

Figure 15: Employment Share by Major NAICS Sector, 2014-2018

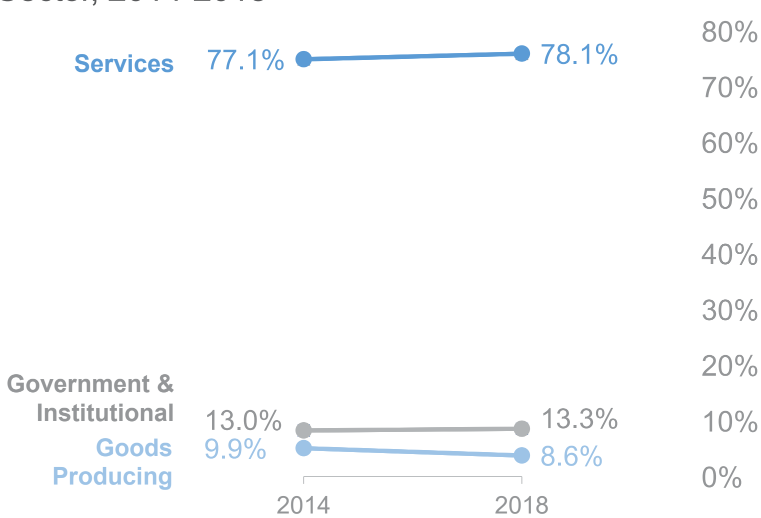


Figure 16: Establishments by Major NAICS Sector, 2013-2018

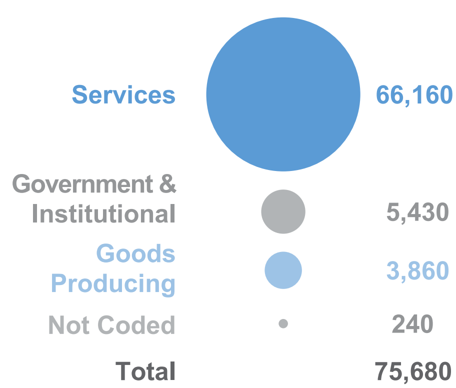
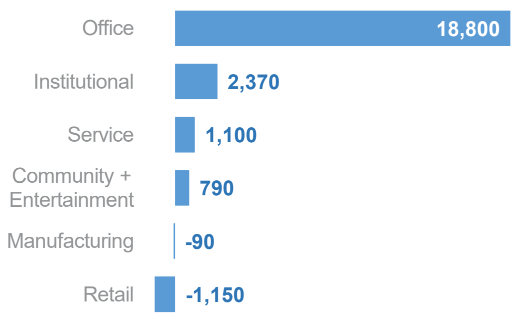


Figure 17: Downtown Employment Change 2017-2018



Urban Economic Structure

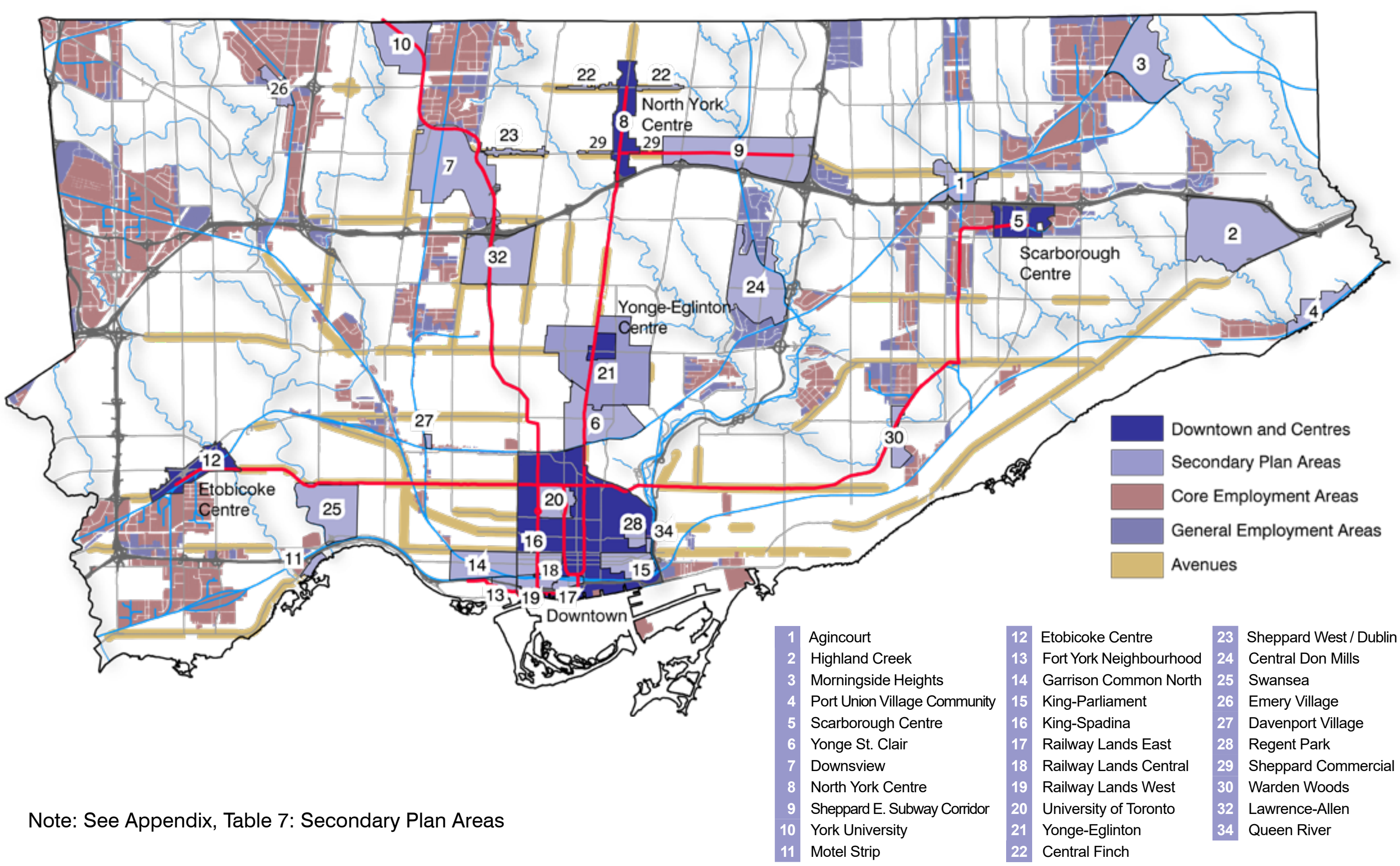
Toronto's Official Plan directs both employment and residential growth towards specific areas of the city, including Downtown, the Centres, the Avenues and Employment Areas (see Map 2). Together, these areas form the backbone of the city's urban economic structure. They are connected by transit and transportation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

The Official Plan also identifies 32 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 Avenues are important corridors along major streets where reurbanization is anticipated and encouraged to create new housing and job opportunities

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

Map 2: Urban Economic Structure



Note: See Appendix, Table 7: Secondary Plan Areas

Golden Horseshoe, 2017 ("Growth Plan").

The Growth Plan reinforces Toronto's Official Plan by enabling the identification of Strategic Growth Areas. These 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 2041.

Employment in the Downtown

Toronto's Downtown is a local and national economic hub. It contains 565,350 jobs within 21.4km², accounting for 37.1% of Toronto's jobs with an average employment density of 26,420 jobs per km² (264 jobs per hectare).

Downtown Employment

In 2018, employment in Downtown increased by 21,820 jobs or 4.0% (see Figures 17 and 18). Downtown has grown at an average annual rate of 3.9% since 2013, adding a total of 97,530 jobs since that time. This employment growth rate is above the city's average of 2.2% over the last five years (see Table 6, Appendix).

Office employment comprises 65.7% of Downtown employment. The Office category added 18,800 jobs in 2018, growing at 5.3%. Other categories that experienced growth included Community and Entertainment (3.6%), Institutional (3.1%), and Service (1.9%). Downtown Manufacturing (-2.1%) and Retail (-4.0%) employment decreased in 2018.

Downtown continues to attract new establishments. In 2018, 22% of new business establishments were counted in the Downtown.

Figure 18: Employment Growth vs. 5-Year Average

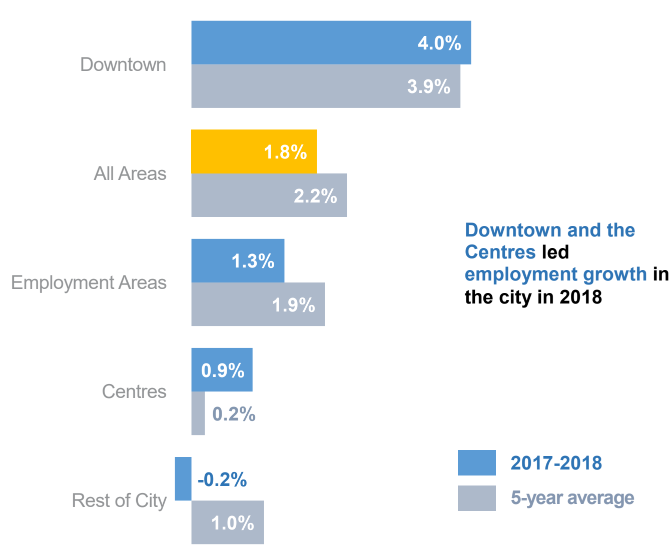


Figure 19: The Centres Employment Change 2017-2018

The Centres are home to 81,440 jobs or 5.3% of employment in the city.

The Centres

The four Centres are home to 81,440 jobs or 5.3% of employment in the city. In 2018, the Centres together added just over 700 jobs (0.9%), half the citywide rate of (1.8%). Please see Figure 19.

In 2018, Centres growth was led by North York (1,020 jobs) and Yonge Eglinton (770 jobs). Employment decreased in Scarborough (-690 jobs) and Etobicoke (-390 jobs).

Nearly three-quarters of all Centres jobs are in the Office category (see Figures 20 and 21).

North York Centre

North York Centre is Toronto's largest Centre with 34,910 jobs, comprising 2.3% of jobs in the city. Almost 8 in 10 jobs in North York Centre are Office, representing 27,600 jobs (79.1%).

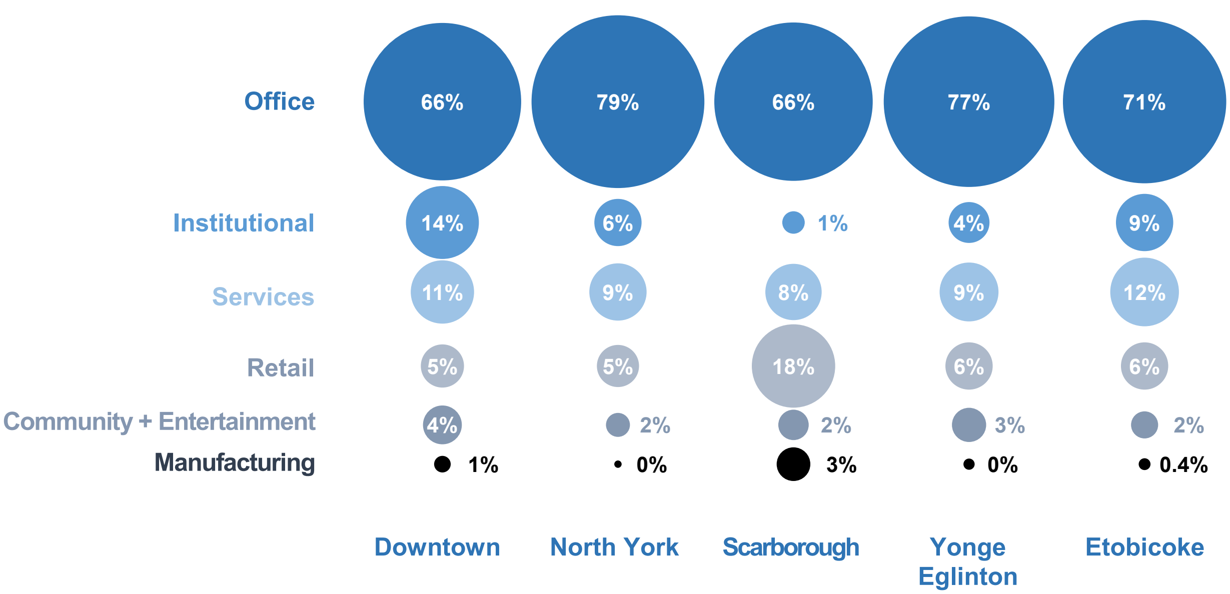
In 2018, North York Centre saw net increases in Service (440 jobs or 17%) Office (360 jobs or 1.3%), Institutional (170 jobs or 9%) and small increases in Retail (80 jobs) and Manufacturing (30 jobs). Since 2013, North York Centre employment increases were mostly in Service (700 jobs) and Institutional (600 jobs).

Yonge-Eglinton Centre

Yonge-Eglinton Centre is Toronto's second largest Centre with 18,090 jobs, or 1.2% of the City's total. Yonge-Eglinton contains the highest density of employment of any Centre with over 31,000 jobs per square kilometre. In 2018, employment in this Centre decreased by 690 jobs or 3.7%.

Over three-quarters (77.1%) of employment in Yonge-Eglinton Centre is Office. The Office employment category decreased by 500 jobs (3.5%) in 2018. Small annual

Figure 20: Downtown and Centres, Share of Employment by Category in 2018



decreases were counted in Retail (70 jobs), Community and Entertainment (50 jobs), Manufacturing (40 jobs) and Service (30 jobs).

Scarborough Centre

Employment in Scarborough Centre totaled 17,980 jobs in 2018, comprising 1.2% of the City's total. The survey counted an increase of 770 jobs or 4.5% from 2017. Since 2013, Scarborough Centre added 1,110 jobs to grow annually at 6.6%.

Most of Scarborough's growth over the past year was in Office (1,290 jobs or 12.1%), followed by Service (100 jobs) and Community and Entertainment (100 jobs) Since 2013, Office grew by 2,290 jobs.

Etobicoke Centre

Etobicoke Centre is the smallest Centre in Toronto, but has grown at the fastest of all Centres since 2013 (3.8% per annum), adding 1,780 jobs. The Centre has 10,460 jobs total, representing 0.7% of employment in Toronto.

Most employment is Office (7,410 jobs or 70.8%), followed by Service (1,180 jobs) and Institutional (990 jobs). Since 2013, Office has added 1,380 jobs, followed by Institutional (250 jobs) and Service (110 jobs).

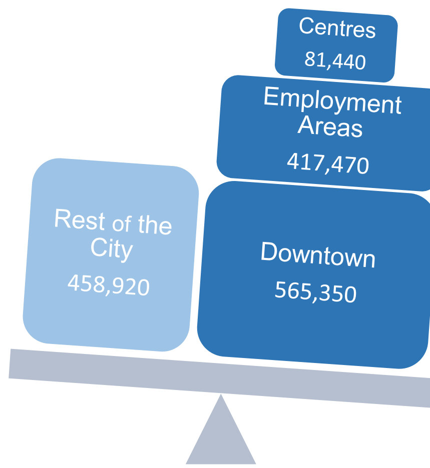
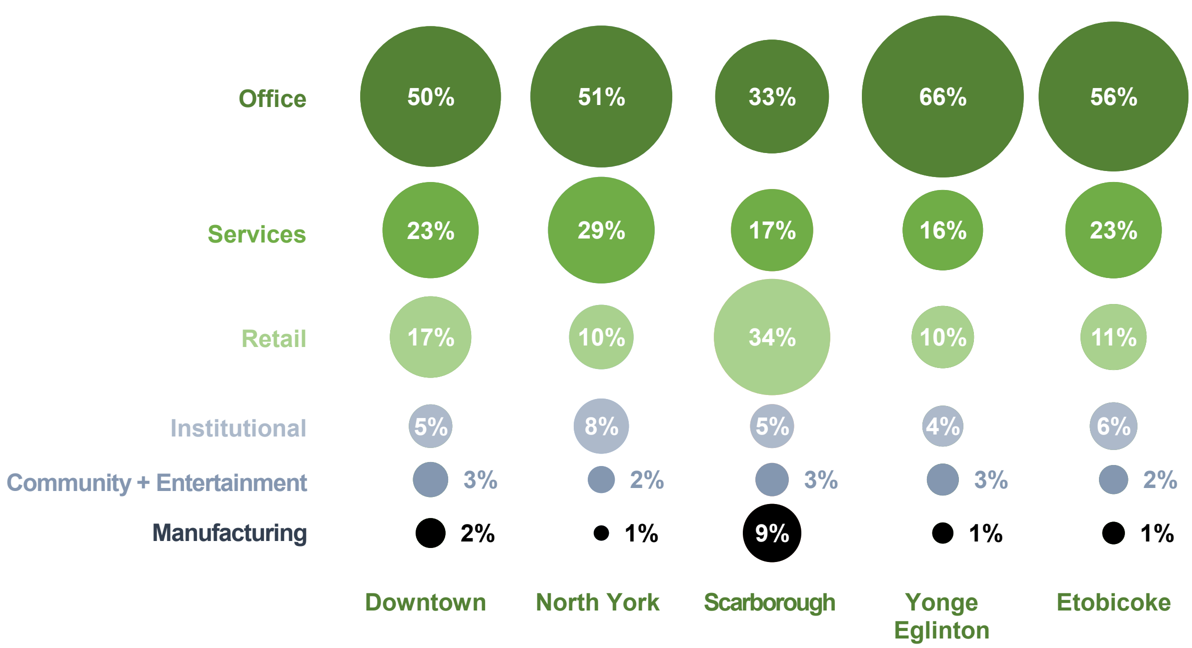


Figure 21: Downtown and Centres, Share of Establishments by Category in 2018



Secondary Plan areas contain 314,020 jobs, 20.8% of the city's employment.

Employment in Secondary Plan Areas

With 20.8% of all employment (314,020 jobs), Secondary Plan areas reflect much of the city's recent urban growth. In 2018, Secondary Plan employment grew by 9,210 jobs or 3.0%, well above the city average growth rate of 1.8%.

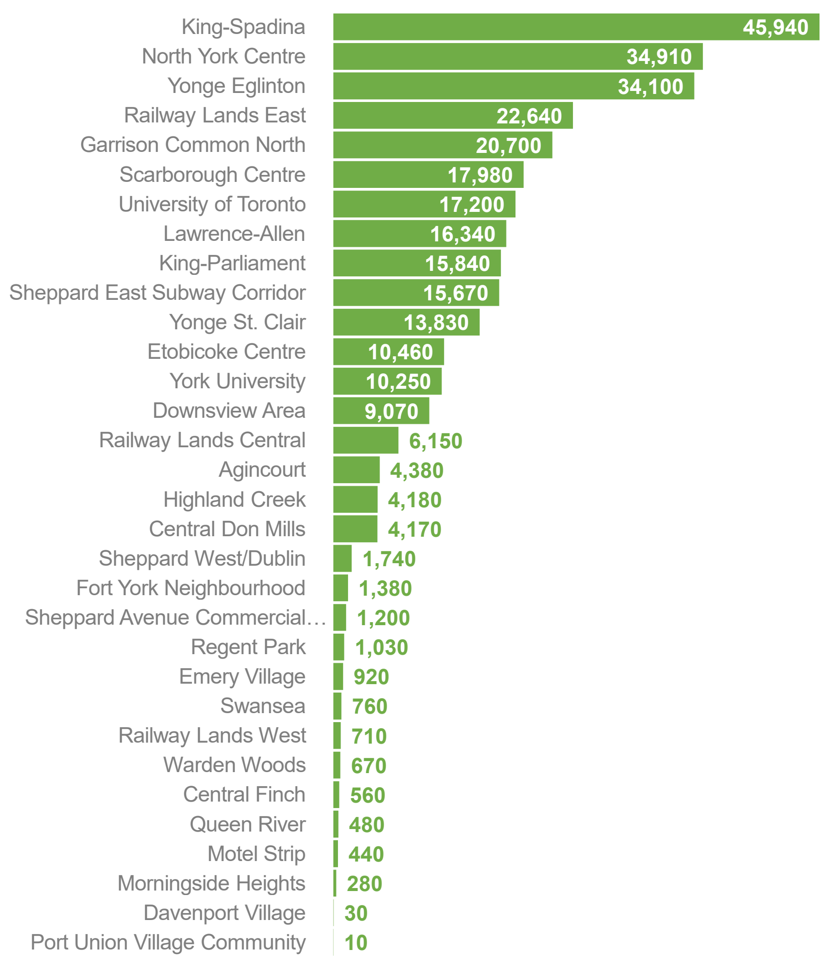
The Official Plan contains 32 Secondary Plans to manage growth and change in specific parts of the city. Secondary Plan areas contain a range of land use designations and cover diverse geographic areas across Toronto, including parts of Downtown, the Centres, and Employment Areas. As a result, the employment 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 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 Downtown and the Centres information in these areas.

Secondary Plan Area Employment

Secondary Plan employment includes 23.8% of all Office employment

Figure 22: Secondary Plan Areas, 2018 Employment



in the city, as well as 23.1% of all Community and Entertainment employment in the city (see Table 7, Appendix).

More than half (50.3%) of employment within Secondary Plan areas is concentrated in the five largest areas by employment (see Figure 22). 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 13 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 three exceptions: Lawrence-Allen has mostly Retail employment, due to the presence of the Yorkdale and Lawrence Square shopping centres, and both the University of Toronto and York University have predominantly Institutional employment (see Figures 23 and 24).

Most of these Secondary Plan areas have added jobs over the past year, with a few exceptions: York University, Etobicoke Centre, Yonge Eglinton, Lawrence-Allen and Sheppard East Subway Corridor Secondary Plan areas. Combined, the largest Secondary Plan areas added 8,970 jobs (97.5% of all growth in Secondary Plan areas).

Smaller Secondary Plan areas

The 20 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. In 2018, smaller Secondary Plan areas grew more slowly, adding 220 jobs.

In 2018, Secondary Plan Area employment grew by 9,210 jobs or 3.0% above the citywide growth rate of 1.8%

Figure 23: Secondary Plan Area Employment, 2018

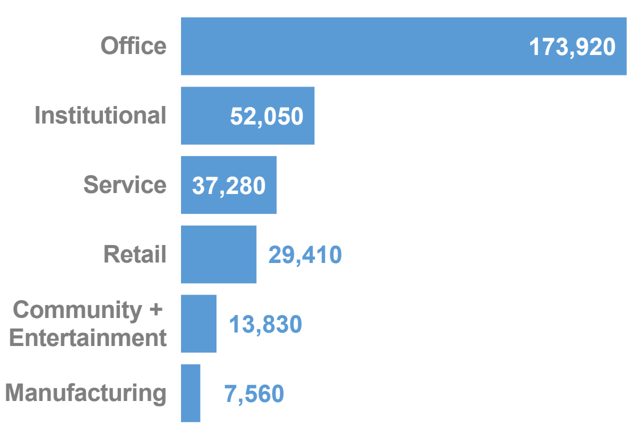
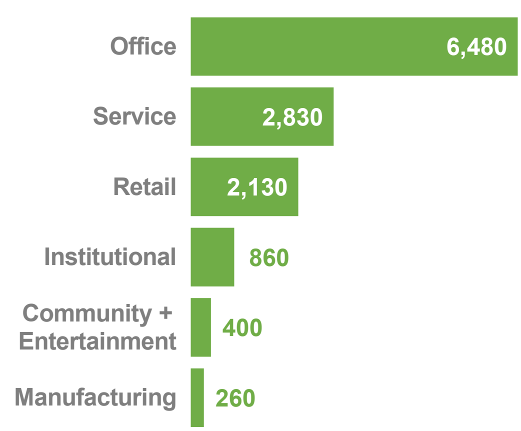


Figure 24: Secondary Plan Area Establishments, 2018



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 2018 Toronto Employment Survey. Overall, 29.4% of all establishments (22,260 locations) and 27.5% of all jobs (417,470 jobs) are located in Toronto's Employment Areas.

Employment Areas are particularly important to the Manufacturing sector, with approximately 4 out of 5 Manufacturing establishments and 92.6% of all Manufacturing jobs located in Toronto's Employment Areas (see Map 4).

Employment Areas continue to attract new businesses, with 28.8% of new establishments (nearly 1,000 establishments) in the city locating in Employment Areas in 2018.

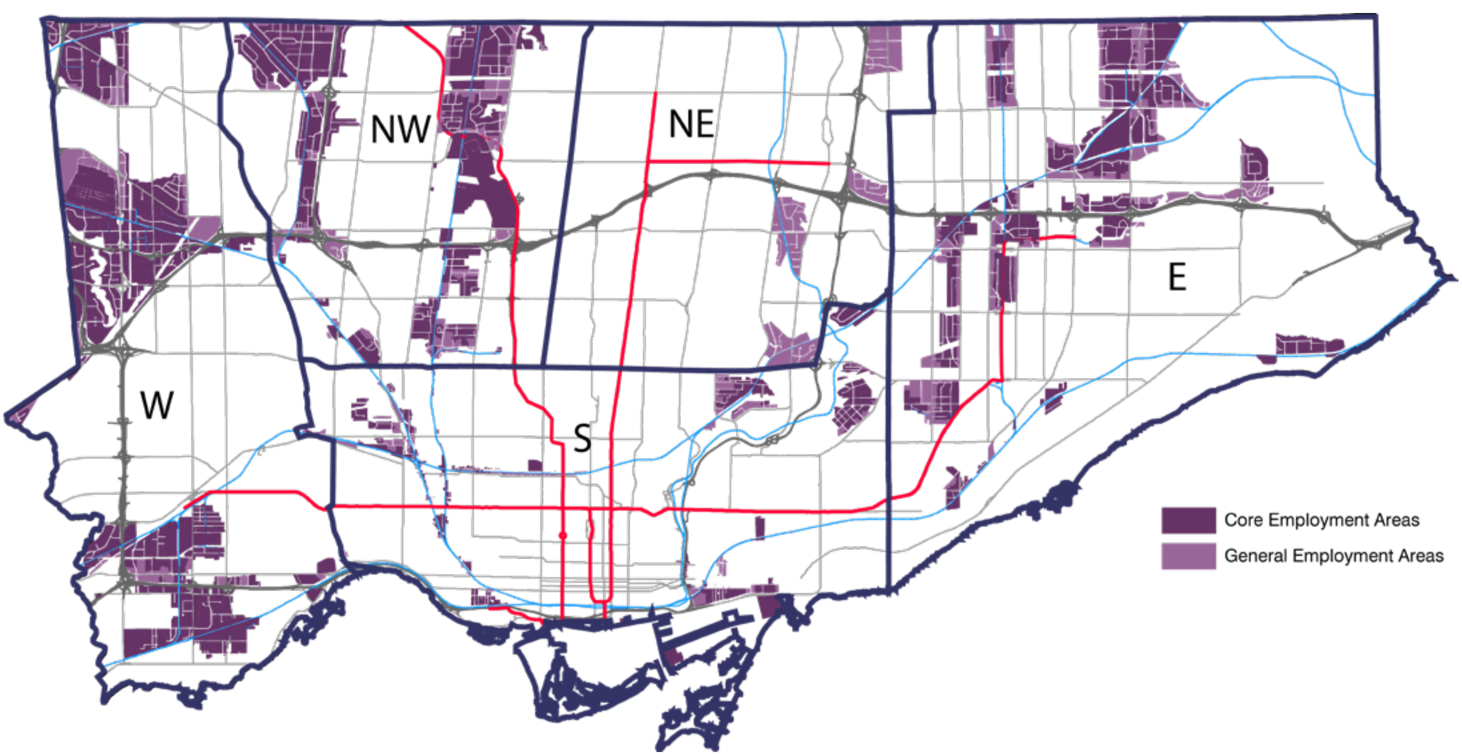
Regional Employment Policies

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

If the average rate of employment growth continues (2.2% annually over the last five years), Toronto will achieve the Growth Plan forecast between 2024 to 2026, at least fifteen years before the target. Given the Provincial Legislation and pace of Toronto's employment growth relative to the forecast, the Province can be expected to undertake a review of current Growth Plan forecasts.

Often, industrial and other impactful employment uses have few alternative locations in the city due to the

Map 3: Toronto's Employment Areas and Employment Monitoring Areas (2018)



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.

Conversions are managed through a Municipal Comprehensive Review of the Official Plan. Policies regrading employment lands were adopted by City Council in 2013.

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.

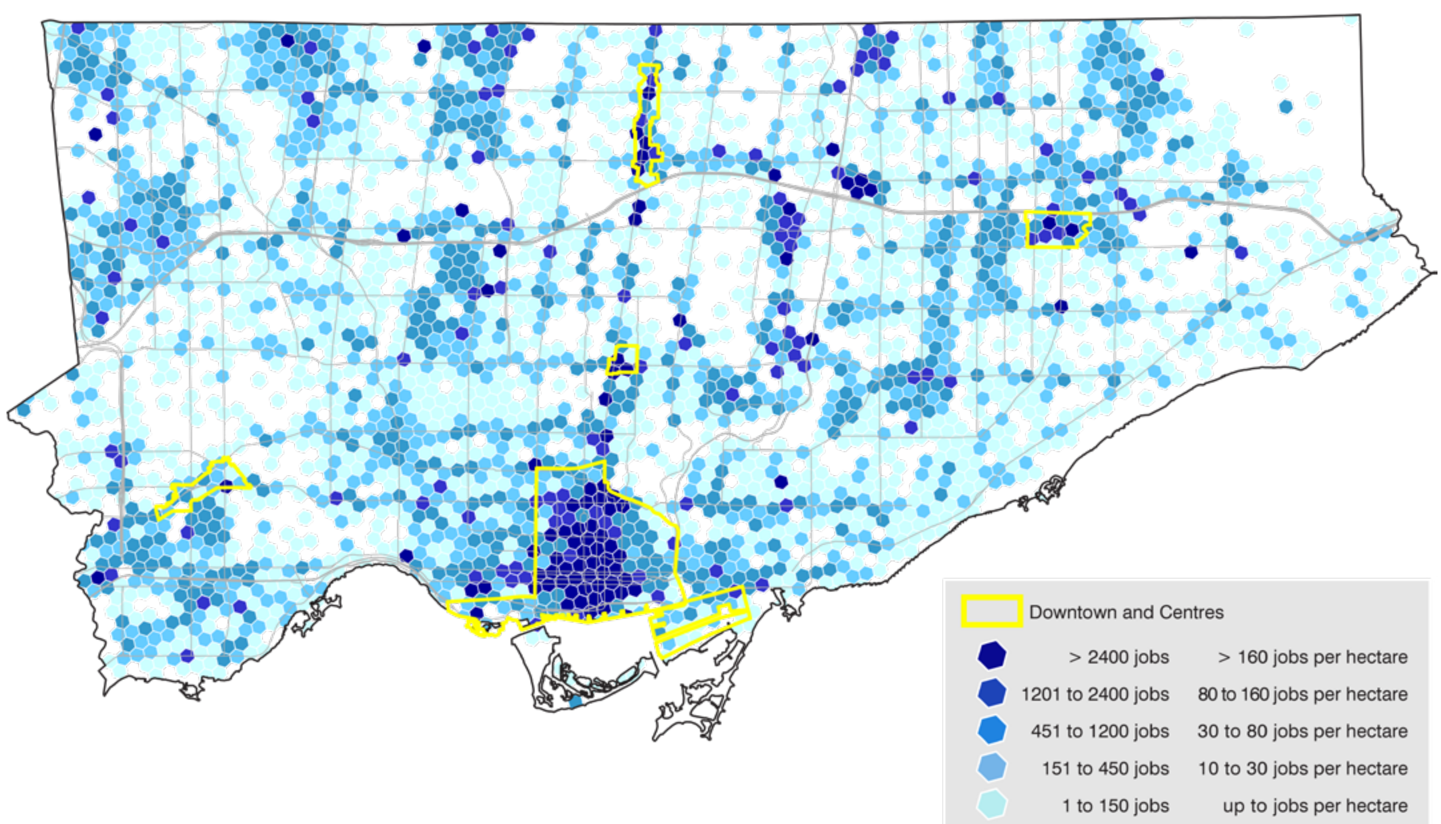
Core and General Employment Areas

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 (2018)



Employment Area Sector Activity

Toronto's Employment Areas contain 27.5% of all jobs and 29.4% of all business establishments.

Manufacturing employment is the top sector across Employment Areas, making up 20.7% of all jobs (86,230 jobs), followed by employment in Wholesale and Retail Trade (16.3% or 68,200 jobs) and Professional, Scientific and Technical Services (10.3% or 42,864 jobs).

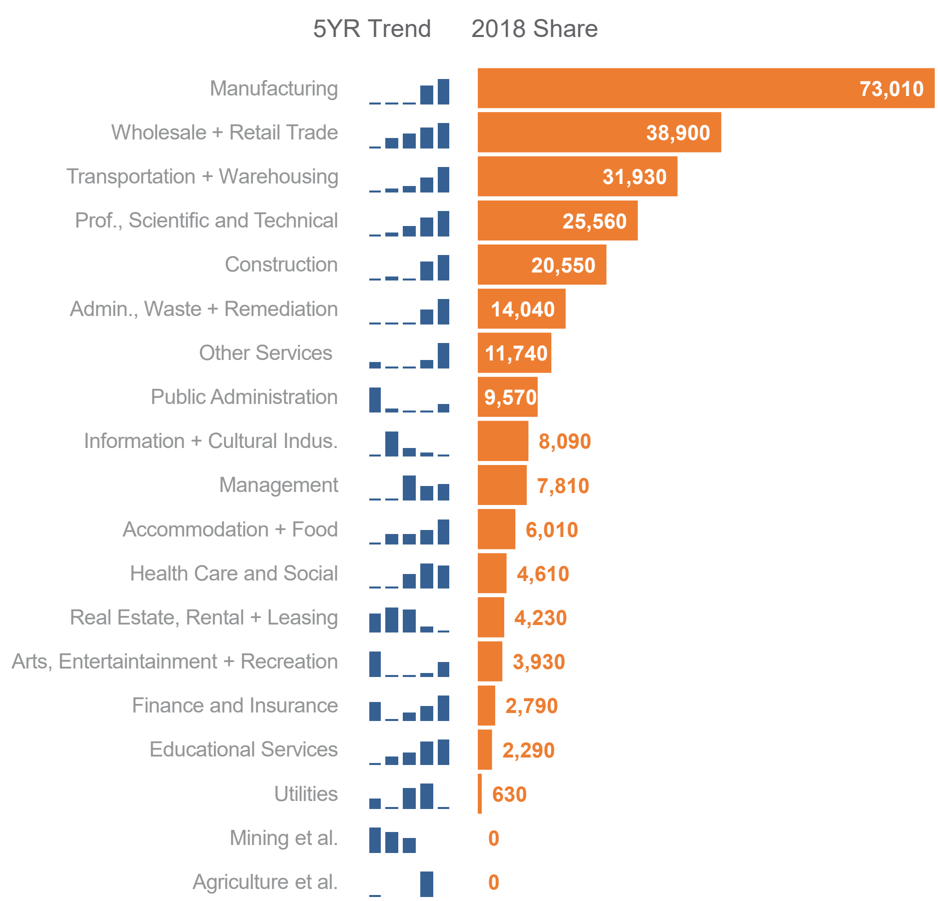
Employment Areas accommodate important concentrations of jobs citywide in several sectors, led by employment in Manufacturing (92.6%), Utilities (87.4%), Transportation and Warehousing (75.9%) and Construction (72.1%).

Core Employment Area Activity

Core Employment areas continue to host land consumptive land uses. In 2018, these areas led Employment Area jobs in Manufacturing (27.5% or 73,010 jobs), Wholesale and Retail Trade (14.6% or 38,900 jobs) and Transportation and Warehousing (12.0% or 31,930 jobs).

Core Employment Areas are leading locations citywide for employment in Manufacturing (78.4%), Transportation and Warehousing (69.4%) and Construction (59.7%). See Figure 25.

Figure 25: Core Employment by NAICS 2018



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 19.3% of employment areas jobs (29,300 jobs), followed by Professional, Scientific, and Technical Services (11.4% or 17,310 jobs) and Manufacturing (8.7% and 13,220 jobs).

General Employment Areas are leading locations citywide for employment in Utilities (71.5%), Real Estate and Rental and Leasing (21.7%) and Wholesale and Retail Trade (16.2%).

Administrative and Support, Waste Management and Remediation Services (17.3%) and Manufacturing (14.2%) also have significant shares of jobs citywide (see Figure 26).

In 2018, employment in Toronto's Employment Areas grew by 1.3%, adding 5,500 jobs.

Figure 26: General Employment by NAICS 2018

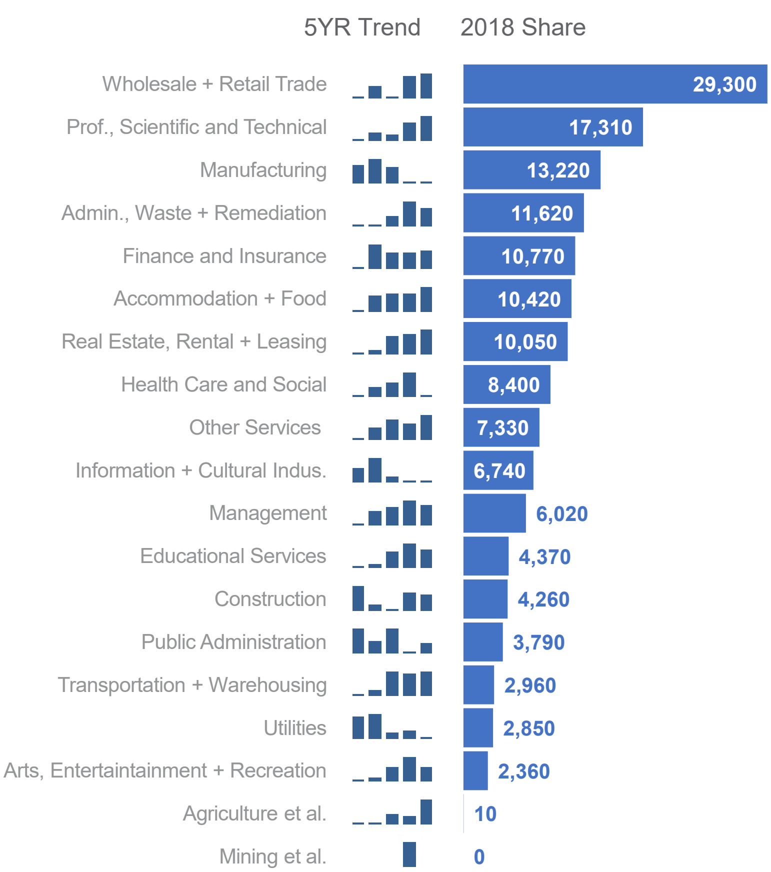
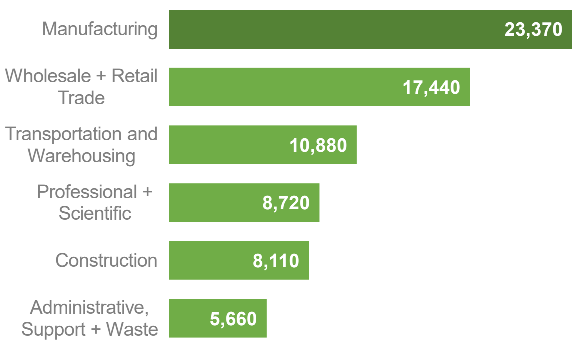
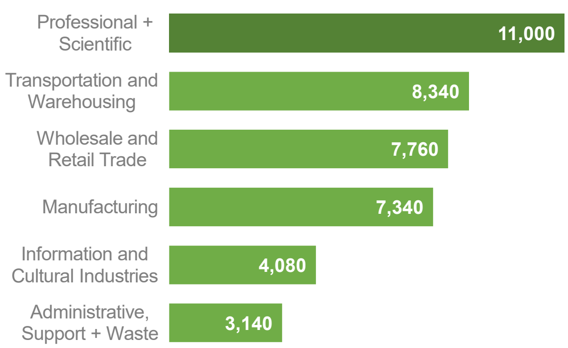


Figure 27: Top Employment Sectors by EMA 2018

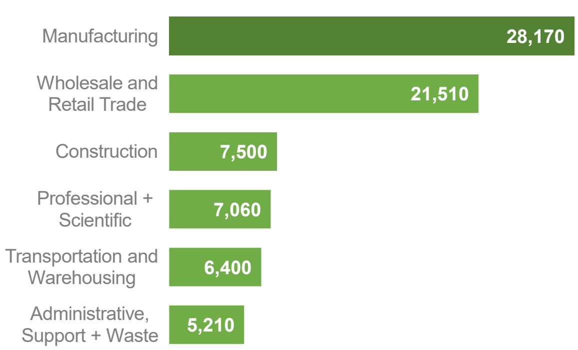
West EMA - Top 6 NAICS Sectors



South EMA - Top 6 NAICS Sectors



Northwest 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, and Figure 28).

In 2018, employment grew by 1.3% in all EMAs, below the average annual growth rate of 1.9% since 2013.

West

The West EMA approximates the former municipality of Etobicoke. 25% of Employment Area jobs (104,180 jobs) are in the West EMA. Of these, 89.7% are within Core Employment Areas. In 2018, West EMA employment grew 1.3%, adding 1,380 jobs, growing by 9.5% or 9,020 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 (see Figure 27) include Manufacturing (22.4%), Wholesale and Retail Trade (16.7%) and Transportation and Warehousing (10.4%).

In 2018, Finance and Insurance was the quickest-growing sector in the West EMA, adding 290 jobs or 20%. Since 2013, the Construction sector grew the most, growing by 5.6% annually, adding 1,920 jobs.

South

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

Some 13.5% of Employment Area jobs (56,510 jobs) are in the South EMA. 71.8% of these jobs are within Core Employment Areas. In 2018, South EMA employment grew by 4.9%, adding 2,650 jobs, growing by 21.6% and adding 10,040 jobs since 2013.

Top employment sectors in the South EMA include Professional, Scientific and Technical Services (9.59%), Transportation and Warehousing (14.8%) and Wholesale and Retail Trade (13.7%). Manufacturing also has a 13% employment share.

The Professional, Scientific and Technical Services sector has grown the most since 2013, adding 4.130 jobs (60.2%). In 2018, the Transportation and Warehousing sector grew the most, adding 1,010 jobs or 13.8%.

Manufacturing in the South EMA declined slightly, a net decrease of 150 jobs or 2% in 2018, continuing its longer term trend.

Northwest

The Northwest EMA approximates the western part of the former municipality of North York, and contains 23.4% of the city's Employment Area jobs (97,680 jobs); 76.5% of these jobs are within Core Employment Areas. In 2018, Northwest EMA employment grew by 0.7%, adding 720 jobs, growing by 8.9% or 7,970 jobs since 2013.

Top employment sectors in the Northwest EMA include Manufacturing (28.8%), Wholesale and Retail Trade (22%) and Construction (7.7%).

In 2018, Real Estate and Rental and Leasing was the quickest-growing sector in the Northwest EMA, adding 150 jobs or 7.5%. Since 2013, the Manufacturing sector grew the most, growing by 5%, adding 1,340 jobs. Administrative and Support, Waste Management and Remediation Services followed close behind, adding 1,280 new jobs and growing 32.4% since 2013.

Northeast

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

About 15.5% of Employment Area jobs (64,620 jobs) are in the Northeast EMA. The Northeast EMA has no Core Employment Areas, but has broader sector diversity than the other EMAs. In 2018, Northeast EMA employment decreased by 0.7%, losing 430 jobs. It has grown by 11.5%, adding 6,650 jobs since 2013.

Top employment sectors in the Northeast EMA (see Figure 27a) include Professional, Scientific and Technical Services (17.1%), Finance and Insurance (12.8%) Administration, Support and Waste Services (9.5%).

In 2018, the Real Estate and Rental and Leasing sector grew the most, adding 375 jobs or 7.1%.This sector has also grown the most since 2013, adding 2,720 jobs or 92.7%. Despite losing 1,620 jobs since 2013, Manufacturing added 210 jobs in 2018.

East

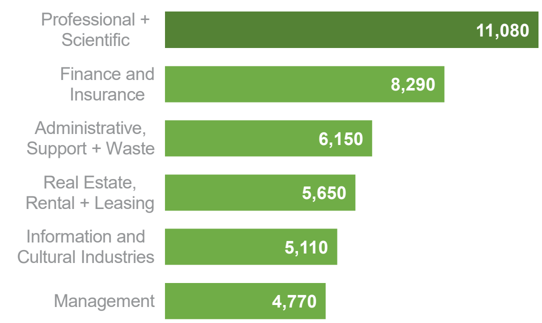
The East EMA approximates the former municipality of Scarborough. 22.6% of Employment Area jobs (94,480 jobs) are in the East EMA. 60.7% of these jobs are within Core Employment Areas. In 2018, East EMA employment grew 1.3%, adding 1,170 jobs, growing by 4.6% or 4,150 jobs since 2013.

Top employment sectors in the East EMA include Manufacturing (24.4%), Wholesale and Retail Trade (18.8%) and Transportation and Warehousing (9.2%).

In 2018, the Manufacturing sector grew the most in the East EMA, adding 780 jobs or 3.5%. Since 2013, Transportation and Warehousing grew the most, adding 1,530 new jobs and growing 21.5% since 2013.

Figure 27a: Top Employment Sectors by EMA 2018

Northeast EMA - Top 6 NAICS Sectors



East EMA - Top 6 NAICS Sectors

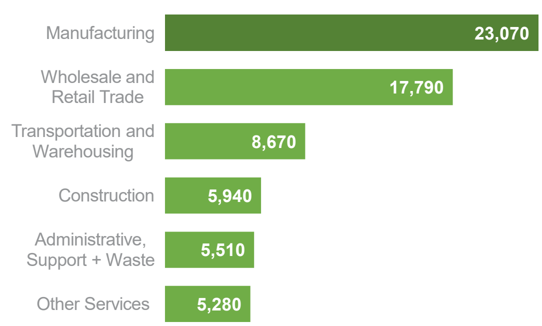
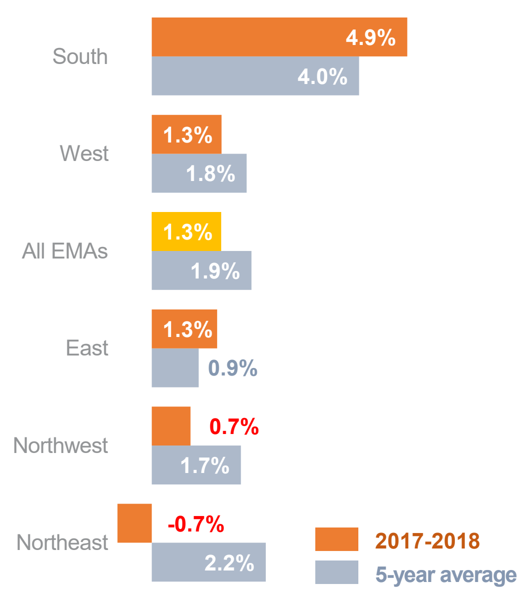


Figure 28: Employment Growth by EMA 2018 vs. 5-Year Average



Methodological Note for 2018

As an establishment survey, the Survey collects employment and land use data from business establishments and major employers.

These data include the number of jobs at each establishment, the number, location, and founding year of establishments, and the reasons for any significant employment change.

Major Employer program

In the case of major, multi-branch employers, the Survey collects information through its Major Employer program. With Major Employers, the Survey sends a questionnaire to the primary contact at the employer's head office, to collect data on the employer's list of business locations and the employment at each location.

Footloose Employment

As an establishment-based survey, the Survey does not fully capture footloose employment, a term for employment that does not have a regular location. To better capture footloose employee counts, the Survey began working more closely with Major Employers to identify different types of footloose employment. Examples of employees captured by this method include taxi drivers, real estate agents and construction workers.

In order to capture information on footloose employees, the Survey programme included additional outreach to businesses identified as having employees who report to a head office location, but work at different locations in the city.

Toronto District School Board

In 2016, the Survey began working more closely with the Toronto District School Board (TDSB) to better capture its footloose employment.

Table 4: Toronto Employment Survey, Revised TDSB Reporting 2016-2017

	Total Employment	
	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

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

In 2016, reporting from TDSB indicated approximately 25,000 actively employed footloose employees in the city. These employees included substitute teachers and other travelling staff. At the time, these employee counts represented a particularly large magnitude of footloose employees in a specific land use category and sector. Ongoing work with the TDSB in 2018 revealed varying levels of activity for these workers and more detail regarding their work locations.

Based on this information, total employment counts for the years 2016 and 2017 have been revised and are being restated (see Tables 4 and 5, below).

Restated employment counts

The restated employment counts in Tables 4 and 5 remove 25,000 part-time employees, and add 4,400 occasional full-time workers, for each year in 2016 and 2017. These adjustments affect entries for the Toronto District School Board in these years.

These changes are a 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 Survey 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/).

Table 5: Toronto Employment Survey, Revised Citywide Reporting 2016-2017

	Total Employment	
	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

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

Appendices

Table 6: Total Employment in the Centres and Downtown, 2013-2018

							2013-2018		2017-2018*	
Location	**2013**	**2014**	**2015**	**2016***	**2017***	**2018**	**Net Change**	**%**	**Net Change**	**%**
Downtown	467,820	482,710	508,640	511,370	543,530	565,350	97,530	20.8%	21,820	4.0%
North York Centre	35,350	34,830	35,000	34,090	33,900	34,910	-440	-1.2%	1,020	3.0%
Yonge-Eglinton	19,760	19,010	17,390	17,540	18,780	18,090	-1,670	-8.5%	-690	-3.7%
Scarborough Centre	16,870	16,440	16,690	16,350	17,210	17,980	1,120	6.6%	770	4.5%
Etobicoke Centre	8,690	9,380	9,770	9,490	10,850	10,460	1,770	20.4%	-390	-3.6%
Downtown and the Centres	**548,480**	**562,370**	**587,480**	**588,840**	**624,260**	**646,790**	**98,310**	**17.9%**	**22,530**	**3.6%**
Rest of City	815,370	822,020	834,800	851,960	871,990	876,390	61,030	7.5%	4,410	0.5%
City Total	**1,363,850**	**1,384,390**	**1,422,280**	**1,440,790**	**1,496,250**	**1,523,180**	**159,330**	**11.7%**	**26,940**	**1.8%**

** 2016 and 2017 employment totals revised in 2018 based on updated employer information.*
Table numbers have been rounded to the nearest ten. Totals and sums may differ due to rounding.

Figure 30: Total Employment by Economic Sector 2014-2018

Table 7: Secondary Plan Area Employment by 6 Sectors, 2018

No.	Secondary Plan Area	Manufacturing	Retail	Service	Office	Institutional	Community + Entertainment	Total
1	Agincourt	670	690	630	2,170	220	10	4,380
24	Central Don Mills	0	860	920	1,530	760	100	4,170
22	Central Finch	0	20	50	390	90	10	560
27	Davenport Village	0	0	0	20	0	0	30
7	Downsview Area	4,100	830	1,670	780	1,460	230	9,070
26	Emery Village	40	90	230	300	240	20	920
12	Etobicoke Centre	30	540	1,180	7,410	990	310	10,460
13	Fort York Neighbourhood	10	20	110	40	930	270	1,380
14	Garrison Common North	570	1,330	2,590	13,640	2,190	390	20,700
2	Highland Creek	0	90	290	370	3,000	440	4,180
15	King-Parliament	110	1,230	2,000	9,320	2,770	410	15,840
16	King-Spadina	390	2,060	8,330	32,020	920	2,220	45,940
32	Lawrence-Allen	20	6,780	1,990	4,720	2,680	150	16,340
3	Morningside Heights	0	0	0	0	200	90	280
11	Motel Strip	20	40	170	150	50	0	440
8	North York Centre	50	1,640	3,030	27,600	2,060	530	34,910
4	Port Union Village Community	0	0	0	10	0	0	10
34	Queen River	50	230	160	40	0	0	480
18	Railway Lands Central	0	120	1,710	3,290	20	1,010	6,150
17	Railway Lands East	260	480	2,150	15,350	20	4,390	22,640
19	Railway Lands West	0	180	300	160	20	50	710
28	Regent Park	0	130	90	410	220	180	1,030
5	Scarborough Centre	540	3,310	1,510	11,950	240	440	17,980
29	Sheppard Avenue Commercial Area	0	30	50	1,000	110	0	1,200
9	Sheppard East Subway Corridor	0	4,140	1,540	5,350	4,320	310	15,670
23	Sheppard West/Dublin	0	400	410	690	220	10	1,740
25	Swansea	140	80	50	220	200	70	760
20	University of Toronto	10	190	370	1,720	14,270	630	17,200
30	Warden Woods	320	20	60	30	190	50	670
21	Yonge Eglinton	100	3,100	3,990	22,350	3,370	1,190	34,100
6	Yonge St. Clair	130	710	1,120	10,560	1,080	240	13,830
10	York University	0	70	580	330	9,210	80	10,250
	All Secondary Plan Areas	**7,560**	**29,410**	**37,280**	**173,920**	**52,050**	**13,830**	**314,020**

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

Table 8: Total Employment in Employment Monitoring Areas and City by NAICS, 2014-2018

	All EMAs					Non Employment Areas					Total				
NAICS	**2014**	**2015**	**2016**	**2017**	**2018**	**2014**	**2015**	**2016**	**2017**	**2018**	**2014**	**2015**	**2016**	**2017**	**2018**
Agriculture, Forestry, Fishing and Hunting	10	10	10	10	10	60	50	70	10	10	70	60	80	20	20
Mining, Quarrying, and Oil and Gas Extraction	0	0	0	20	0	70	20	20	0	10	70	20	20	20	10
Utilities	3,900	3,900	3,670	3,720	3,480	420	390	400	420	500	4,320	4,280	4,070	4,140	3,980
Construction	23,220	22,770	22,270	24,340	24,810	8,810	9,980	9,040	9,390	9,580	32,040	32,760	31,310	33,730	34,390
Manufacturing	83,660	83,910	83,320	85,320	86,230	7,280	6,160	6,500	7,120	6,900	90,940	90,070	89,810	92,430	93,130
Transportation and Warehousing	30,640	31,500	32,240	33,380	34,890	8,810	9,390	10,320	10,010	11,110	39,450	40,900	42,560	43,380	46,000
Information and Cultural Industries	15,350	17,010	15,440	15,110	14,830	33,840	34,300	35,670	37,120	40,430	49,190	51,310	51,120	52,230	55,260
Finance and Insurance	11,200	13,690	12,870	12,990	13,560	119,220	128,700	130,070	137,310	149,160	130,420	142,380	142,950	150,300	162,730
Real Estate and Rental and Leasing	10,270	11,130	13,420	13,630	14,280	27,280	27,580	28,120	30,500	32,070	37,550	38,710	41,540	44,130	46,340
Professional, Scientific and Technical Services	37,800	38,900	39,480	41,640	42,860	115,400	117,010	115,130	117,070	117,340	153,200	155,910	154,600	158,710	160,210
Management of Companies and Enterprises	11,030	12,600	13,960	14,230	13,830	34,400	33,560	36,990	38,150	37,990	45,430	46,160	50,940	52,380	51,810
Administrative & Support, Waste Mgt & Remediation	21,290	21,180	22,590	25,600	25,660	38,110	48,220	39,160	43,430	41,620	59,400	69,400	61,750	69,030	67,290
Educational Services	5,410	5,790	6,340	6,880	6,650	95,020	96,860	105,250	111,330	115,060	100,430	102,640	111,580	118,220	121,710
Health Care and Social Assistance	12,070	12,350	12,980	13,690	13,010	161,760	159,480	169,400	171,320	170,890	173,830	171,830	182,390	185,010	183,900
Arts, Entertainment and Recreation	6,200	5,590	5,840	6,250	6,290	26,400	26,860	25,120	29,780	30,380	32,600	32,440	30,950	36,030	36,670
Accommodation and Food Services	15,310	15,950	15,980	16,050	16,430	91,080	94,550	97,070	101,950	104,640	106,390	110,490	113,050	118,010	121,070
Other Services (Except Public Administration)	17,840	18,000	18,160	18,340	19,070	55,950	56,960	57,170	58,110	58,610	73,790	74,960	75,330	76,450	77,680
Public Administration	14,090	13,250	13,380	13,000	13,350	64,480	66,550	64,290	65,450	66,890	78,570	79,800	77,660	78,450	80,250
Wholesale and Retail Trade	65,160	66,490	66,310	67,780	68,200	111,480	111,340	112,520	115,660	112,430	176,640	177,820	178,830	183,440	180,630
Not Coded	50	90	110	30	30	20	230	150	60	90	70	330	260	90	120
Grand Total	**384,500**	**394,100**	**398,360**	**411,980**	**417,470**	**999,900**	**1,028,180**	**1,042,430**	**1,084,210**	**1,105,710**	**1,384,390**	**1,422,280**	**1,440,790**	**1,496,180**	**1,523,180**

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

Table 9: Total Employment in Employment Monitoring Areas by Type of Employment Area and NAICS, 2014-2018

		East EMA					Northeast EMA					Northwest EMA				
NAICS	**EA Type**	**2014**	**2015**	**2016**	**2017**	**2018**	**2014**	**2015**	**2016**	**2017**	**2018**	**2014**	**2015**	**2016**	**2017**	**2018**
Agriculture, Forestry, Fishing and Hunting	Core	10	10	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
Mining, Quarrying, and Oil and Gas Extraction	Core	0	0	0	10	0	0	0	0	0	0	0	0	0	10	0
	General	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Utilities	Core	120	70	70	70	70	0	0	0	0	0	0	0	0	0	0
	General	470	400	570	570	570	2,570	2,720	2,230	2,260	2,150	190	150	160	160	130
Construction	Core	4,440	4,500	4,560	5,020	4,680	0	0	0	0	0	5,340	5,440	5,560	6,010	6,460
	General	1,430	980	1,000	1,300	1,250	1,070	1,040	1,160	1,200	990	1,300	1,260	1,030	1,070	1,040
Manufacturing	Core	18,340	18,050	17,620	17,970	18,770	0	0	0	0	0	24,690	24,620	25,050	26,080	26,600
	General	4,360	4,480	4,810	4,320	4,300	5,700	5,300	4,600	4,070	4,280	1,540	1,550	1,610	1,590	1,570
Transportation and Warehousing	Core	6,330	6,350	6,530	6,950	7,350	0	0	0	0	0	5,630	5,700	5,650	5,640	5,770
	General	810	950	1,310	1,250	1,310	550	590	620	620	600	360	390	380	640	630
Information and Cultural Industries	Core	2,820	2,950	2,800	2,500	1,820	0	0	0	0	0	630	620	530	960	860
	General	860	860	930	530	470	5,420	5,710	5,120	5,130	5,110	170	180	160	220	230
Finance and Insurance	Core	460	400	410	470	490	0	0	0	0	0	490	560	650	720	700
	General	1,420	1,400	1,580	1,560	1,720	6,370	9,420	8,270	8,220	8,290	460	470	390	350	390
Real Estate and Rental and Leasing	Core	610	770	760	740	750	0	0	0	0	0	900	970	1,050	990	1,090
	General	1,280	1,450	1,650	1,860	2,110	2,650	3,040	4,890	5,270	5,650	760	760	920	960	1,010
Professional, Scientific and Technical Services	Core	3,390	3,270	2,940	2,640	2,610	0	0	0	0	0	4,750	4,950	5,170	5,360	5,280
	General	1,630	1,840	2,020	2,020	2,390	10,390	11,050	10,200	11,260	11,080	1,700	1,600	1,760	1,690	1,780
Management of Companies and Enterprises	Core	2,860	2,930	2,940	2,500	2,460	0	0	0	0	0	940	890	1,120	1,060	1,030
	General	70	80	70	60	60	2,930	4,530	4,340	5,040	4,770	650	680	830	840	610
Administrative & Support, Waste Mgt & Remediation	Core	3,170	3,050	2,820	2,910	3,250	0	0	0	0	0	3,310	3,290	3,130	3,650	4,280
	General	2,050	1,740	2,070	2,280	2,260	4,460	4,670	4,930	6,200	6,150	1,010	1,010	1,240	1,220	930
Educational Services	Core	340	390	450	500	530	0	0	0	0	0	700	700	760	780	760
	General	1,190	1,230	1,400	1,530	1,240	1,690	1,790	1,950	2,060	1,970	470	480	560	540	640
Health Care and Social Assistance	Core	540	540	530	590	520	0	0	0	0	0	1,080	900	900	1,190	1,110
	General	2,920	2,760	3,010	3,040	3,010	3,380	3,530	3,420	3,530	3,190	1,350	1,440	1,430	1,560	1,280
Arts, Entertainment and Recreation	Core	150	200	210	240	240	0	0	0	0	0	1,520	800	780	550	570
	General	530	570	620	750	410	750	760	840	910	900	280	360	370	380	400
Accommodation and Food Services	Core	520	540	490	500	580	0	0	0	0	0	440	490	520	580	590
	General	2,860	3,010	3,040	3,210	3,440	2,060	2,170	2,020	1,780	1,730	2,040	2,090	2,170	2,180	2,140
Other Services (Except Public Administration)	Core	2,710	2,650	2,740	2,710	2,920	0	0	0	0	0	3,350	3,330	3,160	3,280	3,180
	General	2,280	2,370	2,410	2,260	2,350	1,840	1,980	2,040	2,180	2,340	1,240	1,400	1,440	1,300	1,230
Public Administration	Core	2,030	1,980	1,950	1,940	2,020	0	0	0	0	0	2,750	2,480	2,510	2,610	2,660
	General	1,060	910	870	770	730	1,430	1,460	1,650	1,590	1,740	1,260	1,240	1,230	1,200	1,200
Wholesale and Retail Trade	Core	7,640	7,770	7,910	8,230	8,240	0	0	0	0	0	13,510	13,700	13,800	13,910	13,740
	General	9,160	9,370	9,120	9,490	9,550	3,900	3,450	3,560	3,760	3,700	6,720	6,900	7,320	7,670	7,770
Not Coded	Core	30	30	10	10	0	0	0	0	0	0	10	10	30	10	20
	General	0	10	10	0	0	0	0	0	0	0	0	0	30	0	10
Total	**Core**	**56,510**	**56,450**	**55,740**	**56,500**	**57,300**	**0**	**0**	**0**	**0**	**0**	**70,040**	**69,450**	**70,370**	**73,390**	**74,700**
	General	**34,380**	**34,410**	**36,490**	**36,800**	**37,170**	**57,160**	**63,210**	**61,840**	**65,080**	**64,640**	**21,500**	**21,960**	**23,030**	**23,570**	**22,990**
Grand Total		**90,890**	**90,860**	**92,230**	**93,300**	**94,470**	**57,160**	**63,210**	**61,840**	**65,080**	**64,640**	**91,540**	**91,410**	**93,400**	**96,960**	**97,690**

Note: EA Type refers to Core and General Employment Areas (see Employment Areas, page 22).

Table 9: Total Employment in Employment Monitoring Areas by Type of Employment Area and NAICS, 2014-2018

		West EMA					South EMA					All EMAs				
NAICS	**EA Type**	**2014**	**2015**	**2016**	**2017**	**2018**	**2014**	**2015**	**2016**	**2017**	**2018**	**2014**	**2015**	**2016**	**2017**	**2018**
Agriculture, Forestry, Fishing and Hunting	Core	0	0	10	0	0	0	0	0	0	0	10	10	10	0	0
	General	0	0	0	0	0	0	0	10	10	10	0	0	10	10	10
Mining, Quarrying, and Oil and Gas Extraction	Core	0	0	0	0	0	0	0	0	0	0	0	0	0	20	0
	General	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Utilities	Core	500	510	590	610	520	50	40	50	50	50	670	620	700	720	630
	General	0	0	0	0	0	10	10	10	10	0	3,230	3,280	2,960	2,990	2,850
Construction	Core	6,830	6,650	6,620	7,210	7,480	2,140	2,240	1,780	1,840	1,920	18,750	18,830	18,520	20,080	20,550
	General	220	280	280	310	620	460	390	280	380	360	4,470	3,940	3,750	4,260	4,260
Manufacturing	Core	20,870	20,950	20,690	22,120	21,740	5,580	5,820	5,880	5,960	5,910	69,480	69,430	69,240	72,130	73,010
	General	1,200	1,760	1,680	1,670	1,630	1,380	1,390	1,380	1,530	1,440	14,180	14,480	14,070	13,180	13,220
Transportation and Warehousing	Core	9,380	10,080	10,020	10,690	10,620	6,970	6,900	7,100	7,180	8,190	28,310	29,030	29,300	30,470	31,930
	General	550	460	510	250	260	60	80	120	150	150	2,330	2,480	2,950	2,910	2,960
Information and Cultural Industries	Core	2,150	2,650	2,110	2,240	1,960	2,570	3,290	3,070	2,650	3,450	8,180	9,510	8,510	8,350	8,090
	General	280	270	320	290	300	430	480	420	600	630	7,170	7,510	6,940	6,760	6,740
Finance and Insurance	Core	1,570	1,000	1,140	1,220	1,500	60	90	60	70	100	2,590	2,050	2,260	2,490	2,790
	General	250	220	240	230	240	120	130	140	140	130	8,620	11,640	10,610	10,500	10,770
Real Estate and Rental and Leasing	Core	2,210	2,010	2,010	1,970	1,830	800	850	770	610	550	4,510	4,600	4,580	4,320	4,230
	General	840	1,040	1,120	960	1,000	220	240	250	260	290	5,750	6,530	8,840	9,310	10,050
Professional, Scientific and Technical Services	Core	7,790	8,130	8,560	8,370	8,590	6,800	6,730	7,250	8,450	9,070	22,730	23,080	23,920	24,810	25,560
	General	160	130	120	130	130	1,190	1,210	1,450	1,740	1,930	15,070	15,820	15,550	16,830	17,310
Management of Companies and Enterprises	Core	2,550	2,550	3,230	3,340	3,380	830	760	830	780	940	7,180	7,130	8,120	7,680	7,810
	General	30	30	30	30	20	170	160	570	570	560	3,850	5,470	5,840	6,540	6,020
Administrative & Support, Waste Mgt & Remediation	Core	4,390	4,180	4,890	5,310	5,560	1,090	1,400	1,080	1,290	950	11,970	11,920	11,920	13,160	14,040
	General	140	180	140	200	100	1,660	1,680	2,290	2,540	2,190	9,320	9,270	10,670	12,440	11,620
Educational Services	Core	410	440	480	540	500	240	360	310	440	500	1,680	1,880	2,000	2,260	2,290
	General	130	130	140	190	190	250	280	290	310	320	3,740	3,910	4,340	4,630	4,370
Health Care and Social Assistance	Core	1,690	1,860	2,240	2,340	2,520	410	440	560	530	460	3,730	3,740	4,220	4,650	4,610
	General	250	270	280	280	280	440	620	630	630	630	8,350	8,610	8,760	9,040	8,400
Arts, Entertainment and Recreation	Core	2,000	1,940	1,920	2,220	2,350	550	530	550	570	760	4,230	3,480	3,470	3,580	3,930
	General	80	70	100	140	140	340	360	440	500	510	1,970	2,110	2,370	2,670	2,360
Accommodation and Food Services	Core	3,800	3,880	3,840	3,790	3,990	700	790	850	880	850	5,450	5,700	5,700	5,750	6,010
	General	1,560	1,580	1,600	1,650	1,610	1,340	1,400	1,440	1,490	1,510	9,860	10,250	10,270	10,300	10,420
Other Services (Except Public Administration)	Core	3,850	3,750	3,680	3,910	4,200	1,230	1,220	1,370	1,300	1,450	11,140	10,960	10,950	11,200	11,740
	General	310	320	340	360	340	1,040	980	990	1,050	1,060	6,700	7,040	7,220	7,140	7,330
Public Administration	Core	3,460	2,900	2,970	2,760	3,040	1,890	2,060	1,980	2,020	1,850	10,130	9,420	9,410	9,330	9,570
	General	210	210	200	110	110	0	0	10	10	10	3,950	3,820	3,960	3,670	3,790
Wholesale and Retail Trade	Core	12,630	13,360	13,370	13,470	13,640	2,950	2,880	2,890	2,960	3,280	36,730	37,700	37,970	38,560	38,900
	General	3,760	3,580	3,760	3,910	3,790	4,890	5,480	4,580	4,390	4,480	28,430	28,790	28,350	29,220	29,300
Not Coded	Core	10	30	30	0	0	0	10	20	0	10	50	80	70	20	30
	General	0	0	0	0	0	10	0	0	0	0	10	10	40	10	10
Total	**Core**	**86,090**	**86,870**	**88,400**	**92,110**	**93,420**	**34,880**	**36,390**	**36,380**	**37,580**	**40,280**	**247,500**	**249,140**	**250,860**	**259,570**	**265,700**
	General	**9,970**	**10,530**	**10,860**	**10,710**	**10,760**	**13,990**	**14,880**	**15,300**	**16,290**	**16,230**	**136,990**	**144,960**	**147,500**	**152,400**	**151,770**
Grand Total		**96,060**	**97,400**	**99,260**	**102,820**	**104,180**	**48,860**	**51,270**	**51,680**	**53,860**	**56,510**	**384,500**	**394,100**	**398,360**	**411,980**	**417,470**

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).

Endnotes

1. City of Toronto (2017). Economic Development and Culture. Economics Estimate 2011-2016. https://www.toronto.ca/city-government/data-research-maps/city-stats-in-detail/
2. Statistics Canada (2018). Gross domestic product, expenditure-based, Canada. Quarterly. Table: 36-10-0449-01 (formerly CANSIM 380-0064).
3. Federal Reserve Bank of St Louis (2018). Real Quarterly GDP. https://fred.stlouisfed.org/tags/series?t=gdp%3Bquarterly%3Busa
4. Statistics Canada (2018). Gross domestic product, income and expenditure, second quarter 2018. https://www150.statcan.gc.ca/n1/daily-quotidien/180830/dq180830a-eng.htm
5. Organisation for Economic Co-operation and Development (2018). Consumer Confidence Index. https://data.oecd.org/leadind/consumer-confidence-index-cci.htm
6. Organisation for Economic Co-operation and Development (2018). Busniess Confidence Index. https://data.oecd.org/leadind/business-confidence-index-bci.htm
7. https://economics.td.com/provincial-economic-forecast
8. CBRE Research (2018). Toronto Industrial MarketView, Q3 2018.
9. City of Toronto, City Planning Division, Research and Information (2018). How Does the City Grow, July 2018.
10. Cushman Wakefield (2018). Marketbeat: Greater Toronto Area, ON, Office Q3 2018.
11. CBRE Research (2018). Toronto Office MarketView, Q3 2018.
12. Karsten, J. and West, D. M. (2017). Technology adoption powers shift in retail landscape. The Brookings Institute. https://www.brookings.edu/blog/techtank/2017/05/10/technology-adoption-powers-shift-in-retail-landscape/
13. CBRE Research (2018). Toronto is North America's most popular market for international retail expansion.
14. CBRE Research (2018). How Global is the Business of Retail?
15. Citywide employment growth in 2018 also includes approximately 40 jobs that remained uncoded under NAICS.

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