TORONTO City Planning

This bulletin summarizes the findings of the 2019 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 TO

Toronto Employment Survey 2019

Survey Highlights

2019 employment	1,569,800
employment increase	46,920
employment growth	3.1%
business establishments	76,560
new business establishments	3,810
new office employment	23,470
office job growth	3.2%
new institutional employment	16,770
institutional job growth	6.6%
new downtown jobs	19,440
downtown job growth	3.4%

A Growing 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 its competitive advantages and create a vibrant city and region.

The Toronto area continues to prosper. From 2011 to 2018, Toronto's GDP is estimated to have grown 2.7% per year, outpacing the average annual growth rates of both Ontario (2.2%) and Canada (2.1%).[1]

The 2019 Toronto Employment Survey counted 1,569,800 jobs, an increase of 46,920 jobs or 3.1% from 2018.

In Toronto, growth is managed through the Provincial Growth Plan and Toronto's Official Plan. A Place to Grow: the Growth Plan for the Greater Golden Horseshoe, 2019 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 (2019) forecasts 3.4 million people and 1.72 million jobs in the City of Toronto by 2041.
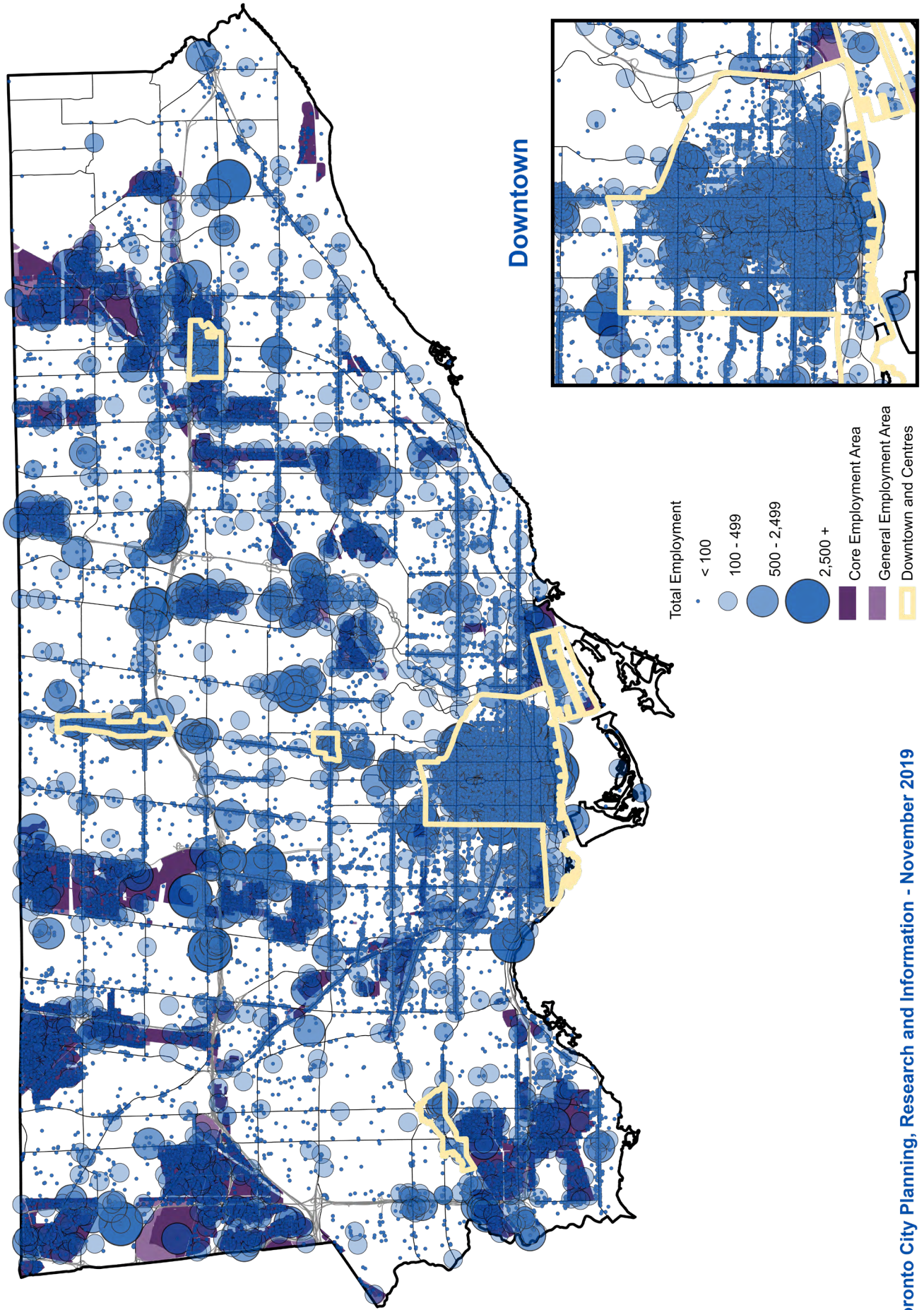
Toronto's Official Plan, which came into force in June 2006, and which has subsequently undergone thematic policy updates, guides development in the city. Its policies promote economic prosperity by supporting growth and managing land use change.

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

The 2019 Toronto Employment Survey offers a detailed picture of Toronto's economy, highlighting key citywide trends and emerging patterns in the growth management areas of the Official Plan.

In 2019, the Survey acquired employment data from 89% of identified business establishments.

Map 1: Employment Concentrations, City of Toronto

Downtown

Total Employment

- < 100
- 100 - 499
- 500 - 2,499
- 2,500 +

Core Employment Area
General Employment Area
Downtown and Centres

Toronto City Planning, Research and Information - November 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 implementation 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 Is 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 business establishments:

- 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 2019, employment data was acquired from 89% of identified businesses establishments, an increase from the 2018 response rate of 86%.

Survey Geography

Surveyors conduct in-person business establishment interviews in commercial, industrial, institutional and mixed use areas across the city, including:

- Major office and service clusters in Downtown and the Centres
- Employment Areas which are 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.

2019 employment growth of 46,920 jobs or 3.1% was above long term trends.

City Employment Overview

Continued urban growth

In 2019, the Toronto Employment Survey recorded 1,569,800 jobs in the city of Toronto, a gain of 46,920 jobs or 3.1% from 2018 (see Table 1). Growth in 2019 exceeds Toronto's five-year average employment growth rate of 2.5%, as well as the city's 10-year average rate of 2.0%. In comparison, Statistics Canada's Labour Force Survey reported an employed labour force of 1,569,900 people in Toronto in September 2019 (seasonally adjusted three month average).[2]

Toronto's employment growth from about Q2 2018 through Q2 2019 as measured by the Survey sits between estimates of economic output from both Canada (1.6% of GDP)[3] and the U.S. (4.0%) in the same periods.[4]

Exports driving growth

Canada-wide economic growth was driven by exports in 2019, with services and goods-producing industries achieving 2.6% growth in economic output from Q2 2018 through Q2 2019. Real GDP growth increased to 0.9% in Q2 2019 from 0.1% quarterly growth in the previous two quarters. Gains were primarily driven by an increase in export volumes of 3.2% in Q2 2019, continuing trends from 2018. Exports of goods continue to be led by energy products, and rose 3.7% in Q2 2019 after increasing 2.3% in the first quarter. Exports of services increased by 1.1% in the second quarter, driven by growth in travel services.[5]

Consumer and business 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 100.34 in July 2019, down from 101.03 in July 2018, but up from 99.81 in July 2014.[6]

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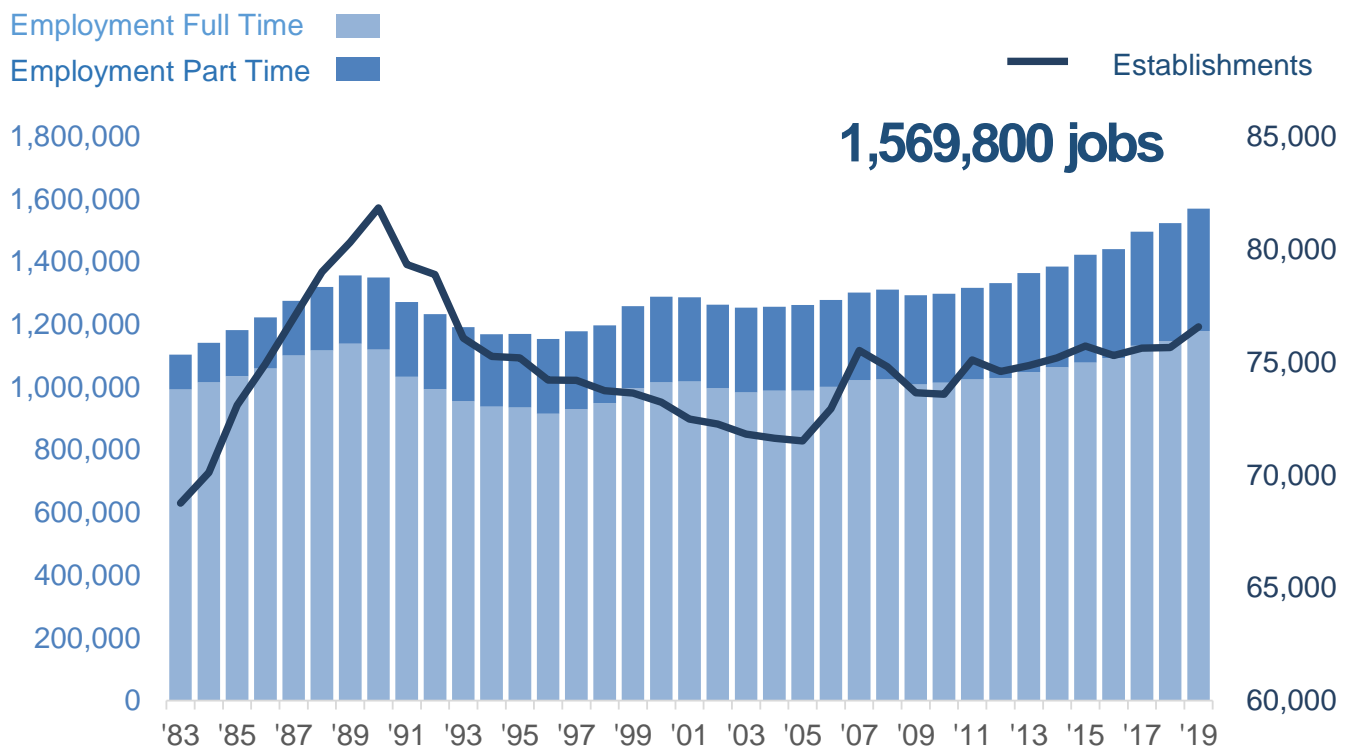
Note: See Table 1: Total Employment

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 future, and provides a qualitative index on economic conditions. The index was 112.31 in July 2019, below a peak of 122.68 in July 2018 but above the July 2014 level of 102.66.[7]

Full-time job growth

Full-time employment (75.1% of total) grew more slowly than the city average, adding 31,930 jobs (2.8%) from 2018. Part-time employment (24.9% of total) added 14,980 jobs (4.0%) from 2018.

The 2018-2019 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 1.3% per annum since 2009 (see Figure 1).

Office led employment gains

Toronto's Office category added 23,470 jobs, exactly half of all net new jobs, and grew by 3.2% from 2018.

Office continues to be the city's largest employment category and growth driver with 753,420 jobs (48.0% of the city total). Office employment has increased on average by 2.6% annually since 2014. Office employment is expected to remain stable until at least 2021 due to the current low interest rate environment as well as low unemployment.[8]

Other category gains

The city's employment growth in 2019 was also shared by the Institutional, Service and Retail categories. Manufacturing and Warehousing as well as Community and Entertainment, the City's two smallest categories, showed slight employment declines.

Improved survey coding

In 2019, land use activity codes were updated to create new codes for emerging activities. Each year, improvements are made to the coding process to improve the specificity and accuracy of both land use activity and employment classification.

Full-time employment grew slightly slower than overall employment, adding 31,930 jobs (2.8%) from 2018.

Table 1: Total Employment - 2009, 2018, 2019

Employment	Total Number of Employees			Net Change	Growth Rate %	Net Change	Growth Rate %
	2009	2018	2019	2009-2019		2018-2019	
Full-time	1,008,380	1,147,010	1,178,940	170,560	16.9%	31,930	2.8%
Part-time	284,810	375,870	390,850	106,040	37.2%	14,980	4.0%
Total	**1,293,190**	**1,522,880**	**1,569,800**	**276,610**	**21.4%**	**46,920**	**3.1%**

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

Key Citywide Trends

Office Trends

Office employment continues to lead overall employment growth in Toronto, adding 23,470 jobs or 3.2% in 2019 (see Figures 2 and 3, and Table 3 on page 9). Sub-categories with above average growth this year included Business Services and Technical Services, which respectively grew by 8.2% and 6.4% from 2018. In Business Services, growth was driven by Computer Services (13.0% annual growth), Management Consultants (8.7%), and Personnel Services (7.7%). The expansion of the technology sector in Toronto is covered in further detail beginning on page 28.

In Technical Services, activities leading employment growth in 2019 included Tenants of Hot Desk / Touchdown Offices (Co-working) which had 22.5% annual growth (1,480 jobs), as well as Architects and Planners (9.3%) and Interior Designers / Decorators (7.4%). The growth of the latter two activities reflects the ongoing scale of Toronto's

development and construction activity, which added almost 900,000 square metres of non-residential space – mostly office – just from large projects (over 50,000 square metres) between 2014 and 2018.[9]

Co-working spaces have experienced extremely strong growth in Toronto over the past five years. In 2014, this activity accounted for just under 2,000 jobs with roughly 30 establishments. By 2019, employment had expanded by 6,170 jobs or 327.1% (65.4% annualized), and the category now includes around 120 establishments. Providers of co-working space have helped to drive demand for office space in Toronto along with technology firms.[10,11]

High demand for office space is continuing, particularly in the downtown. As of Q3 2019, downtown's office vacancy rate was reported at 1.3% and 2.2% by different sources, while the Greater Toronto Area (GTA) rate was reported at 4.1% and 5.8% due to greater availability in suburban locations.[10,12]

Figure 2: 2018-2019 Employment Growth Share by Category

The Office Category led 2019 job growth in the city
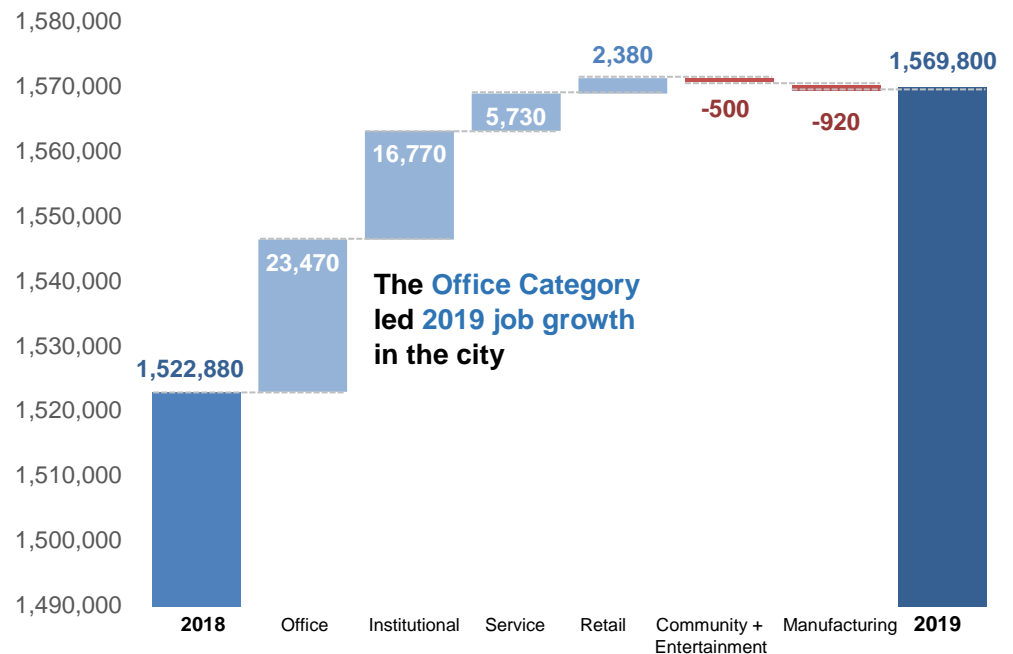
Institutional Trends

The Institutional category experienced robust growth over the past year, adding almost 17,000 jobs and 6.6%, more than double the five-year average of 3.2%. This expansion has been driven primarily by gains in post-secondary education, private education, and health care.

Public Universities and Colleges grew by a combined 13.5% from 2018, adding almost 7,800 jobs. Almost half of this increase was due to the resumption of full staffing of teaching assistants at York University after a 2018 strike. The remainder of growth resulted from expansion and increases in enrollment at a range of institutions, reflecting a nation-wide trend towards higher enrollment over the past decade.[13]

There have also been significant gains in education in the private sector, with the Private Education sub-category expanding by 4.4% from 2018 and by 19.6% since 2014 (annualized 3.9%).

Healthcare employment has continued to increase in Toronto, with the Health Services sub-category adding 6,000 jobs or 7.0% from 2018. This growth aligns with a nation-wide increase in health-related expenditures.[14] Growth has been distributed across many hospitals and facilities but particularly those that have recently completed renovations or expansions.

Additional healthcare jobs related to serving the elderly population, such as at Homes for the Aged, have grown steadily over the last five years at an annualized rate of 2.8%. As Canada's population ages, health-related employment growth can be expected to continue.

Institutional Volunteers

In 2018, the Survey began recording volunteer employment at Institutional establishments in Toronto to better understand patterns of volunteer work. Findings from a 2017 pilot survey showed that more volunteers were located at Institutional establishments than any other employment category.

In 2019, the Survey counted 28,425 Institution-based volunteers in Toronto, or approximately 10.4% of the magnitude of all Institutional employment in 2019.

Top sub-categories for volunteers included Places of Worship (77.5%), Collective Residential (8.6%), Health Services (6.9%), and Private Educational (5.6%); see Figure 4. These four sub-categories contain the vast majority (98.4%) of all Institution-based volunteers in Toronto.

Figure 3: 2018-2019 Employment Growth vs. 5-Year Average

Category	2018-2019	5-year average
Institutional	6.6%	3.1%
Office	3.2%	2.6%
Service	3.0%	2.9%
Retail	1.6%	1.3%
Manufacturing	-0.7%	1.8%
Community + Entertainment	-0.88%	3.3%
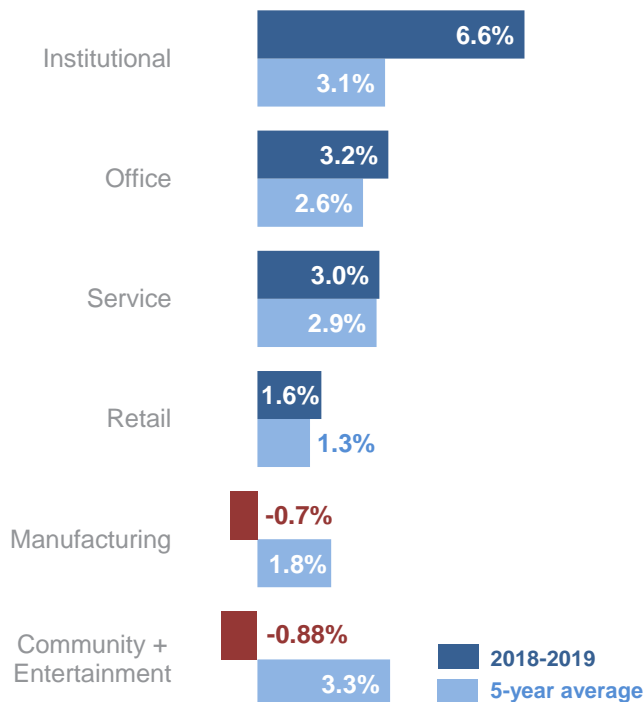
Figure 4: Volunteers by Type of Establishment, 2019

Places of Worship	22,089	77.5%
Collective Residential	2,437	8.6%
Health Services	1,955	6.9%
Private Educational	1,597	5.6%
Other (5)	407	1.4%
Total	**28,425**	
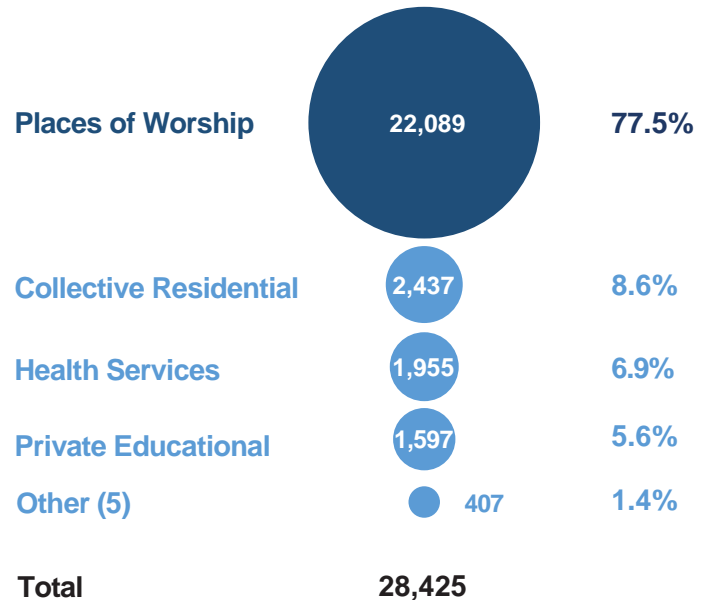
Manufacturing employment declined by 0.7% in 2019, though the Warehousing sub-category experienced strong growth.

Manufacturing and Warehousing Trends

After experiencing growth for the past two years, employment in Manufacturing and Warehousing declined in 2019 by 920 jobs or -0.7%. Notable closures this year include the Campbell's Soup factory, which previously contributing over 500 manufacturing jobs in Etobicoke. However, change in this category has bifurcated, with Warehousing employment experiencing stronger growth than Manufacturing employment.

As a sub-category, Warehousing has grown by 1,090 jobs or 7.1% in the last year, and at an annualized rate of 4.4% between 2014 and 2019. Meanwhile, employment in the Manufacturing sub-category lost 2,010 jobs or -1.6% in 2019, with an annualized growth rate of 1.6% over the past five years. Demand for industrial space is being driven by e-commerce and food

warehousing and distribution, as evidenced by the recent expansion or planned construction of distribution centres for Amazon and Canada Post in Scarborough, and Purolator and Metro in Etobicoke.[15,16] Local companies such as Canada Goose and the cosmetics company Deciem have also rapidly expanded distribution employment over the last year. Combined, these six examples represent almost 2,400 existing or planned jobs in Warehousing (roughly half exist in 2019 and half are anticipated at new facilities).

This demand for industrial space in Toronto has contributed to an industrial vacancy rate of between 0.5% and 0.7% as of Q3 2019, which is in line with the GTA average vacancy rate of 0.4% to 0.7%.[16,17] The GTA industrial market is one of the most competitive in North America.[15]

Table 2: New Establishments, 2018-2019

Location	2018	2019	Category	2018	2019
Centres	250	150	Manufacturing	180	140
Downtown	770	980	Retail	480	520
Employment Areas	1,000	1,030	Service	940	980
Rest of the City	1,460	1,640	Office	1,370	1,340
			Institutional	170	410
			Community & Entertainment	340	410
City Total	**3,470**	**3,810**	**City Total**	**3,470**	**3,810**

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

Retail Trends

Retail employment grew by 2,380 jobs or 1.6% in 2019, just above the five-year average growth rate of 1.3%. This trend reflects data on retail sales, which grew slightly for the Toronto Census Metropolitan Area (CMA) in July 2019 (seasonally adjusted three month average).[2] Similarly to Manufacturing and Warehousing, the Retail category is also being impacted significantly by the growth of e-commerce, which had sales growth of 20% Canada-wide from March 2018 to March 2019, compared to 1.6% growth for retail sales overall.[18]

Within the Retail category, the Food and Beverage sub-category has been driving growth in 2019. Both Specialty Food Store employment and Liquor, Wine and Beer Store employment grew at above average rates from 2018, adding 3.2% and 5.3% respectively. New locations or expansions of grocery stores have also contributed significantly to growth over the past couple of years, including new openings, expanded online grocery services, as well as growth in organic grocers.[19]

The last year saw several bankruptcies and closure of clothing and footwear retail brands, including Payless Shoe Source, Town Shoes, Forever 21, J. Crew, and Gymboree, as well as home furnishings retailer Home Outfitter.[19] However, the impact of these closures in Toronto was limited, with closed locations of these chains contributing to a collective loss of approximately 450 jobs, or 0.3% of all retail employment in 2019.

Although cannabis-related retail has received significant media attention since the legalization of cannabis in 2018, business establishment employment in Toronto is still relatively small given the limited number of retail licenses being allocated.

Retail employment rebounded from 2018, adding 2,380 jobs or 1.6%.

Table 3: Employment by Category, 2009, 2014, 2018, 2019

Category	Total Number of Employees				Net Change	Growth Rate %	Net Change	Growth Rate %	Net Change	Growth Rate %
	2009	2014	2018	2019	2009-2019		2014-2019		2018-2019	
Manufacturing	130,130	124,610	137,210	136,290	6,160	4.7%	11,680	9.4%	-920	-0.7%
Retail	142,280	144,540	151,750	154,130	11,850	8.3%	9,590	6.6%	2,380	1.6%
Service	150,960	170,630	191,330	197,060	46,100	30.5%	26,430	15.5%	5,730	3.0%
Office	610,870	662,970	729,950	753,420	142,550	23.3%	90,450	13.6%	23,470	3.2%
Institutional	216,500	233,730	255,900	272,670	56,170	25.9%	38,940	16.7%	16,770	6.6%
Community & Entertainment	42,460	47,920	56,740	56,240	13,780	32.5%	8,320	17.4%	-500	-0.9%
Total	**1,293,190**	**1,384,390**	**1,522,880**	**1,569,800**	**276,610**	**21.4%**	**185,410**	**13.4%**	**46,920**	**3.1%**

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

Business Establishments

In 2019, the Survey counted a record 76,560 business establishments in the city, a net increase of 920 establishments or 1.2% (see Figures 5 and 6). This is the highest annual increase since 2011, when 1,530 establishments were added. Since 2014, the number of business establishments in Toronto has grown on average 0.4% annually.

Net gains in establishments included Institutional (350), Office (340), Service (300), and Community and Entertainment (120). Net total establishment counts decreased in Retail (-150) and Manufacturing (-70).

New Establishments in the City

The net change in business establishment statistic measures business location openings and closures (see Table 2 on page 8). New establishments include both new business starts as well as new locations of existing firms.

Beginning in 2018, the Survey programme was enhanced by implementing additional tracking of occupant moves, to more accurately distinguish relocations from new location openings or closures.

Employees per Establishment

In 2019, the average number of employees per establishment increased to 20.5 (see Figure 7). This metric has increased steadily at a rate of 2.3% annually from 18.4 in 2014. The increase is partly due to a slower increase in business locations relative to employment growth, which may have resulted from factors such as the consolidation of employees in fewer establishments with higher employee density. Examples include the City of Toronto's Office Modernization Program, as well planned consolidation at Rogers Media's head office.[15,20]

In 2019, the number of large businesses (with 100 or more employees) increased by 106 to 2,485. Toronto's large businesses make up 3.2% of Toronto's establishments.

Figure 5: Establishments in the City of Toronto, 1983-2019
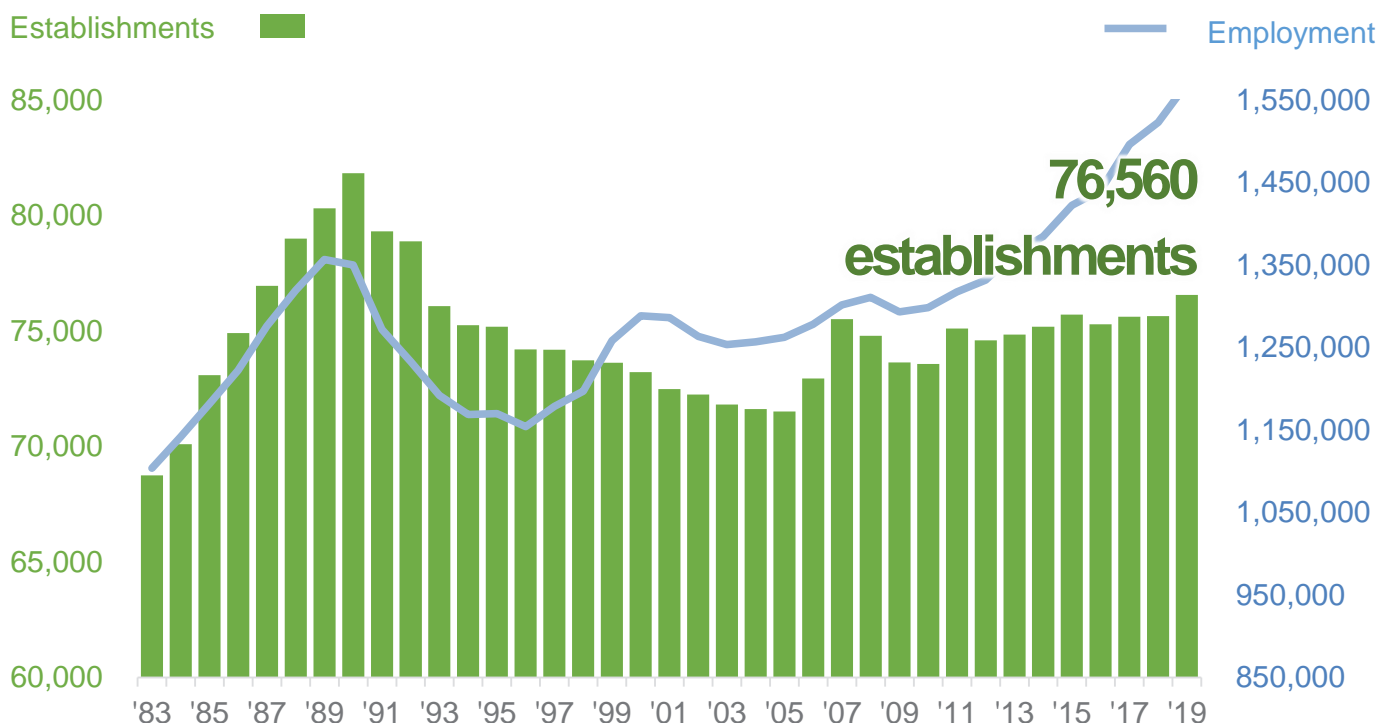
Location of New Establishments

Citywide, the Survey counted 3,810 net new business establishments, 5.0% of the 2019 total. Of these new locations, the Survey counted 1,030 (27.1%) in Employment Areas, 980 (25.8%) in Downtown and 150 (3.9%) in the Centres. The remainder, 1,640 new establishments (43.2%), are located in the rest of the city (see Figure A.1 in Appendix).

Since 2014, Downtown's share of new establishments has increased the most (3.5%), while the rest of the city has seen a slight decrease in the share of new establishments (-0.5%).

Office (35.3%) led the share of new establishments in 2019, followed by Service (25.7%) and Retail (13.7%).

Despite secular global trends, Toronto remains an attractive location for industrial establishments, adding 140 new manufacturing establishments in 2019 which represent 760 manufacturing jobs.

Longevity

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

In 2019, 35.7% of Toronto's business establishments reported being at the same location for less than 5 years; some 31.3% of establishments reported being at the same location for 6 to 15 years (see Figure A.2 in Appendix).

Overall, 33.0% of the city's establishments have remained in the same location for more than 15 years. This breadth of business location tenure demonstrates a strong degree of stability in the local economy despite economic cycles and recessions.

Figure 6: Total 2019 Establishments by Category

Office	29,080
Service	19,030
Retail	14,620
Institutional	6,340
Manufacturing	4,960
Community + Entertainment	2,520
Total	**76,560**

Figure 7: Employees per Establishment, 2000-2019

43.0 Institutional
27.5 Manufacturing
25.9 Office
22.3 Community + Entertainment
20.5 All Sectors
10.4 Retail
10.4 Service
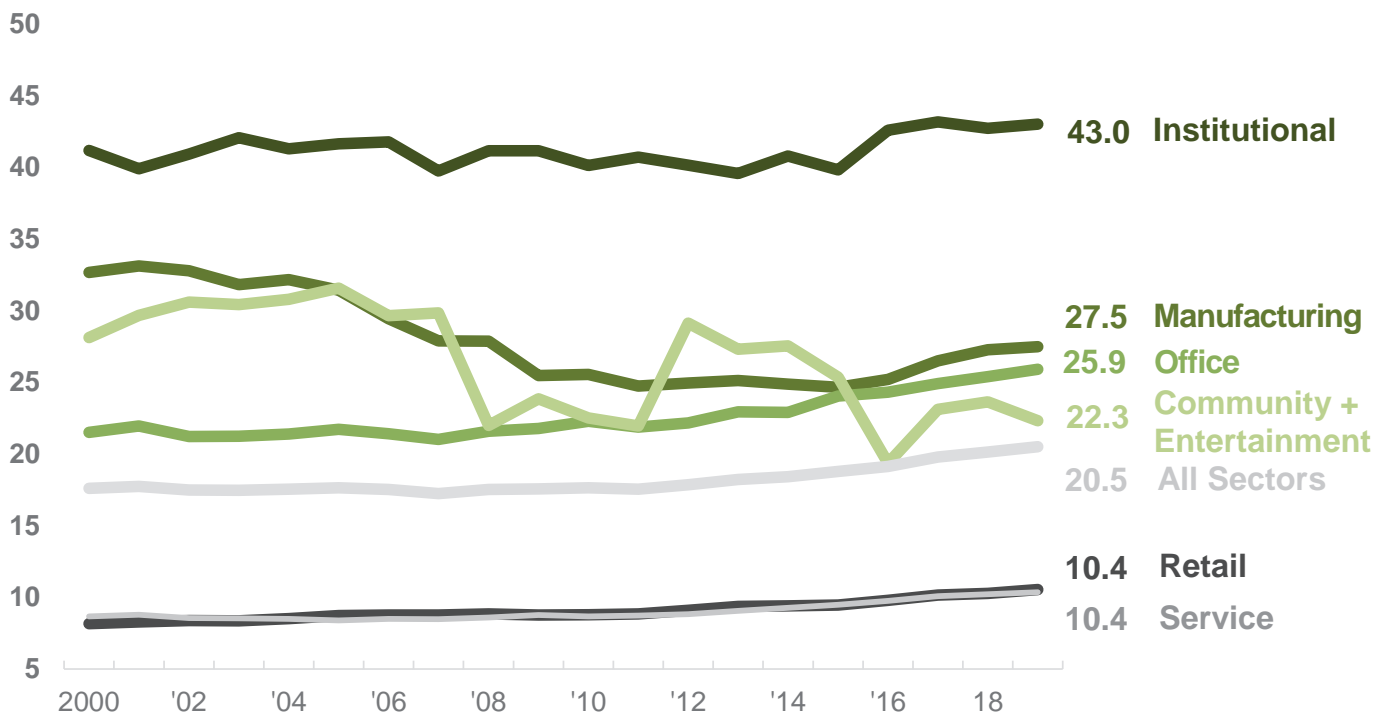
Toronto's top employment Categories are Office (48.0%), Institutional (17.4%), and Service (12.6%).

Employment Categories

The Survey utilizes six employment categories to reflect the underlying land use activities of employment across the city. See Maps A.1 to A.6 in the Appendix for the spatial distributions of their employment across Toronto.

Structural Change

In 2019, Toronto employment increased by 46,920 or 3.1%, exceeding the city's five-year (2.5%) and ten-year (2.0%) compound annual growth rates.

Over the five-year period from 2014 to 2019, four categories have grown faster than the city average: Community and Entertainment, Institutional, Service, and Office (see Figure 8).

City Employment Share

Toronto's top employment categories are Office (48.0%), Institutional (17.4%) and Service (12.6%); see Figures 9, 10 and 11. Employment growth in these categories contributed to 84% of net job growth in the city since 2014.

The remaining shares of city employment are Retail (9.8%), Manufacturing and Warehousing (8.7%) and Community and Entertainment (3.6%). While Retail and Manufacturing employment have lagged Toronto's job growth over the last five years, Community and Entertainment has been Toronto's fastest-growing category, averaging 3.4% growth over the last five years.

Figure 8: 2018-2019 Employment Increase by Category

Office	23,470	3.2%
Institutional	16,770	6.6%
Service	5,730	3.0%
Retail	2,380	1.6%
Community + Entertainment	-500	-0.9%
Manufacturing	-920	-0.7%
Total	46,920	
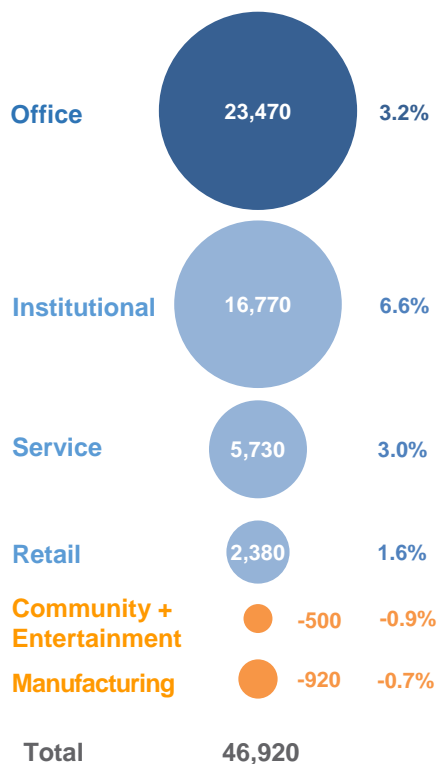
Figure 9: Total 2019 Employment by Category

Office	753,420	48.0%
Institutional	272,670	17.4%
Service	197,060	12.6%
Retail	136,290	9.8%
Manufacturing	154,130	8.7%
Community + Entertainment	56,240	3.6%
Total	1,569,800	
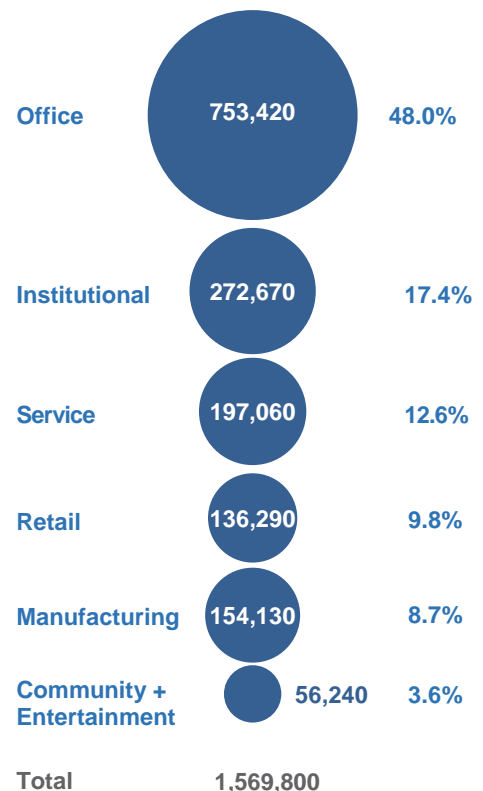
City Establishment Share

Toronto's categories of business establishments have a similar pattern to employment, with Office (38.0%), Service (24.9%) and Retail (19.1%) making up the largest shares, followed by Institutional (8.3%), Manufacturing (6.5%) and Community and Entertainment (3.3%); see Figures 10 and 11.

With fewer employees per location and broader geographic dispersal, 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 90,450 jobs since 2014 with an average annual growth rate of 3.2%.

Institutional has added 38,940 jobs since 2014 and grown at an annual average of 3.2%.

Service has been the third-fastest growing employment category since 2014, adding 26,430 jobs and growing by an average of 2.9% annually.

Community and Entertainment, despite being the smallest category, has grown the fastest since 2014, adding 8,320 jobs or 3.4% annual average growth. However, employment declined by 0.9% in 2019, largely due to a re-classification of a large pool of mobile employees at Maple Leaf Sports and Entertainment (MLSE) from holding multiple part-time positions at two locations to being based at a single location.

Retail employment has changed significantly in the last ten years. In 2009, the category had experienced its third consecutive year of job loss, shedding 5,490 jobs. Periods of growth from 2011 to 2013 and 2015 to 2017 were followed by job loss in 2014 and 2018. Retail has rebounded in 2019, adding 2,380 jobs or 1.6%, with 1.3% average annual growth and 9,590 jobs added since 2014.

Manufacturing and Warehousing employment experienced a slight setback in 2019, decreasing by 920 jobs or -0.7% after experiencing two years of strong growth in 2017 and 2018. While Manufacturing has experienced a long-term decline in growth, the majority of that decline occurred prior to 2009. As a result, the post-recession ten-year trend is positive with 6,160 jobs or 0.6% average annual growth since 2009, and 11,680 jobs or 1.8% average annual growth since 2014.

Figure 10: City Share of Employment by Category in 2019

Category	Share
Office	48.0%
Institutional	17.4%
Service	12.6%
Retail	9.8%
Manufacturing + Warehousing	8.7%
Community + Entertainment	3.6%
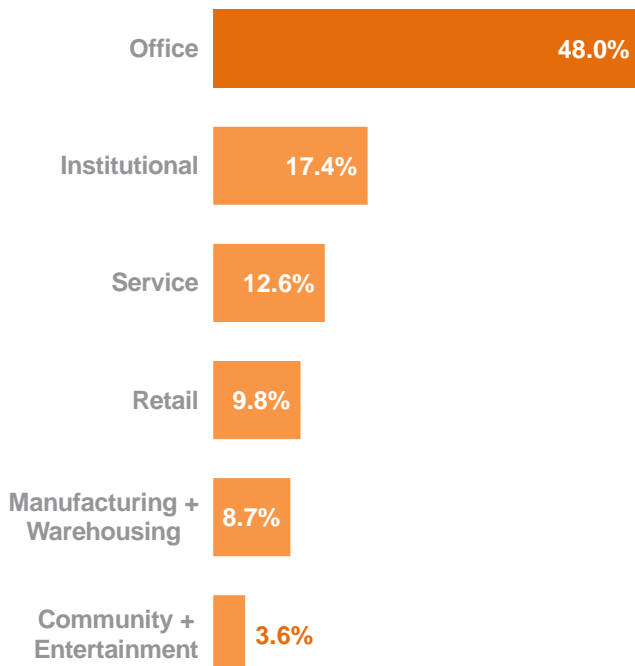
Figure 11: City Share of Establishments by Category in 2019

Category	Share
Office	38.0%
Service	24.9%
Retail	19.1%
Institutional	8.3%
Manufacturing + Warehousing	6.5%
Community + Entertainment	3.3%
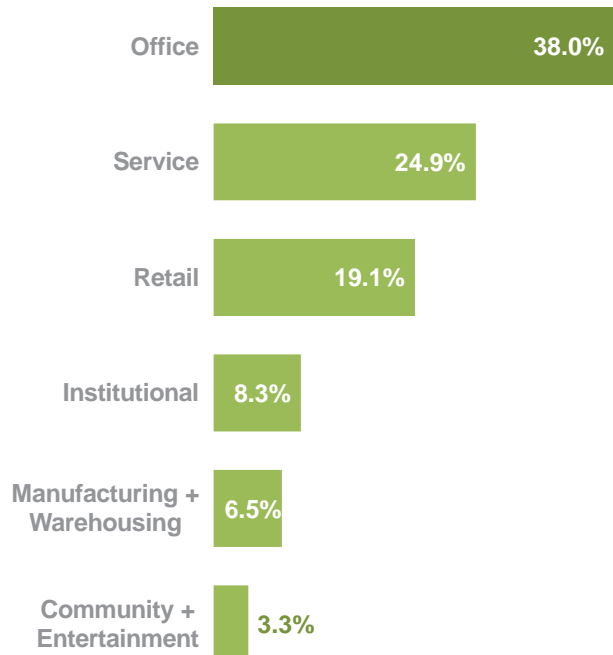
Service-based industries make up 78.4% of employment in Toronto's economy.

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 2019, the Survey was extremely successful in coding Toronto's establishments with 98.7% of businesses assigned a full 6-digit code.

Toronto's Economy

Three major industries make up the employment shares of Toronto's economy (see Figures 13 and 14): Service-Based industries (78.4%), Government and Institutional industries (13.5%) and Goods Producing industries (8.1%).

Since 2014, growth in Government and Institutional (18.0%) and Service-Based jobs (15.2%) have balanced employment losses in Goods Production (-6.9%). Total five-year employment net change totaled 185,410 jobs added, including Service-Based (162,660 jobs), Government and Institutional (32,290 jobs) and Goods Producing industries (a loss of 9,480 jobs).

Figure 12: City Employment Share by NAICS Sector, 2019

	5YR Trend	2019 Total
Health Care and Social		12.4%
Finance and Insurance		11.3%
Professional, Scientific + Technical		11.1%
Retail Trade		9.2%
Educational Services		8.3%
Accommodation + Food		8.0%
Manufacturing		5.8%
Public Administration		5.2%
Other Services		5.1%
Admin., Waste + Remediation		4.1%
Information + Cultural		3.3%
Management		3.1%
Real Estate, Rental + Leasing		3.0%
Transportation + Warehousing		3.0%
Wholesale Trade		2.5%
Arts, Entertainment + Recreation		2.2%
Construction		2.2%
Utilities		0.2%
Agricultural et al.		0.0%

Service-Based employment led growth in 2019, adding 41,270 jobs (3.5%). Government and Institutional added 9,770 jobs (4.8%). Goods Production lost 4,070 jobs (-3.1%), continuing a five-year trend of decreasing employment (see Figure 12).

Major Sectors

The Survey uses NAICS to classify the economy into 20 major sectors. Toronto's largest NAICS sector is Health Care and Social Assistance, comprising 194,210 jobs or 12.4% of city employment.

In 2019, 52.3% of all jobs in Toronto were in the top five NAICS sectors (see Figure 12). Three of these five sectors have increased their shares of total employment since 2014: Finance and Insurance (+1.9%), Educational Services (+1.0%) and Health Care and Social Assistance (+0.2%). Four of the five top sectors had the highest annual growth rates in 2019, demonstrating a consolidation of employment in Toronto's major economic sectors.

In 2019, the top sectors for job growth included:

- Finance and Insurance (adding 15,170 net jobs or 9.3%)

- Professional, Scientific and Technical Services (adding 13,710 net jobs or 8.6%)

- Health Care and Social Assistance (adding 10,350 net jobs or 5.6%)

- Educational Services (adding 9,140 net jobs or 7.5%).

Since 2014, additional sectors have experienced above-average annual growth rates and five-year employment increases:

- Real Estate, Rental and Leasing added 9,410 jobs since 2014, averaging 4.9% annual growth

- Transportation and Warehousing added 8,000 jobs since 2014, averaging 4.1% annual growth

- Accommodation and Food Services added 19,520 jobs since 2014, averaging 3.7% annual growth.

Figure 13: Employment Share by Major NAICS Sector, 2014-2019

Services 77.1% ●━━━━━━● 78.4%

80%
70%
60%
50%
40%
30%
20%

Government & Institutional 13.0% ●━━━━● 13.5% 10%
Goods Producing 9.9% ●━━━● 8.1% 0%
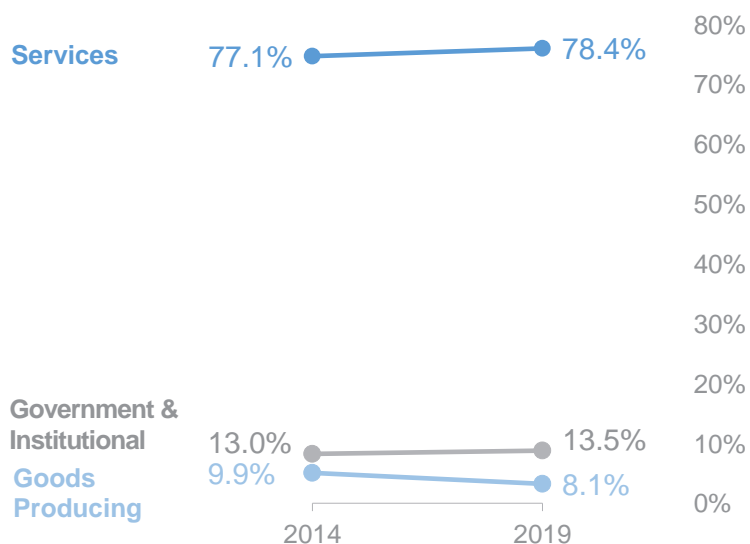
2014   2019

Figure 14: Establishments by Major NAICS Sector, 2014-2019

Services 66,970

Government & Institutional 5,420

Goods Producing 3,920

Not Coded 250

Total 76,560
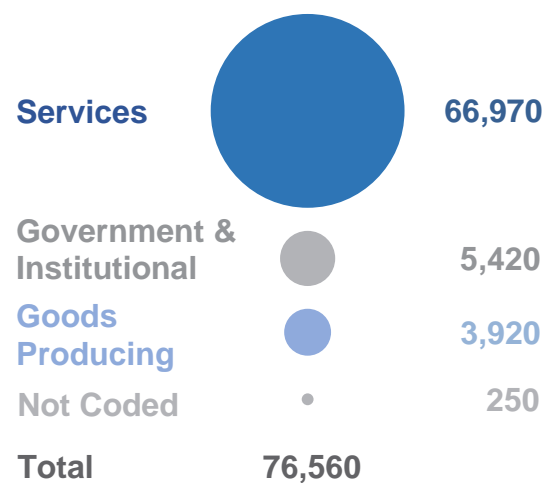
Urban Economic Structure

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 re-urbanization 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 A Place to Grow: the Growth Plan for the Greater Golden Horseshoe, 2019 ("the Growth Plan").

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

Map 2: Urban Economic Structure

Legend:
- Downtown and Centres
- Secondary Plan Areas
- Core Employment Area
- General Employment Area
- Avenues

1	Agincourt	12	Etobicoke Centre	23	Sheppard West/Dublin
2	Highland Creek	13	Fort York Neighbourhood	24	Central Don Mills
3	Morningside Heights	14	Garrison Common North	25	Swansea
4	Port Union Village Community	15	King-Parliament	26	Emery Village
5	Scarborough Centre	16	King-Spadina	27	Davenport Village
6	Yonge St. Clair	17	Railway Lands East	28	Regent Park
7	Downsview Area	18	Railway Lands Central	29	Sheppard Commercial
8	North York Centre	19	Railway Lands West	30	Warden Woods
9	Sheppard E. Subway Corridor	20	University of Toronto	32	Lawrence-Allen
10	York University	21	Yonge Eglinton	34	Queen River
11	Motel Strip	22	Central Finch		

Note: See Appendix, Table 7: Secondary Plan Areas

accommodate intensification and higher densities of both population and employment. Strategic Growth Areas include Urban Growth Centres, Major Transit Station Areas, infill sites such as brownfields or greyfields, and may include lands along major roads with existing or planned frequent transit service or higher order transit corridors.

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

Employment in Downtown

Toronto's Downtown is a local and national economic hub. It contains 584,660 jobs within 21.4km², 37.2% of Toronto's jobs with an average employment density of 27,320 jobs per km² (273 jobs per hectare).

In 2019, employment in Downtown increased by 19,440 jobs or 3.4% (see Figures 15 and 16). Downtown has grown at an average annual rate of 4.2% since 2014, adding a total of 101,950 jobs since that time. This employment growth rate is above the city's average of 2.5% over the last five years (see Table A.1, Appendix).

Office employment comprises 65.3% of Downtown employment. The Office category added 11,720 jobs in 2019, growing at 3.2%. Every category experienced growth except Community and Entertainment, which decreased by -7.2%, largely due to the reclassification of MLSE jobs described in the Employment Categories topic on page 13. Institutional gained the most employment (8.1%), followed by Manufacturing and Warehousing (6.1%), Retail, and Service (both 3.0%).

Downtown continues to attract a significant share of new establishments. In 2019, 26% of new business establishments were counted in Downtown, up from 22% in 2018.

Toronto's Downtown continued its growth in 2019, adding 19,440 jobs (3.4%) and attracting 22% of new establishments.

Centres
82,320

Employment Areas
423,780

Rest of the City
478,050
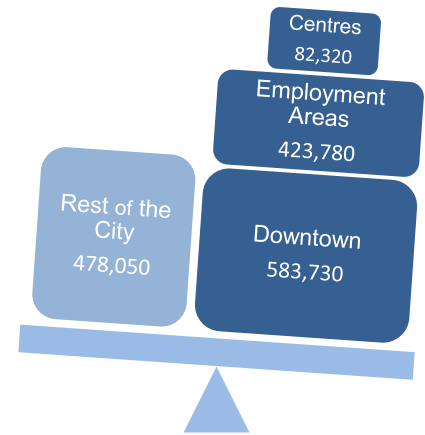
Downtown
583,730

Figure 15: Downtown Employment Change 2018-2019

Office	11,720
Institutional	6,550
Service	1,760
Retail	850
Manufacturing + Warehousing	250
Community + Entertainment	-1,700

Figure 16: Employment Growth vs. Five-Year Average

	2018-2019	5-year average
Downtown	3.4%	4.2%
All Areas	3.1%	2.7%
Employment Areas	1.6%	2.1%
Centres	1.1%	0.7%
Rest of City	4.4%	1.9%
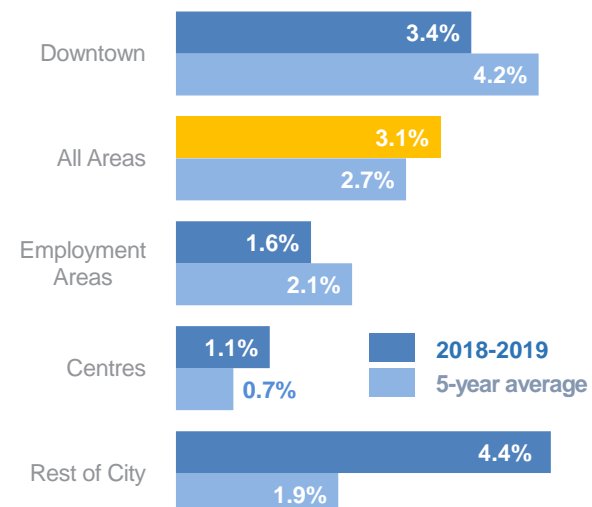
Figure 17: The Centres Employment Change 2018-2019

North York Centre

Category	Value
Office	740
Service	500
Community + Entertainment	20
Manufacturing + Warehousing	0
Retail	-120
Institutional	-150

Scarborough Centre

Category	Value
Retail	90
Manufacturing + Warehousing	60
Service	20
Community + Entertainment	-100
Institutional	-140
Office	-1,090

Yonge-Eglinton Centre

Category	Value
Office	280
Community + Entertainment	240
Service	110
Institutional	20
Manufacturing + Warehousing	0
Retail	-20

Etobicoke Centre

Category	Value
Office	170
Retail	130
Service	90
Institutional	40
Manufacturing + Warehousing	10
Community + Entertainment	-60

The Centres

The four Centres are home to 82,320 jobs or 5.2% of employment in the city. In 2019, the Centres together added almost 900 jobs (1.1%), below the citywide rate of (3.1%); see Figure 17 for 2019 employment change in each of the Centres. Nearly three-quarters of all Centres jobs are in the Office category (see Figures 18 and 19).

North York Centre

North York Centre is Toronto's largest Centre with 35,920 jobs, comprising 2.3% of jobs in the city. Almost 8 in 10 jobs in North York Centre are Office, representing 28,340 jobs (78.9%).

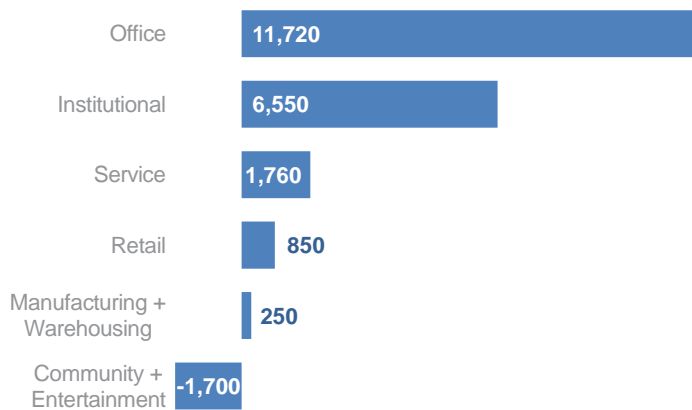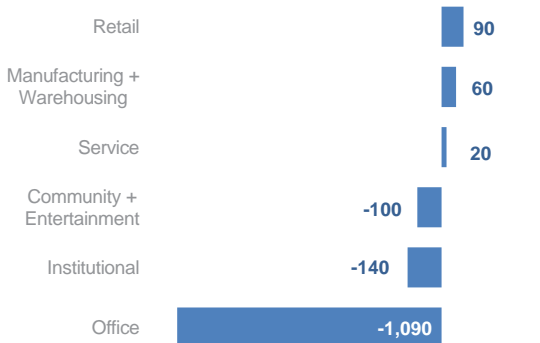In 2019, North York Centre saw net increases in Office (740 jobs or 2.7%) and Service (500 jobs or 16.5%), and net decreases in Institutional (-150 jobs or -7.2%) and Retail (-120 jobs or -7.3%). Community and Entertainment and Manufacturing remained stable. Since 2014, North York Centre employment increases were mostly in Service (1,190 jobs) and Institutional (210 jobs).

Scarborough Centre

Employment in Scarborough Centre totaled 16,830 jobs in 2019, comprising 1.1% of the City's total. The Survey counted a decrease of 1,150 jobs or -6.4% from 2018. Yet over the five-year period since 2014, Scarborough Centre added 390 jobs with an average annual growth rate of 0.5%.

Almost all of Scarborough's employment decrease over the past year was in the Office category (-1,090 jobs or 9.5%). This decrease is due in part to the relocation or consolidation of jobs at locations in Downtown, including firms such as Telus and SAP Canada (-550 jobs), as well

as some volatility in employment counts at existing firms year-over-year.

Small employment losses were also experienced in Institutional (140 jobs) and Community and Entertainment (100 jobs), while Retail (90 jobs), Manufacturing (60 jobs), and Service (20 jobs) experienced slight growth. Over the longer five-year period since 2014, Office grew by 800 jobs.

Yonge-Eglinton Centre

Yonge-Eglinton Centre is Toronto's second largest Centre by employment with 18,720 jobs, or 1.2% of the City's total. Yonge-Eglinton contains the highest density of employment of any Centre with approximately 31,000 jobs per square kilometre. In 2019, employment in this Centre grew by 640 jobs or 3.5%.

Over three-quarters (75.9%) of employment in Yonge-Eglinton Centre is Office. The Office employment category expanded by 280 jobs (2.0%) in 2019. Community and Entertainment also grew (240 jobs), as did Service (110 jobs). Institutional, Manufacturing, and Retail employment were stable.

Etobicoke Centre

Etobicoke Centre is the smallest Centre in Toronto, but has grown the fastest of all Centres since 2014 (3.1% per annum), adding 1,470 jobs. The Centre has 10,850 jobs total, representing 0.7% of employment in Toronto.

Most employment is in the Office category (7,580 jobs or 69.9%), followed by Service (1,270 jobs) and Institutional (1,040 jobs). Since 2014, Office has added 990 jobs, followed by Institutional (220 jobs) and Service (210 jobs).

Figure 18: Downtown and Centres, Share of Employment by Category in 2019

	Downtown	North York	Scarborough	Yonge-Eglinton	Etobicoke
Office	65%	79%	62%	76%	70%
Institutional	15%	5%	3%	4%	10%
Service	10%	10%	9%	9%	12%
Retail	5%	4%	20%	6%	6%
Community + Entertainment	4%	2%	2%	4%	2%
Manufacturing + Warehousing	1%	0%	4%	0%	0.4%
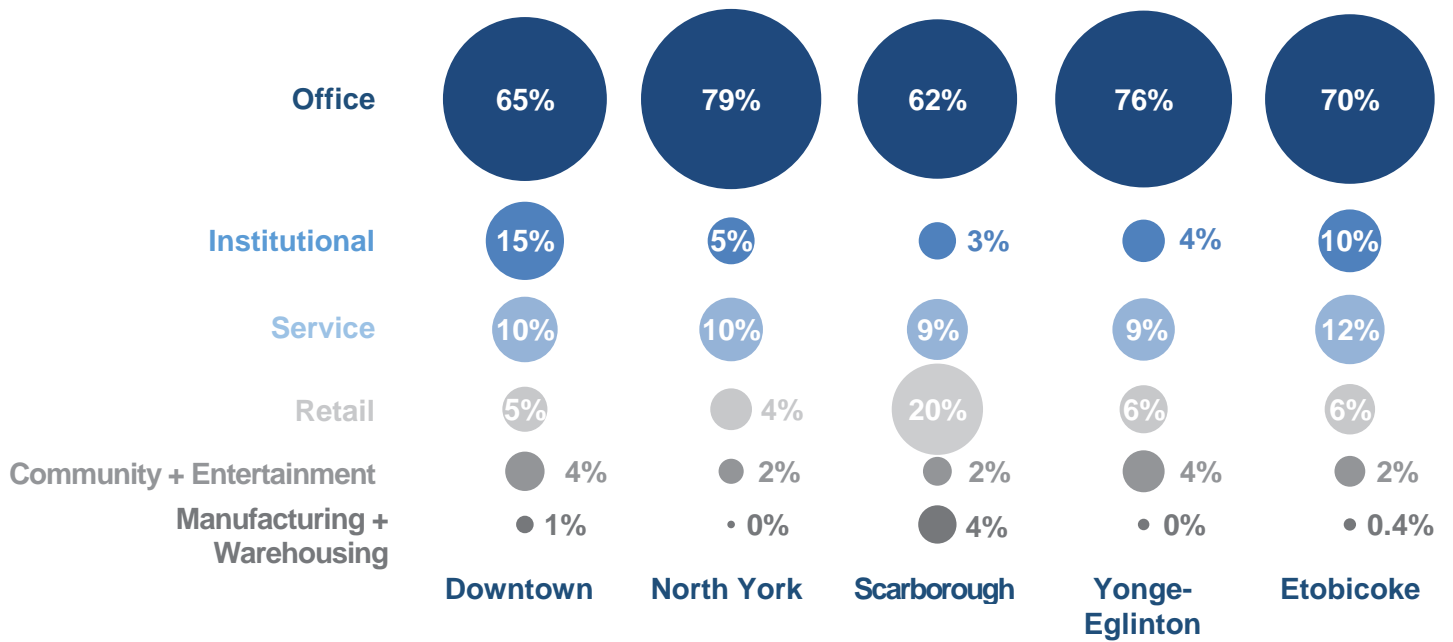
Figure 19: Downtown and Centres, Share of Establishments by Category in 2019

	Downtown	North York	Scarborough	Yonge-Eglinton	Etobicoke
Office	50%	50%	33%	66%	56%
Service	23%	30%	18%	17%	23%
Retail	16%	10%	34%	10%	11%
Institutional	5%	7%	5%	5%	6%
Community + Entertainment	3%	2%	2%	2%	2%
Manufacturing + Warehousing	2%	1%	8%	1%	1%
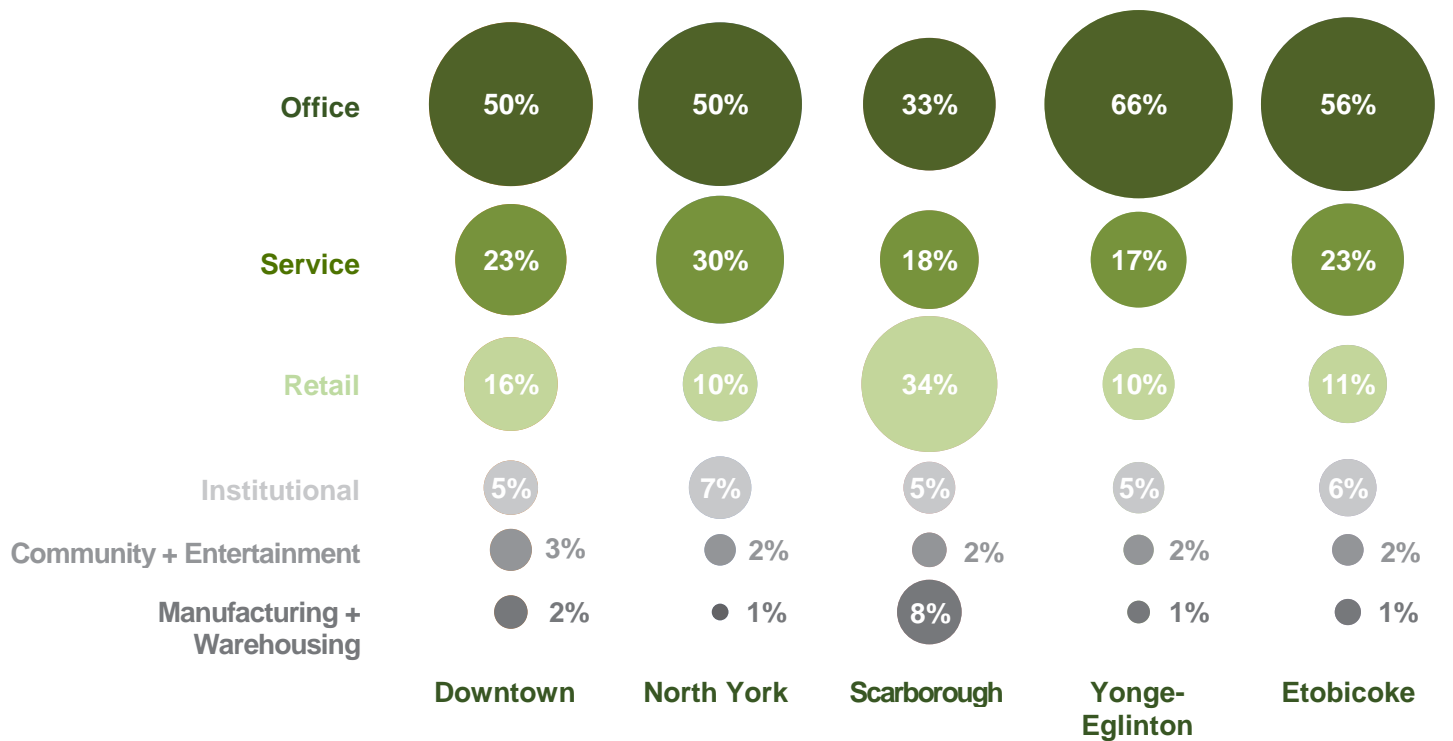
Employment in Secondary Plan Areas

With one-fifth of all employment, 21.0% or 329,560 jobs, Secondary Plan areas reflect much of the city's recent urban growth. In 2019, Secondary Plan employment grew by 15,480 jobs or 4.9%, out-pacing the city's average growth rate of 3.1%.

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 detailed Secondary Plan areas for Downtown, North York Centre and Yonge Eglinton Centre differ somewhat from the urban structural elements of the Centres and Downtown as depicted in the Official Plan. Employment and establishment counts for these Secondary Plan areas differ from the totals for Downtown and the Centres.

Figure 20: Secondary Plan Areas, 2019 Employment

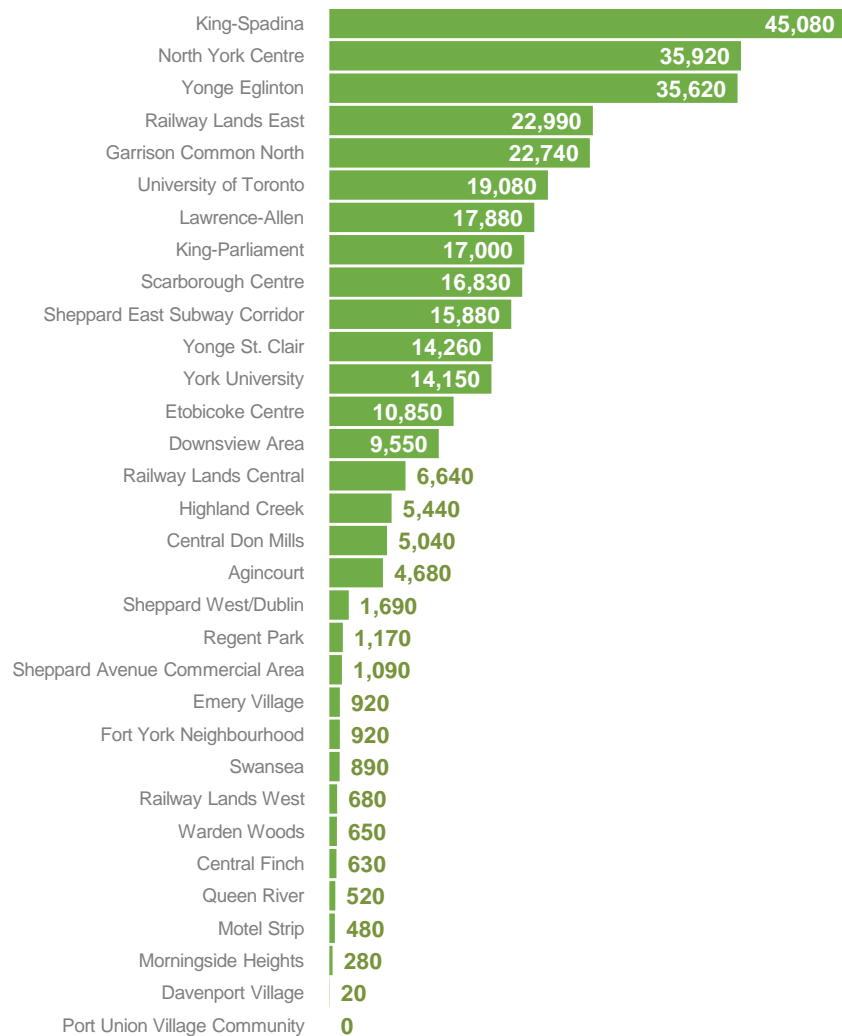| Secondary Plan Area	Employment
King-Spadina	45,080
North York Centre	35,920
Yonge Eglinton	35,620
Railway Lands East	22,990
Garrison Common North	22,740
University of Toronto	19,080
Lawrence-Allen	17,880
King-Parliament	17,000
Scarborough Centre	16,830
Sheppard East Subway Corridor	15,880
Yonge St. Clair	14,260
York University	14,150
Etobicoke Centre	10,850
Downsview Area	9,550
Railway Lands Central	6,640
Highland Creek	5,440
Central Don Mills	5,040
Agincourt	4,680
Sheppard West/Dublin	1,690
Regent Park	1,170
Sheppard Avenue Commercial Area	1,090
Emery Village	920
Fort York Neighbourhood	920
Swansea	890
Railway Lands West	680
Warden Woods	650
Central Finch	630
Queen River	520
Motel Strip	480
Morningside Heights	280
Davenport Village	20
Port Union Village Community	0

Note: See Appendix, Table A.2: Secondary Plan Areas

Secondary Plan Area Employment

Secondary Plan employment includes approximately one-fifth of all employment in Toronto for each category except Manufacturing, including 23.5% of all Office employment in the city (see Table A.2 in the Appendix).

Almost half (49.3%) of employment within Secondary Plan areas is concentrated in the five largest areas by employment (see Figure 20). 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 21 and 22).

Almost all of these Secondary Plan areas have added jobs over the past year, with two exceptions: Scarborough Centre and King-Spadina Secondary Plan areas. Combined, the largest Secondary Plan areas added 12,340 jobs (79.8% of all growth in Secondary Plan areas).

Smaller Secondary Plan areas

The 20 smaller Secondary Plan areas (with less than 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 and Railway Lands West. Also, Institutional employment is the main category in Highland Creek, Morningside Heights and Fort York Neighbourhood, while Manufacturing employment is the most prevalent category in Downsview and Warden Woods. In 2019, smaller Secondary Plan areas collectively grew by 3,130 jobs, mostly driven by Institutional employment growth in the Highland Creek Secondary Plan area.

Figure 21: Secondary Plan Area Employment, 2019

Category	Employment
Office	177,330
Institutional	59,690
Service	39,380
Retail	29,920
Community + Entertainment	15,340
Manufacturing	7,910
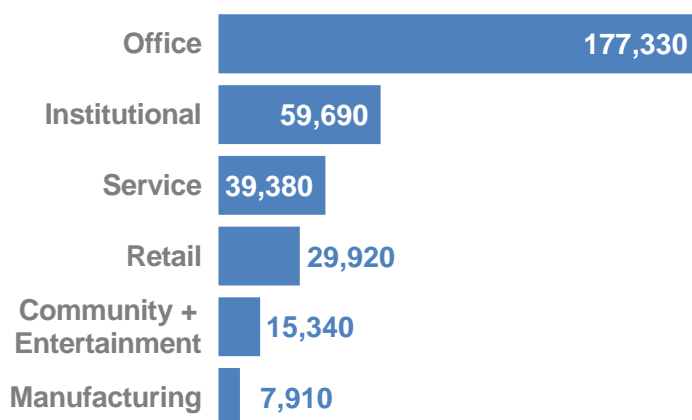
Figure 22: Secondary Plan Area Establishments, 2019

Category	Establishments
Office	6,480
Service	2,970
Retail	2,130
Institutional	920
Community + Entertainment	410
Manufacturing	200
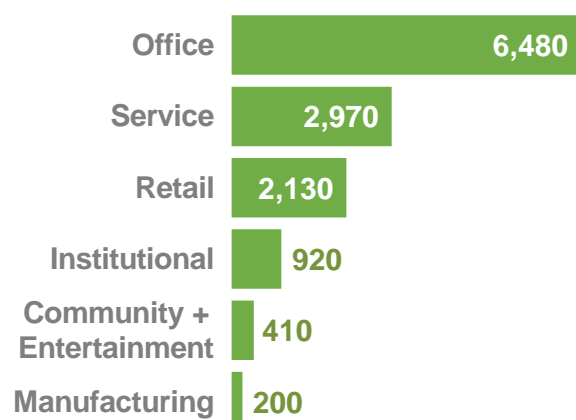
Employment Areas

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 2019 Toronto Employment Survey. Overall, 29.5% of all establishments, 22,610 locations, and 27.0% of all jobs, 423,920 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 92.3% of all Manufacturing jobs located in Toronto's Employment Areas (see Map 4).

Employment Areas continue to attract new businesses, with 27.1% of new establishments in the city, 1,030 in total, locating in Employment Areas in 2019.

Regional Employment Policies

The 2019 Growth Plan contains employment growth forecasts for the City of Toronto. Employment is forecast to grow to 1,720,000 jobs by 2041. This same forecast appears in the 2017 Growth Plan and the 2006 Growth Plan as amended in 2013.

If the average rate of employment growth continues (2.5% annually over the last five years), Toronto is likely to reach the Growth Plan forecast between 2023 to 2025, at least sixteen years before the forecast. The Province has initiated a review of the Growth Plan forecasts. The employment forecast for Toronto is likely to be revised upward.

Often, industrial and other impactful employment uses have few alternative locations in the city due to the potential impacts of their activities on

Map 3: Toronto's Employment Areas and Employment Monitoring Areas (2019)

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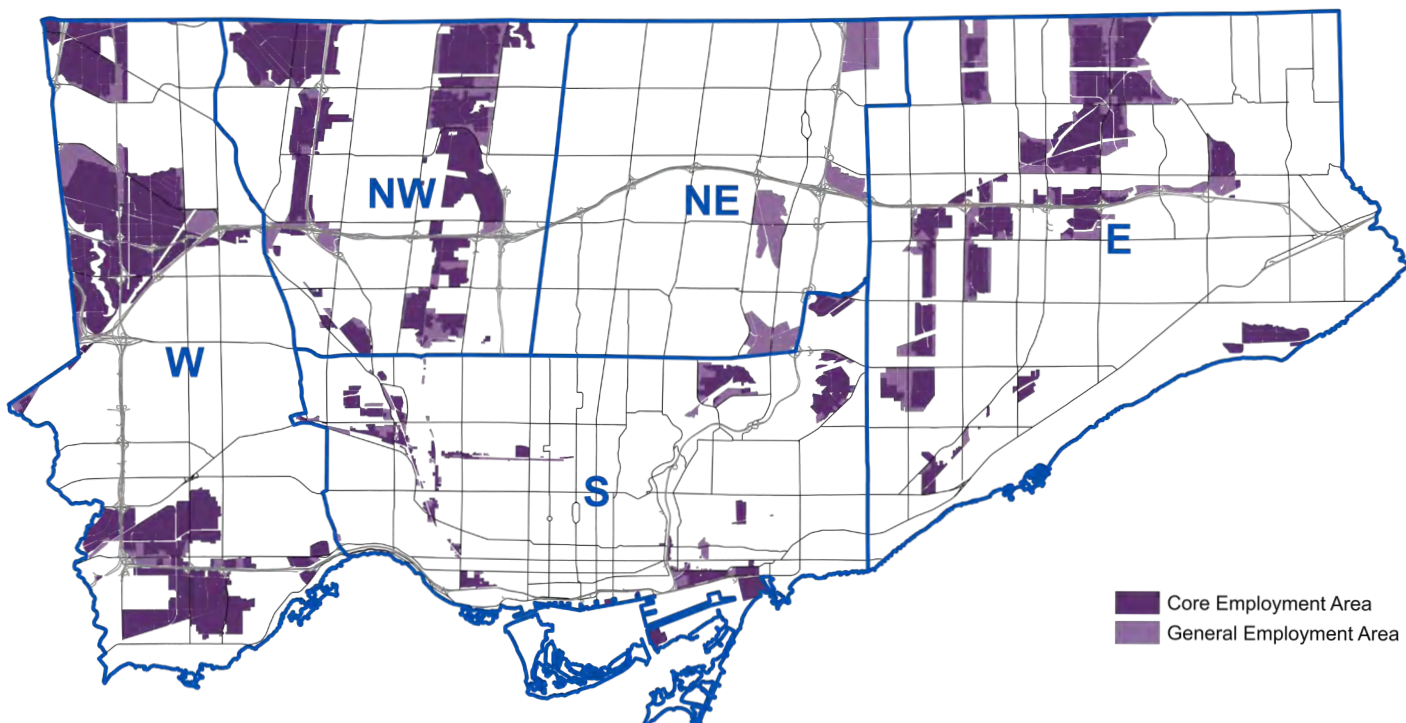
residential and other sensitive land uses. Conflicts related to the conversion of employment lands to residential or other sensitive uses can destabilize an entire area, resulting in employment loss and erosion of available areas for business formation or expansion.

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

In January 2019, the Province circulated Proposed Amendment 1 to the Growth Plan for the Greater Golden Horseshoe, 2017. In consultation with municipalities, the amendment created Provincially Significant Employment Zones (PSEZs), areas defined by the Minister for the purpose of long term planning for job creation and economic development. Employment Areas identified as being within a PSEZ may not be converted to non-employment uses outside of a Municipal Comprehensive Review. A number of PSEZs have been identified in Toronto by the Province, but the boundaries have not been finalized.

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 ceased reporting on Employment Districts and began reporting on Employment Areas in 2016 (including data to 2013). See Table A.4 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 tend to be located within the interior of Employment Areas. Uses that would attract the general public into the interior of employment lands and 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, service, and restaurants. These areas have increased visibility and transit access to draw the broader public.

Map 4: Toronto's Employment Density (2019)

Legend:
- Downtown and Centres
- > 2,400 jobs
- 1,201 to 2,400 jobs
- 451 to 1,200 jobs
- 151 to 450 jobs
- 1 to 150 jobs
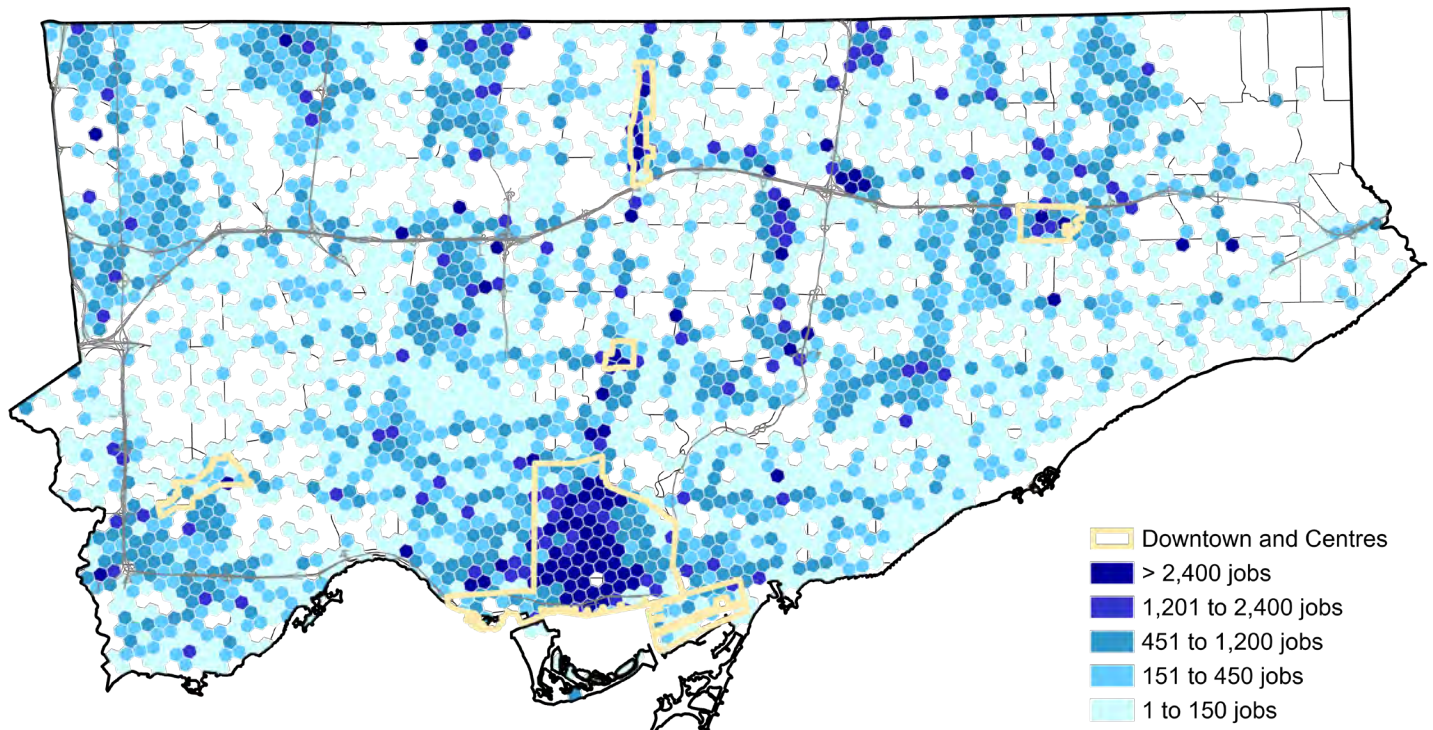
Employment Areas contain 27.0% of all jobs and 29.5% of all business establishments.

Employment Area Sector Activity

Manufacturing employment is the top sector across Employment Areas, making up 19.8% of all jobs (83,730 jobs), followed by employment in Wholesale and Retail Trade (16.2% or 68,750 jobs) and Professional, Scientific and Technical Services (10.4% or 44,040 jobs).

Employment Areas accommodate important concentrations of jobs citywide in several sectors, led by employment in Manufacturing (92.3%), Utilities (81.8%), Transportation and Warehousing (77.7%) and Construction (70.4%).

Core Employment Area Activity

Core Employment areas continue to host land-consumptive land uses. They cover 60.7 square kilometres in Toronto, which represents 9.6% of the city's total land area. With 64.1% of all jobs in Employment Areas, Core Employment Areas contain an average of almost 4,500 jobs per square kilometre.

In 2019, these areas led Employment Area jobs in Manufacturing (79.3% or 71,980 jobs), Wholesale and Retail Trade (14.4% or 39,160 jobs) and Transportation and Warehousing (12.5% or 33,950 jobs).

Core Employment Areas are leading locations citywide for employment in Manufacturing (79.3%), Transportation and Warehousing (71.8%) and Construction (59.5%). See Figure 23.

Figure 23: Core Employment by NAICS 2019

Sector	5YR Trend	2019 Total
Manufacturing		71,980
Wholesale + Retail Trade		39,160
Transportation + Warehousing		33,950
Professional, Scientific and Technical		26,670
Construction		20,150
Admin., Waste + Remediation		14,970
Other Services		12,610
Public Administration		9,970
Information + Cultural		8,610
Accommodation + Food		6,490
Management		5,780
Finance and Insurance		4,940
Health Care and Social		4,790
Real Estate, Rental + Leasing		4,270
Arts, Entertainment + Recreation		3,890
Educational Services		2,640
Utilities		660
Agriculture et al.		10
Mining et al.		0

General Employment Area Activity

General Employment Areas provide support activities for Core Employment Areas and help buffer heavy industrial uses from surrounding areas. They cover 21.2 square kilometers in Toronto, 3.3% of the city's land area. With 35.9% of Employment Area jobs, they have an average employment density of almost 4,250 jobs per square kilometre.

Sectoral employment in General Employment Areas is led by Wholesale and Retail Trade, having 19.4% of employment area jobs (29,590 jobs), followed by Professional, Scientific, and Technical Services (11.4% or 17,370 jobs) and Finance and Insurance (8.1% and 12,310 jobs).

General Employment Areas are leading locations citywide for employment in Utilities (59.2%), Real Estate and Rental and Leasing (21.9%) and Administrative and Support, Waste Management and Remediation services (18.1%).

Wholesale and Retail Trade (16.1%), Management of Companies and Enterprises (13.3%), and Manufacturing (13.0%) also have significant shares of jobs citywide in General Employment Areas (see Figure 24).

In 2019, employment in Toronto's Employment Areas grew by 1.6%, adding 6,560 jobs.

Figure 24: General Employment by NAICS 2019

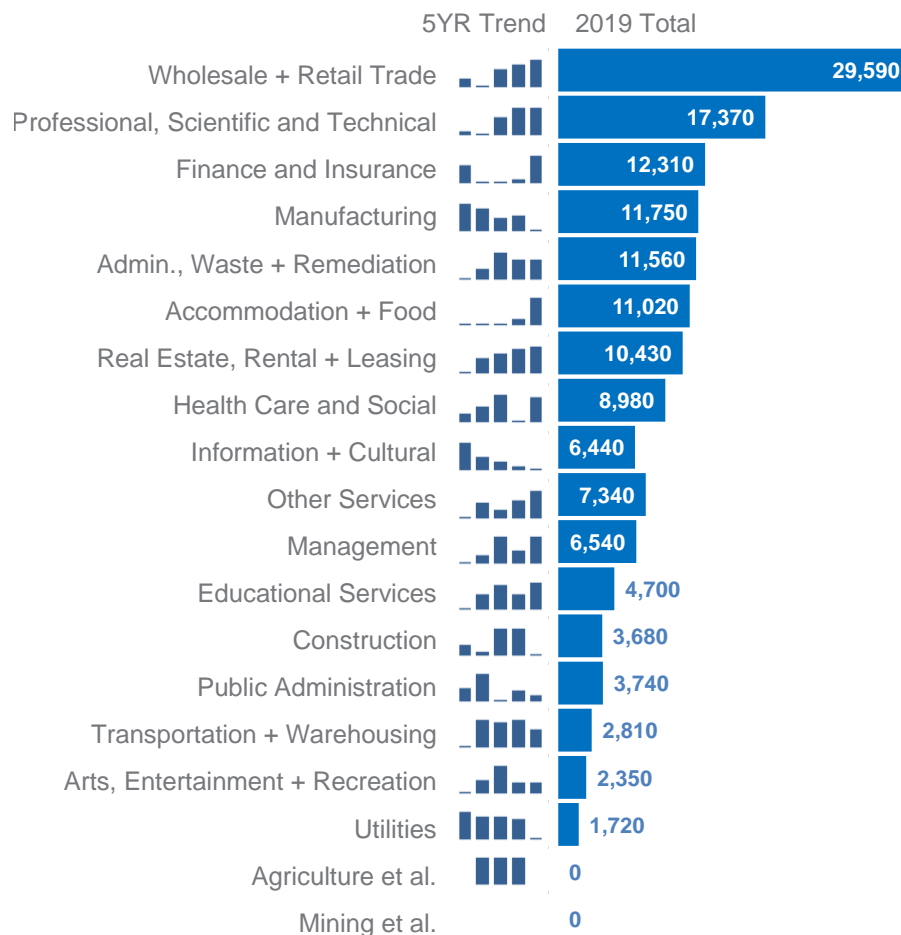|	5YR Trend	2019 Total
Wholesale + Retail Trade		29,590
Professional, Scientific and Technical		17,370
Finance and Insurance		12,310
Manufacturing		11,750
Admin., Waste + Remediation		11,560
Accommodation + Food		11,020
Real Estate, Rental + Leasing		10,430
Health Care and Social		8,980
Information + Cultural		6,440
Other Services		7,340
Management		6,540
Educational Services		4,700
Construction		3,680
Public Administration		3,740
Transportation + Warehousing		2,810
Arts, Entertainment + Recreation		2,350
Utilities		1,720
Agriculture et al.		0
Mining et al.		0

Figure 25a: Top Employment Sectors by EMA 2019

West EMA - Top 6 NAICS Sectors

Sector	Jobs
Manufacturing	22,220
Wholesale + Retail Trade	17,500
Transportation and Warehousing	11,440
Professional + Scientific	8,590
Construction	7,780
Accommodation and Food Services	5,810

South EMA - Top 6 NAICS Sectors

Sector	Jobs
Professional + Scientific	12,310
Wholesale + Retail Trade	8,530
Transportation and Warehousing	8,380
Manufacturing	6,730
Information and Cultural	4,290
Administrative, Support + Waste	3,310

Northwest EMA - Top 6 NAICS Sectors

Sector	Jobs
Manufacturing	27,260
Wholesale + Retail Trade	21,170
Professional + Scientific	7,290
Construction	6,940
Transportation and Warehousing	6,540
Administrative, Support + Waste	5,700

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 on page 22, and Figures 25 and 26).

In 2019, employment grew by 1.6% in all EMAs, below the average annual growth rate of 2.1% since 2014.

West

The West EMA approximates the former municipality of Etobicoke. 24.6% of Employment Area jobs (104,110 jobs) are in the West EMA. Of these, 89.3% are within Core Employment Areas. In 2019, West EMA employment decreased by 70 jobs or -0.1%, with a positive five-year trend of 8.4% or 8,040 jobs added since 2014.

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 25a) include Manufacturing (21.3%), Wholesale and Retail Trade (16.8%) and Transportation and Warehousing (11.0%).

In 2019, Transportation and Warehousing had the largest year-over-year growth in the West EMA, adding 560 jobs or 5.2%. It also experienced the most growth since 2014, adding 1,510 jobs with 3.0% average annual growth.

South

The South EMA approximates the areas of the former municipalities of the City of Toronto, York, and East York. Some 14.0% of Employment Area jobs (59,240 jobs) are in the South EMA. 72.8% of these jobs are within Core Employment Areas. In 2018, South EMA employment grew by 4.8%, adding 2,740 jobs, growing by 21.2% and adding 10,380 jobs since 2014.

Top employment sectors in the South EMA include Professional, Scientific and Technical Services (20.8%), Wholesale and Retail Trade (14.4%), and Transportation and Warehousing (14.1%). Manufacturing has a 11.4% employment share.

The Professional, Scientific and Technical Services sector has grown the most over both the past one- and five-year periods, adding 1,330 jobs (12.1%) since 2018 and 4,330 jobs (54.2%) since 2014. Manufacturing has continued to decline in the South EMA, shedding 610 jobs or 8.3% in 2019 and continuing its longer term trend.

Northwest

The Northwest EMA approximates the western part of the former municipality of North York, and contains 23.2% of the city's Employment Area jobs (98,340 jobs); 75.8% of these jobs are within Core Employment Areas. In 2019, Northwest EMA employment grew by 0.7%, adding 660 jobs, growing by 7.4% or 6,800 jobs since 2014.

Top employment sectors in the Northwest EMA include Manufacturing (27.7%), Wholesale and Retail Trade (21.5%) and Professional, Scientific and Technical Services (7.4%).

Administrative and Support, Waste Management and Remediation Services has added the most employment of any sector in the Northwest EMA, growing by 480 jobs or 9.2% since 2018 and 1,370 jobs or 31.7% since 2014. Manufacturing followed close behind, adding 1,030 new jobs and growing 3.9% since 2014.

Northeast

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

About 15.0% of Employment Area jobs (63,560 jobs) are in the Northeast EMA. The Northeast EMA has no Core Employment Areas, but has broader sector diversity than the other EMAs. In 2019, Northeast EMA employment decreased by 1.6%, losing 1,050 jobs. It has grown by 11.2% since 2014, adding 6,400 jobs.

Top employment sectors in the Northeast EMA (see Figure 25b) include Professional, Scientific and Technical Services (17.3%), Finance and Insurance (15.4%), and Administration, Support and Waste Services (9.8%).

In 2019, the Finance and Insurance sector grew the most, adding 1,530 jobs or 18.5%. This sector has also grown the most since 2014, adding 3,450 jobs or 94.2%. Meanwhile, both the Manufacturing and Utilities sectors lost over 1,000 jobs in the Northeast EMA over the last year.

East

The East EMA approximates the former municipality of Scarborough and contains 23.3% of Employment Area jobs (98,680 jobs). Of these, 61.7% of these jobs are within Core Employment Areas. In 2019, East EMA employment grew 4.5%, adding 4,270 jobs, growing by 8.6% or 7,810 jobs since 2014.

Top employment sectors in the East EMA include Manufacturing (24.6%), Wholesale and Retail Trade (18.1%) and Transportation and Warehousing (9.9%).

The Finance and Insurance sector grew the most in the East EMA in 2019, with net growth of 2,100 jobs, due to a re-classification of two large establishments from the Management of Companies and Enterprise sector, which conversely lost 2,220 jobs. Both the Manufacturing and Transportation and Warehousing sectors added significant net new employment of more than 1,100 jobs each in 2019. Excluding the Finance and Insurance sector due to employment re-classification, the Transportation and Warehousing sector grew the most in the East EMA since 2014, adding 2,680 new jobs (37.6%).

Figure 25b: Top Employment Sectors by EMA 2019

Northeast EMA - Top 6 NAICS Sectors

Sector	Jobs
Professional + Scientific	10,990
Finance and Insurance	9,820
Administrative, Support + Waste	6,200
Real Estate, Rental + Leasing	5,710
Management	5,140
Information and Cultural	4,650

East EMA - Top 6 NAICS Sectors

Sector	Jobs
Manufacturing	24,250
Wholesale and Retail Trade	17,810
Transportation and Warehousing	9,820
Other Services	6,020
Construction	5,830
Administrative, Support + Waste	5,660
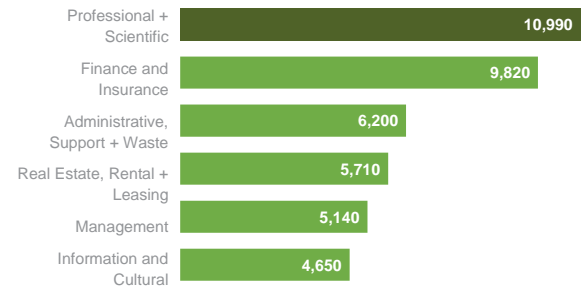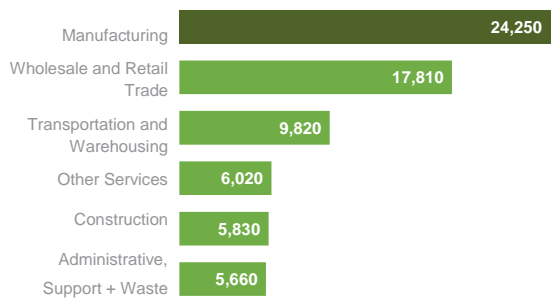
Figure 26: Employment Growth by EMA 2019 vs 5-Year Average

EMA	2018-2019	5-year average
South	4.8%	4.2%
East	4.5%	1.7%
Total	1.6%	2.1%
Northwest	0.7%	1.5%
West	-0.1%	1.7%
Northeast	-1.6%	2.2%
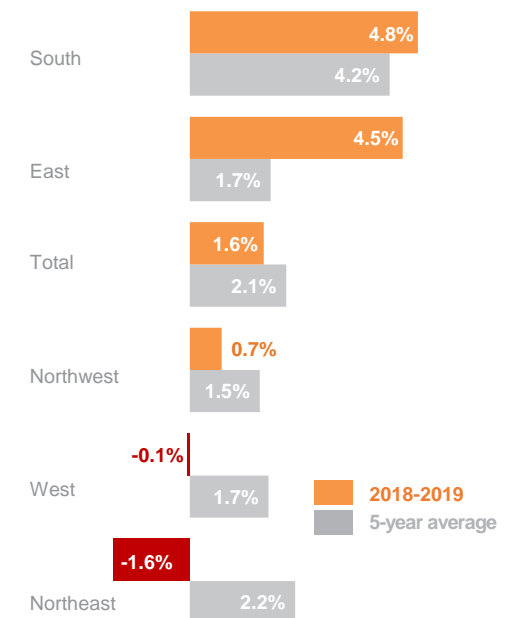
Employment in Toronto's tech sector has grown by 84.6% since 2014, with 60,408 jobs in 2019.

Figure 27: Top 5 Tech Subsectors by Total Employment, 2019

Computer Systems Design	35,144	58.2%
Telecomm Carriers	9,788	16.2%
Software Publishing	5,214	8.6%
Data Processing and Hosting	3,615	6.0%
Video Game Design	1,821	3.0%
Remaining Subsectors (12)	4,826	8.0%
Total		60,408
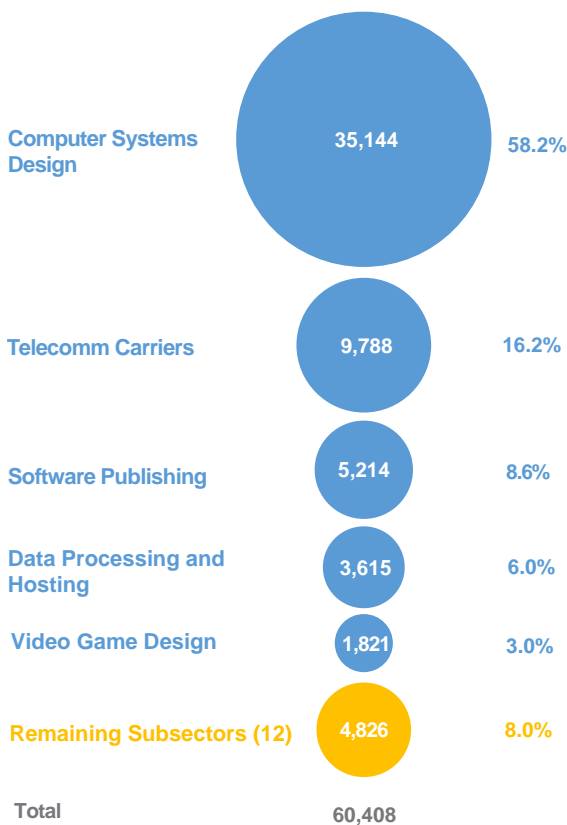
Toronto's Technology Sector

Introduction

A key feature of Toronto's economy in 2019 is the growth of its technology sector. Building on decades of development in information systems, communications technology and media industries, the city's growth in internet and online services, computer-generated imagery, computer-aided design and development and geospatial analysis has led to the specialization and diversification of the technology sector in Toronto.

An analysis of recent results from the Survey has shown evidence of the growth and spatial clustering of Toronto's technology sector.

To better understand the growth and evolution of this sector of the city's economy, staff explored why technology firms cluster in Toronto, where they cluster and why. This exploration was undertaken in 2019 by analyzing Survey data and conducting interviews with a range of firms from the technology sector. Staff analyzed the size, context, and location of technology sector firms over time to understand locational preferences and identify sectoral trends.

Defining the Tech Sector

While the "tech sector" is often described in differing economic or industrial terms, the addition of geographic data makes it possible to study the relative locations of

tech firms and their activities in detail using the results from the Survey.

For this research, the tech sector was defined as the group of firms that create technological platforms to enable new services or industries, with pioneering or disruptive technology at the core of their business model. Firms were excluded that use technology as an enabler, but which did not feature technology as a core offering of their business.

For the purpose of this analysis, the tech sector was identified using the NAICS classification of establishments by their economic activities according to Statistics Canada's definition of the tech sector. More details on defining the tech sector are provided in the Appendix, along with a list of subsectors (see Table A.3).

Sector Growth

The Survey counted 1,729 tech establishments in 2019, approximately 2% of all establishments in the city. Tech establishments increased 15.5% from 2018 and 85.7% from 2014. Total employment within tech firms in 2019 was 60,408 jobs, which represents an increase of 16.6% from 2018, and 84.6% from 2014; see Table 4 on page 31. In 2019, jobs in tech establishments represented 4% of all jobs in Toronto.

Growth by Subsector

Computer Systems Design is the largest component of the sector in terms of employment, with a workforce of 35,144, comprising 58.2% of total tech employment. Telecomm Carriers register in at a distant second with a workforce of 9,788, compromising 16.2% of total tech employment (see Figure 27).

Computer Systems Design and Software Publishers have also grown the most over five years. Of interest is the rise of Video Game Design, which has been steadily climbing over the past five years to round out the top five subsectors in 2019. The Remaining Subsectors category reflects the net employment change of the residual twelve tech subsectors. Those subsectors that experienced a decline in employment were mainly involved in manufacturing or wholesaling (see Figure 28).

Analysis

The performance of the Computer Systems Design subsector is in line with recent reports documenting the tech sector in the Greater Golden Horseshoe. Researchers have identified a growth of "Soft Tech", subsectors such as computer systems design, web hosting, and software design, while noting a decline in "Hard Tech", subsectors related to the manufacturing and wholesaling of tech products.

Potential factors contributing to these trends include the "knowledge-intensive" nature of Soft Tech subsectors, while Hard Tech subsectors may be facing competitive pressure from the global market in conjunction with the disruption of the wholesaling subsector by e-commerce.[21]

Computer Systems Design leads tech sector employment with 35,144 jobs (58.2%) in 2019.

Figure 28: Employment Change by Tech Subsector 2014-2019

Subsector	Employment Change
Computer Systems Design	19,526
Software Publishers	4,658
Telecomm Carriers	1,608
Video Game Design	1,214
Data Processing and Hosting	867
Remaining Subsectors (12)	-193
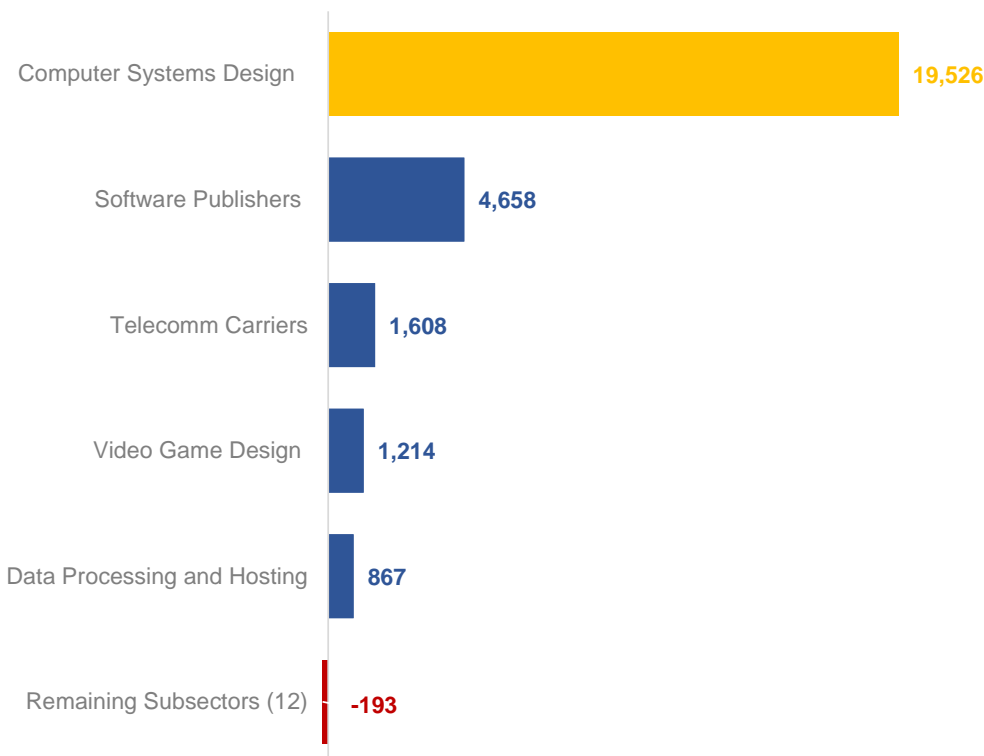
Spatial Clustering

Clusters play an important role in the economic performance of both industries and the city-regions in which they are situated. Indicators of industry strength such as employment growth, wages, and employment rates tend to be higher for clustered industries. City-regions subsequently have stronger economies when they have higher rates of employment in clusters.[22]

Research suggests that the Central Business District is no longer the only concentration of employment in cities, with varying evidence of decentralization in Canadian metropolises including polycentricity and dispersion.[23]

Toronto's Tech Clusters

Map 5 illustrates the clustering of the tech sector in Toronto, from which two distinct locational patterns can be observed. The first is a clustering in Downtown south of Queen Street, as well as in Liberty Village, both of which are within the South EMA; see the inset of Map 5. Clustering within the South EMA comprises 63.4% of total tech employment within the city of Toronto.

A second series of clusters can be observed within the Official Plan geographies of Downtown, the Centres, and the Employment Areas (see Table 4). Altogether, the Official Plan geographies comprise 90.7% of all tech sector employment, and 80.7% of all tech sector establishments.

The most significant clustering appears in Downtown, followed by the Employment Areas. Clustering of tech firms within these geographies demonstrate the importance of land use policy in supporting economic growth in the city.

Although there remains a large concentration of tech establishments in and around downtown, Survey results support the literature as Toronto's tech sector displays patterns of polycentricity with multiple clusters throughout the city. Dispersion can also be seen with tech establishments choosing to locate along the city's subway lines, and in close proximity to major highways. Reasons behind these locational patterns are explored further below.

Firm Interviews

To understand the Toronto context for the tech sector, interviews were conducted with local tech sector firms to document their stated reasons behind locational choices. In total, eleven establishments located in Downtown and Liberty Village of various sizes and subsectors were interviewed.

Representatives were asked about their locational preferences on both inter- and intra-metropolitan scales, whether their current location met their needs, whether they were looking to grow the number of employees, and whether such growth would require a change in location.

Map 5: Toronto Tech Clusters 2019

South EMA Spatial Distribution

Total Tech Employment
- ≤10
- ≤50
- ≤100
- ≤500
- ≤3000

South EMA
Downtown and Centres

Map Geography
- Downtown and Centres
- Core Employment
- General Employment
- Subway Lines

Tech Density
- Sparse
- Dense
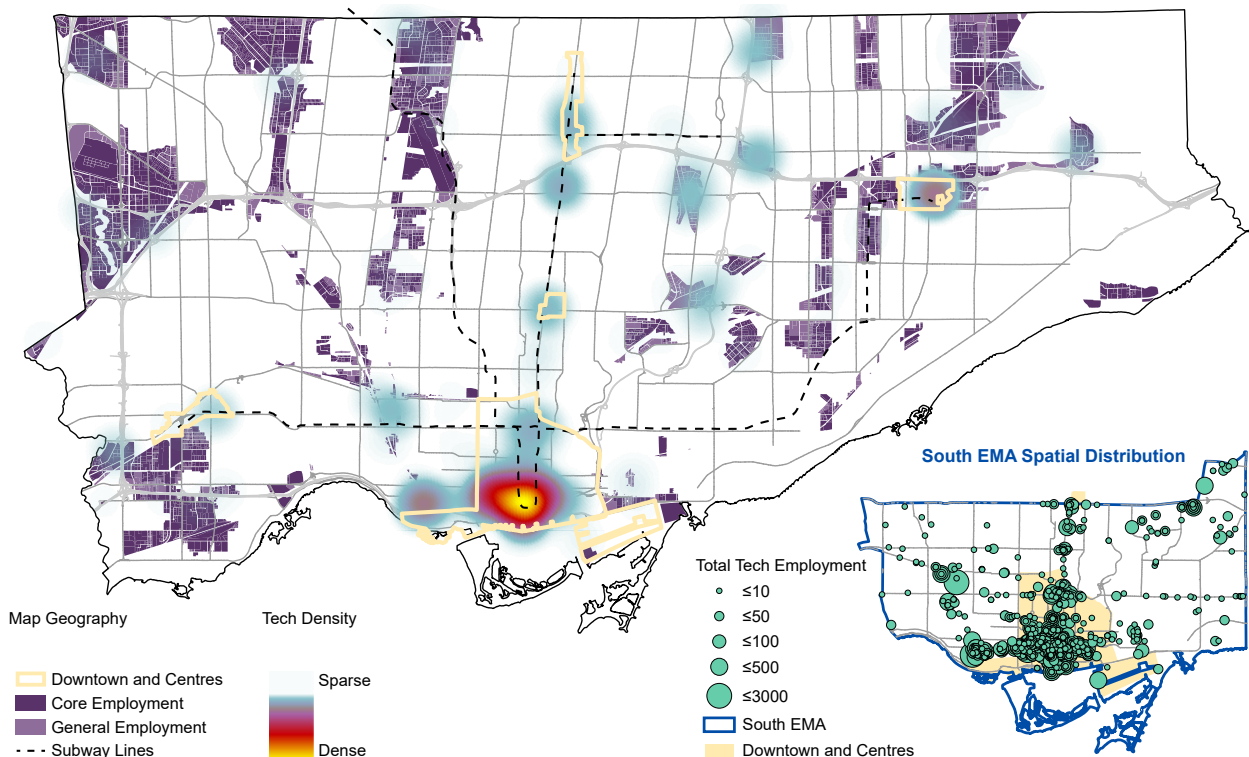
Toronto is a Tech Centre

When asked why they chose to locate in Toronto, participants stated that Toronto is "a tech centre", offering a "diversity of education and culture which builds successful organizations." Diversity of people in particular was linked to economic strength. The simplicity and speed of Canada's immigration system relative to that of the United States, along with quality of life attributes such as health care and education were also factors influencing locational choice, particularly for internationally headquartered firms.

Local and Regional Location

Participants were asked to rank various attributes influencing locational preferences, such as access to public transit and proximity to clients and investors, on both metropolitan and neighbourhood scales (see page 36 of the Appendix). With slight variances in ranking, the top three attributes on both scales were: access to skilled workers, access to public transit, and neighbourhood amenities. Discussions revealed the significance of public transit and neighbourhood amenities to accessing skilled workers, with many firms stating that they were competing to acquire talent.

Talent

Firms were largely seeking to attract younger employees, from new graduates to those approaching their early thirties. There was a general consensus among establishments that employees in this demographic do not tend to own cars, and prefer to work in urban rather than suburban areas. Therefore, establishments seek locations that are both accessible and attractive to their desired talent pool.

Public Transit

In terms of accessibility, being located in close proximity to both regional GO Transit stations and local TTC lines proved essential for each establishment. Firms asserted that they could not compete for labour if they were located in a suburb or far from transit. Regarding GO Transit specifically, being located near Exhibition Station for Liberty Village establishments, and Union Station for establishments in Downtown, enables access to labour from the entire Greater Golden Horseshoe area. This allowed firms to establish partnerships and recruit from a variety of higher education institutions outside of Toronto, such as the Universities of Waterloo and Guelph. In fact, access to GO Transit was often a higher priority than access to the TTC.

Urbanity

Participants stated that younger employees are looking to work in a "hip", vibrant neighbourhood with a variety of amenities such as cafes and restaurants. Establishments also expressed the desire to be in creative, energetic, and vibrant neighbourhoods, as such environments were seen to contribute to community-building and inspire both creativity and productivity. The Central Business District did not necessarily meet these characteristics according to some firms, and was associated by some with congestion, a lack of community, and diminished productivity. Building character was similarly referenced, with a strong preference expressed for brick-and-beam buildings and their associated history. Again, inspiring creativity and productivity was the primary theme, with being in a historic space likened by one firm to "working in a piece of art". Citing their location in a building that also houses a dance studio and architecture firm, the firm emphasized the role this plays in avoiding the creation of a "vanilla tech place where everyone is doing the same thing".

Conclusion

Prior research has anticipated continued expansion of the tech sector components that depend on the creation of platforms and platform technologies relied on by other industries.[24] Therefore, the sector is likely to continue to grow, while competition may contribute to a continuing shift into soft technology, online platforms and e-commerce. These findings demonstrate the importance of access to the highly skilled labour force of the city and region which values access to public transit and urbanity. Further analysis of Toronto's tech sector is available on the Toronto Employment Survey website: www.toronto.ca/employmentsurvey.

Table 4: Toronto Tech Clusters, 2019

Geography	Total Employment	% of 2019 Tech Employment	Total Establishments	% of 2019 Tech Establishments
Downtown	29,701	49.2%	689	39.80%
Centres	7,262	12.0%	114	6.50%
Employment Areas	17,836	29.5%	589	34.10%
Rest of City	5,609	9.3%	337	19.50%
2019 Total	60,408	100.0%	1,729	100.0%
2018 Total	51,800	-	1,497	-
2014 Total	32,728	-	931	-

Appendices

Table A.1: Total Employment in the Centres and Downtown

	2014	2015	2016	2017	2018	2019	2014 - 2019		2018 - 2019	
							Net Change	% Change	Net Change	% Change
Downtown	482,710	508,640	511,370	543,530	565,220	584,660	101,950	21.1%	19,440	3.4%
North York Centre	34,830	35,000	34,090	33,900	34,910	35,920	1,090	3.1%	1,010	2.9%
Yonge-Eglinton	19,010	17,390	17,540	18,780	18,080	18,720	-290	-1.5%	640	3.5%
Scarborough Centre	16,440	16,690	16,350	17,210	17,980	16,830	390	2.4%	-1,150	-6.4%
Etobicoke Centre	9,380	9,770	9,490	10,850	10,460	10,850	1,470	15.7%	390	3.7%
Downtown and the Centres	562,370	587,490	588,840	624,270	646,650	666,980	104,610	18.6%	20,330	3.1%
Rest of City	822,020	834,790	851,950	871,980	876,230	902,820	80,800	9.8%	26,590	3.0%
City Total	**1,384,390**	**1,422,280**	**1,440,790**	**1,496,250**	**1,522,880**	**1,569,800**	**185,410**	**13.4%**	**46,920**	**3.1%**

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

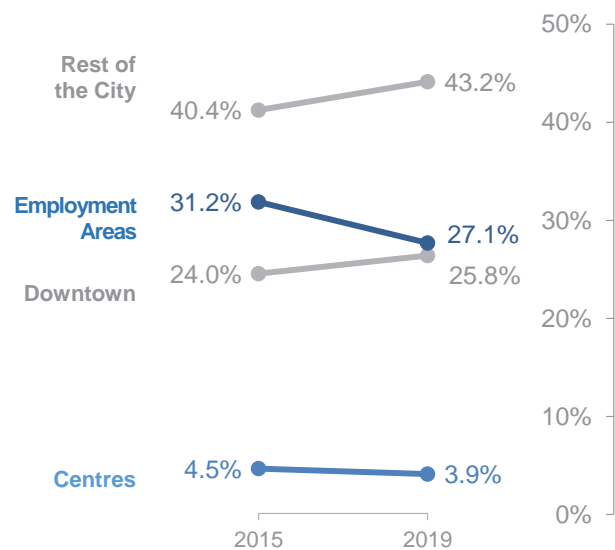## Figure A.1: Location of New City Establishments, 2015-2019

Figure A.2: Longevity of City Establishments, 2015-2019
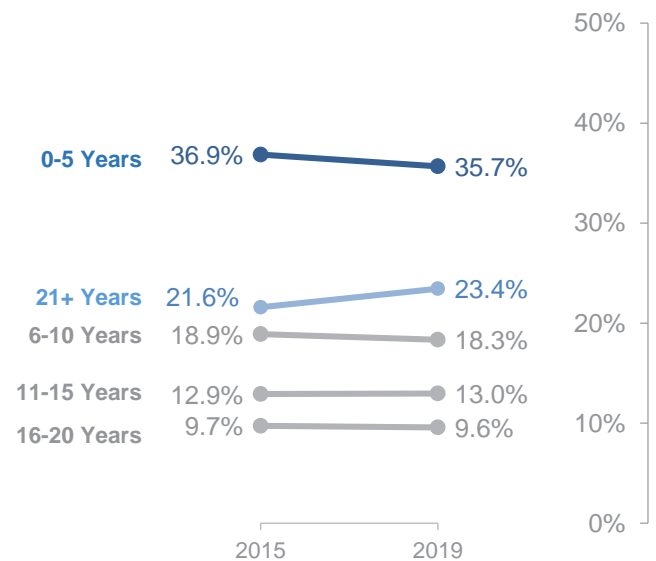
Table A.2: Secondary Plan Total Employment by 6 Sectors, 2019

No.	Secondary Plan Area	Manufacturing	Retail	Service	Office	Institutional	Community & Entertainment	Total
1	Agincourt	730	710	650	2,370	210	10	4,680
24	Central Don Mills	10	800	1,190	2,010	930	100	5,040
22	Central Finch	0	30	60	450	80	10	630
27	Davenport Village	0	0	10	20	0	0	20
7	Downsview Area	4,100	900	1,760	1,000	1,560	230	9,550
26	Emery Village	40	110	230	280	260	10	920
12	Etobicoke Centre	40	670	1,270	7,580	1,040	250	10,850
13	Fort York Neighbourhood	10	10	90	60	480	260	920
14	Garrison Common North	610	1,560	2,700	14,530	2,970	370	22,740
2	Highland Creek	0	80	350	410	4,160	440	5,440
15	King-Parliament	240	1,320	1,990	10,600	2,340	510	17,000
16	King-Spadina	370	2,010	8,320	31,300	1,040	2,050	45,080
32	Lawrence-Allen	10	7,160	2,320	5,220	2,900	250	17,880
3	Morningside Heights	0	0	0	0	190	90	280
11	Motel Strip	20	40	170	170	90	0	480
8	North York Centre	50	1,520	3,530	28,340	1,920	550	35,920
4	Port Union Village Community	0	0	0	0	0	0	0
34	Queen River	40	200	10	90	190	0	520
18	Railway Lands Central	0	80	1,740	2,610	20	2,190	6,640
17	Railway Lands East	310	380	2,510	15,290	20	4,480	22,990
19	Railway Lands West	0	200	280	170	20	10	680
28	Regent Park	10	140	130	410	320	160	1,170
5	Scarborough Centre	600	3,410	1,520	10,390	570	340	16,830
29	Sheppard Avenue Commercial Area	0	30	50	880	120	10	1,090
9	Sheppard East Subway Corridor	10	4,090	1,500	5,440	4,540	310	15,880
23	Sheppard West/Dublin	20	370	420	670	200	10	1,690
25	Swansea	140	140	70	240	230	70	890
20	University of Toronto	40	270	510	1,880	15,710	670	19,080
30	Warden Woods	320	20	50	30	190	50	650
21	Yonge Eglinton	80	2,820	4,140	23,680	3,420	1,500	35,620
6	Yonge St. Clair	130	800	1,180	10,790	1,050	330	14,260
10	York University	0	60	650	440	12,910	90	14,150
	All Secondary Plan Areas	**7,910**	**29,920**	**39,380**	**177,330**	**59,690**	**15,340**	**329,560**

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

Toronto Employment by Category, 2019

A.1

Manufacturing & Warehousing Employment
- · < 100
- · 100 - 499
- ○ 500 - 2,499
- ○ 2,500 +

■ Core Employment Area
■ General Employment Area
▢ Downtown and Centres

A.2

Retail Employment
- · < 100
- · 100 - 499
- ● 500 - 2,499
- ● 2,500 +

■ Core Employment Area
■ General Employment Area
▢ Downtown and Centres

A.3

Service Employment
- · < 100
- · 100 - 499
- ● 500 - 2,499
- ● 2,500 +

■ Core Employment Area
■ General Employment Area
▢ Downtown and Centres
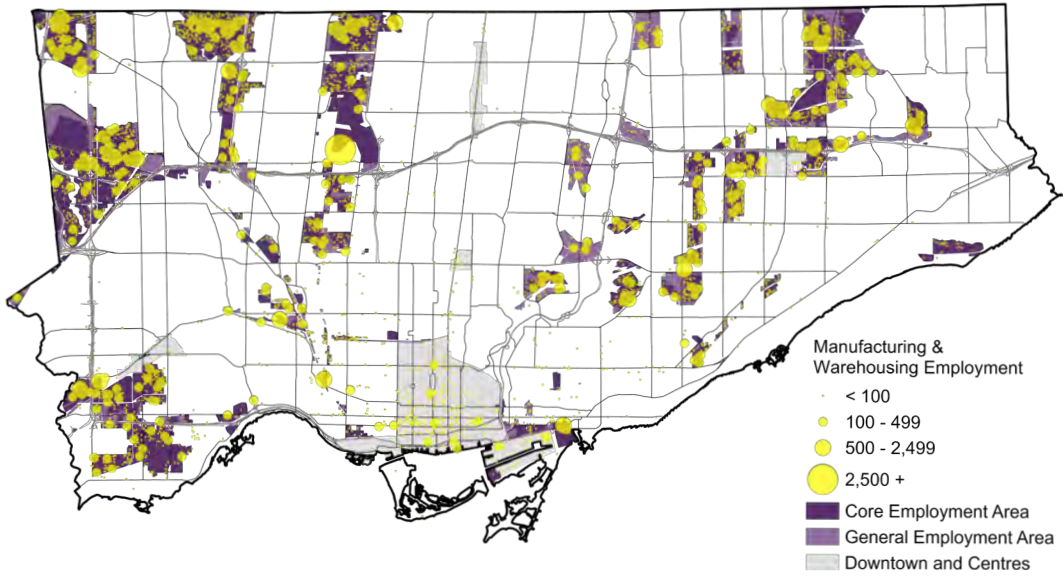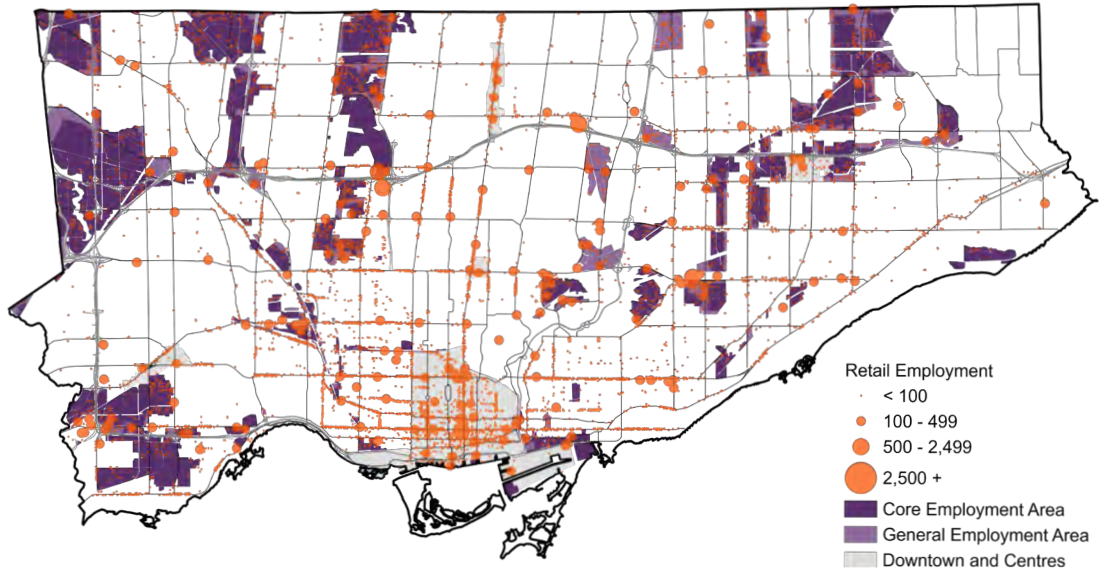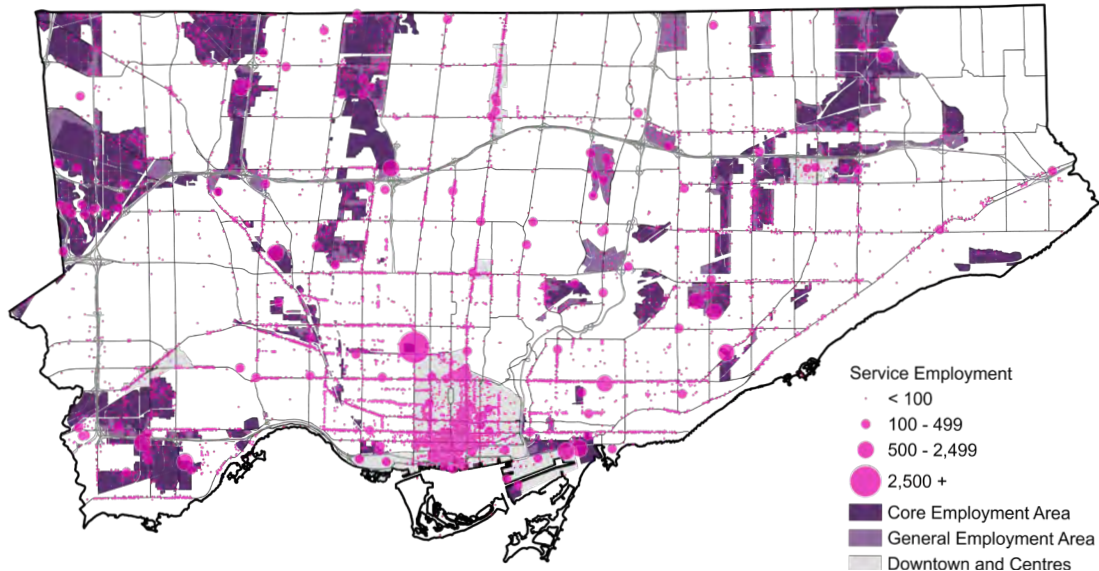
(A.1) Manufacturing and Warehousing, (A.2) Retail, (A.3) Service,
(A.4) Office, (A.5) Institutional, and (A.6) Community and Entertainment

A.4

Office Employment
· < 100
• 100 - 499
● 500 - 2,499
⬤ 2,500 +
Core Employment Area
General Employment Area
Downtown and Centres

A.5

Institutional Employment
· < 100
• 100 - 499
● 500 - 2,499
⬤ 2,500 +
Core Employment Area
General Employment Area
Downtown and Centres

A.6

Community & Entertainment
Employment
· < 100
• 100 - 499
● 500 - 2,499
⬤ 2,500 +
Core Employment Area
General Employment Area
Downtown and Centres
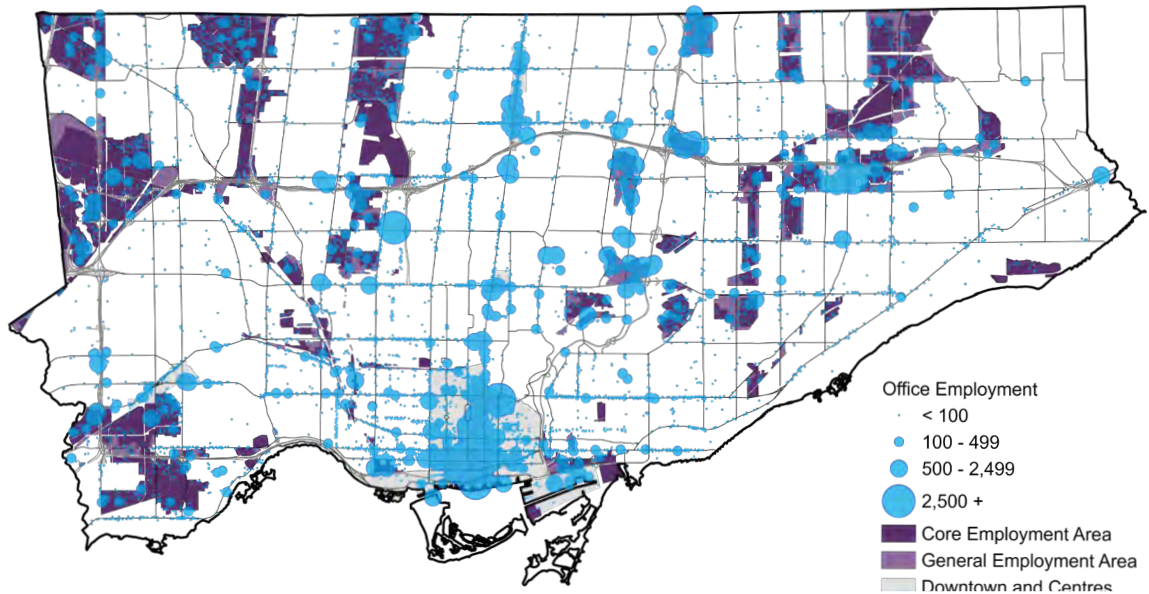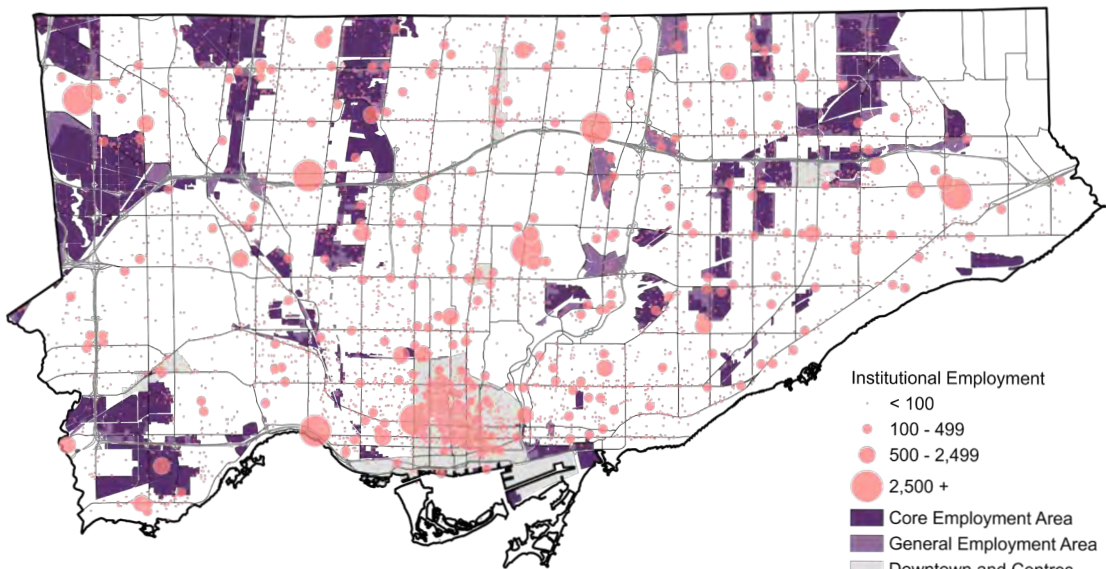
Table A.3: 2019 NAICS Codes
for the Tech Sector as defined by
Statistics Canada

334110: Computer manufacturing

334210: Telephone Manufacturing

334220: Radio and Television Equipment
Manufacturing

334290: Other Communications Equipment
Manufacturing

334310: Audio and Video Equipment Manufacturing

334410: Semiconductor Manufacturing

334610: Magnetic and Optical Media Manufacturing

417310: Computer and Software Wholesalers

417320: Electronic Components Wholesalers

511211: Software Publishers

511212: Video Game Publishers

517310: Telecomm Carriers

517410: Satellite Telecommunications

517911: Telecommunications Resellers

517919: All Other Telecommunications

518210: Data Processing and Hosting

Defining the Tech Sector continued

In using NAICS to identify tech establishments, it must be noted that while Statistics Canada applies NAICS coding to workers, the Toronto Employment Survey is an establishment-based tool.

There are establishments that are wholly comprised of "tech sector" activity, and many others where "tech sector" activities are occurring within them yet the establishment as a whole may not fit the definition of the sector. Consequently this classification will necessarily differ from other sources.

Further, this investigation addresses the composition of a single urban entity, while the tools of Statistics Canada have been developed for use at national and international scales. The use of NAICS in conjunction with the Statistics Canada classification of the tech sector represents a narrowing of the definition for the purpose of counting establishments where employment is enabled by the innovative or disruptive use of technology.

In applying the definition narrowly, certain establishments were excluded that might otherwise fall under the category of tech sector. For example, in cases where the primary function of the establishment was administrative, such as in the case of head offices, these were excluded. While the business as a whole might have some tech sector activities, the application of this approach to each establishment or business location enables the distinction of technology enabled employment from more typical office employment.
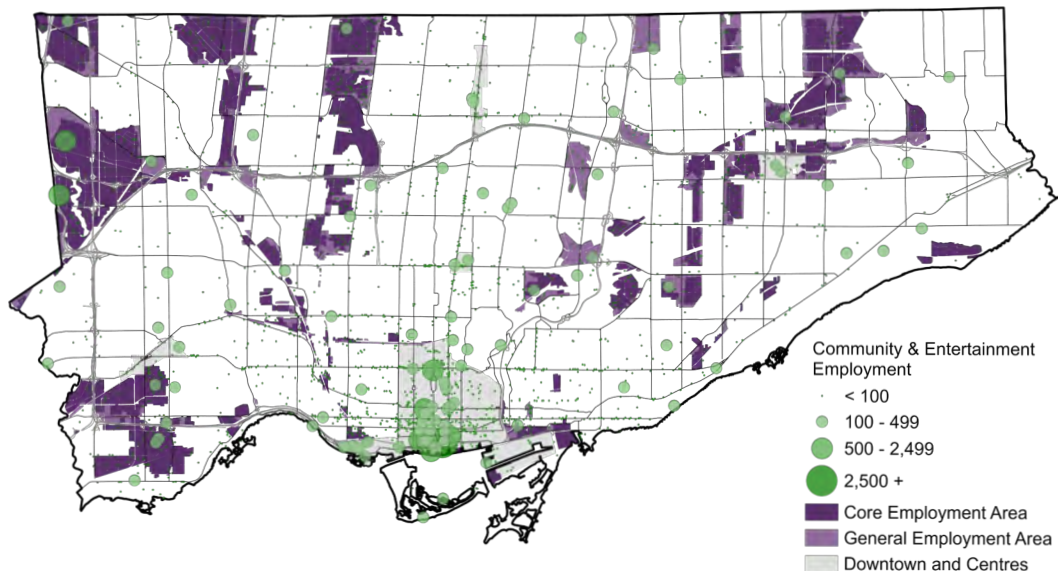
Additionally, businesses were identified whose economic activity would fall within this definition of the tech sector, but which were assigned a NAICS code outside of the scope of the Statistics Canada definition.

In order to include such firms within the analysis, the NAICS code under which the firm is classified would have to be included as part of the definition. To do so would require a more detailed analysis of establishments under each code to determine if the predominant employment met the stated definition of tech. Refining the boundaries of the sector is an area for further research and analysis.

Attribute Ranking

To further understand the factors which bear the greatest weight with respect to locational preference, interview participants were given a list of attributes to rank independently from 1 to 5.

Attributes were selected based on those identified in the literature as influencing locational choice, and included the following: presence of an anchor firm, presence of research institutions, access to skilled workers, co-location with similar firms and industries, proximity to the Central Business District, availability and cost of commercial space, neighbourhood amenities (e.g. restaurants, parks, cafes), access to public transit, and access to highways.

Each participant was asked to apply this ranking to the neighbourhood, while those originating from outside of Toronto completed an additional ranking at the metropolitan scale.

Table A.4: Total Employment in Employment Monitoring Areas by Type of Employment Area and NAICS, 2015 - 2019

NAICS	All EMAs					Non Employment Areas					Total				
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019
Agriculture, Forestry, Fishing and Hunting	10	10	10	10	10	50	70	10	10	20	60	80	20	20	30
Mining, Quarrying, and Oil and Gas Extraction	0	0	20	0	0	20	20	0	10	0	20	20	20	10	0
Utilities	3,900	3,670	3,720	3,520	2,380	390	400	420	540	530	4,280	4,070	4,140	4,060	2,910
Construction	22,770	22,270	24,340	24,850	23,830	9,980	9,040	9,390	9,580	10,020	32,760	31,310	33,730	34,440	33,850
Manufacturing	83,910	83,320	85,320	86,200	83,730	6,160	6,500	7,120	6,890	7,020	90,070	89,810	92,430	93,090	90,750
Transportation and Warehousing	31,500	32,240	33,380	34,890	36,760	9,390	10,320	10,010	11,110	10,550	40,900	42,560	43,380	46,000	47,310
Information and Cultural Industries	17,010	15,440	15,110	14,670	15,050	34,300	35,670	37,120	38,430	37,270	51,310	51,120	52,230	53,100	52,320
Finance and Insurance	13,690	12,870	12,990	13,560	17,250	128,700	130,070	137,310	149,140	160,620	142,380	142,950	150,300	162,700	177,870
Real Estate and Rental and Leasing	11,130	13,420	13,630	14,270	14,700	27,580	28,120	30,500	32,070	32,950	38,710	41,540	44,130	46,340	47,650
Professional, Scientific and Technical Services	38,900	39,480	41,640	42,890	44,040	117,010	115,130	117,070	117,440	130,000	155,910	154,600	158,710	160,330	174,040
Management of Companies and Enterprises	12,600	13,960	14,230	13,830	12,330	33,560	36,990	38,150	37,980	36,680	46,160	50,940	52,380	51,810	49,010
Administrative and Support, Waste Management and Remediation Services	21,180	22,590	25,600	25,660	26,540	48,220	39,160	43,430	41,570	37,370	69,400	61,750	69,030	67,240	63,910
Educational Services	5,790	6,340	6,880	6,650	7,340	96,860	105,250	111,330	115,060	123,510	102,640	111,580	118,220	121,710	130,850
Health Care and Social Assistance	12,350	12,980	13,690	13,010	13,760	159,480	169,400	171,320	170,860	180,440	171,830	182,390	185,010	183,860	194,210
Arts, Entertainment and Recreation	5,590	5,840	6,250	6,290	6,240	26,860	25,120	29,780	30,380	28,810	32,440	30,950	36,030	36,670	35,050
Accommodation and Food Services	15,950	15,980	16,050	16,440	17,520	94,550	97,070	101,950	104,710	108,410	110,490	113,050	118,010	121,150	125,930
Other Services (Except Public Administration)	18,000	18,160	18,340	18,950	19,950	56,960	57,170	58,110	58,530	59,540	74,960	75,330	76,450	77,490	79,490
Public Administration	13,250	13,380	13,000	13,350	13,710	66,550	64,290	65,450	66,880	67,160	79,800	77,660	78,450	80,240	80,870
Wholesale and Retail Trade	66,490	66,310	67,780	68,310	68,750	111,340	112,520	115,660	114,230	114,940	177,820	178,830	183,440	182,540	183,690
Not Coded	90	110	30	20	40	230	150	60	90	30	330	260	90	110	60
Grand Total	394,110	398,370	412,010	417,370	423,920	1,028,190	1,042,460	1,084,190	1,105,510	1,145,870	1,422,270	1,440,800	1,496,200	1,522,910	1,569,800

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

Table A.4: Total Employment in Employment Monitoring Areas by Type of Employment Area and NAICS, 2015 - 2019

NAICS	EA Type	East					North-East					North-West				
		2015	2016	2017	2018	2019	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019
Agriculture, Forestry, Fishing and Hunting	Core	10	0	0	0	10	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	10	0	0	0	0	0	0	0	0	0	10	0	0
	General	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Utilities	Core	70	70	70	70	70	2,720	2,230	2,260	2,150	990	0	0	0	0	0
	General	400	570	570	570	580	0	0	0	0	0	150	160	160	170	160
Construction	Core	4,500	4,560	5,020	4,680	4,940	1,040	1,160	1,200	990	840	5,440	5,560	6,010	6,510	5,940
	General	980	1,000	1,300	1,250	890	0	0	0	0	0	1,260	1,030	1,070	1,040	1,000
Manufacturing	Core	18,050	17,620	17,970	18,740	19,580	5,300	4,600	4,070	4,280	3,270	24,620	25,050	26,080	26,600	25,600
	General	4,480	4,810	4,320	4,300	4,670	0	0	0	0	0	1,550	1,610	1,590	1,570	1,660
Transportation and Warehousing	Core	6,350	6,530	6,950	7,350	8,550	590	620	620	600	590	5,700	5,650	5,640	5,770	5,930
	General	950	1,310	1,250	1,310	1,270	0	0	0	0	0	390	380	640	630	610
Information and Cultural Industries	Core	2,950	2,800	2,500	1,820	1,700	5,710	5,120	5,130	5,090	4,650	620	530	960	820	1,110
	General	860	930	530	430	500	0	0	0	0	0	180	160	220	210	220
Finance and Insurance	Core	400	410	470	490	2,610	9,420	8,270	8,220	8,290	9,820	560	650	720	700	710
	General	1,400	1,580	1,560	1,720	1,710	0	0	0	0	0	470	390	350	390	410
Real Estate and Rental and Leasing	Core	770	760	740	750	730	3,040	4,890	5,270	5,630	5,710	970	1,050	990	1,090	1,040
	General	1,450	1,650	1,860	2,110	2,220	0	0	0	0	0	760	920	960	1,010	1,060
Professional, Scientific and Technical Services	Core	3,270	2,940	2,640	2,610	2,560	11,050	10,200	11,260	11,160	10,990	4,950	5,170	5,360	5,280	5,490
	General	1,840	2,020	2,020	2,350	2,300	0	0	0	0	0	1,600	1,760	1,690	1,780	1,800
Management of Companies and Enterprises	Core	2,930	2,940	2,500	2,460	260	4,530	4,340	5,040	4,770	5,140	890	1,120	1,060	1,030	1,130
	General	80	70	60	60	40	0	0	0	0	0	680	830	840	610	760
Administrative and Support, Waste Management and Remediation Services	Core	3,050	2,820	2,910	3,250	3,420	4,670	4,930	6,200	6,150	6,200	3,290	3,130	3,650	4,280	4,740
	General	1,740	2,070	2,280	2,260	2,250	0	0	0	0	0	1,010	1,240	1,220	930	960
Educational Services	Core	390	450	500	530	710	1,790	1,950	2,060	1,970	2,050	700	760	780	760	910
	General	1,230	1,400	1,530	1,240	1,480	0	0	0	0	0	480	560	540	640	650
Health Care and Social Assistance	Core	540	530	590	520	590	3,530	3,420	3,530	3,190	3,270	900	900	1,190	1,110	1,220
	General	2,760	3,010	3,040	3,010	3,420	0	0	0	0	0	1,440	1,430	1,560	1,280	1,440
Arts, Entertainment and Recreation	Core	200	210	240	240	170	760	840	910	900	830	800	780	550	570	590
	General	570	620	750	410	460	0	0	0	0	0	360	370	380	400	370
Accommodation and Food Services	Core	540	490	500	580	750	2,170	2,020	1,780	1,730	1,800	490	520	580	590	640
	General	3,010	3,040	3,210	3,440	3,640	0	0	0	0	0	2,090	2,170	2,180	2,140	2,270
Other Services (Except Public Administration)	Core	2,650	2,740	2,710	2,890	3,730	1,980	2,040	2,180	2,260	2,020	3,330	3,160	3,280	3,170	3,340
	General	2,370	2,410	2,260	2,350	2,290	0	0	0	0	0	1,400	1,440	1,300	1,230	1,410
Public Administration	Core	1,980	1,950	1,940	2,020	2,090	1,460	1,650	1,590	1,740	1,670	2,480	2,510	2,610	2,660	2,780
	General	910	870	770	730	700	0	0	0	0	0	1,240	1,230	1,200	1,200	1,250
Wholesale and Retail Trade	Core	7,770	7,910	8,230	8,270	8,430	3,450	3,560	3,760	3,720	3,740	13,700	13,800	13,910	13,750	13,420
	General	9,370	9,120	9,490	9,580	9,390	0	0	0	0	0	6,900	7,320	7,670	7,750	7,750
Not Coded	Core	30	10	10	0	0	0	0	0	0	0	10	30	10	0	10
	General	10	10	0	0	0	0	0	0	0	0	0	30	0	10	0
Total	Core	56,450	55,710	56,510	57,280	60,880	63,190	61,820	65,050	64,610	63,560	69,440	70,370	73,400	74,690	74,580
	General	34,410	36,490	36,790	37,120	37,790	0	0	0	0	0	21,950	23,030	23,560	22,990	23,760
Grand Total		90,860	92,200	93,310	94,400	98,680	63,190	61,820	65,050	64,610	63,560	91,400	93,400	96,960	97,680	98,340

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

Table A.4: Total Employment in Employment Monitoring Areas by Type of Employment Area and NAICS, 2015 - 2019

NAICS	EA Type	West 2015	West 2016	West 2017	West 2018	West 2019	South 2015	South 2016	South 2017	South 2018	South 2019	All EMAs 2015	All EMAs 2016	All EMAs 2017	All EMAs 2018	All EMAs 2019
Agriculture, Forestry, Fishing and Hunting	Core	0	0	0	0	0	0	0	0	0	10	10	10	0	0	10
	General	0	0	0	0	0	0	10	10	10	0	0	10	10	10	0
Mining, Quarrying, and Oil and Gas Extraction	Core	0	0	0	0	0	0	0	0	0	0	0	0	20	0	0
	General	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Utilities	Core	510	590	610	520	520	40	50	50	50	70	620	700	720	630	660
	General	0	0	0	0	0	10	10	10	0	0	3,280	2,960	2,990	2,890	1,720
Construction	Core	6,650	6,620	7,210	7,480	7,070	2,240	1,780	1,840	1,920	2,200	18,830	18,520	20,080	20,590	20,150
	General	280	280	310	620	710	390	280	380	360	240	3,940	3,750	4,260	4,260	3,680
Manufacturing	Core	20,950	20,690	22,120	21,740	20,690	5,820	5,880	5,960	5,910	6,100	69,430	69,240	72,130	72,980	71,980
	General	1,760	1,680	1,670	1,630	1,520	1,390	1,380	1,530	1,440	630	14,480	14,070	13,180	13,220	11,750
Transportation and Warehousing	Core	10,080	10,020	10,690	10,620	11,180	6,900	7,100	7,180	8,190	8,290	29,030	29,300	30,470	31,930	33,950
	General	460	510	250	260	260	80	120	150	150	90	2,480	2,950	2,910	2,960	2,810
Information and Cultural Industries	Core	2,650	2,110	2,240	1,940	2,250	3,290	3,070	2,650	3,450	3,550	9,510	8,510	8,350	8,030	8,610
	General	270	320	290	290	350	480	420	600	610	730	7,510	6,940	6,760	6,640	6,440
Finance and Insurance	Core	1,000	1,140	1,220	1,500	1,460	90	60	70	100	160	2,050	2,260	2,490	2,790	4,940
	General	220	240	230	240	240	130	140	140	130	140	11,640	10,610	10,500	10,770	12,310
Real Estate and Rental and Leasing	Core	2,010	2,010	1,970	1,830	1,880	850	770	610	560	620	4,600	4,580	4,320	4,230	4,270
	General	1,040	1,120	960	1,000	1,050	240	250	260	290	390	6,530	8,840	9,310	10,040	10,430
Professional, Scientific and Technical Services	Core	8,130	8,560	8,370	8,590	8,450	6,730	7,250	8,450	9,070	10,170	23,080	23,920	24,810	25,560	26,670
	General	130	120	130	130	140	1,210	1,450	1,740	1,920	2,140	15,820	15,550	16,830	17,330	17,370
Management of Companies and Enterprises	Core	2,550	3,230	3,340	3,380	3,430	760	830	780	940	960	7,130	8,120	7,680	7,810	5,780
	General	30	30	30	20	20	160	570	570	560	590	5,470	5,840	6,540	6,020	6,540
Administrative and Support, Waste Management and Remediation Services	Core	4,180	4,890	5,310	5,560	5,560	1,400	1,080	1,290	950	1,260	11,920	11,920	13,160	14,040	14,970
	General	180	140	200	100	110	1,680	2,290	2,540	2,190	2,050	9,270	10,670	12,440	11,620	11,560
Educational Services	Core	440	480	540	500	520	360	310	440	500	510	1,880	2,000	2,260	2,290	2,640
	General	130	140	190	190	180	280	290	310	320	340	3,910	4,340	4,630	4,370	4,700
Health Care and Social Assistance	Core	1,860	2,240	2,340	2,520	2,530	440	560	530	460	450	3,740	4,220	4,650	4,610	4,790
	General	270	280	280	280	320	620	630	630	630	540	8,610	8,760	9,040	8,400	8,980
Arts, Entertainment and Recreation	Core	1,940	1,920	2,220	2,350	2,280	530	550	570	760	850	3,480	3,470	3,580	3,930	3,890
	General	70	100	140	140	140	360	440	500	510	560	2,110	2,370	2,670	2,360	2,350
Accommodation and Food Services	Core	3,880	3,840	3,790	3,990	4,180	790	850	880	850	930	5,700	5,700	5,750	6,020	6,490
	General	1,580	1,600	1,650	1,610	1,630	1,400	1,440	1,490	1,510	1,690	10,250	10,270	10,300	10,420	11,020
Other Services (Except Public Administration)	Core	3,750	3,680	3,910	4,200	4,120	1,220	1,370	1,300	1,450	1,420	10,960	10,950	11,200	11,700	12,610
	General	320	340	360	340	480	980	990	1,050	1,060	1,140	7,040	7,220	7,140	7,250	7,340
Public Administration	Core	2,900	2,970	2,760	3,040	3,240	2,060	1,980	2,020	1,850	1,860	9,420	9,410	9,330	9,570	9,970
	General	210	200	110	110	110	0	10	10	10	10	3,820	3,960	3,670	3,790	3,740
Wholesale and Retail Trade	Core	13,360	13,370	13,470	13,650	13,610	2,880	2,890	2,960	3,280	3,710	37,700	37,970	38,560	38,950	39,160
	General	3,580	3,760	3,910	3,800	3,900	5,480	4,580	4,390	4,500	4,820	28,790	28,350	29,220	29,350	29,590
Not Coded	Core	30	30	0	0	0	10	20	0	10	10	80	70	20	10	30
	General	0	0	0	0	0	10	0	0	0	10	10	40	10	10	10
Total	Core	86,870	88,400	92,090	93,410	92,970	36,390	36,380	37,580	40,280	43,140	249,140	250,860	259,570	265,660	271,570
	General	10,520	10,860	10,710	10,760	11,140	14,880	15,300	16,290	16,220	16,100	144,960	147,500	152,400	151,700	152,360
Grand Total		**97,390**	**99,250**	**102,800**	**104,170**	**104,110**	**51,270**	**51,680**	**53,860**	**56,500**	**59,240**	**394,100**	**398,360**	**411,980**	**417,360**	**423,920**

Note: Numbers have been rounded to nearest ten. Numbers may differ from sums. EA type refers to Core and General Employment Areas (see Employment Areas, page 22).

Endnotes

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