

This bulletin summarizes the findings of the 2020 Toronto Employment Survey. This resource presents a picture of Toronto's economy based on an annual citywide survey of businesses. For more information, please visit us at: www.toronto.ca/city-government/data-research-maps/research-reports/planning-development/



Toronto Employment Survey 2020

Survey Highlights	
2020 Employment	1,449,910
Employment net loss	-119,890
Employment decline	-7.6%
Business establishments	73,080
Establishment net loss	-3,480
Service employment net loss	-46,100
Service job decline	-23.4%
Office employment net loss	-10,650
Office job decline	-1.4%
Institutional work-from-home	82.4%
Downtown employment net loss	-47,350
Downtown job decline	-8.1%

A Global Pandemic: Rebuild & Recovery

The 2020 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.

At the outset of 2020, COVID-19 (coronavirus) rapidly spread globally and in response governments took unprecedented actions to contain the pandemic and support the economy. This included mandating lock-downs and restrictions that directly impacted mobility and economic activity, as well as significant direct fiscal stimulus and supportive monetary policy.

The 2020 Survey was also impacted by the unique operational challenges associated with a provincial Stay-at-Home Order. As described further within this Bulletin, the Survey was conducted entirely virtually without the fieldwork component that is typically a core part of the process. The procedures were modified to adapt to the unusual conditions while maintaining the consistency of the operational processes, the internal validation of the results, and the safety of the team and respondents.

While recognizing the inherent limitations, the Survey was undertaken in 2020 in order to provide a baseline understanding of the immediate impacts of the COVID-19 pandemic. Due to the nature of the pandemic and lock-downs, Toronto's employment

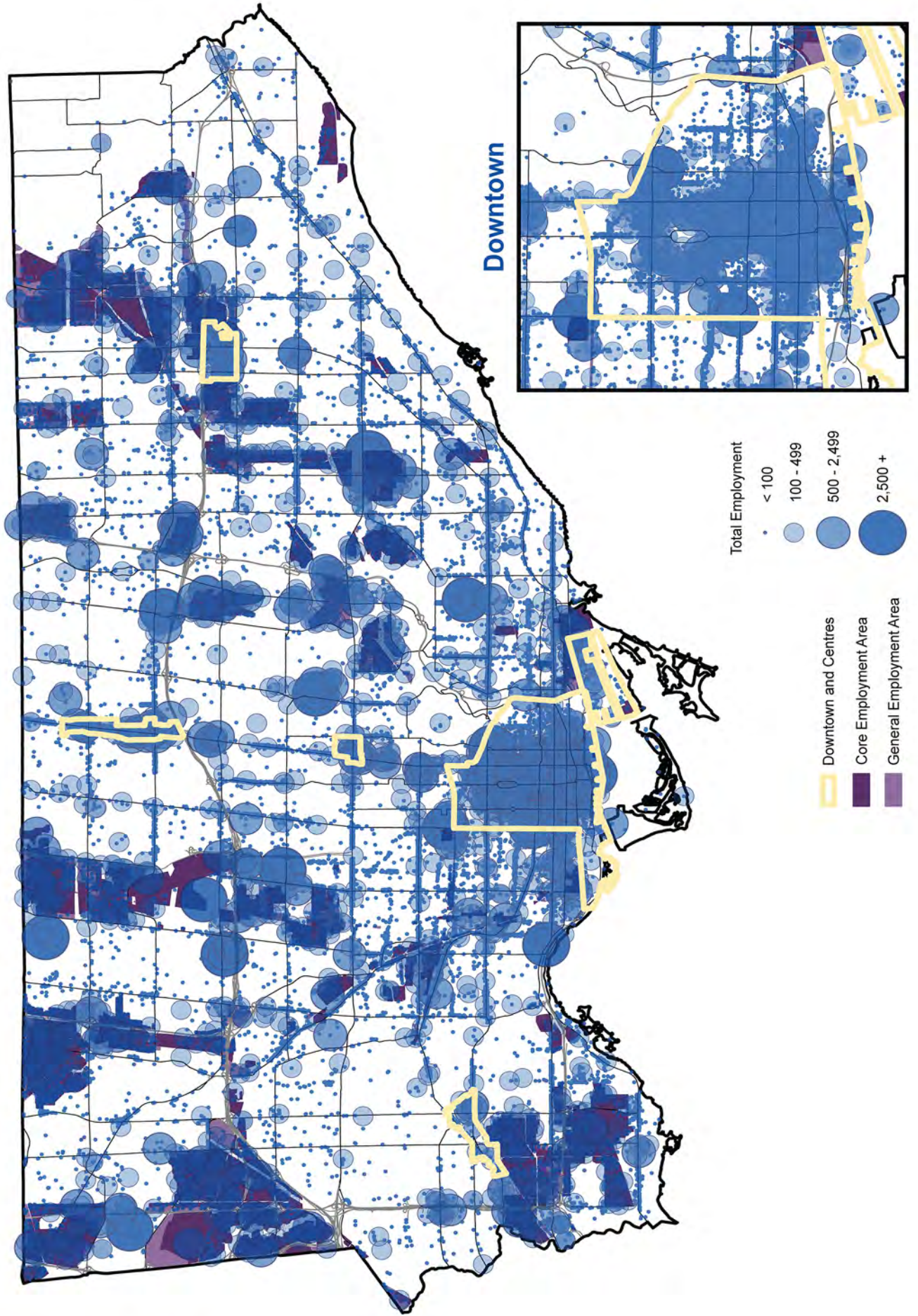
sectors and sub-geographies have seen a much greater dispersion of outcomes in comparison to past recessions. As such, the data described within this Bulletin provides an important point of comparison for the forthcoming 2021 Survey to monitor the magnitude and distribution of economic recovery.

Economic Impact

Toronto experienced an estimated Gross Domestic Product (GDP) decline of -5.3% in 2020.¹ As noted by the Conference Board of Canada, Toronto was disproportionately impacted due to deeper and more prolonged restrictions. Despite this, the organization is forecasting a 5.1% increase in GDP in 2021, followed by another 5.0% increase in 2022, before returning to the long-term growth average. The rationale for this anticipated strong recovery is the local strength of office sector employment, particularly professional and financial services.

Toronto's economy has demonstrated its resilience to external economic impacts throughout the past two decades. As explained in the Bulletin's special topic "Toronto Employment Survey Retrospective", past shifts in the structure of the city's economy have positioned it positively to recover from the pandemic.

Map 1: Employment Concentrations, City of Toronto





Job Losses and Rebound

In 2020, the Toronto Employment Survey recorded 1,449,910 jobs citywide, a decrease of 119,890 jobs or 7.6% from 2019 (see Table 1). The decline follows a sustained period of growth from 2010 to 2019 that saw an annualized 2.1% net increase in employment (see Figure 1). Total 2020 employment is slightly above the 2016 total of 1,440,790 jobs, a loss of four years of employment growth.

Statistics Canada's Labour Force Survey provides a monthly estimate of total employment and unemployment. Although there are important differences with the Toronto Employment Survey,² the Labour Force Survey offers an indicator of approximate trends at more frequent intervals.

In July 2020, the Labour Force Survey reported Toronto's employment as an estimated 1,267,900.³ As of February 2021, this figure had climbed by 6.5% to an estimated total of 1,349,800, indicating that the city as a whole is on a positive recovery trajectory.

Consumer Confidence

Confidence in the economy continues to rebound with the Bloomberg Nanos Canadian Confidence Index reaching 63.50 in March 2021, the highest figure since its launch in 2008. In contrast, a score of 37.08 was recorded in April 2020, an all-time low for the index. The index measures positive and negative perceptions of respondents on personal finances, job security, economic strength, and real estate value with a score of 50 indicating a neutral baseline.⁴

Consumer retail expenditures dropped by an estimated 6.4% in 2020 within the Toronto CMA according to the Conference Board of Canada.⁵ Reflecting stronger consumer confidence, the organization is forecasting a 10.4% increase in 2021, followed by another 7.7% in 2022.

Disproportionate Impacts

The results of the 2020 Survey show that economic impacts have diverged for different types of work and income levels. A long-term trend that the Survey has observed is an increase in the share of part-time employment in Toronto (see Figure 1). In 2020, the impact of job losses was more severe for part-time employees, particularly in the Community, Entertainment and Service sectors. Part-time jobs were lost at almost three times the rate of full-time jobs in 2020.

The Provincial Government's Ontario Economic Report provides insight into the disproportionate impacts by age and sex, while Statistics Canada's Labour Force Survey sheds light on the pandemic impact by ethnicity. From 2019 Q3 to 2020 Q3, the largest decline in employment was experienced by youth aged 15-24 (-16.2%) who were employed in sectors that were among the most heavily impacted including retail, accommodation, and food services.⁶ Approximately 1 in 4 youth aged 15 to 24 work in retail (26.4%) in comparison to less than 1 in 10 workers

aged 25 to 54 (8.7%). According to the same report, females have also been harder hit by the pandemic. The unemployment rate (11.7%) for females was higher than that for males (10.5%) from 2019 Q3 to 2020 Q3.

Labour Force Survey data from 2020 shows that the COVID-19 pandemic has impacted the employment of visible minority groups more severely. At the mid-point of the Toronto Employment Survey in September, the unemployment rate of Canadians who are not Indigenous or a visible minority was the lowest of all racial groups at 7.0%. Higher unemployment levels were observed for all visible minority groups including South Asian (12.4%), Chinese (10.5%), Black (11.7%), and Filipino (8.5%).⁷

Why a Survey Now?

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

The Survey represents an annual programme of consistent data collection since 1983. Through its unbroken 38 years of operation, the Survey has provided a continuous series of snapshots of the city's changing economic composition and evolving land uses. The continued collection of information enables the City to monitor long-range economic trends and emerging activity in areas identified for employment growth in the Official Plan, including Downtown, the Centres, Secondary Plan Areas and Employment Areas (see Map 1). The Survey also provides a basis for assessing other important geographies including Provincially Significant Employment Zones as outlined in the Provincial Growth Plan for the Greater Golden Horseshoe, *A Place to Grow*.

This year, the Toronto Employment Survey team was required to overcome an unprecedented array of challenges, including ensuring a safe in-office working environment, rapidly reconfiguring citywide fieldwork into a telephone survey, and remotely onboarding and training temporary staff on complex procedures.

With a finite amount of time available in the surveying period, the team had to quickly respond to unplanned issues in the initial weeks of the project by implementing measures that improved both efficiency and accuracy, while at the same time building in new tools to assess the impact of the COVID-19 pandemic. Further details on methodological changes and health and safety procedures are in the Appendix.

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.

Table 1: Total City Employment Counts - 2010, 2019, 2020

Employment	Total Number of Employees			Net	%	Net	%
	2010	2019	2020	Change	Change	Change	Change
				2010-2020		2019-2020	
Full-time	1,014,620	1,178,940	1,114,090	99,470	9.8%	-64,850	-5.5%
Part-time	283,680	390,850	335,820	52,140	18.4%	-55,030	-14.1%
Total	1,298,300	1,569,800	1,449,910	151,610	11.7%	-119,890	-7.6%

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

What Data Is Collected?

The Toronto Employment Survey collects citywide business information through in-person visits on an annual basis and is typically carried out between May and September. Surveyors record the following information into a citywide dataset of businesses:

- Primary type of employment activity;
- Full-time and part-time employee counts;
- Length of time business has been at that location.

In the case of major, multi-branch employers, the information is collected through a questionnaire emailed 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.

Survey Geography

The Survey involves one-on-one interviews of business establishments across the city, including:

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

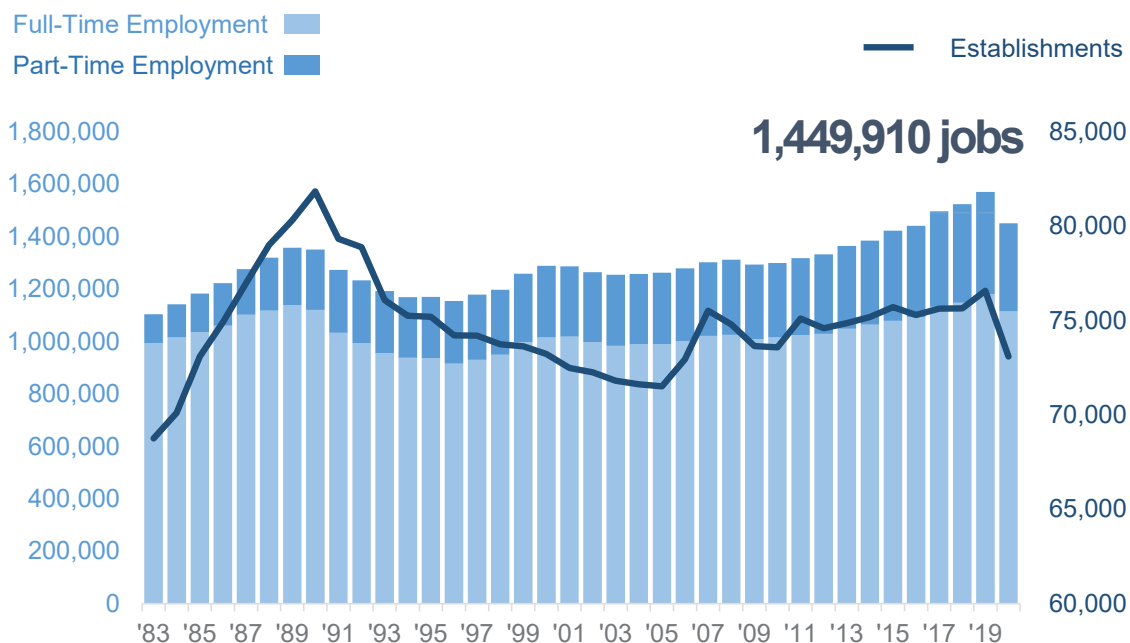
Employment activities that are “footloose” or not place-specific on a daily basis are captured at the business head office or at local reporting offices, when the data is available.

Surveyor Insight

The Survey is a unique data collection tool, involving one-on-one interviews with each establishment in Toronto. Unlike some business data surveys that rely on sampling and indirect data sources, Survey staff confirm information directly with business owners and their employees. As small businesses make up 72.7% of all establishments, the majority of interviews that surveyors conduct are with small businesses.

A new approach taken with the Survey this year was to invite Research Trainee surveyors to share their observations of individual business experiences from the roughly 3,200 interviews each surveyor conducted. Details of these experiences offer a nuanced perspective of the COVID-19 pandemic’s ongoing impact. Their observations are featured throughout the Toronto Employment Survey Bulletin.

Figure 1: Full and Part-Time Employment Counts in the City of Toronto, 1983-2020



Surveyor Insight

“I found that the shops that were unable to incorporate technology into their services struggled the most. These include restaurants and mom and pop shops in the Service sector. Businesses [that] were able to extend their patios or find alternative ways to deliver directly to customers tended to have less of an impact on employment. Businesses [that] depended on indoor dining were more likely to have shut their doors or have minimal staff.”

Key Citywide Trends

Service, Community, and Entertainment Trends

Service, Community, and Entertainment were overrepresented in jobs lost in 2020. Service jobs represent over one-third (38.5%) of jobs lost in the last year, though Service jobs represent just over one-tenth (10.4%) of all jobs. While Community and Entertainment represents only 2.5% of all jobs, losses in this category accounted for 16.6% of all jobs lost in the last year.

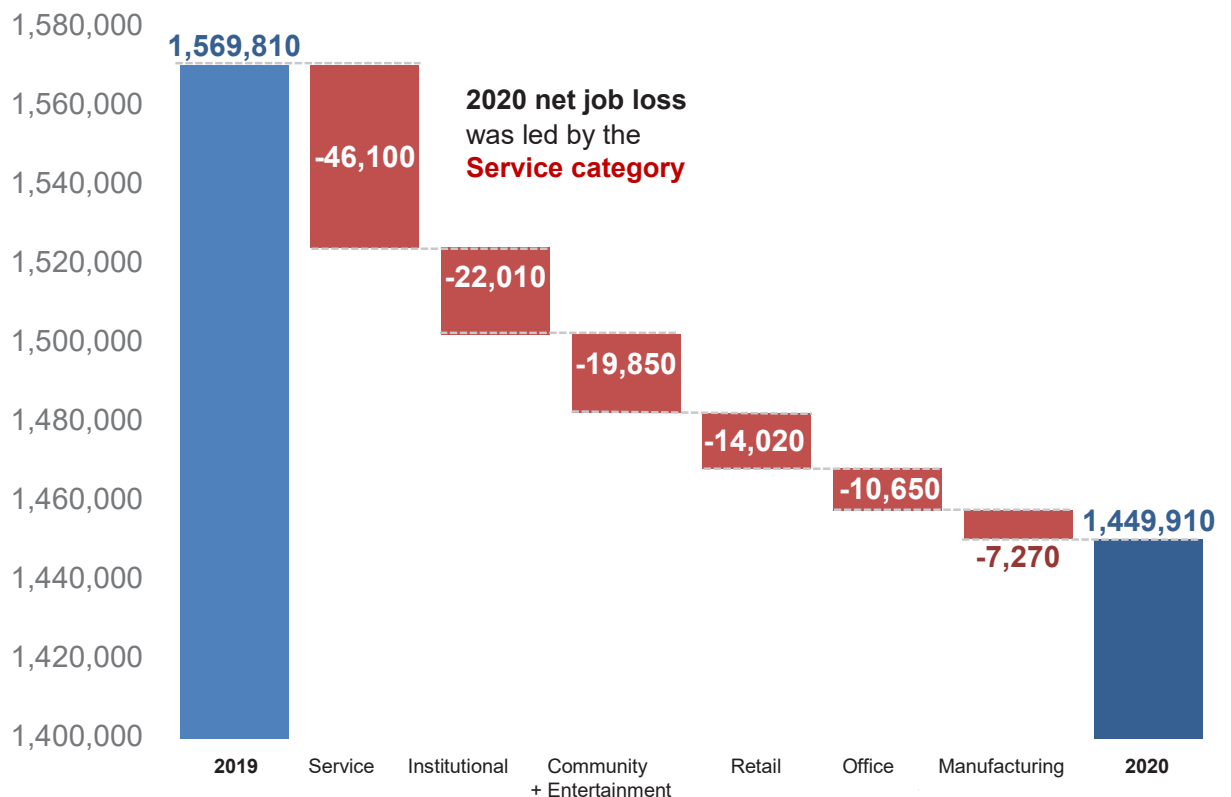
Employment in the Service category reduced by 46,100 jobs or 23.4% in 2020. This category led net employment loss this year (see Figures 2 and 3a). In 2019, Service was the third-fastest growing employment category, adding 26,430 jobs over a five-year period. This year’s decrease

was led by sub-categories including Personal Services (-27.0%) as well as Repairing, Cleaning and Servicing Consumer Commodities (-12.2%).

Most of the loss in Personal Services is in Restaurants, which saw a decline of 36.8% or 20,000 jobs, largely due to COVID-19 related temporary and permanent closures. Losses were also experienced in Lounges and Bars, Coffee Shops, and Fast Food Outlets which saw a combined loss of 11,560 jobs. Cosmetic Personal Services also saw a decline of 15.6% or 2,220 jobs.

Repairing, Cleaning and Servicing Consumer Commodities decreased by 12.2% or 2,020 jobs in the last year. The largest sub-category contributor was Clothing and Textiles (dry cleaning) which saw a decline of 22.7% or 680 jobs.

Figure 2: 2019-2020 Employment Growth, Share by Employment Category



The Community and Entertainment category decreased by 19,850 jobs or 35.3% in 2020. This decrease was led by Indoor Entertainment (-52.1%), On Site Construction/Renovation (-45.5%), and Indoor Sporting/Recreation (-29%). This category led the 2020 decline in establishments (see Figure 3b).

Indoor Entertainment and Indoor Sporting/Recreation collectively lost 13,900 jobs. In the former sub-category, Indoor Stadiums and Arenas (-64.2% or -2,960 jobs) and Cinema (-47% or -950 jobs) led the decline, with hundreds of jobs lost across Toronto’s large sports and entertainment venues.

Within the Indoor Sporting/Recreation sub-category, employment decreases were led by Exercise Facilities and Multi-Purpose Clubs and Halls, which lost a combined 3,760 jobs.

Office Trends

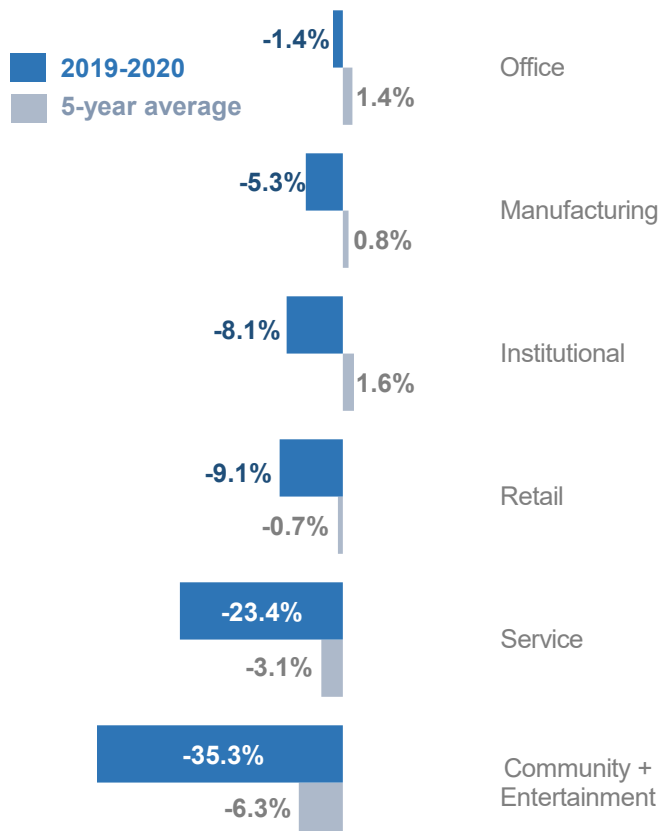
Jobs in the Office category decreased by 10,650 jobs or 1.4% in 2020. Of the different categories, the Office category decreased the least over the last year (see Figure 3a). Due to the shift to work-from-home, the category experienced a minor change relative to the -7.6% citywide average. Sub-categories that experienced the most significant decrease from 2019 include Health Service Offices (-6.9%), Government (-7.0%), and Associations (-5.4%). Finance, Insurance, and Real Estate is one of the few sub-categories that observed gains from 2019, up 15.5%.

As of Q3 2020, the office vacancy rate in Toronto was 5.9%, up from 4.1% in Q3 2019.⁸ Toronto’s vacancy rate is relatively low compared to the GTA rate of 8.4% and the national rate of 11.9%.⁹

Surveyor Insight

“Almost every office-based occupant had transitioned to working-from-home. In a few instances, they had decided to shift to working-from-home permanently to avoid paying rent for their leased spaces. Other occupants reported they were considering doing this in the future as business was down, but their building manager/landlord was not accommodating in reducing rental fees. Some had moved from more costly offices downtown to cheaper areas outside of the downtown core.”

Figure 3a: 2019-2020 Employment Growth versus 5-year Average



Surveyor Insight

“When speaking with industrial and manufacturing businesses they seemed to have more minimal employment changes. These were businesses such as metal manufacturing, chemical and cosmetic manufacturing (hand sanitizer and others), and window and door sales.”

Health Service Offices decreased by 6.9% or 4,600 jobs from 2019. Activities driving this change include Opticians and Optometrists (-11.4%) and Dentists (-8.3%) representing a combined reduction of approximately 1,300 jobs. These changes largely reflect the impact of temporary closures, reduced demand, and public health requirements due to the ongoing pandemic. This trend is included within Office as non-emergency medical services are captured under the Office category.

Finance, Insurance, and Real Estate expanded by 15.5% or 7,080 jobs from 2019. This sub-category has seen strong growth over a five-year period, increasing by 2,120 jobs or 1.2% annually. The Investment Services activity drove gains in the last year, expanding by 15.5% or 4,980 jobs. Additionally, Bank offices and branch locations grew by 2.3% or 2,470 jobs. A contributing factor to the growth in the sub-category was an update to the employment counts reported by a major bank for the first time since 2017.

The relative stability of Office employment coupled with the significant decline in Service jobs reflects the bifurcated impact of the COVID-19 pandemic for different types of work. A CIBC Capital Markets report found that while growth has been observed in relatively higher-paying jobs, lower-paying jobs have accounted for as much as 80% of total jobs lost across Canada since February of 2020.¹⁰

Manufacturing and Warehousing Trends

The Manufacturing and Warehousing category (‘Manufacturing’) declined by 5.3% or 7,270 jobs from 2019. This category experienced less change relative to others. While Manufacturing has experienced a long-term decline over the past thirty-five years, the majority of that decline occurred prior to 2009. The category experienced positive growth from 2014 to 2019, adding 10,150 jobs or 8.0% over that period.

Leading the decrease in the last year is the Product Assembly sub-category which declined by 8% or 3,400 jobs. The activities General Workshop (-23.1% or -680 jobs), Clothing (-12.5% or -620 jobs), and Scientific Equipment and Precision Instruments (-8.4% or -200 jobs) led this year’s change. Significant decreases were observed at manufacturers of fixtures and furniture for offices and retail stores.

Although employment in the Warehousing sub-category expanded over the last five years (2.0% annually) with the rise of e-commerce, 2020 saw a decline of 10.0% or 1,530 jobs. General or Mixed Warehousing lost 7.5% or 460 jobs while Warehouse for Foods and Other Resource Production Goods lost 12.7% or 510 jobs. Despite this, both categories show positive five-year trends with annual growth of 3.3% and 6.0% respectively.

Due to the COVID-19 pandemic, gains were observed at specific establishments including manufacturers of hand sanitizer.

As of Q3 2020 Toronto had the same industrial vacancy rate (0.6%) as the rest of the GTA.¹¹ This represents a minor increase from the Q3 2019 vacancy rates of 0.5% in Toronto and 0.4% in the GTA.¹² Overall, there has been strong demand for industrial space in Toronto, driven by the surge in demand for e-commerce and logistics.¹³

Institutional Trends

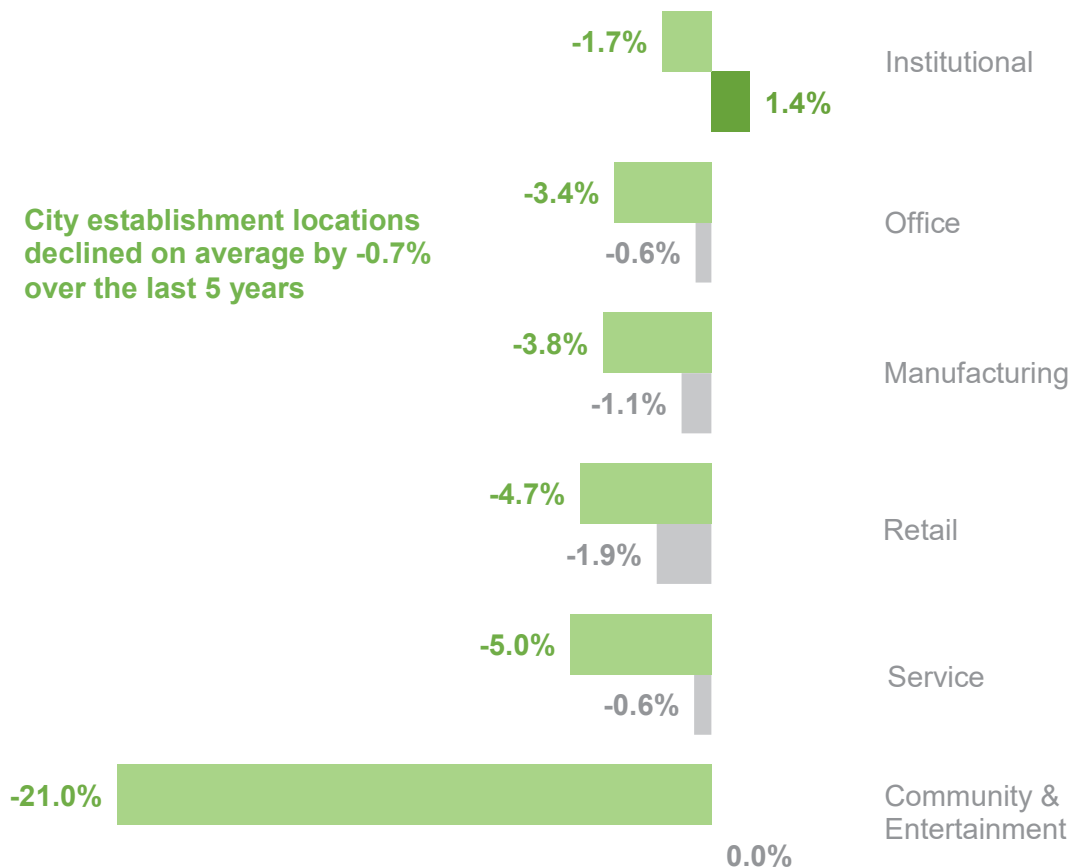
The Institutional category contracted by 8.1% or 22,010 jobs from 2019. Toronto saw a reduction in employment count for institutions with mandated closures and requirements to operate at a lower capacity. Losses in the Public and Private Education sub-sectors drove this change, decreasing by 13.6% and 14.3% respectively for a combined net job loss of 19,130.

Starting March of 2020, the majority of post-secondary students have transitioned to online learning. By comparison, only 16% of university and 12% of college students learned primarily online across Canada in 2019.¹⁴

In the Public Education sub-sector, activities that made up the majority of the decline include Nursery and Day Care Centres (-19.5% or -1,120 jobs) and Community Colleges (-20.5% or -3,180 jobs). Similarly, Private Education experienced losses including Nurseries and Day Care Centres, and multiple school activities. Private Skill-Oriented Educational Establishments also saw significant losses in 2020, decreasing by 15.9% or 1,210 jobs.

Minor gains were seen in the sub-category Care Homes which expanded by 2.7% or almost 600 new jobs from 2019. This includes places of work such as long-term care homes and residences for seniors with hiring to meet new health regulations.

Figure 3b: 2019-2020 Establishment Growth vs. 5-Year Average



Business Establishments

In 2020 the Survey counted 73,080 business establishments in the city, a net decrease of 3,480 establishments or 4.5% from 2019. A similar number of establishments were observed 10 years ago when 73,570 establishments were recorded. This year's decline is the most significant loss of establishments documented by the Survey since it was launched in 1983.

Net total establishment counts decreased in all sectors: Office (-1,000), Service (-950), Retail (-680), Community and Entertainment (-530), Manufacturing (-190), and Institutional (-110).

Employees per Establishment

In 2020, the average number of employees per establishment decreased from 20.5 to 19.8 due to the overall net loss in jobs this year (see Figure 4). Despite the one-year decline in 2020, there is still a higher number of employees per establishment than observed five years ago (18.8 in 2015).

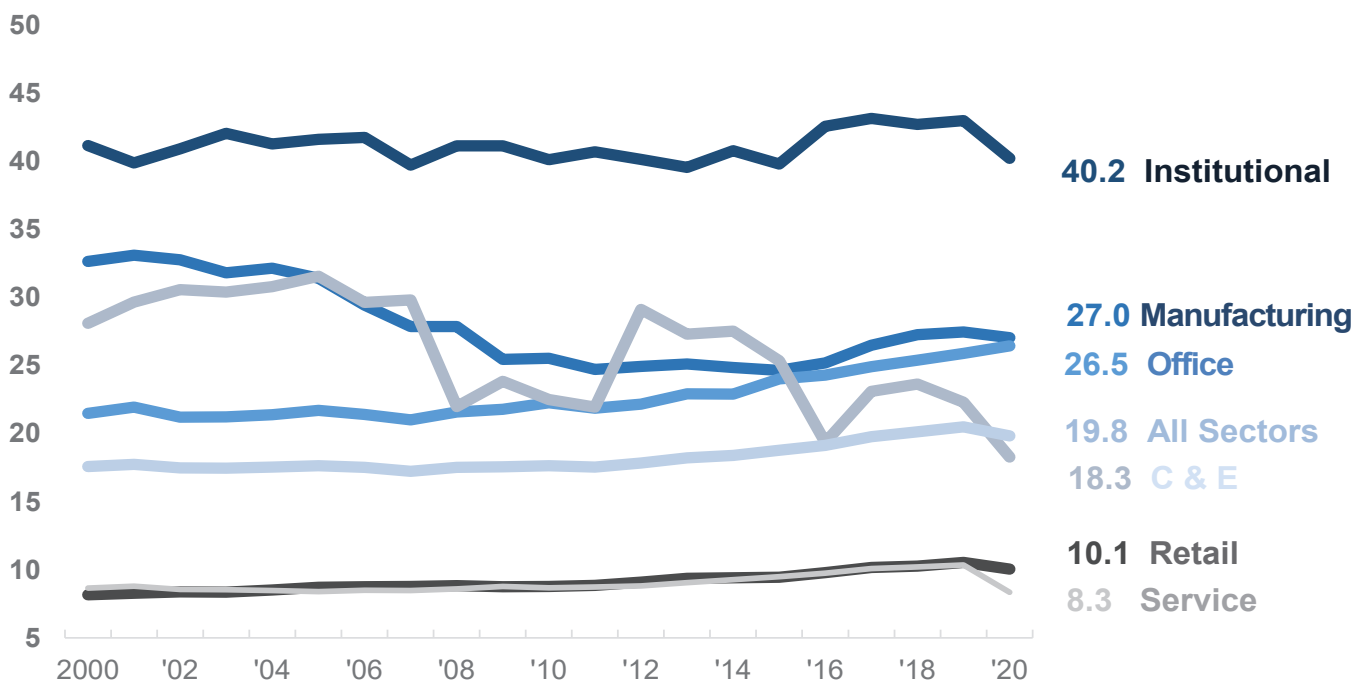
In 2020, the number of large establishments (with 100 or more employees) decreased by 212 to 2,273. Toronto's large businesses make up 3.1% of Toronto's establishments. Please refer to page 39 for a discussion about the economic impact of the COVID-19 pandemic on establishments by size.

Longevity

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

In 2020, 30.9% of Toronto's business establishments reported being at the same location for less than 5 years; some 33.7% of establishments reported being at the same location for 6 to 15 years (see Figure A1 in the Appendix). Overall, 25.6% of the city's establishments have remained in the same location for more than two decades. This breadth of business location tenure demonstrates a strong degree of stability in the local economy despite economic cycles and recessions.

Figure 4: Establishment Counts in the City of Toronto, 1983-2020



New Establishments in the City

The net change in business establishments provides a measure of business location openings and closures. New establishments include both new business starts as well as new locations of existing firms.

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

New Establishment Locations

Citywide, the Survey counted 800 new business establishments, 1.1% of the 2020 total (see Table 2). Of these new locations, 150 (18.8%) were in Employment Areas, 230 (28.8%) in Downtown, and 60 (7.5%) in the Centres. The remainder, 350 new establishments (43.8%), are located in the rest of the city (see Figure A2 in the Appendix).

Since 2015, Downtown's share of new establishments has increased the most (5.5%), while Employment Areas have seen a significant decrease in the share of new establishments (-12.7%).

Office (43.3%) led the share of new establishments in 2020, followed by Service (27.9%) and Retail (17.1%).

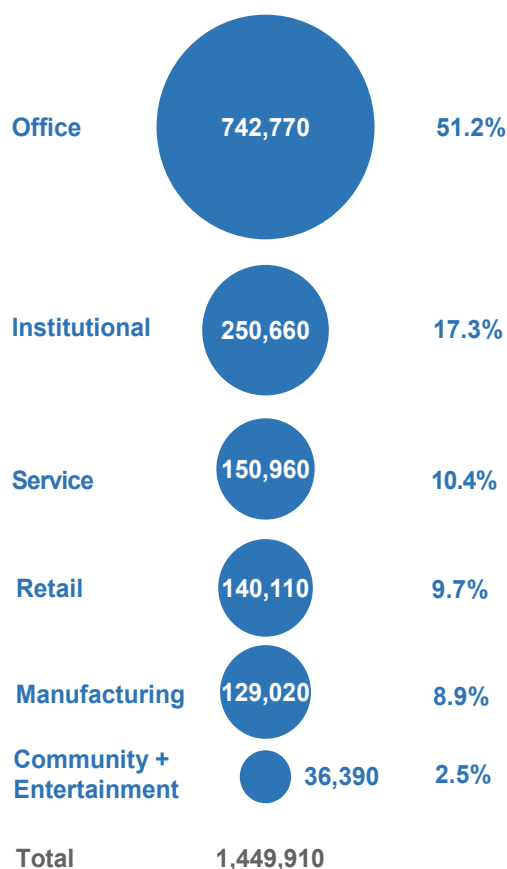
Despite COVID-19 related closures, Toronto remains an attractive location for industrial establishments, adding 20 net new manufacturing establishments in 2020, representing 1,070 jobs.

Table 2: New Establishment Counts By Geography and Land Use Category, 2019-2020

Location	2019	2020	Category	2019	2020
Centres	150	60	Manufacturing	140	20
Downtown	980	230	Retail	520	140
Employment Areas	1,030	150	Service	980	220
Rest of the City	1,640	350	Offi	1,340	350
			Institutional	410	50
			Community & Entertainment	410	20
City Total	3,810	800	City Total	3,810	800

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

Figure 5: Total 2020 Employment by Category



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. In 2020, all categories experienced above-average losses compared to the five-year trend. The most stable category was Office followed by Manufacturing.

The remaining shares of city employment are Retail (9.7%), Manufacturing and Warehousing (8.9%), and Community and Entertainment (2.5%). Except manufacturing and Warehousing, these categories all experienced negative five-year growth rates in 2020.

Community and Entertainment was the most negatively impacted in 2020.

Despite the overall net losses in Retail employment this year, certain Retail activities experienced positive growth including Department Store Retailing (2.5%), Bulk Retail (3.6%), and Supermarkets (1.2%). These activities added a combined total of 670 jobs.

City Employment Share

Toronto's top employment categories are Office (51.2%), Institutional (17.3%) and Service (10.4%) (see Figure 5 and Table 3). Office, Institutional, and Manufacturing and Warehousing were the only categories with positive five-year growth rates in 2020. Institutional leads as Toronto's fastest-growing category, averaging 1.6% annual growth over the last five years.

City Establishment Share

Toronto's categories of business establishments are similarly structured, with Office (38.4%), Service (24.7%), and Retail (19.1%) making up the largest

Table 3: Employment Counts by Employment Category, 2010, 2015, 2019, 2020

Category	Total Number of Employees				Net Change	% Change	Net Change	% Change	Net Change	% Change
	2010	2015	2019	2020	2010-2020	2010-2020	2015-2020	2015-2020	2019-2020	2019-2020
Manufacturing & Warehousing	129,530	124,000	136,290	129,020	-510	-0.4%	5,020	4.0%	-7,270	-5.3%
Retail	140,540	145,340	154,130	140,110	-430	-0.3%	-5,230	-3.6%	-14,020	-9.1%
Service	150,890	176,850	197,060	150,960	70	0.0%	-25,890	-14.6%	-46,100	-23.4%
Office	623,320	693,880	753,420	742,770	119,450	19.2%	48,890	7.0%	-10,650	-1.4%
Institutional	213,490	231,740	272,670	250,660	37,170	17.4%	18,920	8.2%	-22,010	-8.1%
Community & Entertainment	40,530	50,470	56,240	36,390	-4,140	-10.2%	-14,080	-27.9%	-19,850	-35.3%
Total	1,298,300	1,422,280	1,569,800	1,449,910	151,610	11.7%	27,630	1.9%	-119,890	-7.6%

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

shares, followed by Institutional (8.5%), Manufacturing (6.5%), and Community and Entertainment (2.7%) (see Figures 7 and 8).

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

Category Totals

Office has led overall employment growth in the last five years, adding 48,890 jobs since 2015 and achieving a 1.4% annual increase. In 2020, Office was the most robust category, declining by only 1.4% or 10,650 jobs.

Institutional has added 18,920 jobs since 2015 or 1.6% annually. The category experienced a decrease of 8.1% or 22,010 jobs in 2020, the second least impacted sector this year after Office.

Service experienced a loss of 46,100 jobs in 2020, a decline of 23.4%. After Community and Entertainment, Service employment experienced the second largest decline of all categories.

Community and Entertainment experienced a net loss of approximately one-third of its total employment, decreasing by 35.3% or 19,850 jobs in 2020. The number of jobs lost represents a net decline equivalent to 13 years of growth.

Retail employment decreased by 14,020 or 9.1% in 2020. This decline in employment follows a period of stable growth of 1.3% annually from 2015 to 2019.

Manufacturing and Warehousing employment decreased by 7,270 jobs or 5.3%. At 0.9% annual growth, Manufacturing is the third sector after Office and Institutional showing a positive five-year trend in 2020.

Figure 6: Total 2020 Establishment Counts by Category

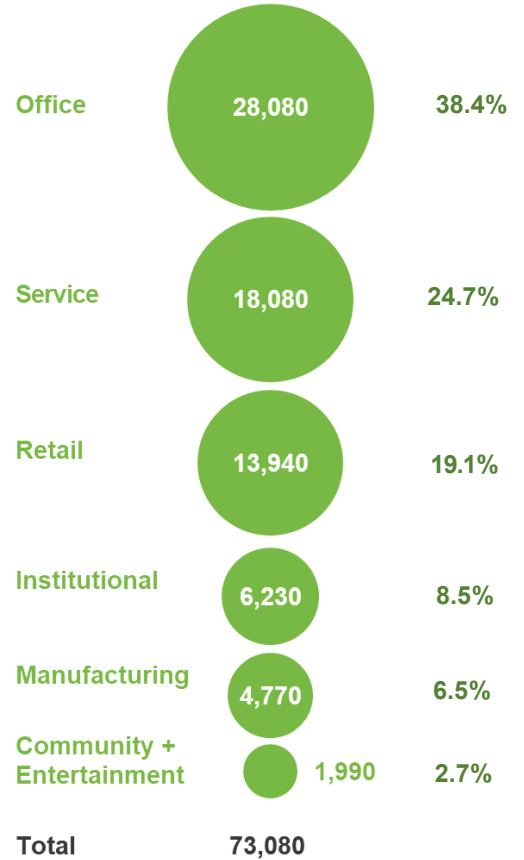


Figure 7: Establishment Counts in the City of Toronto, 1983-2020

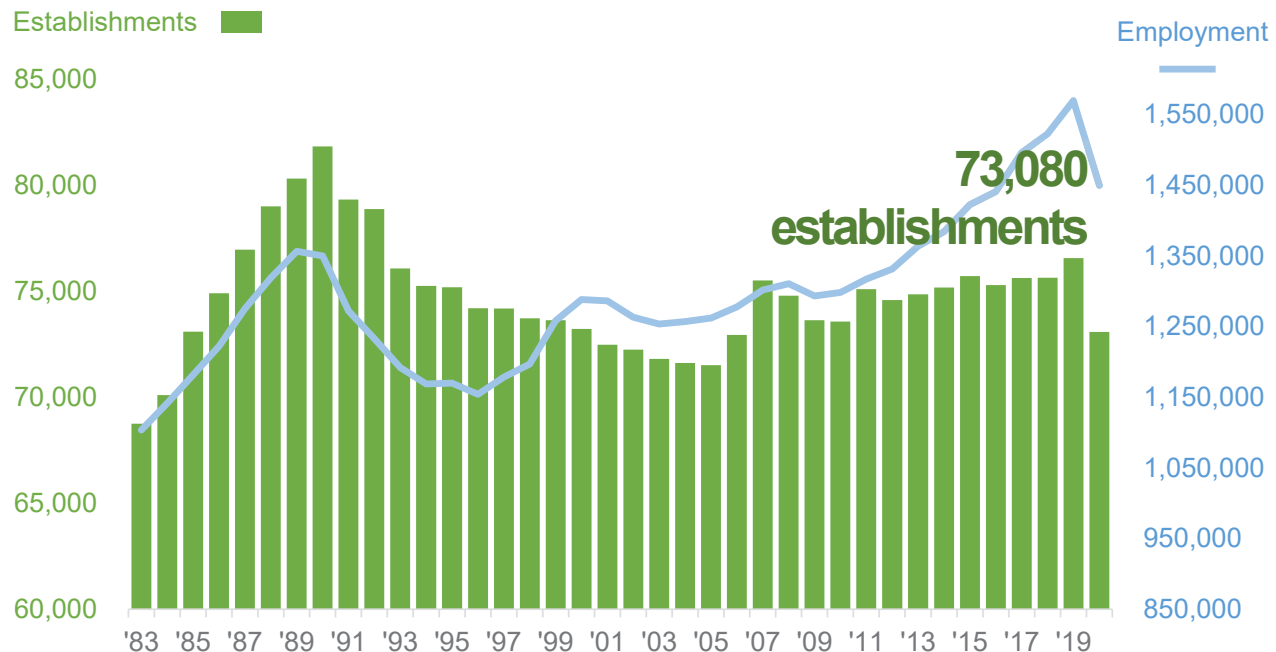


Figure 8: Employment Share by Major NAICS Sector, 2015-2020

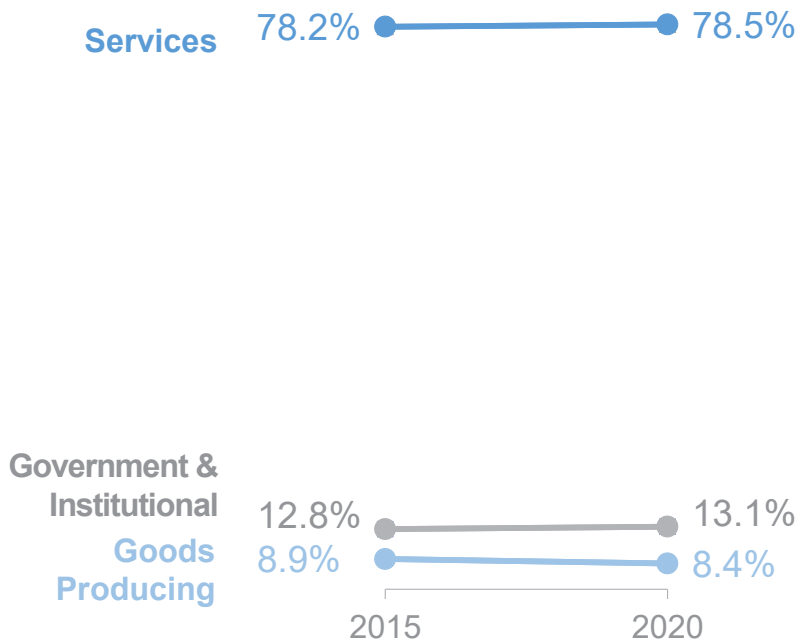
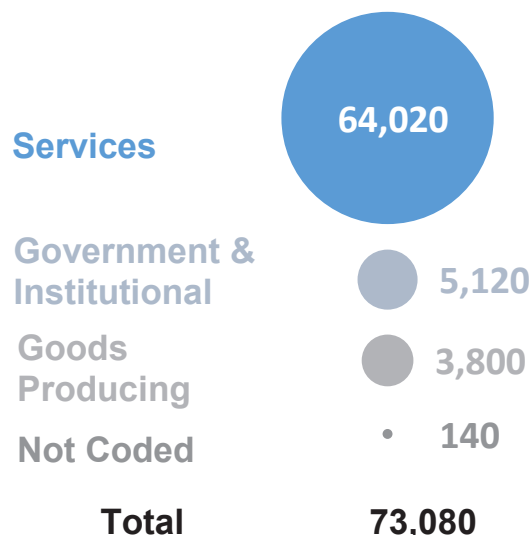


Figure 9: Establishments by Major NAICS Sector, 2015-2020



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 and their land use activity coding profile use and occupancy, NAICS offers considerable detail about the structure of the economy. NAICS is a North American coding standard and allows for the comparison of Toronto's results with other jurisdictions utilizing this same system.

Toronto's Economy

Three major sectors make up the employment shares of Toronto's economy: Service-based industries (78.5%), Government and Institutional industries (13.1%), and Goods Producing industries (8.4%) (see Figures 8 and 9).

In 2020, Service-based employment led annual losses, decreasing by 92,230 jobs or 7.5%. In contrast, in the 2019 Survey this sector had the highest annual growth. Government and Institutional employment declined by 21,200 jobs (-10%). Goods Producing industries lost 6,420 jobs (-5%), continuing the five-year trend of decreasing employment.

Major Sectors

The Survey uses NAICS to classify the economy into 20 major sectors. In 2020, Finance and Insurance replaced Health Care and Social Assistance as Toronto's largest NAICS sector, comprising 191,480 jobs or 13.2% of city employment.

In 2020, 54.6% of all jobs in Toronto were in the top five NAICS sectors (see Figure 10). In comparison, 52.3% of jobs were in the top five NAICS sectors in 2019.

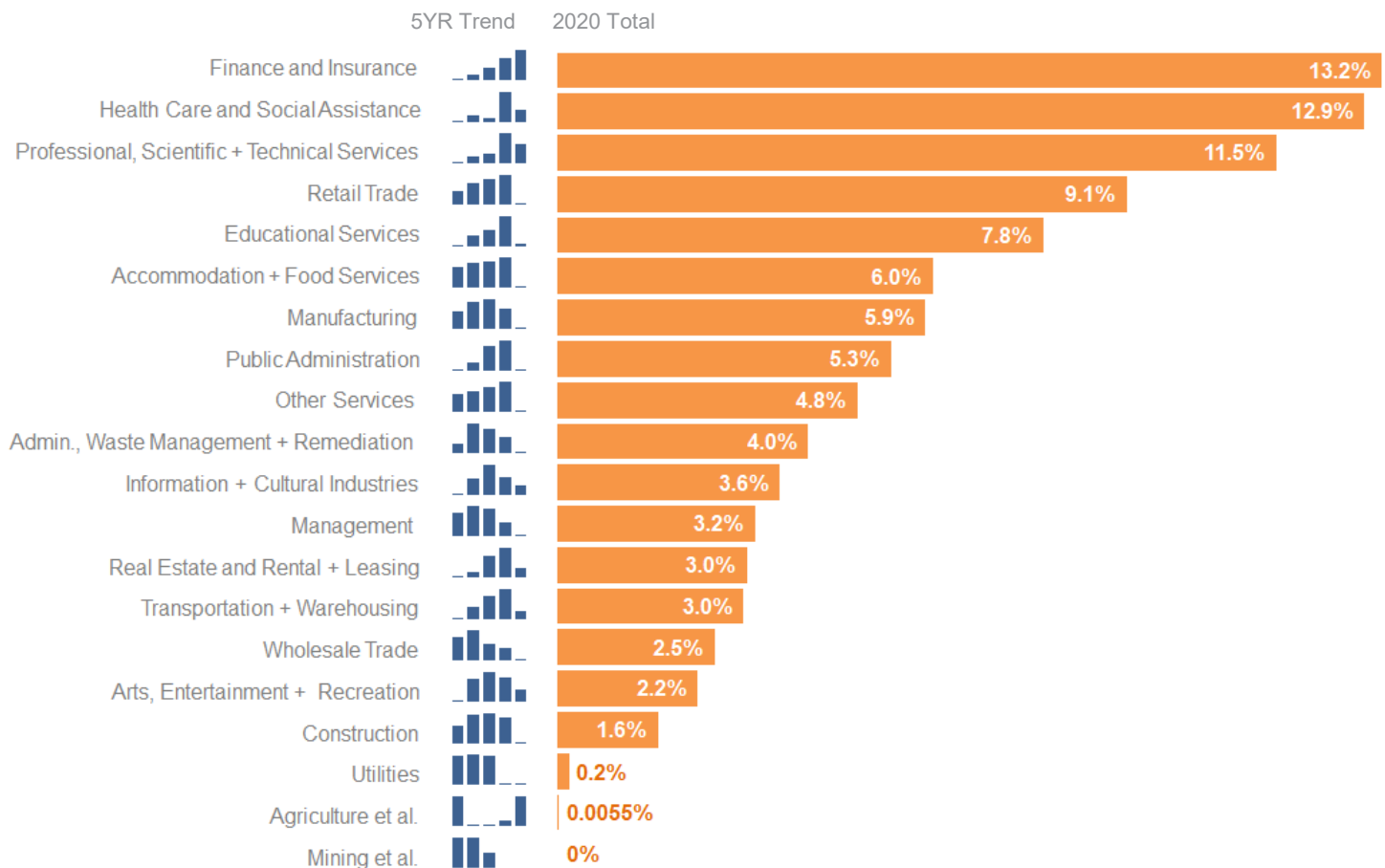
In 2020, Finance and Insurance was the only sector that experienced positive growth, adding 13,610 jobs or 7.7%.

This is slightly less than the growth reported in 2019 of 9.3% or 15,170 jobs.

Most sectors show negative trends over a five-year period, with the exception of the following 6 NAICS sectors.

- Finance and Insurance (49,100 net jobs since 2015, averaging 6.9% annual growth)
- Real Estate, Rental and Leasing (4,590 net jobs since 2015, averaging 2.4% annual growth)
- Educational Services (10,320 net jobs since 2015, averaging 2% annual growth)
- Health Care and Social Assistance (15,510 net jobs since 2015, averaging 1.8% annual growth)
- Transportation and Warehousing (3,180 net jobs since 2015, averaging 1.6% annual growth)
- Professional, Scientific and Technical Services (11,120 net jobs since 2015, averaging 1.4% annual growth)

Figure 10: City Employment Share by NAICS Sector, 2020



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 38 Secondary Plan areas, many of which are experiencing rapid growth through intensification.

Downtown, the Centres and many Secondary Plan areas include *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 intensification 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. 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: Growth Plan for the Greater Golden Horseshoe*.

The Growth Plan directs Toronto's Official Plan Urban Structure by enabling the identification of Urban Growth Centres and other Strategic Growth Areas. As part of the current Municipal Comprehensive Review, the City is analyzing potential Strategic Growth Areas that may include Urban Growth Centres, Major Transit Station Areas, and infill sites such as brownfields or greyfields.

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

Table 4: Total Employment in the Centres and Downtown, 2015-2020

							2015 - 2020		2019 - 2020	
	2015	2016	2017	2018	2019	2020	Net Change	% Change	Net Change	% Change
Downtown	508,640	511,370	543,530	565,220	584,660	537,310	28,670	5.6%	-47,350	-8.1%
North York Centre	35,000	34,090	33,900	34,910	35,920	34,920	-80	-0.2%	-1,000	-2.8%
Yonge-Eglinton	17,390	17,540	18,780	18,080	18,720	17,500	110	0.6%	-1,220	-6.5%
Scarborough Centre	16,690	16,350	17,210	17,980	16,830	15,250	-1,440	-8.6%	-1,580	-9.4%
Etobicoke Centre	9,770	9,490	10,850	10,460	10,850	9,960	190	1.9%	-890	-8.2%
Downtown and the Centres	587,490	588,840	624,270	646,650	666,980	614,940	27,450	4.7%	-52,040	-7.8%
Rest of City	834,790	851,950	871,980	876,230	902,820	834,970	180	0.0%	-67,850	-7.5%
City Total	1,422,280	1,440,790	1,496,250	1,522,880	1,569,800	1,449,910	27,630	1.9%	-119,890	-7.6%

Map 2: Urban Economic Structure

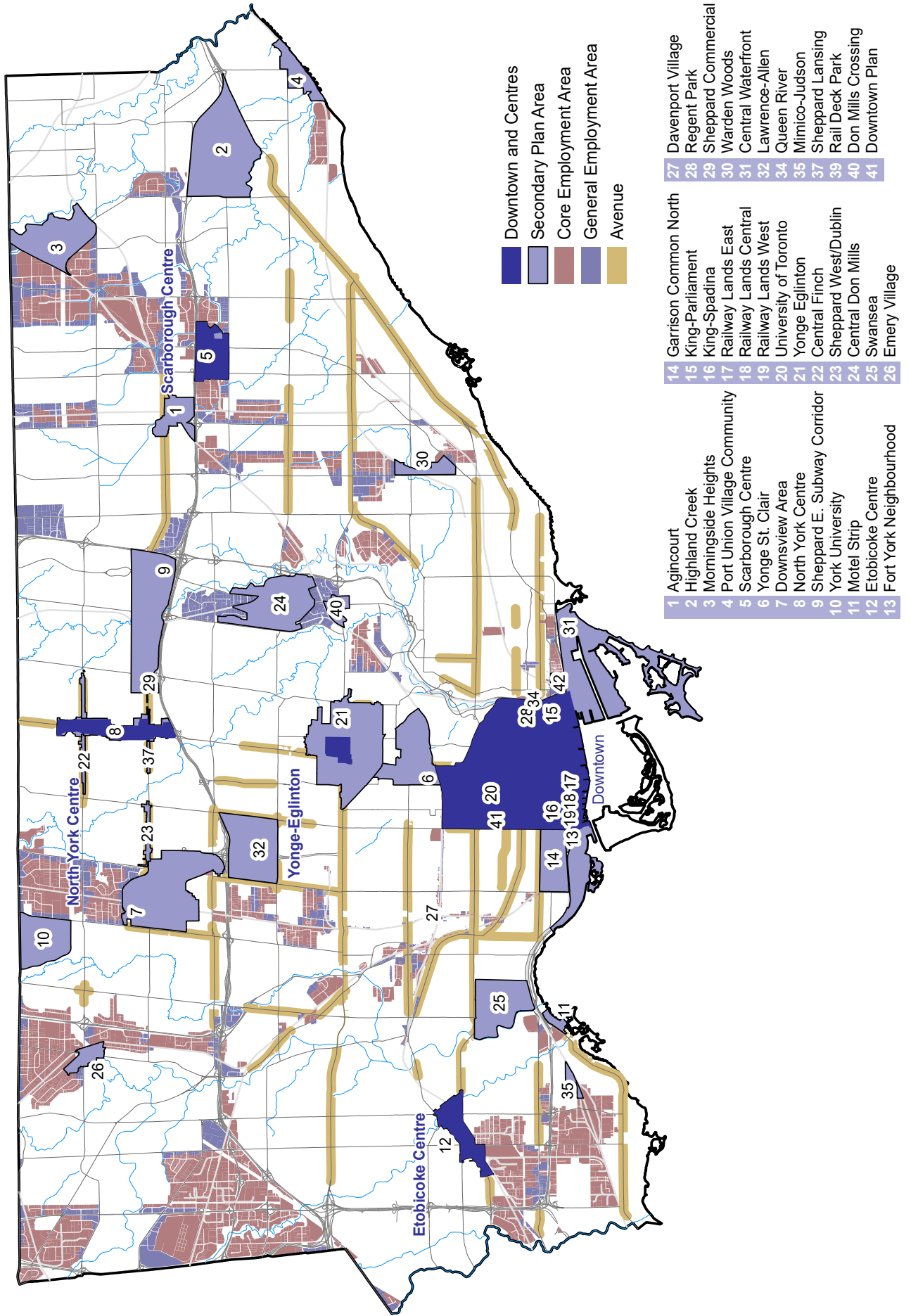
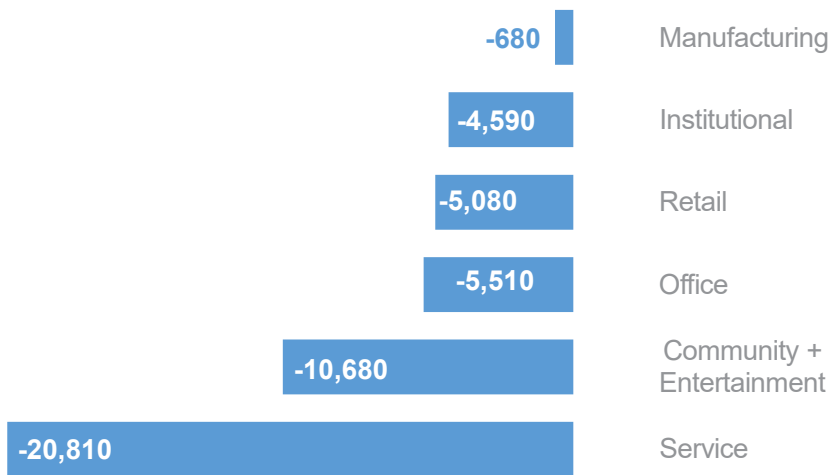


Figure 11: Downtown Employment Change 2019-2020

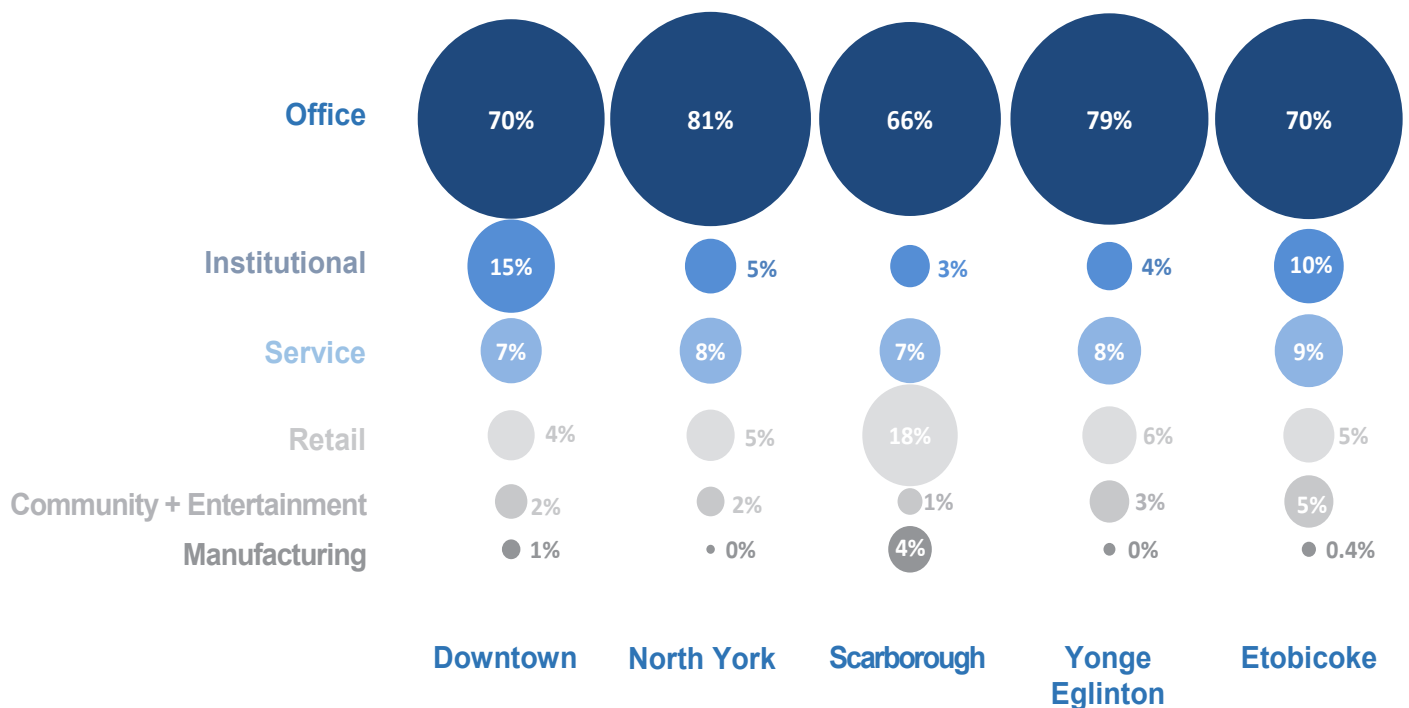


Employment in the Downtown

Toronto's Downtown and Central Waterfront ('Downtown') is a local and national economic hub. It contains 537,310 jobs, 37.1% of the city's total, and has an average employment density of 25,110 jobs per km² or 250 jobs per hectare. This represents a decline from the 2019 average employment density of 27,320 jobs per km² or 273 jobs per hectare.

In 2020, Downtown employment decreased by 47,350 jobs or 8.1% (see Figures 11 and 13). Downtown experienced more change relative to the citywide average of -7.6% (see Table 4).

Figure 12: Downtown and Centres, Share of Employment by Category in 2020



Office employment comprises 70% of Downtown jobs and 51% of establishments (see Figures 12 and 14). The Office category decreased by 5,510 jobs or 1.4% in 2020. All other categories experienced sharper decreases in employment. Community and Entertainment declined the most (-48.6%), followed by Service (-34.1%), Retail (-17.6%), Manufacturing (-15.6%), and Institutional (-5.3%).

Downtown continues to attract a significant share of new establishments, adding 234 this year. In 2020, 29.4% of new business establishments were counted in the Downtown, up from 26.0% in 2019.

Figure 13: Employment Growth vs. 5-Year Average

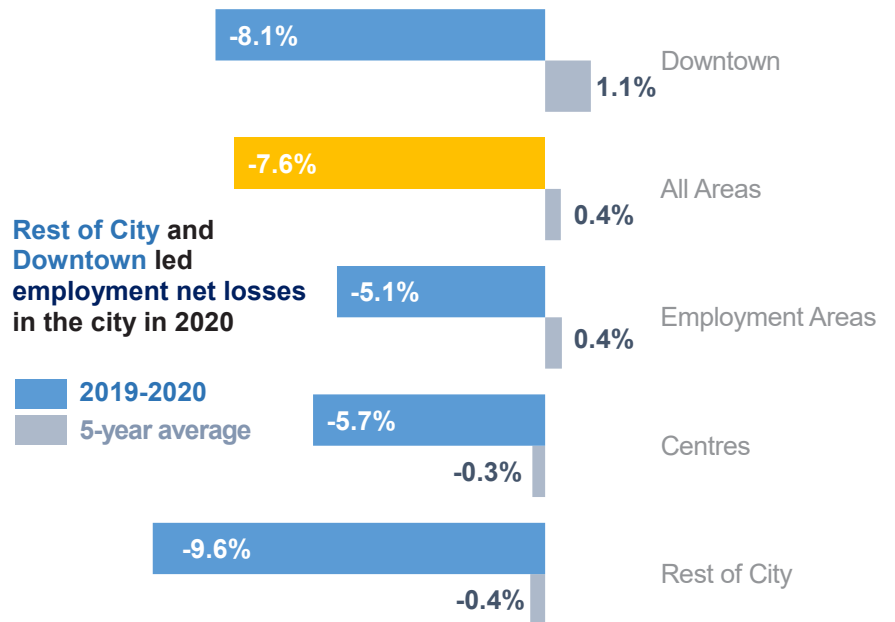


Figure 14: Downtown and Centres, Share of Establishments by Category in 2020

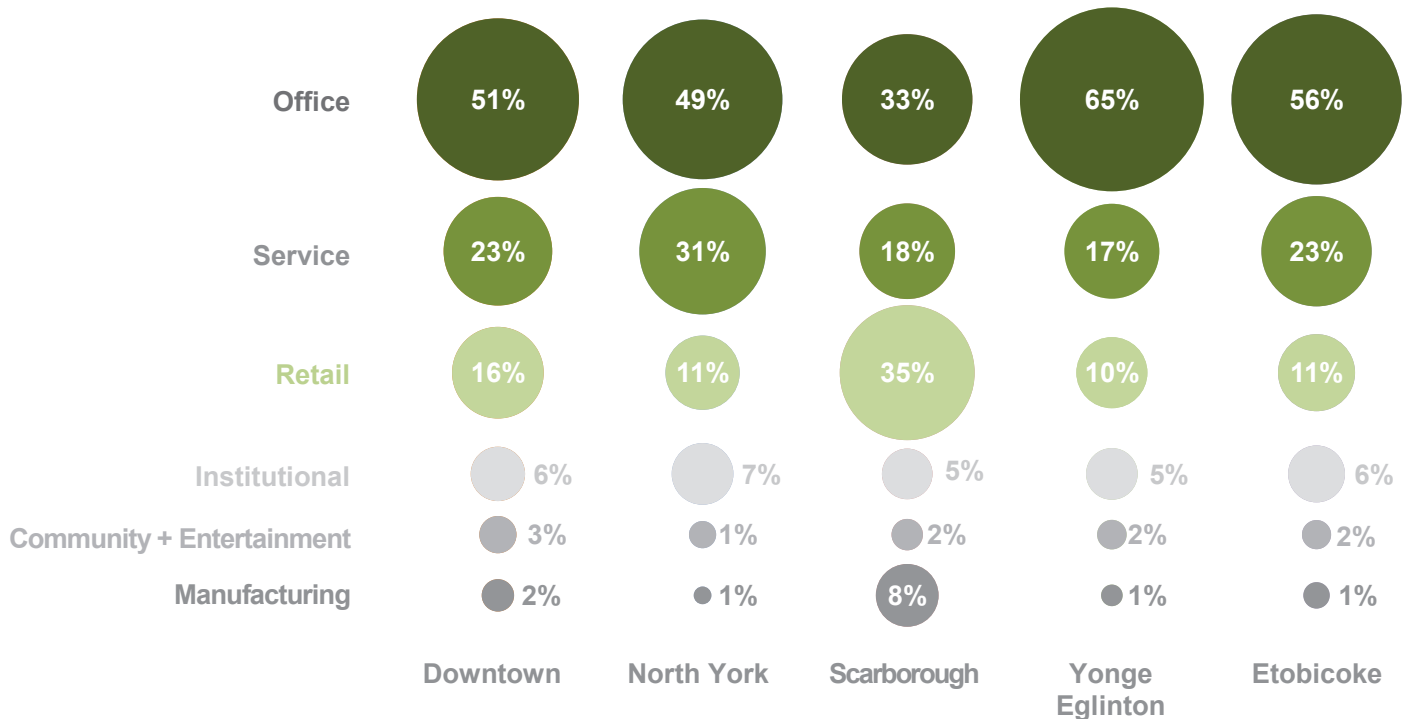


Figure 15a: North York Centre Employment Change by Sector 2019-2020

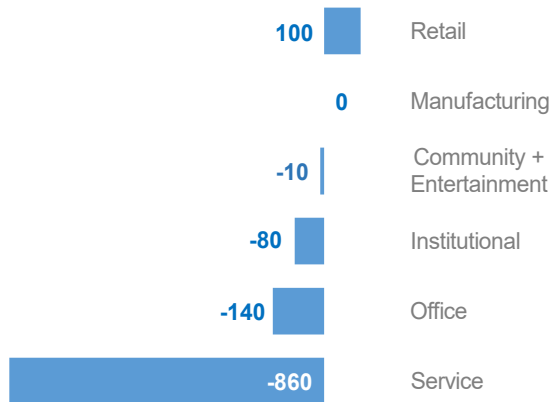
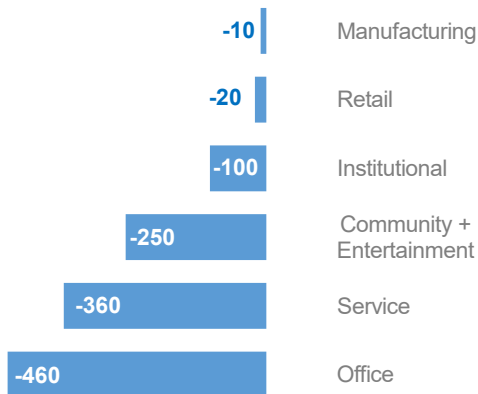


Figure 15b: Yonge-Eglinton Centre Employment Change by Sector 2019-2020



The Centres

The four Centres are home to 77,630 jobs or 5.4% of employment in the city. In 2020, the Centres together lost 4,690 jobs (-5.7%) (see Table 4, Figures 13 and 15a-d).

In 2020, the decline in employment was led by Scarborough Centre (1,580 jobs), followed by Yonge-Eglinton Centre (1,220 jobs), North York Centre (1,000 jobs), and Etobicoke Centre (890 jobs).

Over three-quarters of all jobs in the Centres are in the Office category.

North York Centre

North York Centre is Toronto's largest Centre with 34,920 jobs, comprising 2.4% of jobs in the city. Eight in ten jobs in North York Centre are Office jobs, representing 28,200 jobs (80.8%).

In 2020, North York Centre saw net decreases in Service (-860 jobs or -24.4%), Office (-140 jobs or -0.5%), Institutional (-80 jobs or -4.2%), and Community and Entertainment (-10 jobs or -1.8%). Manufacturing and Warehousing remained stable, while Retail experienced a net increase (100 jobs or 6.6%) primarily due to the opening of a new grocery store.

Yonge-Eglinton Centre

Yonge-Eglinton Centre is Toronto's second largest Centre by employment with 17,500 jobs, or 1.2% of the city's total. Yonge-Eglinton contains the highest density of employment of any Centre with approximately 28,970 jobs per km². In 2020, employment in this Centre decreased by 1,220 jobs or 6.5%.

Over three-quarters (78.6%) of employment in Yonge-Eglinton Centre is in the Office category. Office employment contracted by 460 jobs

(3.2%) in 2020. Community and Entertainment also shrunk, losing 250 jobs (-31.3%), as did Service which saw a loss of 360 jobs (-20.3%). Institutional lost 100 jobs (-12.2%), Manufacturing reduced by 10 jobs (-16.7%), and Retail employment decreased slightly by 20 jobs (-1.9%).

Scarborough Centre

Employment in Scarborough Centre totalled 15,250 jobs in 2020, comprising 1.1% of the city’s total. The Survey counted a decrease of 1,580 jobs or 9.4%. This is slightly more than the decrease Scarborough Centre experienced in 2019 when employment declined by 1,160 jobs or 6.4%.

While the employment decrease from the previous year was primarily in Office jobs, 2020 saw the most net job loss driven by Retail (-630 jobs or -18.5%), followed by Service (-390 jobs or -25.7%), and then Office (-300 jobs or -2.9%). Nearly half of Community and Entertainment jobs were lost (-150 jobs or -44.1%). Minor employment losses were also seen in Manufacturing (-20 jobs).

Etobicoke Centre

Etobicoke Centre is the smallest Centre in Toronto. The Centre has 9,960 jobs total, representing 0.7% of employment in Toronto. Most employment is Office (7,020 jobs or 70.5%), followed by Institutional (970 jobs), and Service (930 jobs). Etobicoke decreased by 890 jobs or 8.2% in 2020. Etobicoke is the only Centre that experienced growth in the Community and Entertainment sector in 2020, adding 230 jobs or 4.8% due to increased employment at construction sites within the Centre.

Figure 15c: Scarborough Centre Employment Change by Sector 2019-2020

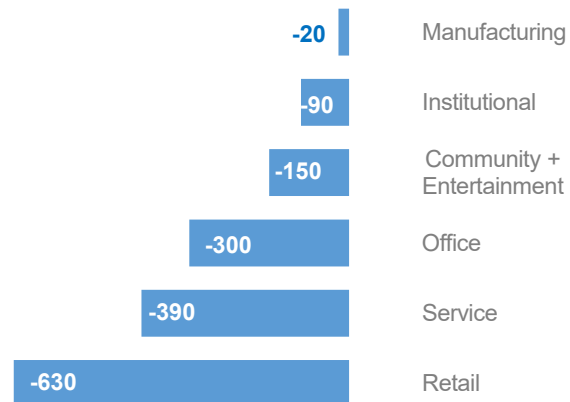


Figure 15d: Etobicoke Centre Employment Change by Sector 2019-2020



Employment in Secondary Plan Areas

With over half (50.7%) of all employment (735,300 jobs), Secondary Plan areas reflect much of the city's recent urban growth. When the Survey reported on 32 Secondary Plan areas in 2019, they accounted for 21.0% of employment or 329,560 jobs. In 2020, 6 additional Secondary Plan areas were approved.

There are multiple parts of the city that belong to more than one Secondary Plan area. For example, businesses at King Street East and Parliament Street fall within three Secondary Plan areas including the Central Waterfront, Downtown Plan, and King-Parliament areas.

Note that the employment numbers in Figure 16 and Table A1 in the Appendix report on each Secondary Plan area individually. Therefore, some duplication occurs between overlapping areas when employment numbers are considered cumulatively.

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 totals for Downtown, the Centres, or Employment Areas.

The Secondary Plan areas for Downtown, North York Centre, and Yonge-Eglinton Centre differ from the areas of the Centres and Downtown identified in the Official Plan's Urban Structure, and as a result, the reported employment and establishment figures are not directly comparable.

Secondary Plan Areas by Employment

Employment is concentrated in the five largest Secondary Plan areas by employment, which collectively contain 74.1% of all jobs in the 38 Secondary Plan areas (see Figure 16). The largest Secondary Plan area is the Downtown Plan (529,400 jobs) and contains over half (55.1%) of employment within Secondary Plan areas. This is followed by Central Waterfront (36,190 jobs), King-Spadina (35,950 jobs), North York Centre (34,920 jobs), and Yonge Eglinton (33,930 jobs).

The remaining 33 Secondary Plan areas contain less than 22,000 jobs each. Of these, roughly half contain 1,000 to 22,000 jobs while half contain less than 1,000 jobs (see Figure 16).

Secondary Plan Areas by Activity

Based on unique employment across all Secondary Plan Areas without overlap, Office was the dominant employment category across all Secondary Plan areas in totality in 2020, representing two-thirds (66.7%) of all jobs and nearly half of all establishments (49.8%). This was followed by Institutional (15.2% of all jobs), Service (8.1% of all jobs), Retail (6.4% of all jobs), Community and Entertainment (2.1% of all jobs), and Manufacturing (1.4% of all jobs) (see Figures 17 and 18).

A number of Secondary Plan areas do not have Office as the main employment category. Manufacturing jobs comprise the bulk of employment for Warden Woods (53.3%) and the Downsview Area (44.8%). Retail jobs represent the majority of employment for Queen River (42.9%) and Lawrence-Allen (40.1%). Service jobs are the majority in Port Union Village Community (100%), Davenport Village (50.0%), and Railway Lands West (37.5%). Institutional jobs make up most of the employment for York University (87.8%), University of Toronto (87.5%), Highland Creek (75.3%), Morningside Heights (66.7%), and Fort York Neighbourhood (53.9%).

Figure 16: Secondary Plan Areas, 2020 Employment

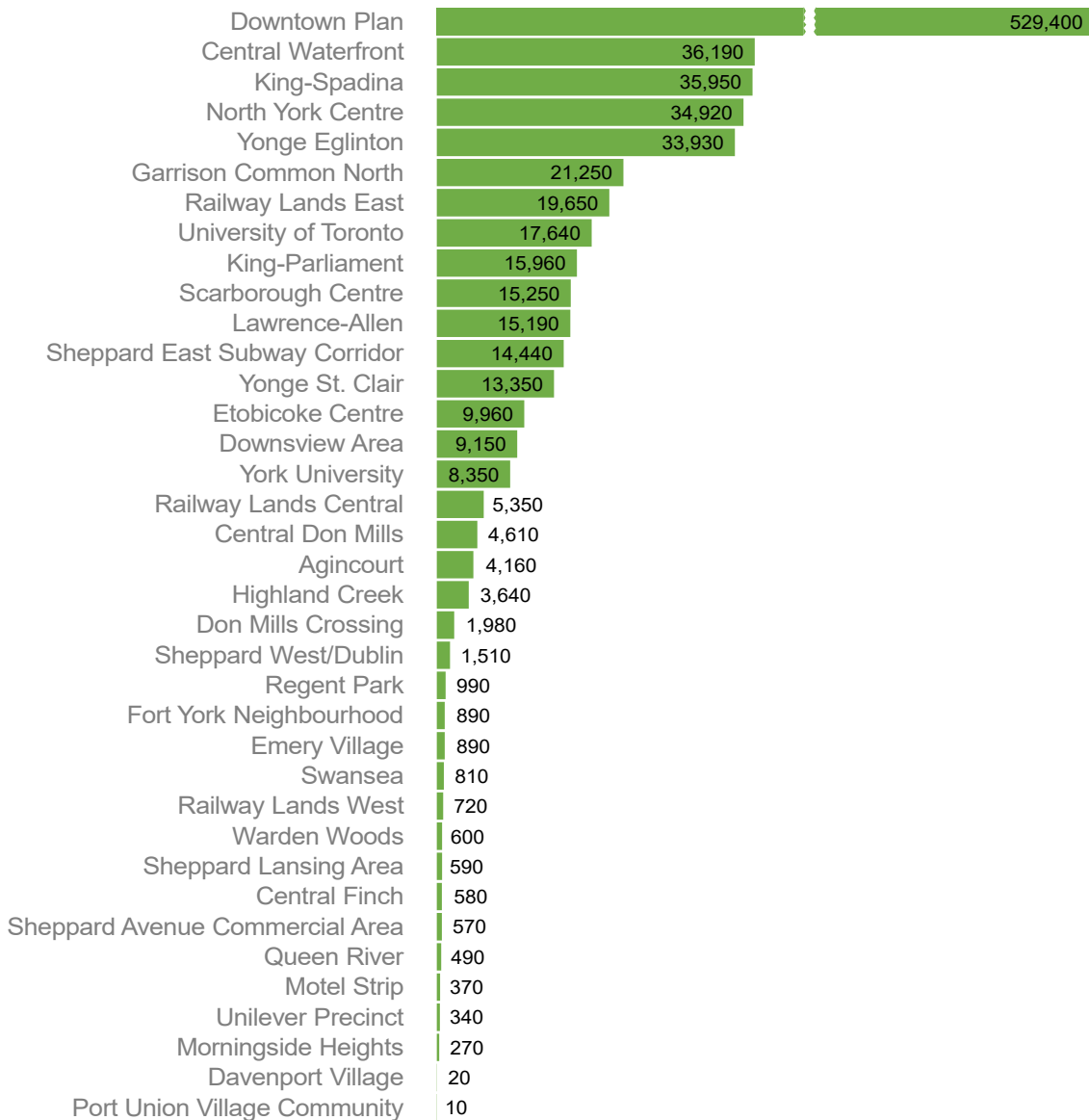


Figure 17: Secondary Plan Area Employment, 2020

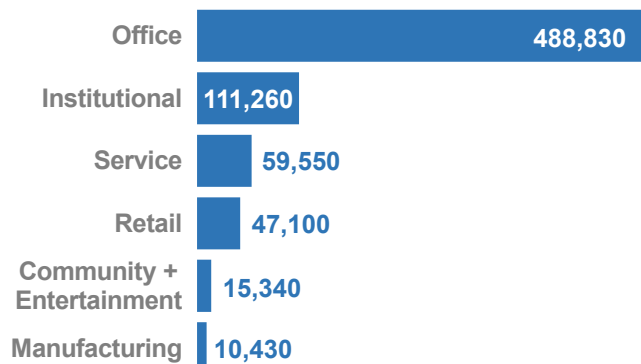
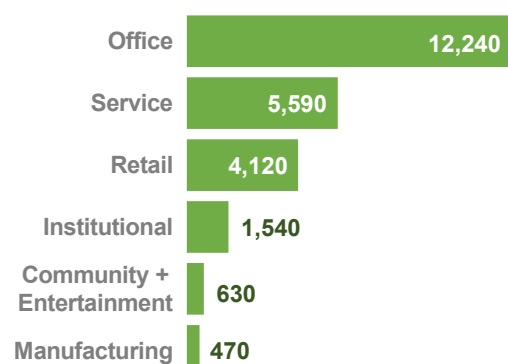


Figure 18: Secondary Plan Area Establishments, 2020



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, help ensure a stable environment for investment, and maintain and grow the City's revenue base.

Map 3 on page 26 shows the location and boundaries of *Core* and *General Employment Areas* identified in the City's Official Plan at the time of the 2020 Survey. Overall, 29.6% of all establishments (21,630 locations) and 25.6% of all jobs (402,250 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 87.6% of all Manufacturing jobs located in Toronto's Employment Areas.

Employment Areas continue to attract new businesses, with 18.8% of new establishments (150) in the city locating in Employment Areas in 2020.

Official Plan Amendment 231

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

Core and General Employment Areas

Section 4.6 of OPA 231 differentiates *Core* and *General Employment Areas*. These designations came into force by an Order of the Ontario Municipal Board on December 20, 2016.

Core Employment Areas are, for the most part, geographically located within the interior of employment areas. Uses that would attract the general public into the interior of employment lands and possibly disrupt industrial operations are not typically permitted in *Core Employment Areas*.

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

Employment Area Sector Activity

The top three sectors include Manufacturing, Wholesale and Retail Trade, and Professional, Scientific and Technical Services, respectively. Manufacturing employment is the largest sector across Employment Areas, making up 19.8% of all jobs (79,460 jobs). The sector experienced a net loss from last year (decreasing by 4,270 jobs) but the proportion of all jobs remained the same. Wholesale and Retail Trade also maintained the same 16.2% of employment, though the number of jobs reduced by 3,560. The share of Professional, Scientific and Technical Services employment increased slightly to represent 10.8% or 43,350 jobs (from 10.4% in 2019 or 44,040 jobs).

Employment Areas accommodate important concentrations of jobs citywide in several sectors, led by Manufacturing (87.6%), Utilities (81.9%), Transportation and Warehousing (73.3%), and Construction (67.2%).

Core Employment Area activity

Core Employment Areas continue to host land consumptive uses. They cover 60.7 km² in Toronto, which represents 9.6% of the city's total land area. *Core Employment Areas* accounted for 257,000 jobs in 2020 or 63.9% of all jobs in Employment Areas, and have an average of 4,230 jobs per km².

In 2020, the sectors that led jobs in Employment Area include Manufacturing (26.8% or 68,870 jobs), Wholesale and Retail Trade (14.4% or 37,060 jobs), and Transportation and Warehousing (12.4% or 31,950 jobs).

Core Employment Areas are leading locations citywide for employment in Manufacturing (75.9%), Transportation and Warehousing (67.5%), and Construction (56.9%) (see Figure 19).

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 km² in Toronto, which represents 3.3% of the city's land area. *General Employment Areas* contain 36.1% of Employment Area jobs for a total of 145,250 jobs in 2020, with an average employment density of almost 6,850 jobs per km².

Sectoral employment in *General Employment Areas* is led by Wholesale and Retail Trade, with 19.4% of jobs (28,130 jobs), followed by Professional, Scientific, and Technical Services (11.5% or 16,730 jobs), and Finance and Insurance (8.9% and 12,880 jobs).

General Employment Areas are leading locations citywide for employment in Utilities (59.2%), Real Estate and Rental and Leasing (21.0%), and Administrative and Support, Waste Management and Remediation services (17.3%).

Wholesale and Retail Trade (15.3%), Management of Companies and Enterprises (13.9%), and Manufacturing (11.7%) also have significant shares of citywide jobs within *General Employment Areas* (see Figure 20).

Figure 19: Core Employment by NAICS, 2020

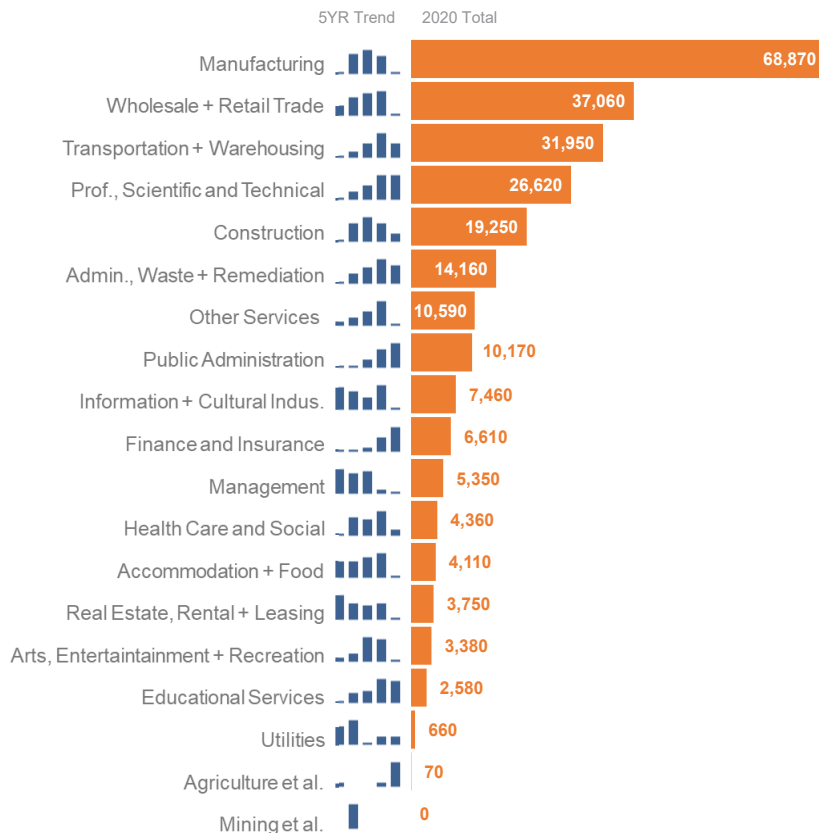
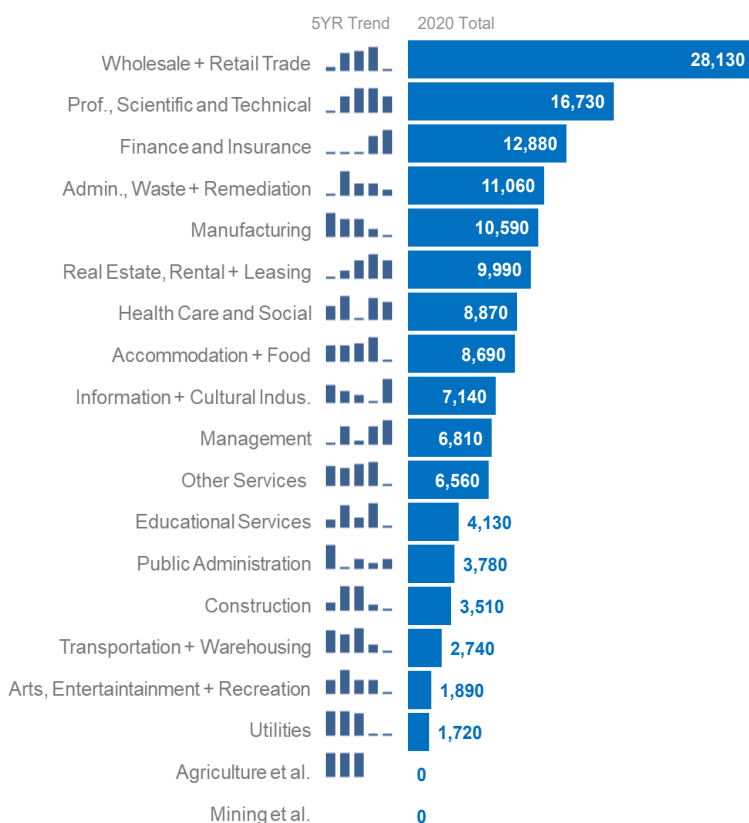


Figure 20: General Employment by NAICS, 2020



Provincially Significant Employment Zones

Provincially Significant Employment Zones (PSEZs) are areas defined by the provincial government for the purpose of long-term planning for job creation and economic development.¹⁵

The 2019 Growth Plan for the Greater Golden Horseshoe introduced PSEZs, 11 of which are located in Toronto (see Map 3). These Zones capture existing employment areas as well as *Mixed Use Areas* with a high concentration of employment (see Map 4).

This is the first year for the Survey to report on employment by PSEZ. It should be noted that some identified PSEZs extend beyond the city's boundaries and into neighbouring municipalities. The Survey only captures the employment for those portions of the PSEZs within the City of Toronto.

Employment in PSEZs accounts for 228,630 jobs or 15.8% of all citywide employment. Designated Employment Areas within PSEZs contain 223,970 jobs. In turn, PSEZs contain only about half (55.7%) of the jobs located in designated Employment Areas.

Map 3: Provincially Significant Employment Zones (PSEZs), City of Toronto.

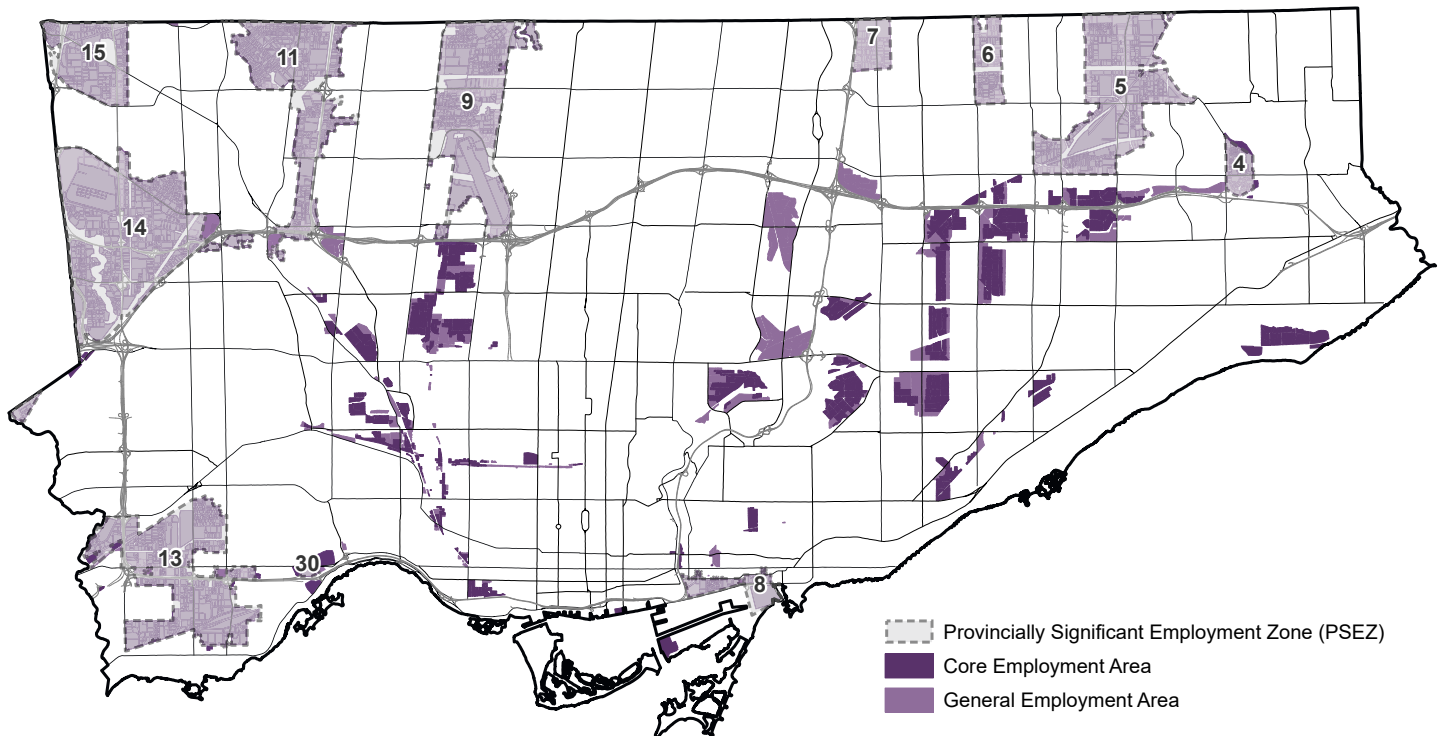
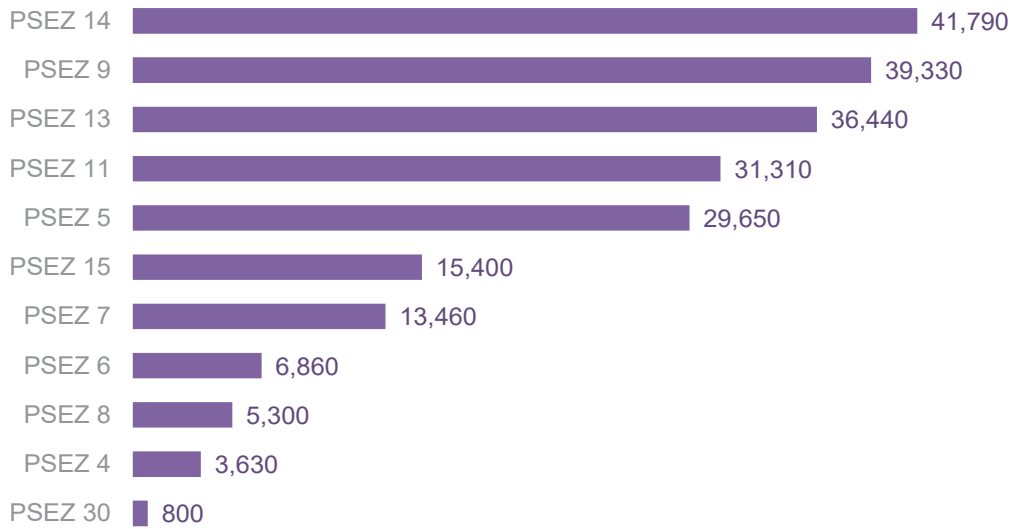
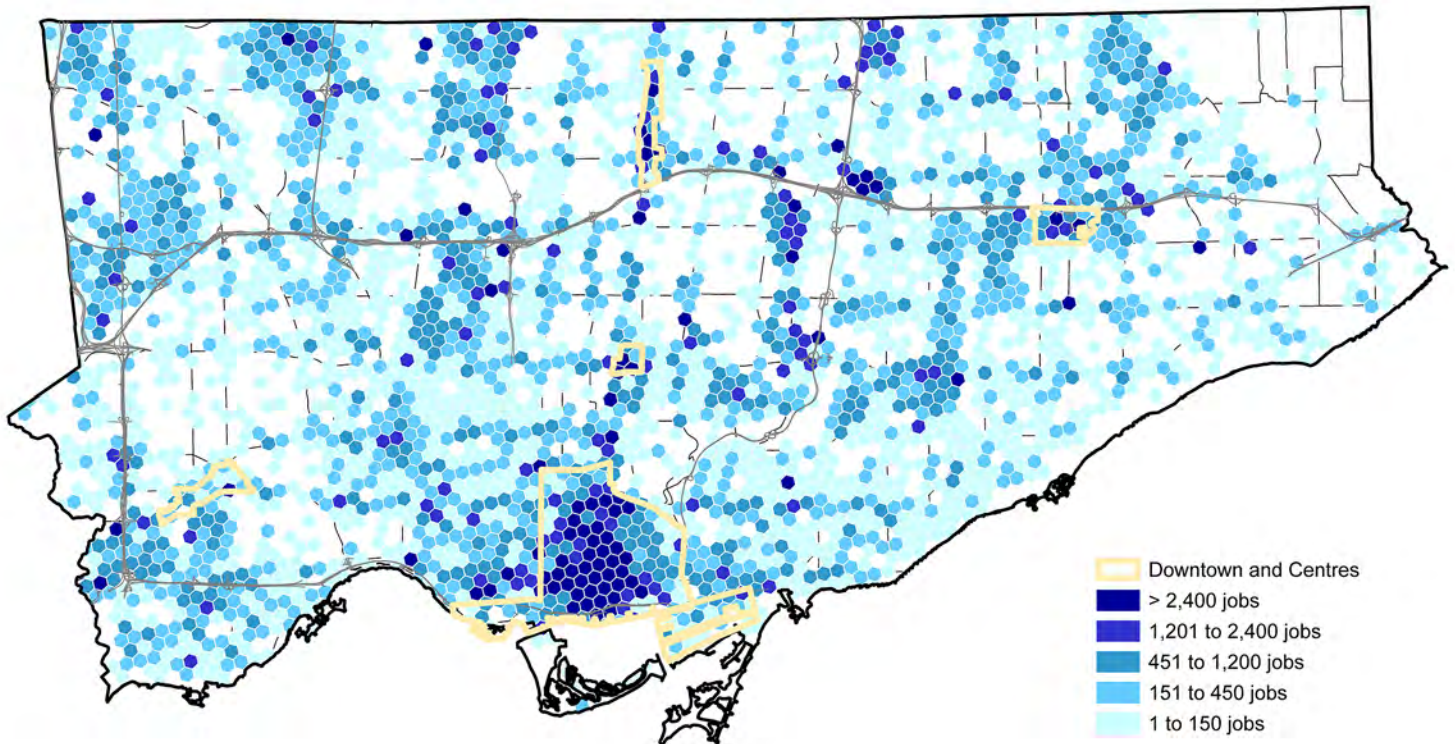


Figure 21: Total Employment by PSEZ ID, 2020



Map 4: Toronto's Employment Density (2020)



Top PSEZs by Employment (within Employment Areas)

About half (5 of 11) of all PSEZs each contain approximately 30,000 to 40,000 jobs (see Table 5 and Figure 21). Two PSEZs contain approximately 15,000 jobs each. The three smaller PSEZs have around 1,000 to 5,000 jobs. The top five Zones with the most employment represent 79.7% of all PSEZ employment. The highest concentration of employment (41,790 jobs) is found in Zone 14, located in the northwest near Pearson Airport. This is followed by Zone 9 in the north (39,330 jobs), then Zone 13 in the southwest (36,440 jobs). The smallest PSEZ is Zone 30, the site of the Ontario Food Terminal, and contains 800 jobs.

PSEZ Activity (within Employment Areas)

The leading employment activity in 2020 for PSEZs is Manufacturing, comprising 25% (56,010 jobs) of the total (see Table 6). This is followed by Wholesale Trade which has 10.1% or 22,600 jobs, and Transportation and Warehousing with 9.3% or 20,720 jobs.

PSEZ Employment Change (within Employment Areas)

Employment in PSEZs experienced a decline of 6.7% in 2020, or 16,170 jobs (see Table 6). Most activities experienced a net loss in 2020, with the exception of Finance and Insurance (added 330 jobs), Agriculture (added 10 jobs), and Utilities (added 10 jobs). Since 2015, Finance and Insurance increased by 1,820 jobs with 6% annual growth. Accommodation and Food Services saw the most significant decrease in employment in the last year of 3,000 jobs or 29.9%. This was followed by Information and Cultural Industries which saw a net loss of 920 jobs or 16.4%.

Table 5: Total EA Employment by PSEZ, 2015-2020

PSEZ ID	2015	2019	2020	2015 - 2020	% Change	2019 - 2020	% Change
4	3,480	3,920	3,630	150	4.3%	-290	-7.4%
5	29,940	32,890	29,650	-290	-1.0%	-3,240	-9.9%
6	7,290	7,720	6,860	-430	-5.9%	-860	-11.1%
7	12,600	13,840	13,460	860	6.8%	-380	-2.7%
8	5,900	6,290	5,300	-600	-10.2%	-990	-15.7%
9	38,920	41,610	39,330	410	1.1%	-2,280	-5.5%
11	31,150	32,640	31,310	160	0.5%	-1,330	-4.1%
13	37,510	39,920	36,440	-1,070	-2.9%	-3,480	-8.7%
14	40,030	44,140	41,790	1,760	4.4%	-2,350	-5.3%
15	15,510	16,270	15,400	-110	-0.7%	-870	-5.3%
30	860	890	800	-60	-7.0%	-90	-10.1%
Total PSEZ	223,190	240,130	223,970	780	0.3%	-16,160	-6.7%
Not in PSEZ	168,380	183,790	178,290	9,910	5.9%	-5,500	-3.0%
Grand Total	391,570	423,920	402,250	10,680	2.7%	-21,670	-5.1%

Note: PSEZ totals are for Toronto only.

Table 6: Total EA Employment in PSEZs by Major NAICS Sector, 2015-2020

NAICS Sector	2015	2019	2020	2015 - 2020	% Change	2019 - 2020	% Change
Agriculture, Forestry, Fishing and Hunting	10	0	10	0	0.0%	10	0.0%
Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0.0%	0	0.0%
Utilities	740	770	780	40	5.4%	10	1.3%
Construction	16,080	16,740	15,990	-90	-0.6%	-750	-4.5%
Manufacturing	56,340	58,930	56,010	-330	-0.6%	-2,920	-5.0%
Wholesale Trade	25,810	24,540	22,600	-3,210	-12.4%	-1,940	-7.9%
Retail Trade	16,140	18,160	17,570	1,430	8.9%	-590	-3.2%
Transportation and Warehousing	19,580	23,000	20,720	1,140	5.8%	-2,280	-9.9%
Information and Cultural Industries	5,790	5,620	4,700	-1,090	-18.8%	-920	-16.4%
Finance and Insurance	6,080	7,570	7,900	1,820	29.9%	330	4.4%
Real Estate and Rental and Leasing	6,480	7,130	6,530	50	0.8%	-600	-8.4%
Professional, Scientific and Technical Services	16,420	16,870	16,410	-10	-0.1%	-460	-2.7%
Management of Companies and Enterprises	3,400	4,330	3,860	460	13.5%	-470	-10.9%
Administrative and Support, Waste Management and Remediation Services	10,400	12,530	11,820	1,420	13.7%	-710	-5.7%
Educational Services	2,890	3,510	3,510	620	21.5%	0	0.0%
Health Care and Social Assistance	6,800	7,980	7,820	1,020	15.0%	-160	-2.0%
Arts, Entertainment and Recreation	3,230	3,510	3,140	-90	-2.8%	-370	-10.5%
Accommodation and Food Services	9,150	10,040	7,040	-2,110	-23.1%	-3,000	-29.9%
Other Services (Except Public Administration)	10,290	11,000	9,840	-450	-4.4%	-1,160	-10.5%
Public Administration	7,540	7,880	7,720	180	2.4%	-160	-2.0%
Not Coded	50	20	10	-40	-80.0%	-10	-50.0%
Total	223,190	240,130	223,960	770	0.3%	-16,170	-6.7%

Regional Employment Policies

The Greater Golden Horseshoe: Growth Forecasts to 2051 (Technical Report) by Hemson Consulting Ltd., released August 26, 2020, supports the forecasts in Schedule 3 of *A Place to Grow*, the Provincial Growth Plan 2020 and includes employment forecasts for the City of Toronto. Under the Reference scenario, employment within the City of Toronto is forecasted to grow to 1,979,000 by 2051.¹⁶

The Technical Report highlights that there is a great degree of uncertainty in projecting future economic conditions during the COVID-19 pandemic. For forecasting purposes, the Technical Report assumes that overall growth will return to pre-pandemic expectations within three years (2023) and notes that underlying economic fundamentals for the region remain positive.¹⁷ At the same time, the authors emphasize the serious immediate impacts of the pandemic for individuals and specific

sectors, noting that some groups may experience sustained negative outcomes post-recovery.¹⁸

The Toronto Employment Survey provides a snapshot in time. Viewed in aggregate over a multi-decade perspective, individual year results illustrate a picture of long-term economic growth interspersed with periods of intermittent decline. Previous declines which occurred from 1991 to 1994, 2001 to 2003, and 2009 were all subsequently followed by periods of continued employment gains. The employment decline recorded by the 2020 Survey was significant but not unprecedented.

Table 7 shows the 2020 Technical Report employment forecast to 2051 in comparison with two scenarios based on historical Toronto Employment Survey data. Under the Growth Plan Reference scenario, the city is forecasted to add an average of 10,600 employees per annum (P.A.) from a base year of 2016 through to 2051. The

Table 7: Employment Forecast Scenarios, 2016-2051

Scenario	2016	2051	2016-2051	P.A.	PA %	Years
Growth Plan Reference	1,608,000	1,979,000	371,000	10,600	0.70%	35
	2009	2019	2009-2019			
TES 10 Years to 2019	1,293,190	1,569,800	276,610	27,661	2.10%	13
	2010	2020	2010-2020			
TES 10 Years to 2020	1,298,298	1,449,910	151,612	15,161	1.20%	24

Note: P.A. abbreviates per annum.

pre-pandemic scenario “TES 10 Years to 2019” shows that between the years 2009 and 2019 the city added 27,661 jobs per annum. If this rate of job growth is applied to the 2016 base year, Toronto would reach the forecasted 2051 figure in 13 years rather than 35. The mid-pandemic scenario “TES 10 Years to 2020” shows the city added 15,161 jobs annually between 2010 and 2020. If this rate of job growth is applied to the 2016 base year, Toronto would reach the forecasted 2051 figure in 24 years.

As noted in the Technical Report, the long-term economic impacts of the pandemic remain uncertain. While the report’s authors assume a recovery period of approximately three years, they emphasize the unpredictability of potential outcomes and that specific industries, firms, and individuals may face prolonged challenges. Within this context, subsequent Toronto Employment Surveys will be essential for assessing the depth and diversity of the recovery on a sub-sector and geospatial basis.

In essence, the initial effects of the pandemic as of 2020 have been to halve the average annual growth rate of the past decade. Based on the average annual rate of growth over the last ten years including 2020, this scenario indicates that if this trend were to continue then the number of jobs in Toronto would still reach the Growth Plan forecast before 2051. This scenario would represent some degree of economic recovery going forward.

Table 8: Total Full-Time and Part-Time Employment, 1983-2020

	1983		2020		1983 - 2020	
	# of Employees	% of Total	# of Employees	% of Total	Net Change	Annualized Growth Rate
Full-time	992,410	89.9%	1,114,090	76.8%	121,680	0.3%
Part-time	111,270	10.1%	335,820	23.2%	224,550	3.0%
Total	1,103,680	100.0%	1,449,910	100.0%	346,230	0.7%

Toronto Employment Survey Retrospective

Historical Perspective

The COVID-19 pandemic has had profound impacts on Toronto's economy and employment structure. In 2020, the Toronto Employment Survey recorded a 7.6% decline in total jobs, making it the largest single-year decline since the Survey was initiated in 1983.

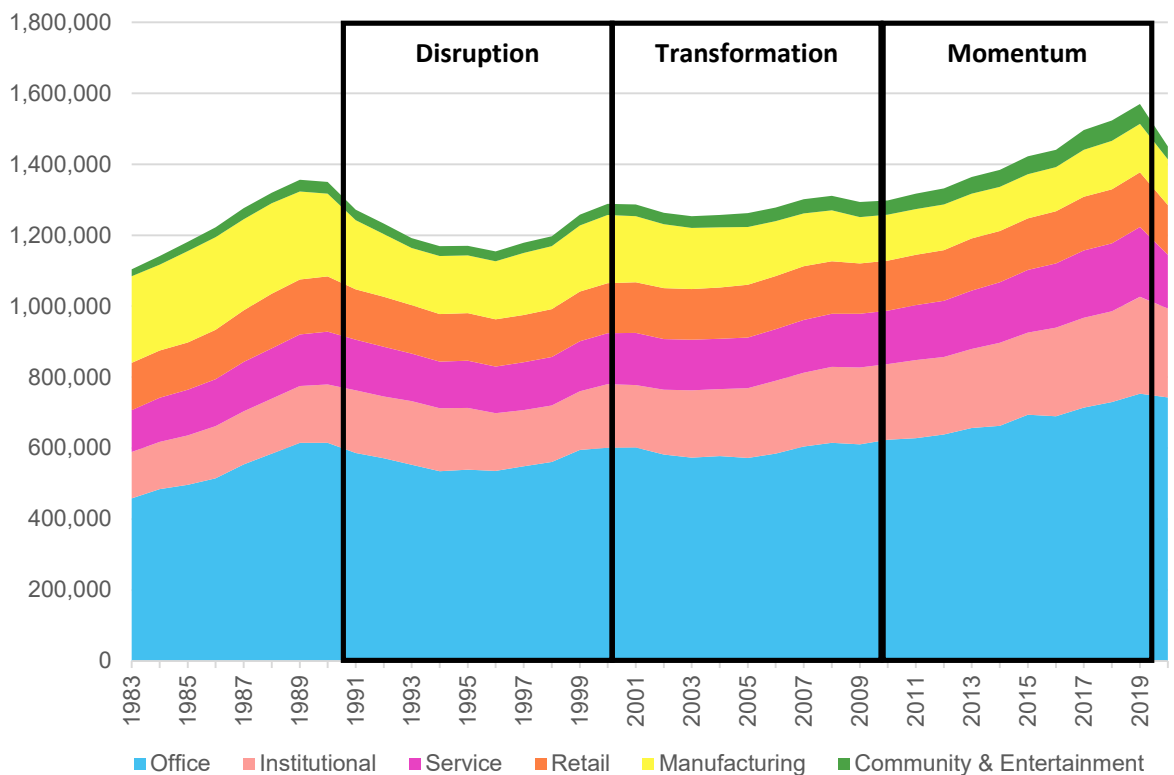
With almost four decades of full-sample primary data of business establishments, the Toronto Employment Survey provides a comprehensive view of how trends have manifested themselves over time and geography. This time frame includes several significant economic events that have had a lasting impact on the economic trajectory of the city.

In the ten years following the global financial crisis (from 2010 to 2019), Toronto added 271,500 jobs, an annualized increase of 0.9%. Over the preceding ten years (2000 to 2009) Toronto's total employment was essentially flat, adding just 4,800 jobs in total. In the decade prior (1990 to 1999) Toronto's total employment declined by 0.7% annually, or a total job loss of -91,850.

Using Toronto Employment Survey data, Figure 22 shows how employment categorized by Land Use Activity Code has grown and contracted over time.¹⁹ For discussion purposes, the three decades are labelled as Disruption (1990s), Transformation (2000s), and Momentum (2010s).

The 1990s (Disruption) were a profoundly negative economic period for Toronto which saw all sectors

Figure 22: Full-Time and Part-Time Employment by Activity, 1983-2020



lose jobs except for Institutional employment. Total employment peaked at 1.34 million jobs in 1989 and reached a low of 1.15 million in 1996. Toronto did not surpass the total employment peak in 1989 for 24 years, and it took until 2018 before the city had more full-time jobs than it had three decades earlier.

The 2000s (Transformation) was not a period of stagnation, but rather the cementing of a fundamental economic shift that was initiated in the prior decade. Manufacturing sector job losses in the 2000s accelerated to -3.8% annually from -2.2% in the 1990s, an average annual loss of 6,220 jobs. In contrast, the other sectors experienced gradual growth in employment through the 2000s. Manufacturing during this period was in decline across Canada as a stronger currency dampened exports alongside the rise of emerging market economies.²⁰ However, Toronto faced specific competitive issues documented in the “Long-Term Employment Land Strategy” resulting from limited vacant land availability and speculation driven by residential conversion pressures.²¹

Despite the stabilization of non-Manufacturing sectors, Toronto struggled to attract major investment in employment-generating uses throughout the 2000s. The Bay-Adelaide “stump”, an unfinished office project halted mid-construction and viewed by some as a symbol of the rapid reversal of the local economy, sat abandoned from 1991 to 2006.

The negative sentiment of this period is best reflected in the report “The New Geography of Office Location and the Consequences of Business as Usual in the GTA” which documented in detail the rise and stagnation of Toronto as the dominant office centre of the region.²²

In the context of these lingering economic challenges, the City of Toronto advanced several key policies which continue to have lasting impacts. Initiated in 2008, a 15-year rebalancing of non-residential property tax rates was introduced in order to increase

Toronto’s competitiveness for attracting new businesses and development.²³ That year also saw the introduction of the Imagination, Manufacturing, Innovation and Technology (IMIT) Program which provides property tax abatement to eligible new employment-generating developments.²⁴ From a land use planning perspective, the approval of Toronto’s Official Plan in 2006, followed by successive reviews, has helped to stabilize Employment Areas and replace office and other commercial space in redevelopments.

The 2010s (Momentum) began with the global financial crisis and subsequent recession. Despite the significant impact of this situation on the global economy, the Toronto Employment Survey recorded a job loss of just 1.3% between 2008 and 2009.

In the remainder of the decade, Toronto experienced a period of rapid employment growth accompanied by major commercial real estate investments. In part, the city’s transition over the preceding two decades away from an export-based goods manufacturing economy driven by industrial employment towards services-based office employment enabled it to directly benefit from the growth of financial and technology companies.

These trends were particularly pronounced in Downtown, which attracted 74% of citywide Office job growth during this decade and saw the development of multiple office towers. The underlying forces driving this positive momentum are described in the “TOcore Planning Downtown: The Outlook for Office and Institutional Employment” report, including regional transit investments and residential intensification that increased labour force access.²⁵

A Diverging Economy

At a macro level, the broad transformation of Toronto's economy over the past three decades has been positive and allowed the city to enter the COVID-19 pandemic recovery period from a strong position. This overall economic growth nevertheless conceals uneven and unequal distributional impacts of the economic restructuring on sectors, jobs, people, and neighbourhoods.

Specific areas of Toronto and sectors of the economy have never fully recovered from the 1990s recession and remain vulnerable to disruption. Map 5 illustrates how employment in many of Toronto's inner suburbs has remained flat or declined between 2001 and 2020.

Toronto has experienced permanent full-time job losses in the Manufacturing, Warehousing, Retail, and Service sectors. At its peak in 1987, 446,000 full-time jobs were reported by the Toronto Employment Survey in these sectors versus just 288,000 in 2020. From 1983 to 2020, part-time jobs grew at an annualized rate of 3.0% across all sector versus just 0.3% for full-time jobs (see Table 8).

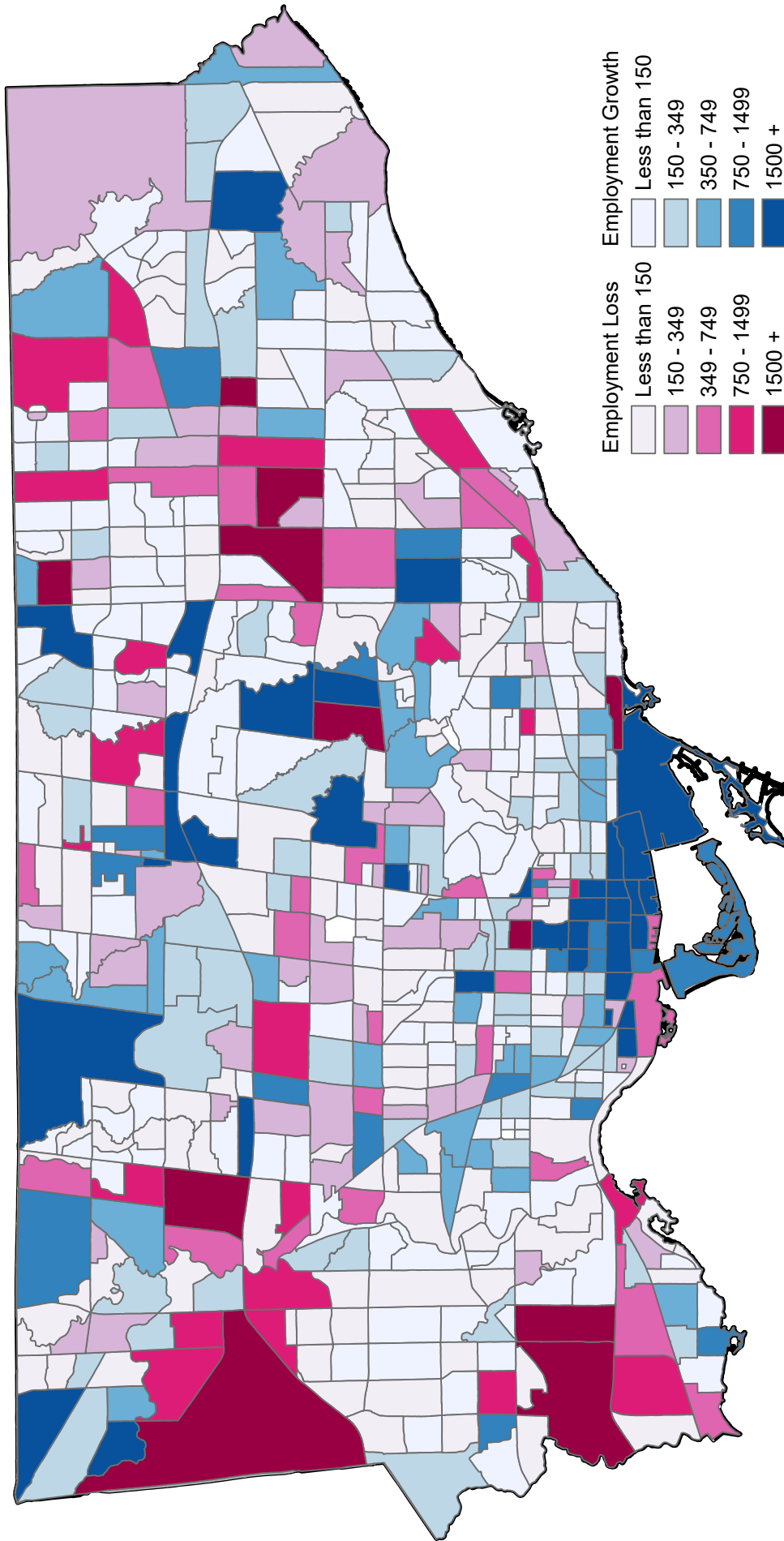
At the same time, the adoption of technology and the internet has contributed to the flexibility of employment opportunities, but also to the increasingly precarious nature of part-time employment.^{26, 27} The diverging paths of part-time and full-time jobs by sector are illustrated in Table 8, and Figures 23 and 24.

The divergence of Toronto's economy is explored further in the "Planning the Next GGH" report which applied an industry archetype methodology to categorize employment spatially from 2006 to 2016.²⁸ The report documents the "hyper-concentration of knowledge-based activities in and around downtown Toronto" alongside the "loss or slower growth of economic activities" elsewhere in the region. The authors describe how job losses in the Greater Golden Horseshoe (GGH) in the manufacturing sector can be partially explained by the adoption of automation and off-shoring. To consider the potential impacts of further automation, the report estimates the relative employment vulnerability of sub-geographies across the region. The report concludes that:

Depending on the geography of job growth and loss, automation could further reinforce the existing concentration of knowledge-based activities in a select few locations. Areas with a concentration of vulnerable employment will be more likely to change, and may experience net employment decline. Meanwhile, areas with concentrations of jobs that are least vulnerable to automation may be subject to added growth pressure.²⁹

Two years later, some of these impacts already have begun to materialize as the unexpected events of 2020 unfolded.

Map 5: Change in Employment by Census Tract, 2001 to 2020



Trend Acceleration

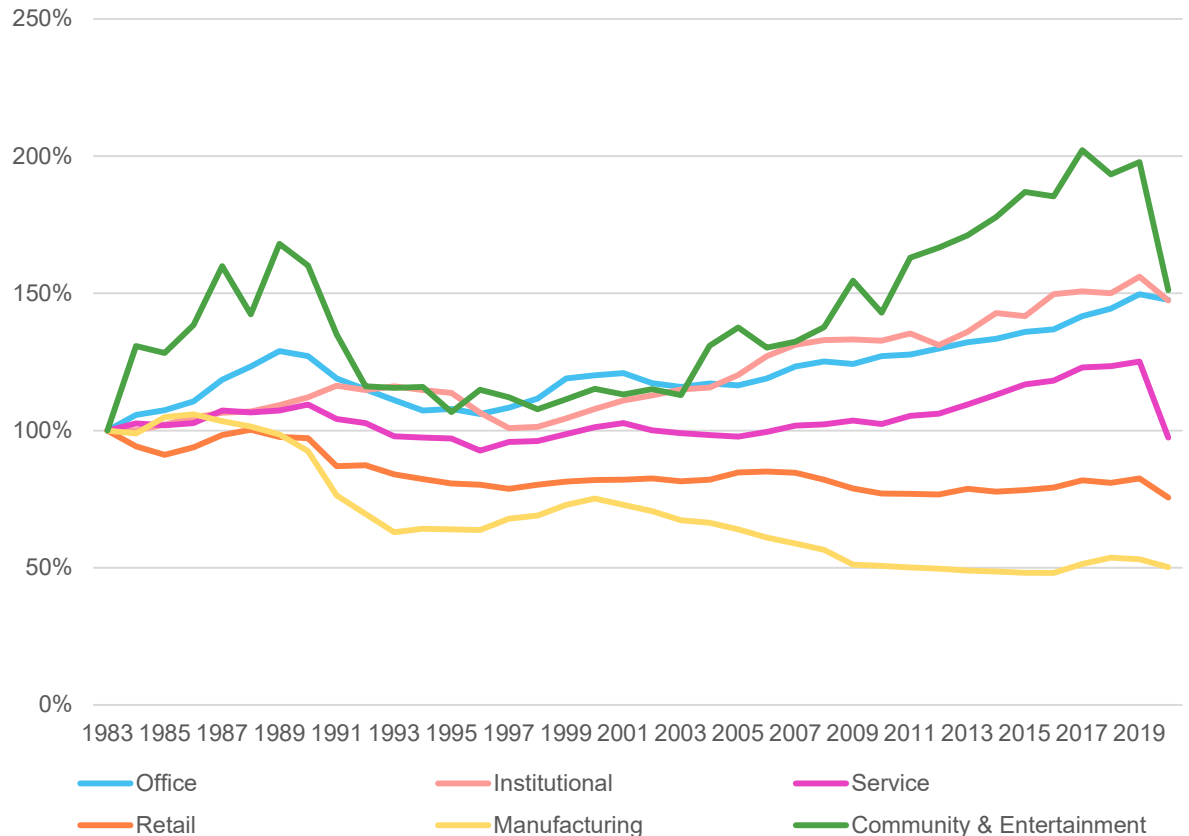
The COVID-19 pandemic has been one of the most volatile economic periods in modern history. Business cycles that have typically occurred over a multi-year period have transpired in a matter of months, resulting in an unprecedented rate of economic contraction and subsequent partial recovery.

At a citywide level, the shift in Toronto’s economy over past decades towards a greater focus on Office and Institutional jobs has placed it in a positive position to rapidly recover from the pandemic. These structural changes, which are being accentuated by the recent strength of the technology sector, favour employment growth in areas with strong talent pools and innovation clusters.

The COVID-19 pandemic has accelerated the adoption of technology and driven forward emerging trends shaping the consumption, production, and distribution of goods and services. In the short term, the rapid shift to online retail, work-from-home, and remote service delivery has had immediate and unequal impacts on Toronto’s economic landscape.

In addition to trend acceleration, the pandemic has the potential to fundamentally disrupt society in ways that are challenging to anticipate. In their Technical Report, Greater Golden Horseshoe Growth Forecasts to 2051, Hemson Consulting Ltd. discusses their assumption that the economy will return to pre-pandemic expectations, but

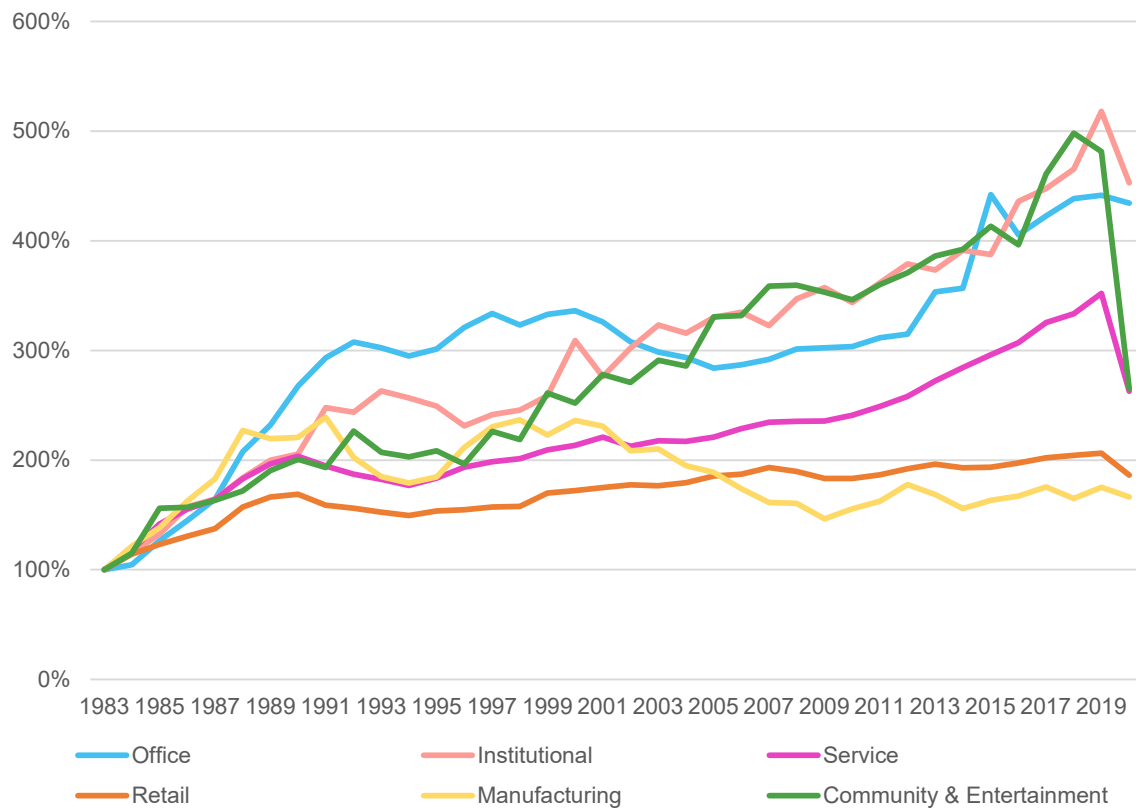
Figure 23: Change in Full-Time Jobs from 1983 Baseline



emphasizes that major events are “often catalysts for far-reaching social, political, and economic change”.³⁰

Amid this context of uncertainty, the importance of monitoring trends through the Toronto Employment Survey and other complementary data sources will be a critical component of the recovery planning process.

Figure 24: Change in Part-Time Jobs from 1983 Baseline



COVID-19 Pandemic Impact

The COVID-19 pandemic substantially impacted employment levels in Toronto over the past year. In 2020, over 5,000 establishments reported a significant change in employment as the result of the COVID-19 pandemic impacts, representing a net loss of over 82,000 jobs (see Table 9).³¹

A majority of these establishments (approximately 3,100) reported employment decreases totalling almost 66,000 jobs. A further 1,500 establishments with 18,500 jobs temporarily closed due to COVID-19, and over 200 establishments permanently closed citing the pandemic as the reason. Only 136 establishments citywide reported adding employment due to COVID-19, representing just over 3,800 net new jobs.

All employment and establishment statistics in this section are focused on these 5,000 establishments that reported significant employment change attributed directly to the COVID-19 pandemic.

COVID-19 Impact by Sector

Establishments in the Service sector reported being most negatively impacted by COVID-19 with net losses of more than 30,000 jobs across almost 2,000 businesses. The largest job losses were reported at Restaurants (over 11,000 jobs), Hotels (4,000 jobs), Coffee Shops (1,800 jobs), and Fast Food Outlets (1,900 jobs).

Significant employment decreases were also reported in the Community and Entertainment sector with almost 400 establishments collectively losing approximately 13,000 jobs. Indoor Stadiums and Arenas, including some of the city's flagship sports venues, lost almost 3,000 jobs, with Public Community Centres and Arenas losing 1,000 jobs, and Exercise Facilities losing over 800 jobs.

Some establishments reported employment increases due to COVID-19, most commonly in the Manufacturing and Warehousing, Retail, and Institutional sectors. Within these sectors, employment increases

Table 9: Annual Employment Change by Type of COVID-19 Impact Reported

Type of COVID-19 Impact	2019	2020	2019 - 2020	% Change
Significant Employment Decrease	147,480	81,620	-65,860	-44.7%
Significant Employment Increase	21,740	25,560	3,820	17.6%
Temporary Closure	18,510	0	-18,510	-100.0%
Permanent Closure	1,610	0	-1,610	-100.0%
Total	189,340	107,180	-82,160	-43.4%

due to COVID-19 were reported at Manufacturers of Vehicles and Vehicular Products (potentially due to efforts to re-tool auto production facilities to produce personal protection equipment early in the pandemic),^{32,33} Grocery Stores, Hospitals, and Care Homes. However, the net increases reported in these sectors were far outweighed by job losses also reported due to the pandemic.

COVID-19 Impact by Size of Establishment

While job losses have been experienced by establishments of all sizes, small businesses have been particularly impacted (see Table 10). Establishments with 1-4 employees reporting employment declines due to COVID-19 lost a collective 82% of their 2019 employment levels. The proportion of 2019 jobs lost was next highest at establishments with 5-9 employees which lost almost 57% of their employees. Establishments between 10 and 499 employees lost an average of 44% of their previous year's

employment, while establishments with between 500 and 4,999 employees lost an average of 24% of their 2019 employment.

At the intersection of impacted sector and establishment size, small and medium-sized Service sector establishments reported significant declines to their employment from COVID-19. Service establishments with between 1 and 99 employees collectively lost more than 28,000 jobs from 2019 levels, almost a third of all employment loss reported due to COVID-19.

Of the relatively small number of establishments reporting employment increases due to the pandemic, the largest net increases from 2019 employment levels were at medium-sized businesses (100 to 499 employees).

Table 10: COVID-19 Impact on Employment Loss by Establishment Size

Number of Employees	2019 Employment	2020 Employment	2019 - 2020	
			Net Change	% Change
1-4	6,030	1,100	-4,920	-81.7%
5-9	15,030	6,520	-8,510	-56.6%
10-19	24,850	13,100	-11,750	-47.3%
20-49	26,750	13,990	-12,760	-47.7%
50-99	18,950	10,420	-8,530	-45.0%
100-249	15,230	9,030	-6,200	-40.7%
250-499	9,280	5,510	-3,770	-40.7%
500-999	4,930	3,600	-1,330	-27.0%
1000-4999	14,590	11,570	-3,020	-20.7%
5000-9999	11,850	6,790	-5,060	-42.7%
Total	147,480	81,620	-65,860	-44.7%

Note: Totals may differ from sums due to rounding.

COVID-19 Impact Classification

As part of the Survey's standard methodology, establishments that experience significant employment change from the previous year provide detailed reasons for the change such as business restructuring, expansion, or seasonal fluctuation. In 2020, the Survey further classified employment change attributed to the COVID-19 pandemic to one of the five factors, which were created in alignment with Statistics Canada's Canadian Survey on Business Conditions:³⁴

- Consumer behaviour (change in demand, public behaviour);
- Business decision (change in business operation);
- Accounts-related (uncertainty in contracts, suppliers, finances);
- Staffing (staff absences, change in productivity);
- Regulatory (public health requirements).

Consumer behaviour was the most commonly reported factor by respondents in employment loss from COVID-19. Almost half of establishments that reported an employment decrease due to the pandemic attributed it to consumer behaviour (46%). A business decision was the next most common reason (23%), followed by regulatory factors (19%), staffing (11%), and accounts-related factors (2%).

Consumer behaviour was the most frequently cited factor for the Manufacturing and Warehousing sector and by Retail, and Service establishments, while regulatory factors were more frequently cited for the Institutional, Community, and Entertainment sectors.

Consumer behaviour was the most commonly reported factor across most establishment sizes. It was also cited as the primary factor for employment change by the few establishments experiencing employment increases due to the pandemic.

COVID-19 Impact by Geography

Within Downtown and the Centres, employment change attributed to the pandemic occurred fairly proportionally to each area's share of employment. However, establishments within PSEZs reported experiencing relatively little employment loss, temporary closures, and permanent closures due to the COVID-19 pandemic compared to the establishments outside of PSEZs. This is likely related to the large presence of manufacturing employment within PSEZs, and the inclusion of manufacturing within the provincial definition of essential businesses that allowed them to remain open throughout the pandemic-related restrictions.

COVID-19 Impact on Work-From-Home

The COVID-19 pandemic and resulting government-mandated lockdowns also impacted the locational landscape of Toronto's economy, including an accelerated shift to work-from-home. In turn, the Survey was modified to enable for the first time the citywide collection of data on work-from-home. Data on the number of employees working from home was collected as a percentage of an establishment's total employment from 0 to 100%.

Using percentages rather than the absolute number of remote employees allowed for the Survey's data collection processes to achieve a balance between the value of precise employment data for each establishment with the rapid re-configuration of employment undertaken by many businesses.

Among establishments that reported work-from-home employment, the highest reported averages were in the Institutional and Office sectors at 82% and 79% respectively, and the lowest were in Manufacturing and Warehousing (43%), Retail (46%), and Service (46%) (see Figure 25).

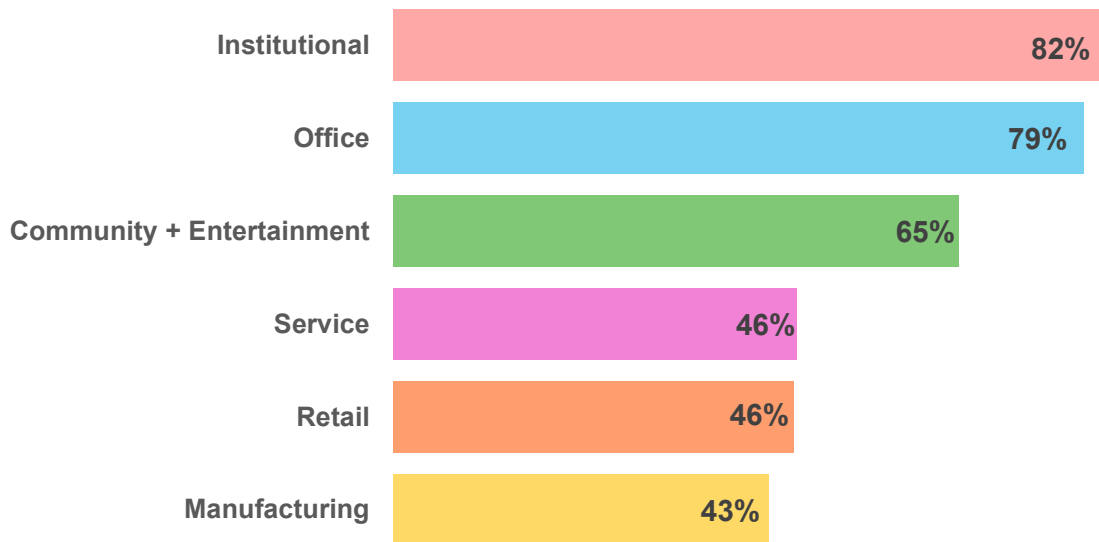
Geographically, work-from-home employment percentages were highest in Downtown (84%), Yonge-Eglinton Centre (83%), and North York Centre (76%), all of which have high proportions of office-based employment.

Work-from-home employment was less prevalent within PSEZs. Only one PSEZ reported a higher average percentage of employees working from home than the area outside PSEZs. Zone 6 contains a cluster of medical offices reporting 100% of their employment as home-based.

One notable area of growth for work-from-home employment is within Toronto's technology (tech) sector. In 2020, tech companies that reported at least some work-from-home employment had an average 88% of their employees working from home.

The ability of tech companies to rapidly adapt to a remote work environment and the digitization of the economy has enabled this sector to expand employment while collectively reducing physical office footprints, which will be discussed further in the subsequent section.

Figure 25: Average Reported Work-From-Home Percentage by Sector



Toronto's Technology (Tech) Sector

A new coding system was introduced to the Toronto Employment Survey in 2019 to track tech sector establishments.

The tech sector is defined as a 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. For the purposes of the Survey, establishments were identified by referencing the NAICS classification of their economic activities with Statistics Canada's definition of the tech sector.

The Toronto Employment Survey is an establishment-based survey and as such all employees within each business are classified by a single

NAICS code. Employees working in technology-related roles within larger entities with an alternative primary economic activity, such as financial services or telecommunications, would not be captured. Consequently, this classification will necessarily differ from other sources. A full list of the tech subsectors and their associated NAICS codes can be found in the Appendix in Table A2.

Despite the significant drop in employment reported citywide in the 2020 Survey, the tech sector experienced a moderate increase in employees and the addition of 180 establishments (see Table 11 and Figure 26). This pattern mirrors the broader economic trajectory of the tech sector in North America which largely experienced net positive benefits

Table 11: Tech Sector Employment and Establishments by Geography, 2020

Geography	Tech Employment	% of 2020 Tech Employment	Tech Establishments	% of 2020 Tech Establishments
Downtown	29,500	48.6%	700	36.4%
Centres	6,950	11.5%	130	6.7%
Employment Areas	17,770	29.3%	560	29.5%
Rest of City	6,440	10.6%	520	27.4%
Total	60,660	100.0%	1,910	100.0%

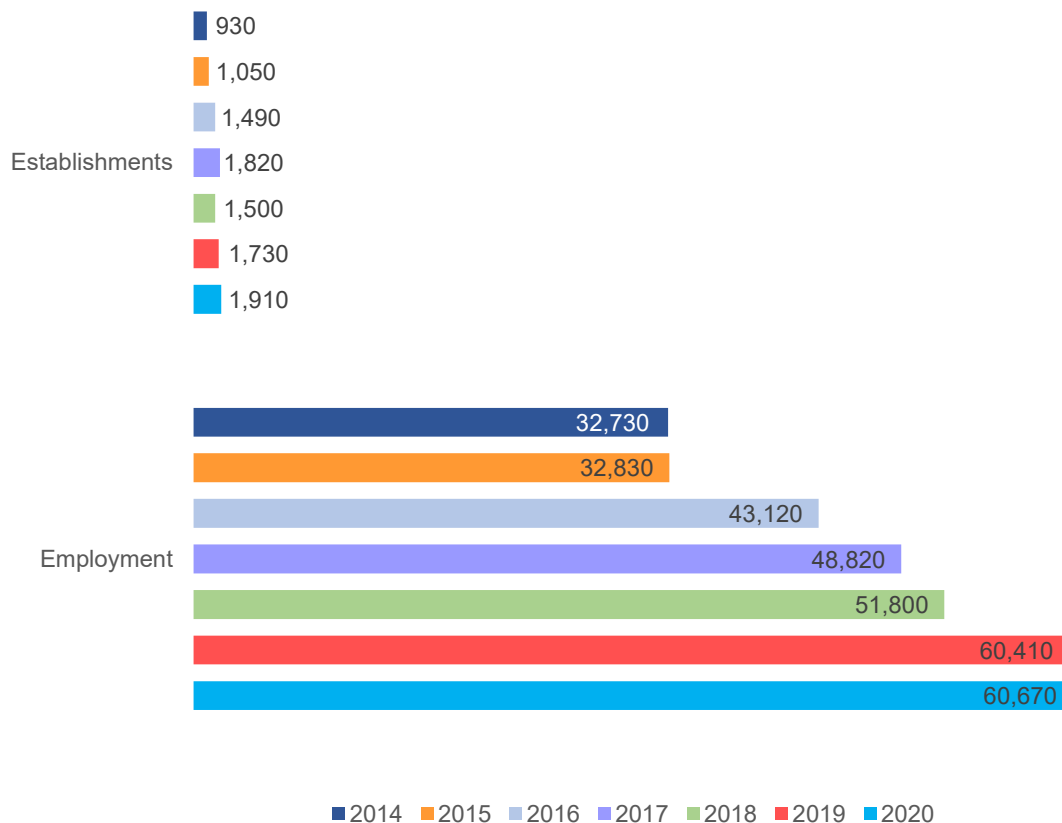
in 2020 from the rapid shift to online commerce, communication, and remote work. Increased demand, in combination with supportive fiscal conditions, has helped spur the creation of new private and public tech sector corporations.

The 2019 Toronto Employment Survey Bulletin reported on the results of interviews with tech sector companies and the preferences influencing their locations within Toronto. The most important factor raised during the interviews was broad geographic access to a talented labour force. Respondents noted that optimal locations were generally in urban contexts in or near Downtown which enabled access to GO Transit, the TTC, and local residents within walking or cycling distance.

An important secondary factor was the concentration of local amenities that appeal to younger employees in close proximity to the office location.

The ability to work remotely and draw on a workforce not tied to physical location could potentially alter these reported preferences. As Toronto enters a post-pandemic recovery period, understanding trends associated with the tech sector will be an important factor to monitor. The Survey will also track the growth of coworking spaces, which have played an important role in accommodating footloose employment, often in tech-related industries.

Figure 26: Tech Sector Employment and Establishments, 2014-2020



Appendix

Methodological Changes in 2020

Due to the COVID-19 pandemic, methodology changes were made to respond to public health measures and restrictions, and to ensure the health and safety of staff and respondents.

Instead of in-person visits, each establishment from the 2019 Survey dataset was contacted by phone or email between June and November. This method often gave surveyors a direct connection to the personnel who provide employment information. This was advantageous in the office and industrial sectors where surveyors may face limited access to office buildings and occasional safety concerns while walking in industrial areas.

However, the absence of physical visits to businesses limited surveyors' ability to confirm whether some establishments were non-responsive as they were operating remotely, or had temporarily or permanently closed. Similarly, the ability to identify new establishments that had recently opened was challenging. The primary method was supplemented by the use of alternative data sources such as media reporting and CoStar.³⁵ Due to these challenges, employment data was acquired from 75% of identified business establishments, a decrease from the 2019 response rate of 89%.

The provincial government classified industries such as manufacturing, food retail, and pharmacy as essential businesses at the onset of the pandemic. Only these essential businesses were permitted to operate at that time. For the first half of the Survey, essential businesses and major employers were prioritized, to take advantage of their potentially higher response rate. This prioritization was later eliminated as more businesses were permitted to operate.

To understand the immediate impact of the COVID-19 pandemic on

employment, additional questions and criteria were added to the Survey in 2020.

Health and Safety

Ensuring the health and safety of staff and respondents was the highest priority in the planning and operation of the Toronto Employment Survey. This necessitated changes throughout the Survey programme in technology, procedures and training.

Key actions and programmatic changes in 2020 included:

- Adopting a fully virtual survey methodology using voice over IP (VOIP) telephone, email and facsimile, in lieu of in-person fieldwork. Telephone calls were routed through surveyors' City-issued computer, over a virtual private network to the City's telephone system. When they telephoned a business, Call Display would show "City of Toronto" and their assigned City telephone number. Incoming calls were routed in the same fashion;
- Equipping surveyors with individual headsets that could be connected to tablets and docking stations;
- Implementing a work-from-home model for training, mentoring, and daily operations. This required:
 - the redesign of the week-long training programme;
 - implementing effective online instruction including the use of breakout sessions;
 - a new approach to team building involving more leadership by the Survey coordinators;
 - greater emphasis on structured supervision and the use of multiple means of communication;
 - testing different online collaboration tools and implementation of referred solutions;
- Incorporating relevant safety training, including instruction by the manager and the project

lead, a suite of corporate online courses on occupational health and safety, and a follow-up training session and assessment by an Occupational Health & Safety representative;

- Coordinating with Occupational Health & Safety and Facilities to ensure office space configuration and signage met or exceeded all safety requirements;
- Providing appropriate personal protective equipment to staff on the occasions that they did have to come into City office spaces;
- Adopting a rotation schedule to limit in-office capacity and moving to a fully remote working environment mid-way through the Survey;
- Completing the City's ReStart process, as requested by the Toronto Office of Rebuild and Recovery, which documented all health and safety protocols being undertaken.

Surveyor Experience

The Survey programme was executed by four Coordinators who provided day-to-day direction to the temporary Research Trainees hired to conduct the Survey. It is noteworthy that despite the operational challenges posed by pandemic impacts, the Coordinators provided the Research Trainees with an environment that prioritized team building, mentoring, and personal development.

The Toronto Employment Survey offers the Research Trainees an introduction to the City Planning Division, the City of Toronto, and the urban planning profession in general. For new staff with limited prior professional experience, a remote working environment creates significant barriers to informal networking and learning opportunities.

To overcome this, the Coordinators used group activities, events, chat and video discussions, peer-to-peer mentoring, real-time feedback, and brought in numerous speakers for presentations and conversations.

Figure A1: Longevity of City Establishments, 2015 to 2020

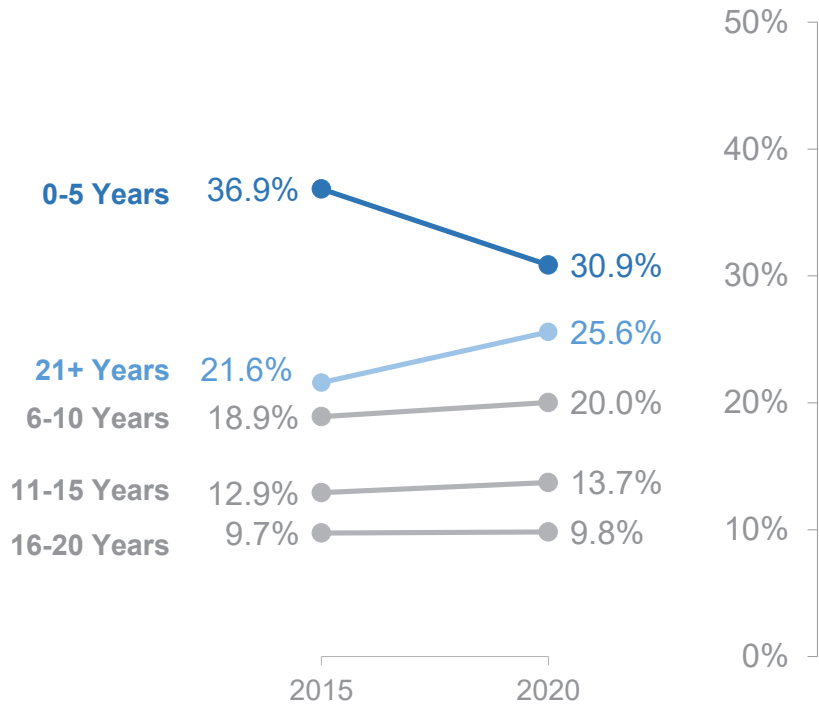
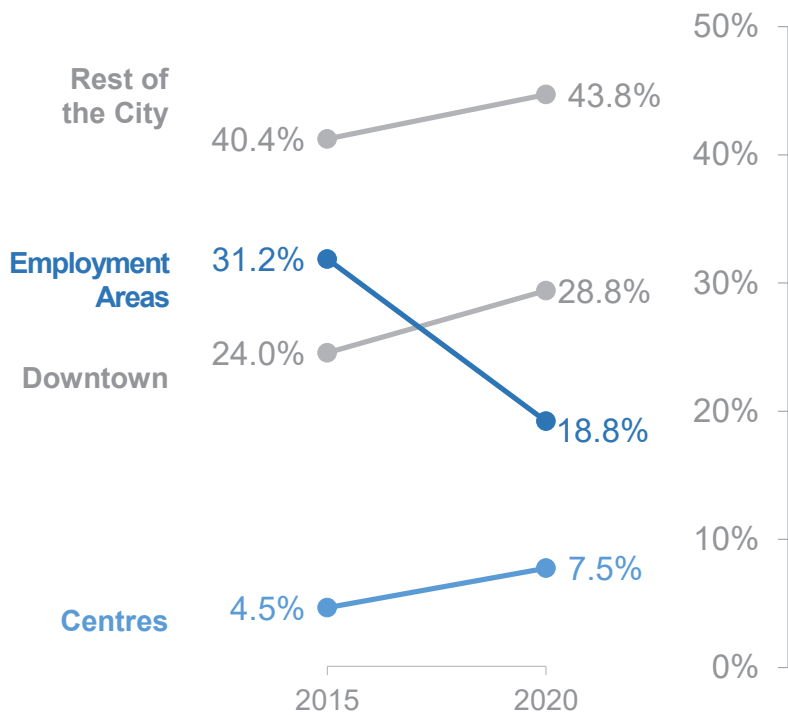
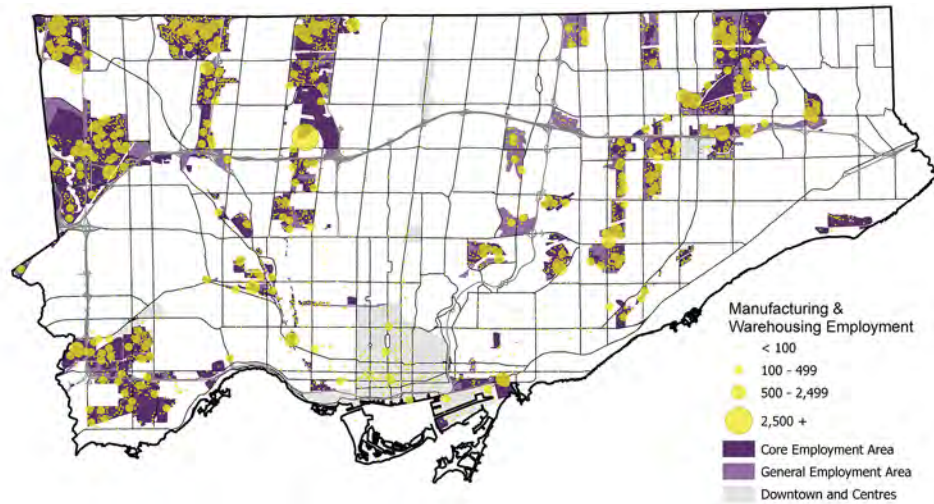


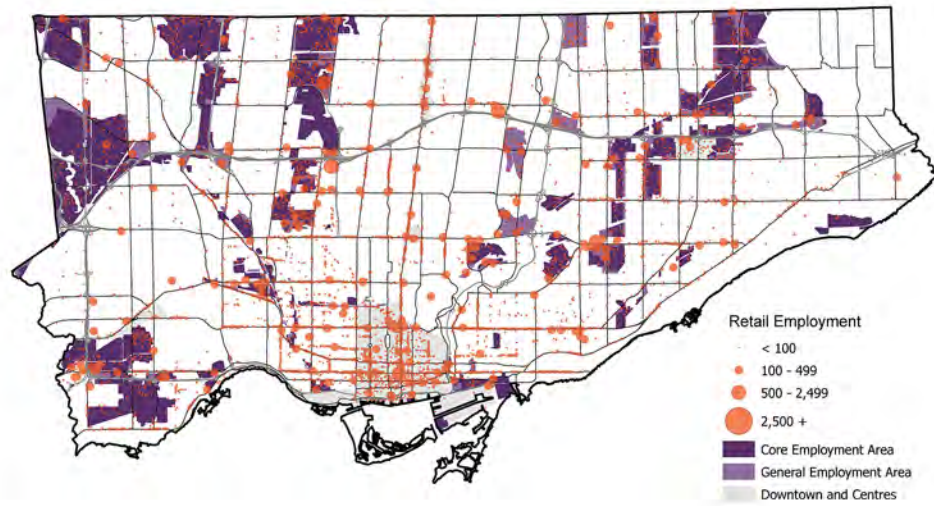
Figure A2: Locations of New City Establishments, 2015 to 2020



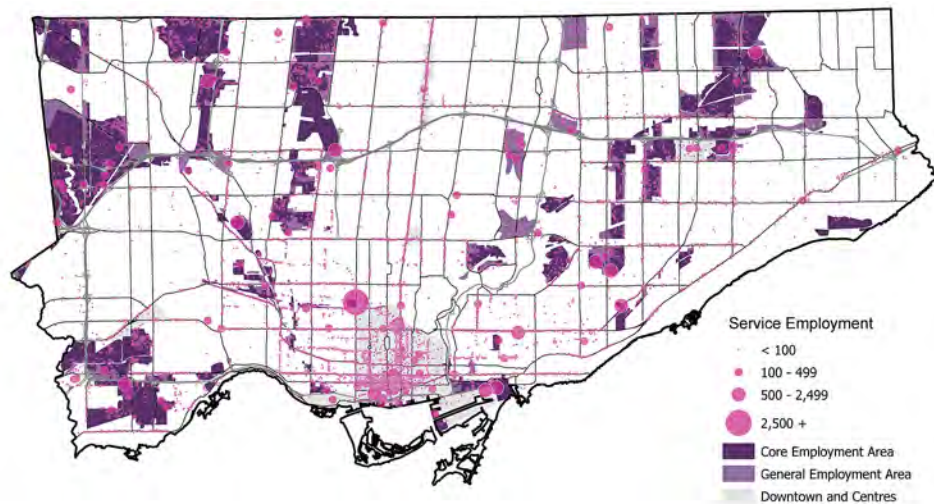
Map A1: Spatial Distribution of Manufacturing and Warehousing Employment



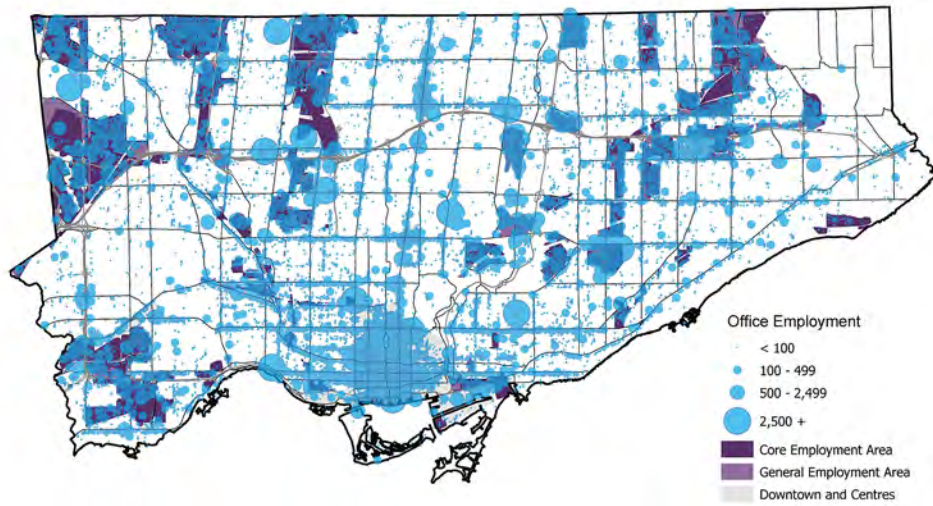
Map A2: Spatial Distribution of Retail Employment



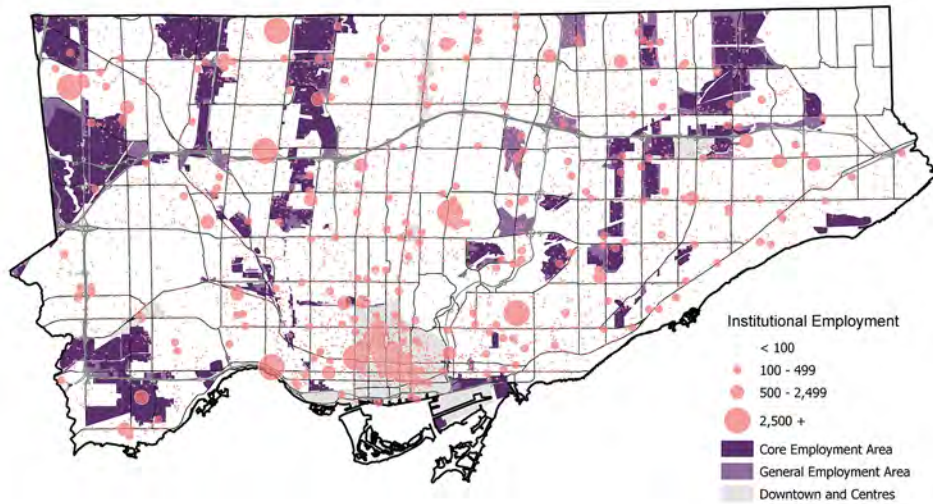
Map A3: Spatial Distribution of Service Employment



Map A4: Spatial Distribution of Office Employment



Map A5: Spatial Distribution of Institutional Employment



Map A6: Spatial Distribution of Community & Entertainment Employment

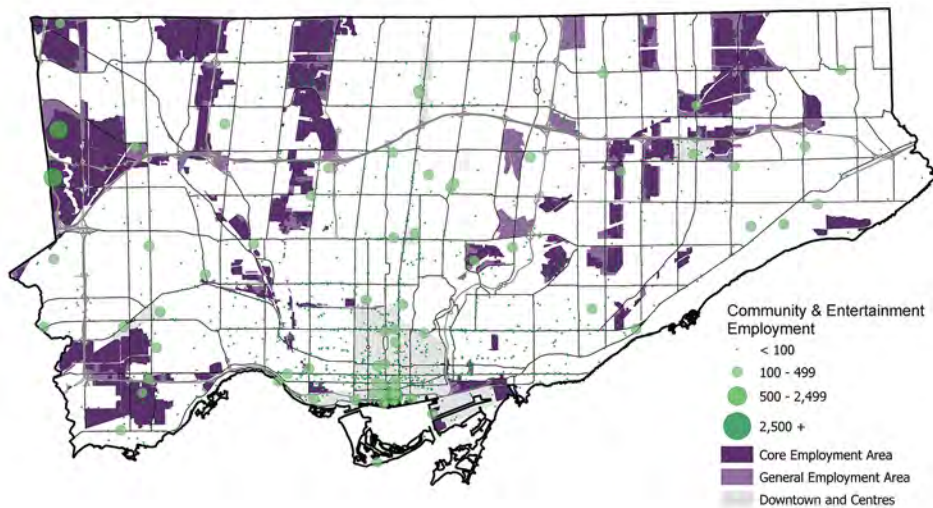


Table A1: Secondary Plan Area Employment by 6 Sectors, 2020

Number	Secondary Plan Area	Manufacturing & Warehousing	Retail	Service	Office	Institutional	Community & Entertainment	Total*
1	Agincourt	710	670	400	2,210	180	10	4,160
2	Highland Creek	0	50	210	390	2,740	250	3,640
3	Morningside Heights	0	0	0	0	180	100	270
4	Port Union Village Community	0	0	10	0	0	0	10
5	Scarborough Centre	580	2,780	1,130	10,090	480	190	15,250
6	Yonge St. Clair	120	650	870	10,580	970	170	13,350
7	Downsview Area	4,100	840	1,700	820	1,500	180	9,150
8	North York Centre	50	1,620	2,670	28,200	1,840	540	34,920
9	Sheppard East Subway Corridor	10	3,640	1,250	7,960	1,520	70	14,440
10	York University	0	50	450	430	7,330	90	8,350
11	Motel Strip	20	40	80	160	70	0	370
12	Etobicoke Centre	40	520	930	7,020	970	480	9,960
13	Fort York Neighbourhood	10	10	90	50	480	250	890
14	Garrison Common North	360	1,610	2,040	14,170	2,880	200	21,250
15	King-Parliament	100	1,210	1,630	10,570	2,110	350	15,960
16	King-Spadina	350	1,830	4,560	27,580	830	810	35,950
17	Railway Lands East	120	290	1,260	16,200	20	1,770	19,650
18	Railway Lands Central	0	50	1,490	2,850	20	940	5,350
19	Railway Lands West	0	200	270	190	60	10	720
20	University of Toronto	40	150	270	1,330	15,440	410	17,640
21	Yonge Eglinton	70	3,150	3,690	22,600	3,230	1,180	33,930
22	Central Finch	10	30	50	420	70	10	580
23	Sheppard West/Dublin	0	320	340	640	210	10	1,510
24	Central Don Mills	10	720	850	1,980	950	100	4,610
25	Swansea	140	150	70	220	180	60	810
26	Emery Village	40	100	200	300	250	0	890
27	Davenport Village	0	0	10	20	0	0	20
28	Regent Park	10	140	100	360	300	90	990
29	Sheppard Avenue Commercial Area	0	30	50	470	30	0	570
30	Warden Woods	320	10	10	20	200	30	600
31	Central Waterfront	1,600	1,230	4,300	25,320	1,520	2,220	36,190
32	Lawrence-Allen	10	6,090	1,370	4,620	2,860	230	15,190
34	Queen River	20	210	10	80	180	0	490
37	Sheppard Lansing Area	0	10	20	480	70	10	590
40	Don Mills Crossing	0	260	20	1,610	80	10	1,980
41	Downtown Plan	2,620	23,360	38,540	373,350	81,750	9,780	529,400
42	Unilever Precinct	0	0	10	330	0	0	340

*Totals may not equal sums due to rounding.

Sum of employment exceeds total unique employment in Secondary Plan areas due to overlap of multiple Secondary Plan geographies. Employment totals are accurate for each individual Secondary Plan area.

Table A2: 2020 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 & Hosting
541514: Computer Systems Design
541515: Video Game Design
811210: Electronic Repair & Maintenance

Endnotes

- 1 The Conference Board of Canada (2021). Major City Insights: Toronto, March 3, 2021
- 2 The Labour Force Survey counts individuals only once according to their main job, whereas the Toronto Employment Survey includes an individual more than once if they hold multiple jobs. For more information, please see Statistics Canada (2021). Guide to the Labour Force Survey, 2020. <https://www150.statcan.gc.ca/n1/pub/71-543-g/71-543-g2020001-eng.htm>
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- 5 The Conference Board of Canada (2021). Major City Insights: Toronto, March 3, 2021 <https://www.ontario.ca/document/ontario-employment-reports/july-september-2020#:~:text=In%20September%202020%2C%20Ontario's%20employment,the%20Canadian%20rate%20of%2010.2%25>
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- 15 Ministry of Municipal Affairs and Housing (2020). *A Place to Grow: Growth Plan for the Greater Golden Horseshoe*, Definitions. <https://www.ontario.ca/document/growth-plan-greater-golden-horseshoe/definition>
- 16 Schedule 3 of *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* provides a figure of 1,980,000 for forecasted employment for the City of Toronto in 2051. This figure is 1,000 jobs higher than that included in the Technical Report due to the system of rounding used in Schedule 3.
- 17 Hemson Consulting Ltd (2020). Greater Golden Horseshoe: Growth Forecasts to 2051, p. 20.
- 18 Hemson Consulting Ltd (2020). Greater Golden Horseshoe: Growth Forecasts to 2051, p. 5.
- 19 The Land Use Activity Code (LUAC) standard was developed by the Regional Information Systems Working Group of the Regional Planning Commissioners of Ontario and has been used consistently by the City of Toronto and updated carefully over the past 37 years. City Planning staff have adapted it over time, interpreting the codes to accommodate the evolution of the local land economy and to recognize entirely new lines of economic activity that were not identified four decades ago, while maintaining overall stability of the coding so as to enable longitudinal analysis.

LUACs and the North American Industry Classification System (NAICS) represent fundamentally different classifications of economic activity. NAICS is designed to capture supply-side “production processes” such that processes based on similar technologies are grouped together. By comparison, the Land Use Activity Codes were designed to describe the overall economic activity and to emphasize the relationship between that activity and its use of land. Thus, while the highly-detailed NAICS coding may distinguish a series of “production processes”, their relationship to land use might properly be described by a more general LUAC class, and it is this latter grouping of activity that is the primary function of the LUAC coding.

A given NAICS code captures the economic activity but not necessarily its physical relationship to land and built space, which is one of the strengths of the LUAC standard. By classifying an establishment by both coding

- standards, the City can produce two distinct yet complementary views of the economic activity within its borders.
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 - 35 CoStar Group, <https://www.costar.com>

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