



Toronto Employment Survey 2022

Survey Highlights

2022 Employment	1,484,600
Employment net gain	33,080
Employment increase	2.3%
Full-time employment gain	1.9%
Part-time Employment Gain	3.4%
Business establishments	71,750
New business establishments	6,470
Service employment net gain	9,920
Service job increase	6.7%
Community and entertainment employment net gain	4,770
Community and entertainment job increase	13.4%
Designated Employment Areas net gain	6,410
Downtown employment net increase	17,290
Downtown job growth	3.2%

Forty Years of Service

The year 2022 represents a milestone for the Survey programme as it represents the 40th year of operation. The Toronto Employment Survey collects annual employment information from business establishments across the city. This information is used to monitor the city's economic structure, employment and land use activity, as well as monitor the progress of the City of Toronto's Official Plan policies.

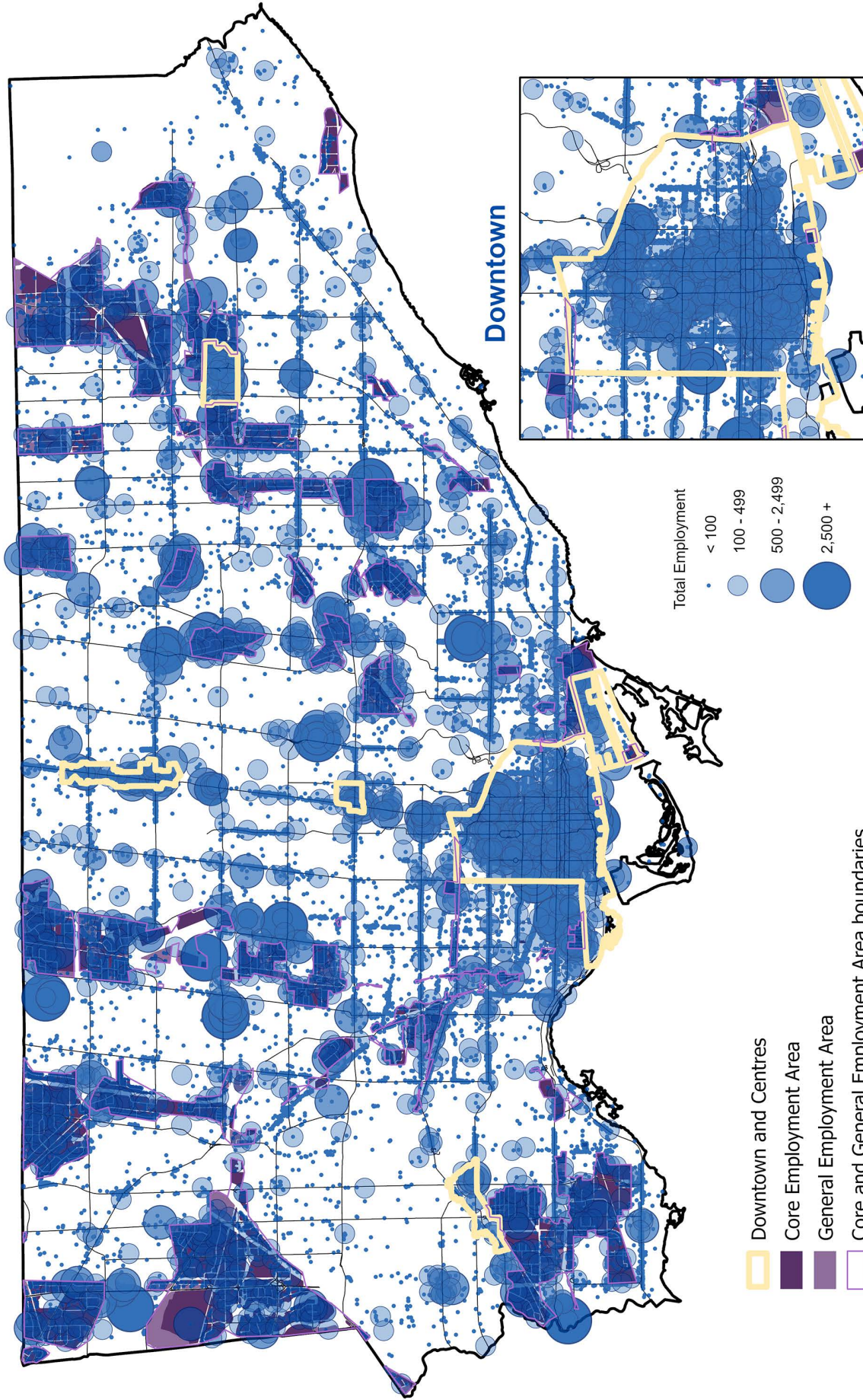
The Survey programme has undertaken consistent data collection since 1983 and has provided a continuous series of snapshots of the city's changing economic composition and evolving land uses. The collection of survey information enables the City to monitor long-range economic trends and emerging activity in areas identified for employment growth in the Official Plan, including Downtown, the Centres, Secondary Plan Areas, and designated Employment Areas. The Survey results enable the creation of effective long-range employment projections, inform planning for urban infrastructure and municipal services, and assist in monitoring the city's progress toward its investment and fiscal goals.

Post Pandemic Recovery

Toronto's economy experienced a partial recovery in 2022, following the record-breaking job losses of 2020 and 2021 due to the impacts of the COVID-19 pandemic. Restrictions imposed by all orders of government accelerated the transformation of business operation that had been underway for some time, toward increasing remote work. By April 2022, lockdowns, capacity limits and other restrictions had been lifted, allowing businesses to reopen at their full capacities. Regardless, the significant economic impacts from the past two years, coupled with the gradual reopening of the economy and global supply chain issues, significantly impacted the growth and prosperity of many of the city's businesses. As the pandemic is still running its course, the recovery process varies across areas and sectors.

While the past two years affected the method by which the annual Toronto Employment Survey was undertaken, with a hybrid method of telephone, internet research and in-person visits, 2022 saw the return of the field survey method consistent with pre-pandemic operations: in-person visits to all businesses across the city.

Map 1: 2022 Employment Concentrations, City of Toronto





The impacts of the pandemic and the public health restrictions since 2020 have affected Toronto's economy in different ways with each employment category reacting differently. While the Office category has remained resilient over the years with minimal fluctuation, categories such as Service and Community and Entertainment experienced severe and prolonged employment impacts from the public safety measures and changes in consumer behaviour. Even though these categories are starting to rebound from those effects, the tightening labour market has made their recovery challenging. The shortage of workers in some industry sectors reflects a migration of workers between sectors, from jobs in the service and food industries to potentially more lucrative positions in more stable sectors such as tech, finance and real estate.¹

Economic Context

In the second half of 2021 and the first half of 2022, Ontario exhibited strong economic growth, as spending on services and housing investment was high. However, as lending rates steadily increased, economic uncertainty remained. In 2022, Ontario experienced real GDP growth of 3.3%, slightly less than the 3.9% observed in 2021.² The province is projected to see little growth in the next two years, 0.3% in 2023 and 0.2% in 2024, due to the impact of inflation and rising borrowing costs on consumer demand.³ TD forecasts that Ontario will be more sensitive to changes in consumer behaviour compared with the rest of Canada because of the higher share of service jobs "where inflation tends to be stickier."⁴

Regaining Employment

Total employment in the City of Toronto in 2022 grew by 2.3% from 2021, compared to 0.1% growth between 2020 and 2021. The Toronto Employment Survey observed an increase in employment of 33,080 jobs from 2021 (versus 1,610 jobs from 2020 to 2021) to a total of 1,484,600 jobs (see Table 1). Map 1 shows the concentration of employment across the city. Total employment remains below the pre-pandemic 2019 total of 1,569,800, a difference of 5.4% or 85,200 jobs, (see Figure 1) indicating that the city has regained about 3 in 10 jobs lost and is still recovering from the impacts of the COVID-19 pandemic. This supports the assumptions supporting the Provincial Growth Plan forecasts. In their 2020 technical report supporting the Schedule 3 forecasts of *A Place to Grow*, the Province's consultants anticipated that overall regional growth would return to pre-pandemic expectations within three years.⁵

The 2022 Toronto Employment Survey response rate was 62%. This is up slightly from the rate in 2021 of 60%, but still far lower than pre-pandemic rates of typically over 85%. Given the Toronto Employment Survey's low response rate, additional information was reviewed to provide added context. Statistics Canada's Labour Force Survey (LFS) provides a monthly sample of both national and regional employment trends. The LFS counts workers whereas Toronto Employment Survey counts jobs, however the frequency of LFS reporting is helpful in understanding the Toronto Employment Survey results.

LFS results for the City of Toronto in September 2022 indicate an employment total of 1,612,440 which represents an increase in total employment of 4.4% from September 2021.⁶ Although the growth represented by the LFS is higher than what the Toronto Employment Survey experienced over the time period, the total employment numbers between the two surveys are similar. LFS industry sector data indicated a recovery of 28.4% for goods-producing sectors and 9.1% for services-producing sectors.⁷ By comparison, LFS results for the Toronto CMA during this period indicated a regional decrease in employment of 2.3%.⁸

Due to a lower response rate in the last three years, it is possible that trends in some sectors may still not have been fully captured by the Toronto Employment Survey in 2022. The overall employment growth rate can be estimated based solely on the 44,843 establishments that responded in 2022. This approach would result in an estimated growth rate of 7.4%, which is now greater than the LFS results over the same period.

Employment totals from the 2021 Census by Place of Work are scheduled to become available later in 2023. The 2023 Toronto Employment Survey bulletin will compare the 2021 Census and the 2021 Survey results.

Divergence by Category, Worker and Geography

In 2022, the Toronto Employment Survey observed a broad range of employment trends across the businesses surveyed, indicating that the pandemic recovery differs across economic categories, income levels and geographies. After two years of decline, both the Service and Retail categories showed improvements with 6.7% and 3.0% increases respectively, although both are still well below their 2019 job numbers. The largest increase, percentage wise, was in the Community and Entertainment category which gained 13.4% or 4,770 jobs since 2021. Even the Manufacturing category, which historically has declined, rebounded slightly with 1.6% growth (2,070 jobs). As the restrictions eased in 2022, many establishments were able to reopen similar to before the pandemic.

The Office category, which demonstrated the most resiliency during the early years of pandemic, was the only category to lose employment in 2022 (albeit small), with a loss of 570 jobs representing a 0.1% decline. As of 2022, it was only 1.0%, or 7,520 jobs, below the pre-pandemic job numbers.

Regardless of improvements, the Service and Community and Entertainment categories are still experiencing the greatest effect from the pandemic. Community and Entertainment is 27.1% below 2019 levels, or 15,030 jobs, while Service is 19.6% below 2019, or 38,710 jobs.

The long-term trend observed by the Toronto Employment Survey is the divergence in employment trends between full-time and part-time employment (see Figure 1). In 2022, part-time employment increased slightly more than full-time employment with growth of 3.4% versus 1.9%. However, looking at the five year growth rate, part-time employment lags at -8.6% versus full-time at -0.5%. The impact of job losses for part-time employees mostly occurred in the Community and Entertainment, and Service categories, however in 2022, those two categories had the largest part-time employment increases, 26.3% and 9.0% respectively.

As the city continues to recover, the Canadian Survey of Business Conditions shows that labour challenges are a major obstacle for businesses as they entered the fourth quarter of 2022. Of the businesses who responded, 37.2% saw recruiting

skilled employees and 36.3% saw retaining skilled employees to be significant issues, while 32.1% expected a shortage in the labour force.⁹ These concerns were most acute in construction, accommodation and food services, and administrative and support, waste management and remediation services.¹⁰ These obstacles were also expressed by businesses owned by visible minorities, with 39.4% expecting a shortage of labour force and 37.9% seeing recruiting skilled employees to be a difficulty.¹¹

As documented in the Toronto Employment Survey Retrospective special topic of the 2020 Bulletin, the broad transformation of Toronto's economy over the past three decades has been positive and has positioned the city well to recover from the COVID-19 pandemic. However, this economic growth masks the uneven distribution of economic structuring on categories, jobs, people, and neighborhoods. Certain areas of Toronto have never fully recovered from the 1990s recession. This is illustrated in Map A.1 on page 35 which shows how employment in the former City of Toronto (specifically in Downtown) has grown while the inner suburbs

Table 1: Total Employment - 2012, 2021, 2022

Employment	Total Number of Employees			Net	%	Net	%
	2012	2021	2022	Change	Change	Change	Change
				2012-2022		2021-2022	
Full-time	1,028,850	1,119,350	1,141,100	112,250	10.9%	21,750	1.9%
Part-time	302,720	332,170	343,500	40,780	13.5%	11,330	3.4%
Total	1,331,570	1,451,520	1,484,600	153,030	11.5%	33,080	2.3%

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

have remained flat or experienced losses between 2001 and 2022. Map A.2 emphasizes the pronounced employment decreases over the past three years, with deeper losses being noted in certain areas of Downtown including the University of Toronto and King-Parliament Secondary Plan areas, plus the Yonge Street corridor. Given these harder hit areas experienced strong employment growth over a two-decade period, they may be better positioned for recovery (as noted in Map A.3). On the other hand, inner suburban areas that have seen a decline over the long-term are more likely to face challenges towards recovery, as the last few years of losses have only compounded this trend.

What Data Is Collected?

The Toronto Employment Survey collects business information citywide through in-person visits on an annual basis and is typically carried out between May and September.

The Survey uses a unique data collection process that involves one-on-one interviews with each of the almost 72,000 business establishments in Toronto. Unlike some business surveys that rely on sampling and indirect sources, Toronto Employment Survey staff confirm information directly with the business owners, managers and employees of each establishment. As small businesses constitute a majority of all establishments, the majority of interviews that surveyors conduct are with small businesses.

Surveyors record the following information about each business establishment:

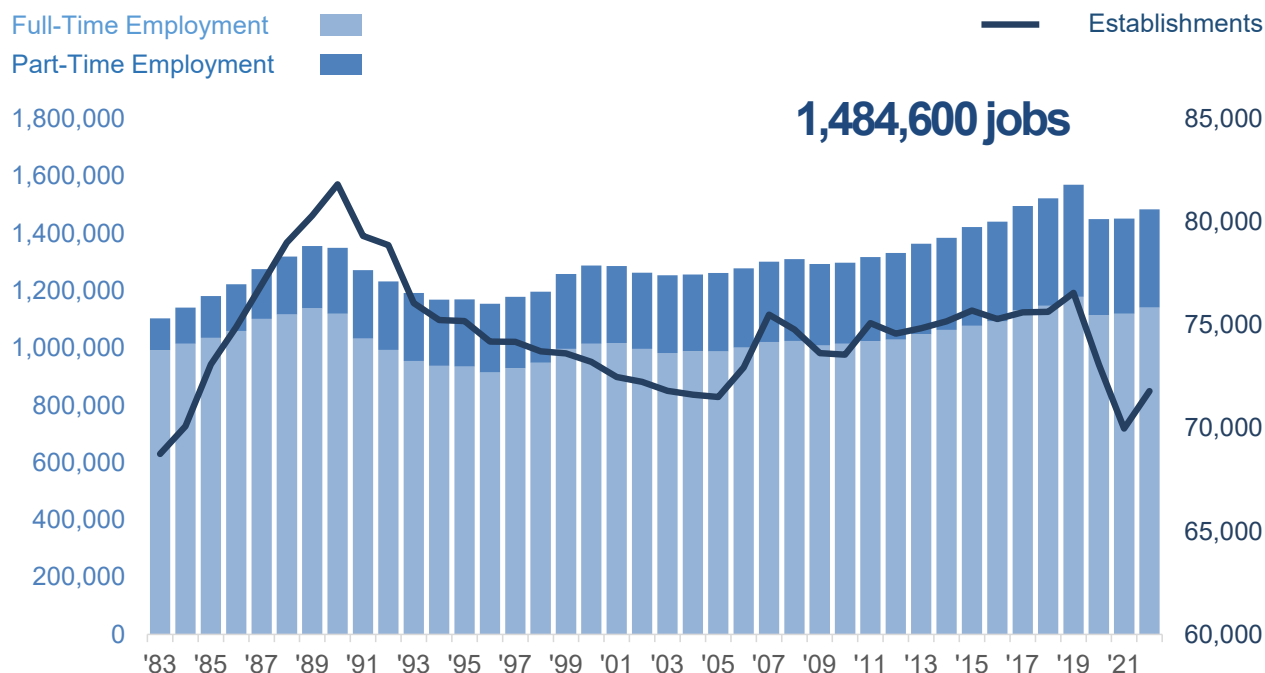
- primary type of employment activity;
- full-time and part-time employee counts;
- length of time the business has been in operation at that location.

In the case of major, multi-branch employers, information is collected through a questionnaire sent to the primary contact at the head office.

Business and employment activity is classified by both the North American Industry Classification System used by Statistics Canada (NAICS), and the Land Use Activity Codes (LUACs) of the Regional Information Systems Working Group (RISWG) of the Regional Planning Commissioners of Ontario (RPCO). This dual coding of predominant land use and employment activity allows comparisons to other jurisdictions. For analytical purposes, the LUACs are grouped into a six-category classification system in order to more accurately examine the trends within these groups over time. These include: Manufacturing & Warehousing, Retail, Service, Office, Institutional, and Community & Entertainment.

These categories are large groups of employment uses for the purpose of consistent employment comparisons over time. They are not “land uses” but meaningful groupings based on Land Use Activity Codes that relate employment to the use of the land it occupies.

Figure 1: Full and Part-Time Employment in the City of Toronto, 1983-2022



Survey Geography

The Survey involves interviews of business establishments across the city of Toronto in order to assess economic activity in the growth management areas of the Official Plan, including:

- Major office and service clusters in Downtown and in the Centres;
- Employment Areas designated for employment uses;
- *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.

This is a survey of business establishments and their corresponding land 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. It does not capture work-from-home, which is an increasing component of the city’s total employment particularly since the onset of the pandemic. This component is captured separately via the Census and other sources.

Key Citywide Trends

Community and Entertainment Trends

Identified as the fastest growing category in 2022, Community and Entertainment gained 4,770 jobs and grew by 13.4% (see Table 2 and Figure 2). This follows a sharp decline in

2020 of 19,860 jobs or 35.8% and little growth in 2021, just 60 jobs or 0.2%. Community and Entertainment also saw a boom in new establishments in 2022 as the top category with 2,120 new establishments.

The five-year employment change for Community and Entertainment was a decrease of 26.2% or 14,320 jobs. This is similar with change between 2019 and 2022 of 27.1% or 15,030 jobs. The five-year average growth rate for this category is a decline of 8.6%, a significant departure from the pre-pandemic average growth of 3.1% observed in 2019.

Absolute losses in 2022 were led by On-Site Construction/Renovation/Maintenance sub-category with a total of 2,240 jobs lost. A significant recovery of jobs in Indoor Entertainment (which includes Stadiums and Arenas, Convention Centres and Cinemas) was observed with 4,496 jobs added in 2022.

Table 2: Employment by Category, 2012, 2017, 2021, 2022

Category	Total Number of Employees				Net	%	Net	%	Net	%
	2012	2017	2021	2022	Change	Change	Change	Change	Change	Change
Manufacturing	128,240	132,290	127,030	129,100	860	0.7%	-3,190	-2.4%	2,070	1.6%
Retail	143,310	152,050	139,270	143,400	90	0.1%	-8,650	-5.7%	4,130	3.0%
Service	158,330	189,150	148,480	158,400	70	0.0%	-30,750	-16.3%	9,920	6.7%
Office	638,120	714,570	748,070	747,500	109,380	17.1%	32,930	4.6%	-570	-0.1%
Institutional	218,420	253,470	253,050	265,700	47,280	21.6%	12,230	4.8%	12,650	5.0%
Community & Entertainment	45,160	54,720	35,630	40,400	-4,760	-10.5%	-14,320	-26.2%	4,770	13.4%
Total	1,331,570	1,496,250	1,451,520	1,484,600	153,030	11.5%	-11,650	-0.8%	33,080	2.3%

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

Service Trends

The Service category grew by 9,920 jobs or 6.7% in 2022, in contrast to declines in 2020 and 2021. Between 2019 and 2022, this category lost 38,710 jobs (19.6%), showing that regardless of the current growth there is still a long way to go.

In 2022, the five-year average growth rate for the Service category was a decline of 2.8%, while it was an increase of 2.9% in 2019. In the last 20 years, Service jobs have comprised, on average, 11.7% of all employment in the city.

Absolute job gains were led by the Personal Services sub-category, with Restaurants, Fast Food Outlets and Cosmetic Services (including hair and nail salons) adding a combined total of 10,825 jobs from 2021. The sub-category Terminal and Dispatch lost the most jobs since 2021, declining by 10.6% (1,937 jobs).

Retail Trends

The Retail category gained 4,130 jobs or 3.0% in 2022. However this category has lost a total of 8,650 jobs since 2017, representing a change of -5.7%. When compared to 2019, the category has lost 10,730 jobs or 7.0%. The five-year average growth rate for Retail is negative 1.1% versus the pre-pandemic average rate of 1.3%.

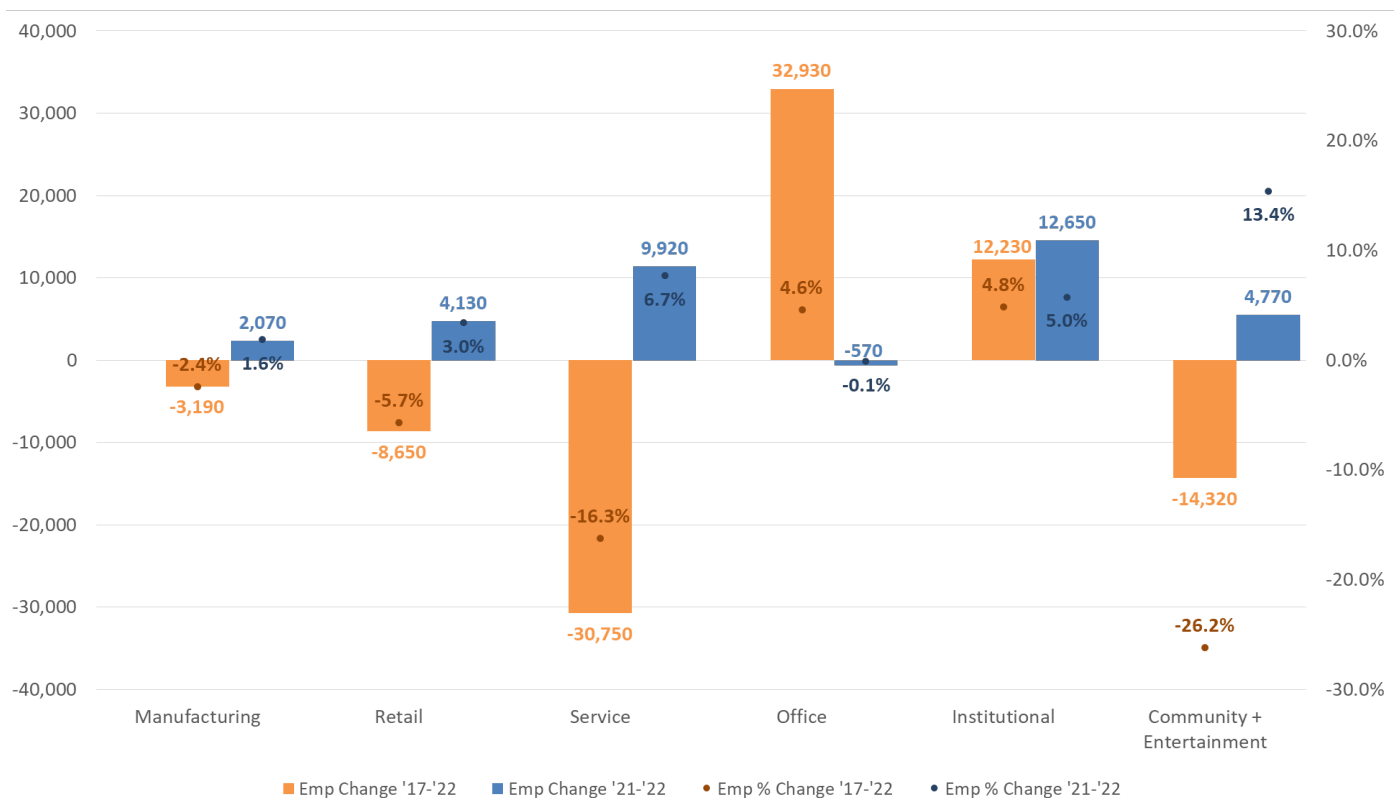
The largest sub-category to gain employment was Food Retail Shopping with a gain of 6.0% or 2,381 jobs. Retail Shopping also gained almost 6% with 1,482 jobs.

Office Trends

The Office category has added more than 109,380 jobs over the past decade. After making a partial recovery in 2021 of jobs lost the year before, Office saw a decrease of 570 or 0.1% jobs in 2022. The Office category has been the least impacted by the pandemic in Toronto, with only 0.8% or 6,320, fewer jobs in 2022 than in 2019.

Only two Office sub-categories gained any notable employment. Finance, Insurance and Real Estate saw a gain of 1.98% or 4,742 jobs, while Trade and Personal Services increased by 6.73% with 2,055 jobs. The Business Services sub-category lost the most jobs, seeing a decline of 6,882 overall (3.99%), followed by Technical Services with a loss of 2,747 jobs (2.55%) and Government with a loss of 2,163 jobs (3.1%).

Figure 2: 2021-2022 Employment Change and % Change by Category



As of Q3 2022, an 8.7% office vacancy rate was reported for Downtown Toronto, the highest in a decade. However, this was lower than the 10.1% rate reported for the Greater Toronto Area (GTA).¹² The Downtown office occupancy index has risen from a low of 3% in May 2021 to 43% as of February 2023, and this will likely continue to rise throughout 2023 as return to office plans are implemented.¹³

Manufacturing and Warehousing Trends

In 2022, Manufacturing gained 2,070 jobs or 1.6%. This follows two years of decline, with 9,540 total jobs lost in 2020 and 2021. Between 2019 and 2022, this category lost 7,470 jobs or 5.5%. The five-year growth rate is negative at 0.4% versus 1.9% in 2019.

Raw Materials Processing saw the most significant gains among the sub-categories, particularly in Food Processing, up by 890 jobs. The largest decline was seen in the Waste Treatment sub-category.

As of Q3 2022, Toronto saw a 0.3% industrial vacancy rate, the same as the GTA, and higher than Q3 2021 when a rate of 0.1% was observed for the city.^{14,15} Industrial spaces remained almost fully occupied.

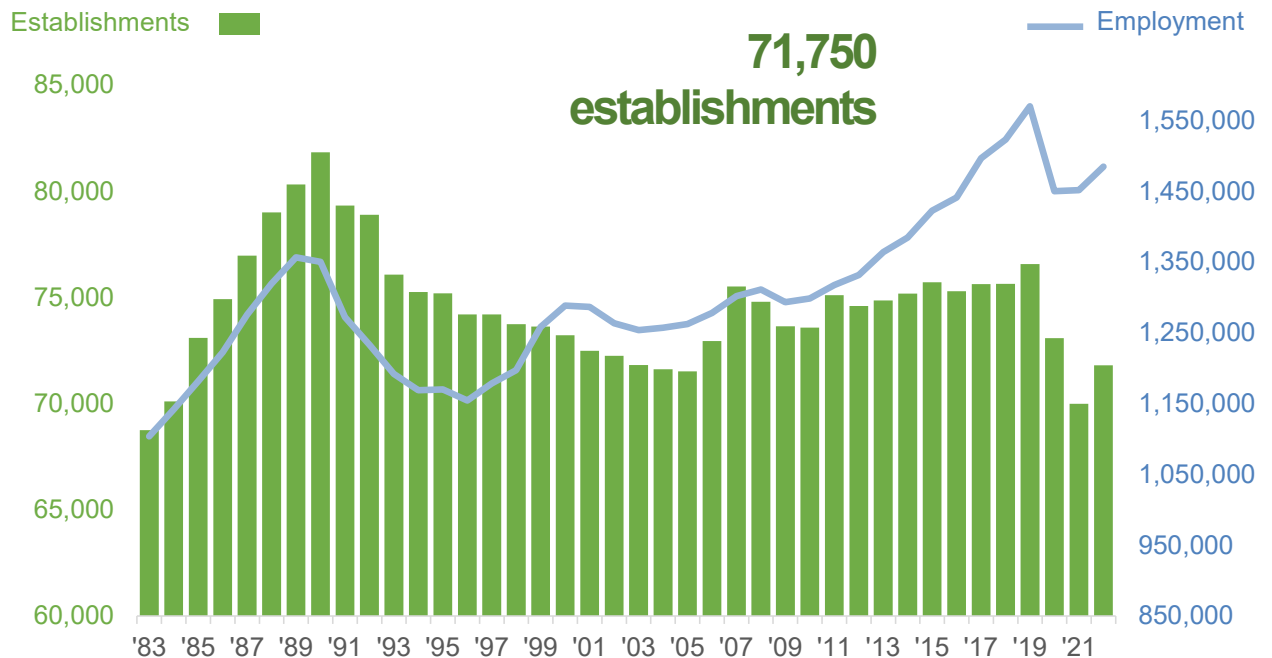
Institutional Trends

The Institutional category grew by 12,650 jobs or 5.0% in 2022, in contrast to its most recent low of 250,780 jobs in 2020. It appears that the pandemic had an initial impact in terms of job growth, however, the current recovery appears to be trending positively for this category. Between 2019 and 2022, the category lost 7,050 jobs, or 2.6%. The five-year average growth rate is 1.1%.

Since 2012, this category added 47,280 jobs (21.6%), which is the highest percent when compared to the other categories.

The Health Services Institutions sub-category led with 96,460 jobs or 36.3% of all Institutional category jobs in 2022.

Figure 3: Establishment Count in the City of Toronto, 1983-2022



Full- and Part-time Trends

In 2022, 1,141,100 or 76.9% of jobs were full-time (defined as 30 hours a week or more) and 343,500 or 23.1% were part-time (see Table 1). This was virtually the same breakdown as observed in 2020 and 2021 (76.8% and 77.1% full-time respectively). Over the last ten years, part-time employment has seen an average annual growth of 1.4%, compared with a 0.9% average annual growth rate for full-time employment. This is a faster rebound in part-time employment and is notable given the higher proportion of part-time jobs lost as a result of the pandemic.

Business Establishments

In 2022, the Survey counted 71,750 business establishments in the city, an increase of 1,760 or 2.5% from 2021 (see Figure 3). The city lost 3,890 establishments (5.1%) over the last five years, reflecting the magnitude of the losses in 2020 and 2021. The city has regained about one-third of the businesses lost due to pandemic impacts.

Total establishment counts increased in most categories, except Office which lost 820 establishments (see Figure 4). Community and Entertainment drastically increased by 1,840 establishments, while there were small increases in Service (390), Retail (240), Manufacturing and Warehousing (50). Institutional showed no change in establishment count.

Figure 4: 2021-2022 Establishment Change versus 5-Year Average

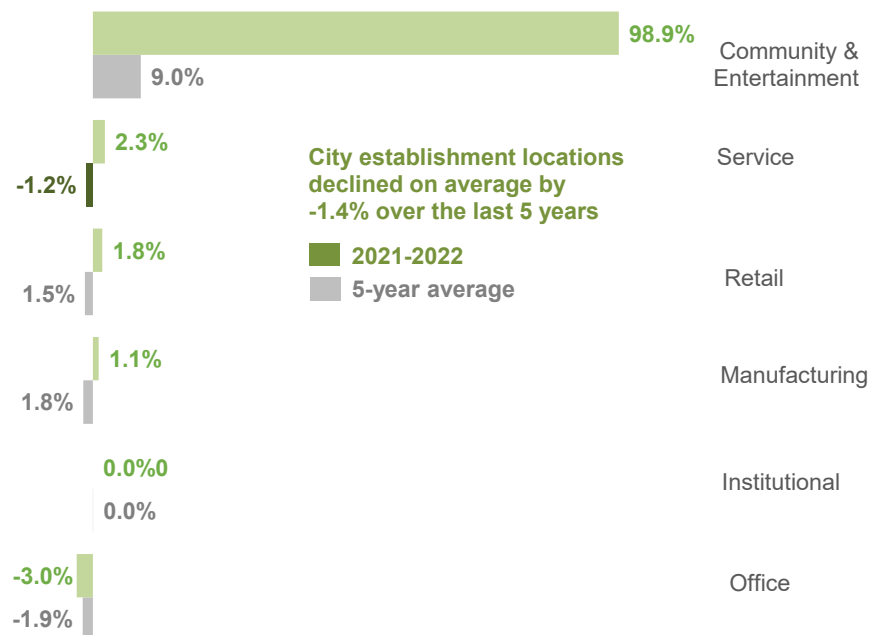
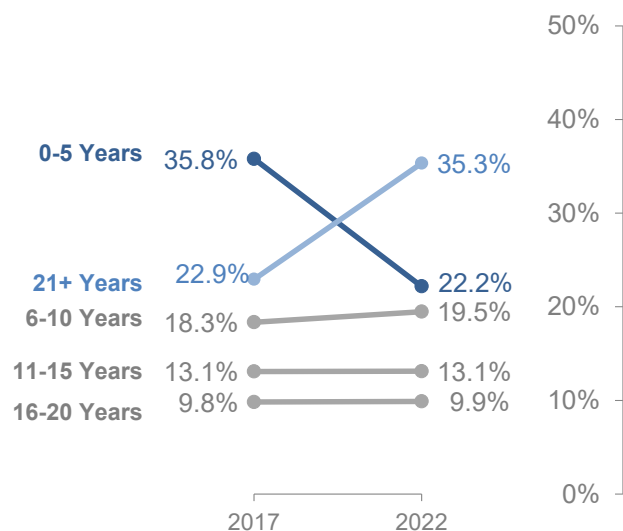


Figure 6: Longevity of New City Establishments, 2017-2022



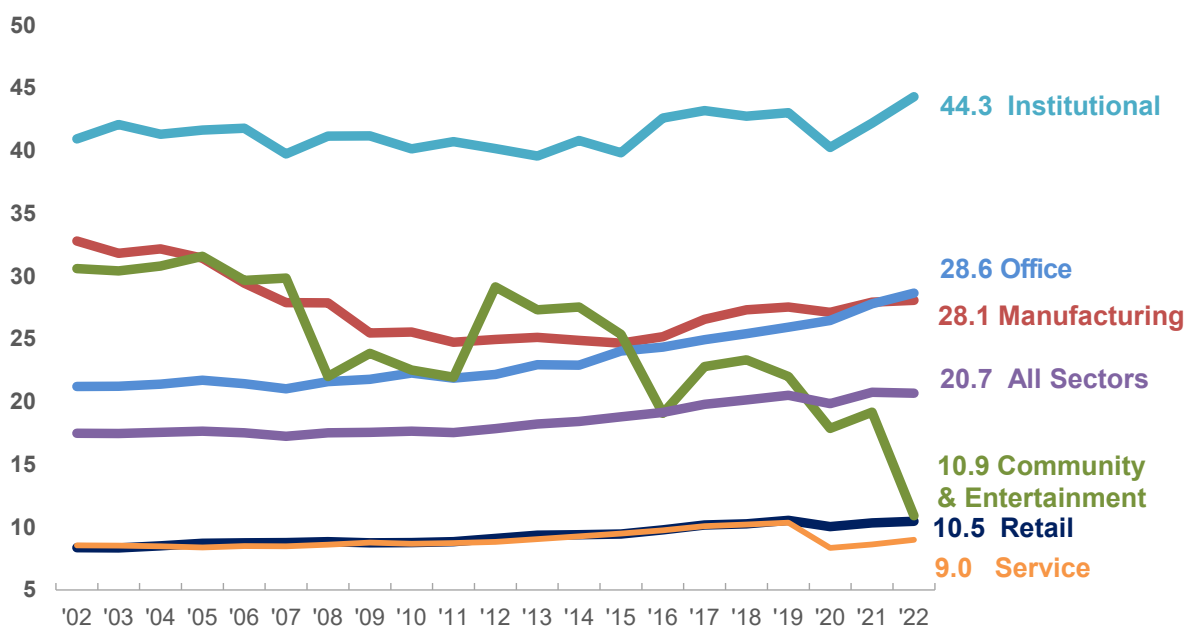
Employees per Establishment

In 2022, the average number of employees per establishment stayed constant with the 2021 average at 20.7% (see Figure 5). As in 2021, this was the highest ratio yet as documented by the Survey. In 2022, the number of large establishments (with 100 or more employees) increased by 25 to 2,303. Large businesses comprise 3.2% of all establishments but account for 56.9% of all employment.

Longevity

Changes in the longevity of business establishments at specific locations can offer insights into the economic health of a city or region. In 2022, 22.2% of Toronto's business establishments reported being at the same location for less than five years and 19.5% of establishments reported being at the same location for 6 to 15 years (see Figure 6). Overall, 35.3% 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.

Figure 5: Employees per Establishment, 2002-2022



New Establishments in the City

Although the city experienced an overall increase of only 2.6% in the number of establishments, the Survey found that 6,470 businesses, 9.0% of all establishments, either opened or moved to a new location in 2022. This is 5,650 more new businesses than in 2021 and 5,670 more than in 2020 (see Table 3). The low numbers in 2020 and 2021 followed by the jump in 2022 should not be seen as solely attributable to the economic instability or possible recovery from the COVID-19 pandemic, but is related to the difficulty of identifying new businesses during the initial period of the pandemic. There has been a lack of prior connections with businesses in the previous two years, which are usually established by surveyors physically visiting businesses. In 2020 and 2021, surveyors could only rely on publicly available contact information for identifying new establishments, followed by contact via telephone and/or email. However, some businesses, especially in the food service industry, choose to use social media and other electronic means over telephone

numbers to connect with the public.¹⁶ Businesses whose targeted clientele is not the general public may also choose not to publicize their contact information.

New Establishments by Category

Community and Entertainment had the most new establishments in the city with 2,120, a share of 32.8%. The Office and Service categories also had large shares of new establishments in 2022, with 25.8% and 20.7% respectively (see Table 4).

New Establishments by Employment

New establishments contributed 1.2% or 17,930 jobs to the total employment in 2022, which is only 0.1% higher than the past two years, but slightly lower than the 1.6% three-year average prior to the pandemic. The location of Amazon's Tech Hub office in Downtown Toronto contributed 6.9% of the new jobs. Of the top 20 largest new establishments, 12 were in Downtown and contributed 18.2% of the total new employment.

New Establishments by Location

The new establishments reported in 2022 are spread out throughout the city, with 2,250 in Employment Areas (34.8%), 1,240 in Downtown (19.2%), 340 in the Centres (5.2%), and 2,640 (40.8%) in the rest of the city (see Figure 7 on page 12). The share of new establishments in Employment Areas grew the most among the four growth management areas, by 12.8% compared to 2021. It is worth noting that this increase may be due to the difficulty in discovering new businesses within Employment Areas in previous years in the absence of a field survey in 2020 and 2021. This is especially the case in Core Employment Areas, as these establishments are less likely to promote their presence to the general public. This jump may reflect new establishments in 2020 and 2021 as well as 2022.

Table 3: New Establishments, 2018-2022

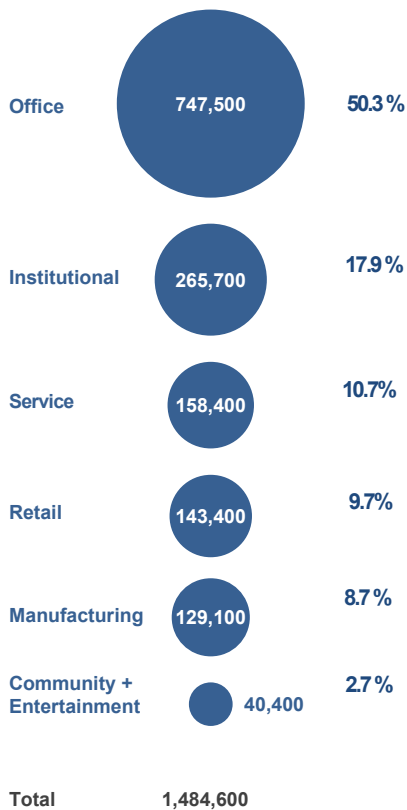
2018	2019	2020	2021	2022
3,470	3,810	800	820	6,470

Table 4: New Establishments, 2021-2022

Location	2021	2022	Category	2021	2022
Centres	30	340	Manufacturing	30	250
Downtown	200	1,240	Retail	270	860
Employment Areas	180	2,250	Service	250	1,340
Rest of the City	400	2,640	Office	150	1,670
			Institutional	50	240
			Community & Entertainment	70	2,120
City Total	810	6,470	City Total	810	6,470

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

Figure 8: Total Employment by Category, 2022



Employment Categories

The Survey utilizes six employment categories to reflect the underlying land use activities of employment across the city: Manufacturing and Warehousing, Retail, Service, Office, Institutional, and Community and Entertainment. See Maps A.4 to A.9 on Pages 38 and 39 in the Appendix for the spatial distributions of their employment across Toronto.

Gains were observed in all employment categories except Office in 2022 (see Table 2). This differs from 2020 and 2021 when all categories experienced losses or only modest gains. In 2022, the largest gains were experienced by the Community and Entertainment category (4,770 jobs or 13.4%), followed by Service (9,920 jobs or 6.7%), Institutional (12,650 jobs or 5.0%), Retail (4,130 jobs or 3.0%) and Manufacturing and Warehousing (2,070 jobs or 1.6%). Office observed a loss of 570 jobs or 0.1%.

In 2022, the categories with negative five-year trends were Community and Entertainment, Service, Manufacturing and Warehousing and Retail, however each of these categories saw one-year gains in 2022 signaling recovery from pandemic declines.

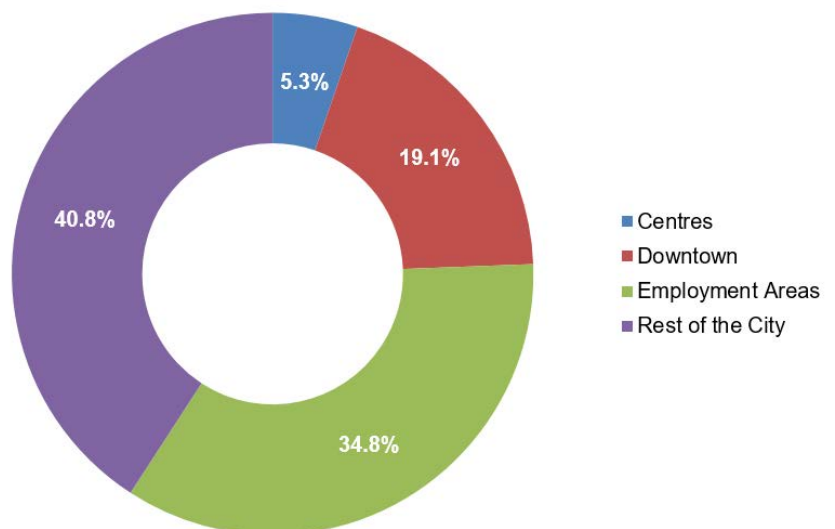
The most stable category in 2022 over a five-year period is Office, followed by Institutional and Retail.

City Employment Share

Toronto’s top employment categories are Office (50.4%), Institutional (17.9%) and Service (10.7%) (see Figure 8 and Table 2). As of 2022, Office accounts for more than half of all jobs in Toronto. In 2022, Institutional passed Office as Toronto’s fastest-growing category, seeing 3.8% average growth over the last five years. It also added the largest number of jobs in 2022 at 12,650.

The remaining shares of city employment are Retail (9.7%), Manufacturing and Warehousing (8.7%), and Community and Entertainment (2.7%). These categories all experienced negative five-year growth rates in 2022.

Figure 7: Share of New Establishments by Location, 2022



City Establishment Share

Among Toronto's categories of business establishments, Office (36.4%), Service (24.5%), and Retail (19.1%) made up the largest shares, followed by Institutional (8.4%), Manufacturing and Warehousing (6.4%), and Community and Entertainment (5.2%) (see Figures 8 and 9). However, the Institutional category has a greater concentration of employees per establishment, 44.3 employees per establishment, compared to Service and Retail with 9.0 and 10.6 employees respectively.

Note that the total number of establishments includes 5,933 establishment records deemed as placeholders. Since 2020, placeholder records have been identified as having either no employment or employment that cannot be confirmed. Examples of placeholders include unstaffed hydro-electric stations and training centres, as well as new temporarily closed businesses or those from which surveyors were unable to obtain employment information. Placeholders are continually examined as part of the field survey programme.

Category Totals

Office led overall employment growth in the last five years, adding 32,930 jobs since 2017, and amounting to a 0.9% average annual increase. However, in 2022, Office was the only category to see a decline in total employment, losing 570 jobs or 0.1%.

Institutional increased by 1.1% annually on average and has added 9,710 jobs since 2017. In 2022, the category saw the largest increase in the number of jobs, adding 12,650.

Retail lost a total of 8,650 jobs since 2017, for a 1.1% average annual decline. However, the category employment increased by 4,130 jobs or 1.6% between 2021 and 2022.

Manufacturing and Warehousing employment increased by 2,070 jobs or 1.6% between 2021 and 2022. The category saw a five-year average decline of 0.4%.

Community and Entertainment saw notable gains in 2022, adding 4,770 jobs or 13.4%, after experiencing a loss of almost one-third of its total employment, decreasing by 27.8% or 15,590 jobs in the last five years. This is the most drastic decline seen of all the categories.

Service experienced an increase of 9,920 jobs between 2021 and 2022 for an annual increase of 6.7%. This comes after the category experienced the largest absolute decline in 2021. Since 2017, Service has lost a total of 32,930 jobs, for a 2.8% average annual decline.

Figure 9: Total Establishments by Category, 2022

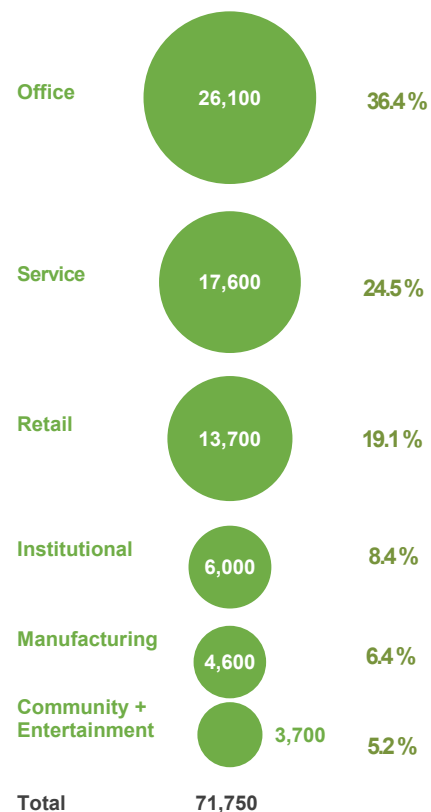


Figure 10: Employment Share by Major NAICS Sector, 2017-2022

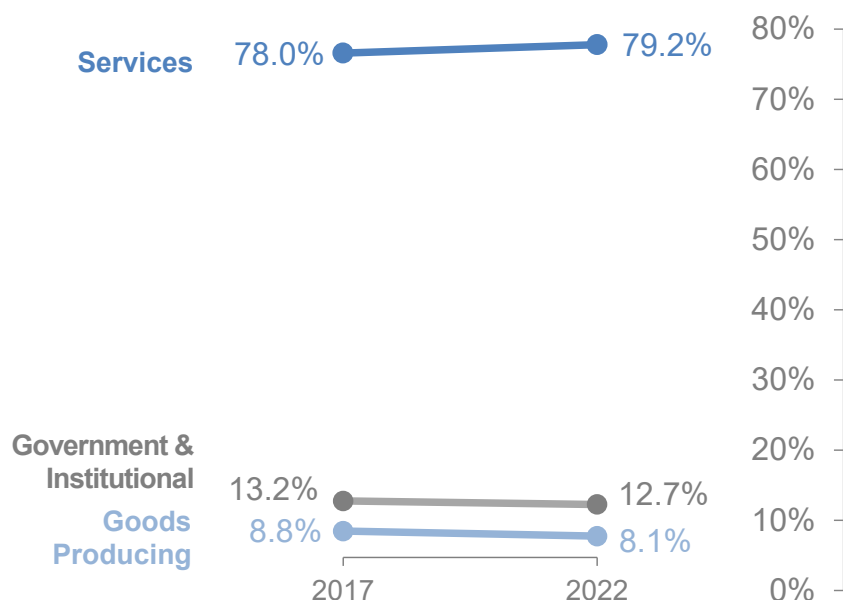
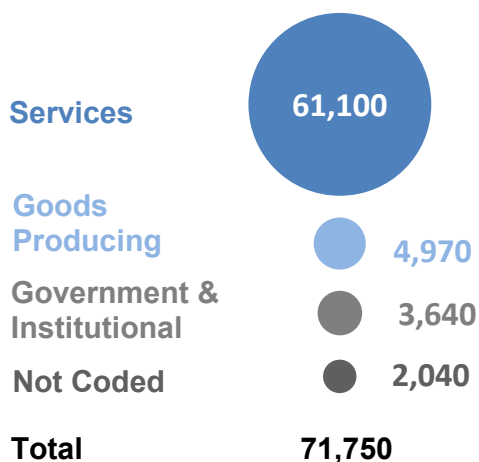


Figure 11: Establishments by Major NAICS Sector, 2017-2022



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 land use and occupancy in the city, 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 and surveys utilizing this same system.

In 2021, a review was conducted of the NAICS coding for the Management of Companies and Enterprises sector, to code establishments more precisely and to more closely align the Survey's coding with those of other data sources, such as the Labour Force Survey conducted by Statistics Canada. Data was updated retroactively to 2016.

Toronto's Economy

Three major sectors make up the employment shares of Toronto's economy: Service-based industries (79.2%), Government and Institutional industries (12.7%) and Goods Producing industries (8.1%) (see Figures 10 and 11).

In 2022, Service-based employment grew by 31,010 jobs or 2.7%. While this sector had the most job losses in 2020, the gains observed in 2021 and again in 2022 are consistent with the pre-pandemic (2019) trend of having the highest annual growth among the sectors. Government and Institutional industries added 1,780 jobs (1.0%) in 2022, however, both it and Goods Producing industries have been steadily decreasing as a share of total employment over the past five years.

Major Sectors

The Survey uses NAICS to classify the economy into 20 major sectors. Finance and Insurance continued to be the largest NAICS sector for the third year in a row, representing 204,280 jobs or 13.8% of all jobs in 2022.

In 2022, 55.7% of all jobs in Toronto belonged to five NAICS sectors (see Figure 12), compared to 55.9% in 2021. The top five sectors consistent across 2020, 2021 and 2022 are: Finance and Insurance; Health Care and Social Assistance; Professional, Scientific, and Technical Services; Retail Trade; and Educational Services.

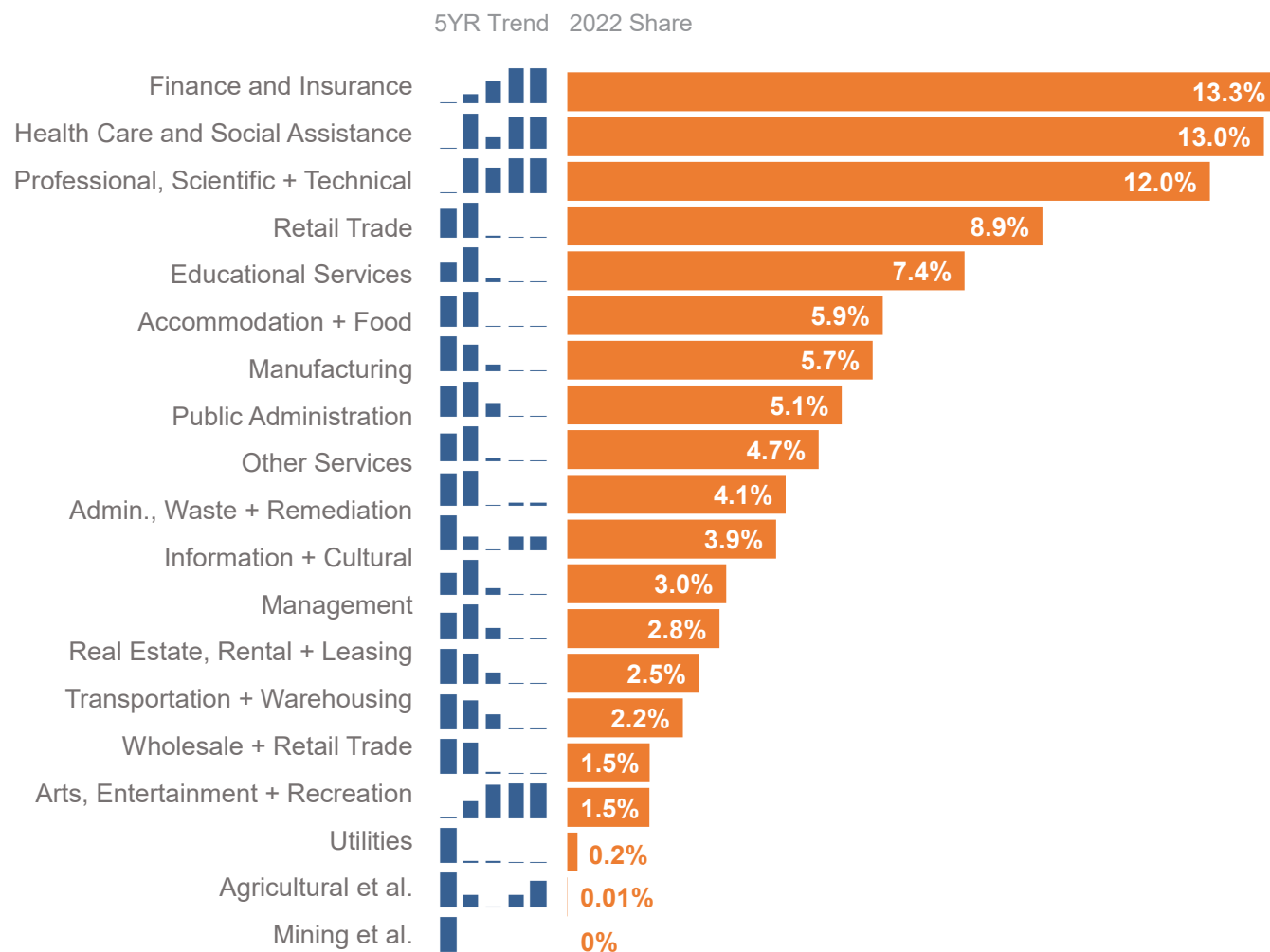
In 2022, the sectors that experienced the greatest growth were Accommodation and Food Services (12,500 jobs or 14.3%), Health Care and Social Assistance (7,910 jobs or 4.1%), Finance and Insurance (6,860 jobs or 3.5%) and Arts, Entertainment and Recreation (5,380 jobs or 23.6%).

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

- Management of Companies and Enterprises added 6,020 jobs since 2017, averaging 6.5% annual growth.

- Finance and Insurance added 23,190 jobs since 2017, averaging 2.6% annual growth.
- Health Care and Social Assistance added 17,040 jobs since 2017, averaging 1.9% annual growth.
- Professional, Scientific and Technical Services added 9,240 jobs since 2017, averaging 5.6% annual growth.

Figure 12: City Employment Share by Major NAICS Sector, 2022



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 49 Secondary Plan areas which outline a growth strategy for a local area. Many of these are experiencing rapid growth through intensification. Of these 49, 6 areas have been adopted by Council but have not yet been approved by the Province or are under appeal and thus may be subject to change, pending Ontario Land Tribunal decisions (see Map 2).

Downtown and the Centres are planned to 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 Provincial legislation, *Places to Grow Act*, 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 reinforces Toronto's Official Plan Urban Structure by encouraging

intensification of Strategic Growth Areas including Urban Growth Centres, Major Transit Station Areas, and infill sites such as brownfields or greyfields.

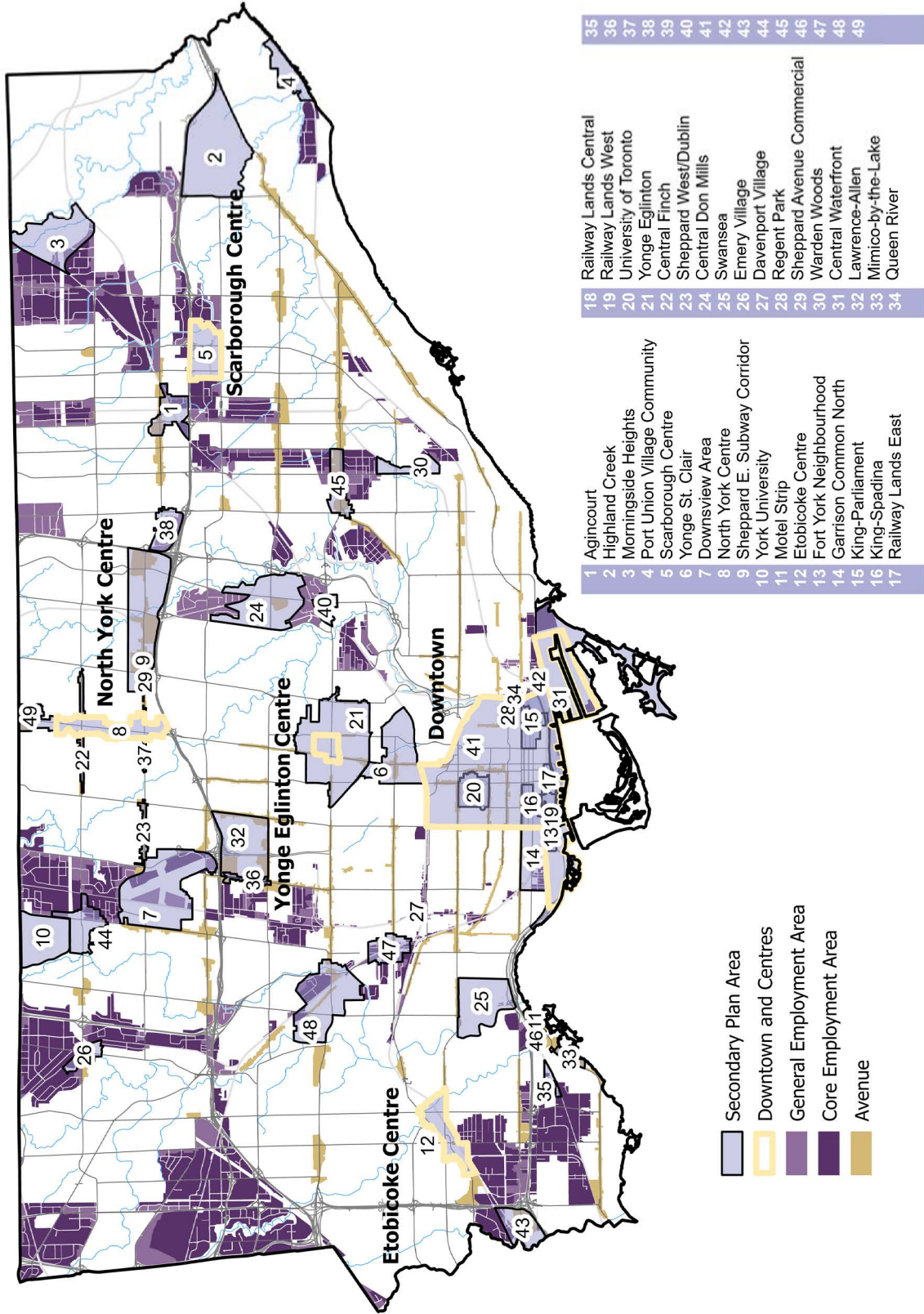
Toronto contains five Urban Growth Centres: Downtown Toronto, Etobicoke Centre, North York Centre, Scarborough Centre, and Yonge-Eglinton Centre. The Growth Plan defines these areas as existing or emerging downtown areas, and which are targeted to each achieve a minimum density of 400 residents and jobs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

Table 5: Total Employment in the Centres and Downtown, 2017 - 2022

							2017-2022		2021-2022	
	2017	2018	2019	2020	2021	2022	Net Change	% Change	Net Change	% Change
Downtown	543,530	565,220	584,660	537,310	547,700	564,990	21,460	3.9%	17,290	3.2%
North York Centre	33,900	34,910	35,920	34,920	34,830	33,770	-130	-0.4%	-1,060	-3.0%
Yonge-Eglinton	18,780	18,080	18,720	17,500	17,100	15,970	-2,810	-15.0%	-1,130	-6.6%
Scarborough Centre	17,210	17,980	16,830	15,250	14,280	14,120	-3,090	-18.0%	-160	-1.1%
Etobicoke Centre	10,850	10,460	10,850	9,960	10,110	9,960	-890	-8.2%	-150	-1.5%
Downtown and the Centres	624,270	646,650	666,980	614,940	624,020	638,810	14,540	2.3%	14,790	2.4%
Rest of City	871,980	876,230	902,820	834,970	827,500	845,790	-26,190	-3.0%	18,290	2.2%
City Total	1,496,250	1,522,880	1,569,800	1,449,910	1,451,520	1,484,600	-11,650	-0.8%	33,080	2.3%

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

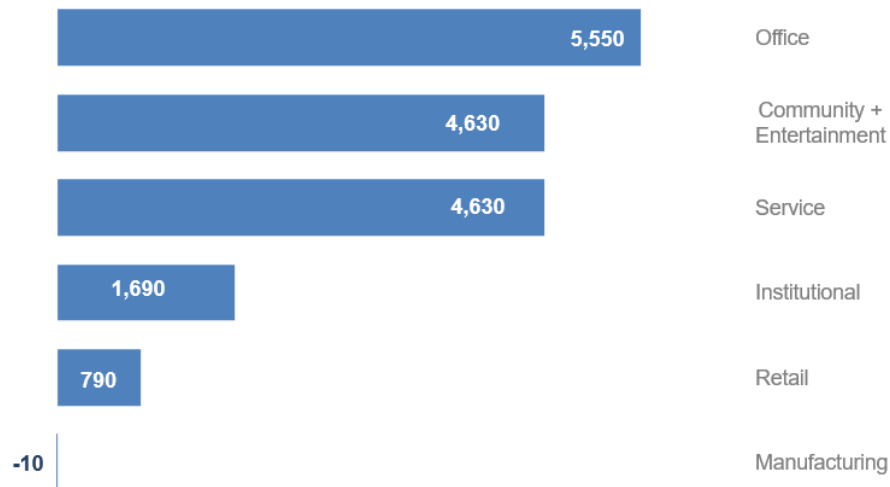
Map 2: Urban Economic Structure



* 6 Secondary Plan Areas have been adopted by Council but have not yet been approved by the Province or are under appeal and thus may be subject to change, pending Ontario Land Tribunal decisions.



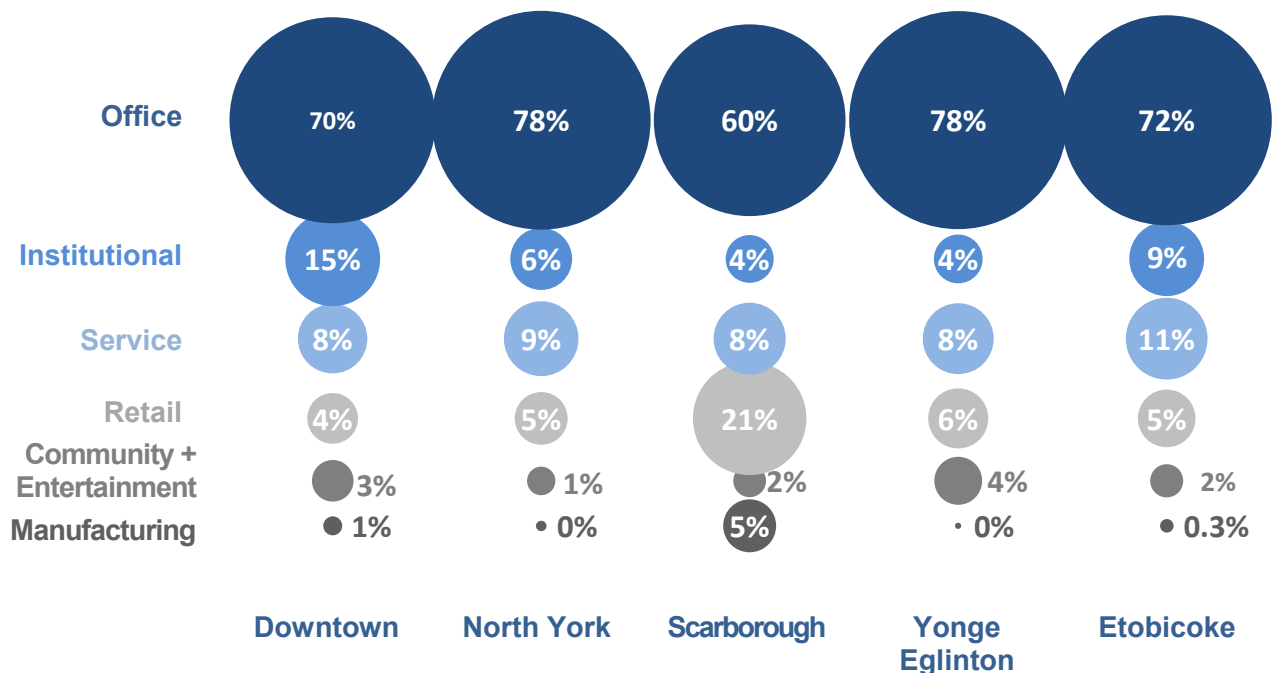
Figure 13: Downtown Employment Change 2021-2022



Employment in the Downtown

Toronto's Downtown is a local and national economic hub. Downtown contains 564,990 jobs, 38.1% of the city's total, and has an average employment density of 26,323 jobs per km² or 263 jobs per hectare. This represents an increase from the 2021 average employment density of 25,593 jobs per km² or 256 jobs per hectare, signaling a second year of recovery from the pandemic impacts observed in 2020. The Strategic Regional Research Alliance's Office Occupancy Index, an estimate of the percentage of office workers working in their downtown offices rather than remotely, steadily increased throughout 2022 to 43% by February 2023 (compared to only 8% in February 2022 due to reinstatement of pandemic related lockdowns and restrictions). This indicates the most significant return to in-person work by downtown office workers since the beginning of the COVID-19 pandemic¹⁷.

Figure 14: Downtown and Centres, Share of Employment by Category, 2022



Downtown grew faster than the citywide average of 2.3%, gaining 17,290 jobs, or 3.2%, in 2022 (see Figure 15). The combined 2021 and 2022 growth of 27,680 jobs represents partial recovery of the 2020 losses of 47,350 jobs or -8.1% (see Table 5). However, Downtown is still down by 3.3%, or 19,670 jobs, since 2019.

Office employment comprises 69.7% of Downtown jobs (see Figures 13 and 14). The Office category grew by 5,550 jobs or 1.4% in 2022. Aside from Manufacturing and Warehousing, which saw a minor decrease of 10 jobs (0.3%), all other categories experienced increases in employment. Community and Entertainment, and Service both added 4,630 jobs, representing gains of 40.8% and 11.6% respectively, Retail gained 3.4% and Institutional added 2.1%.

Downtown continues to attract a significant share of new establishments, adding 1,240 between 2021 and 2022. In 2022, 19.2% of all new business establishments in the city were counted in Downtown, down from 24.8% in 2021.

Figure 15: Employment Growth vs. 5-Year Average by Urban Structure Area

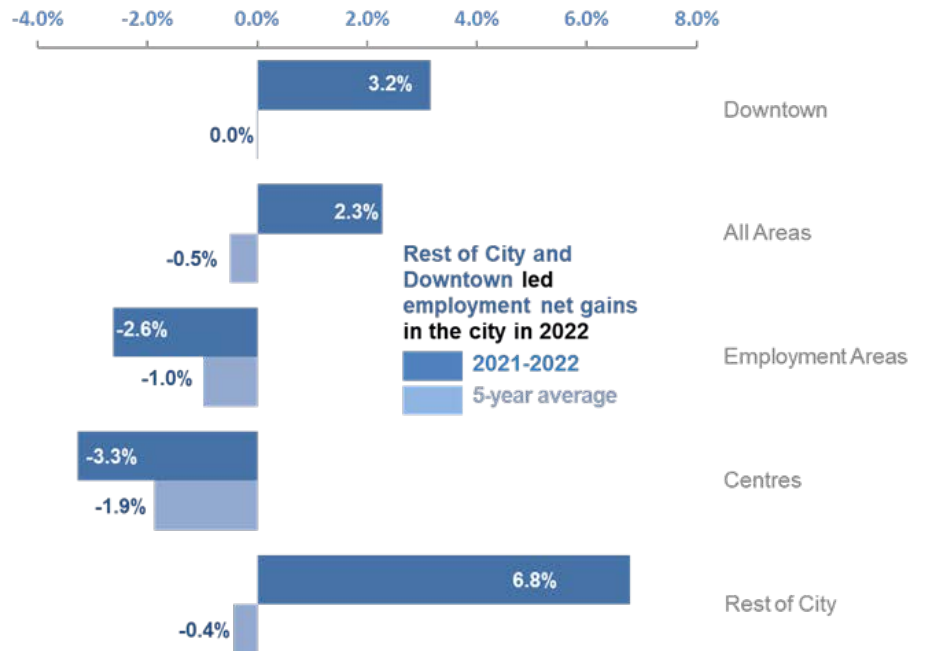


Figure 16: Downtown and Centres, Share of Establishments by Category, 2022

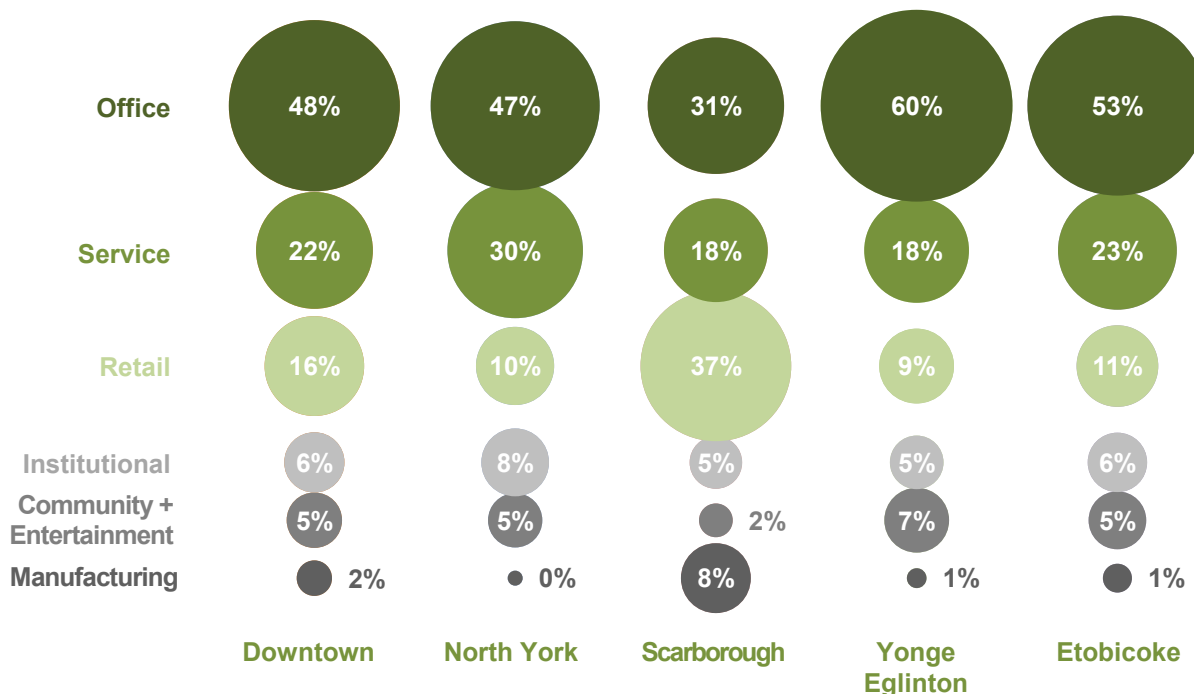


Figure 17a: North York Centre Employment Change by Category 2021-2022

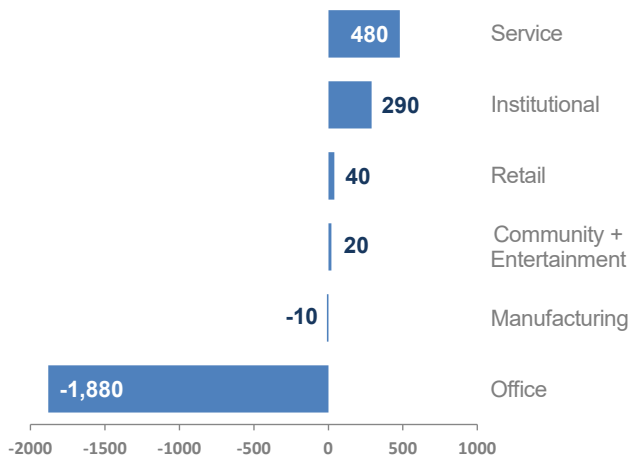
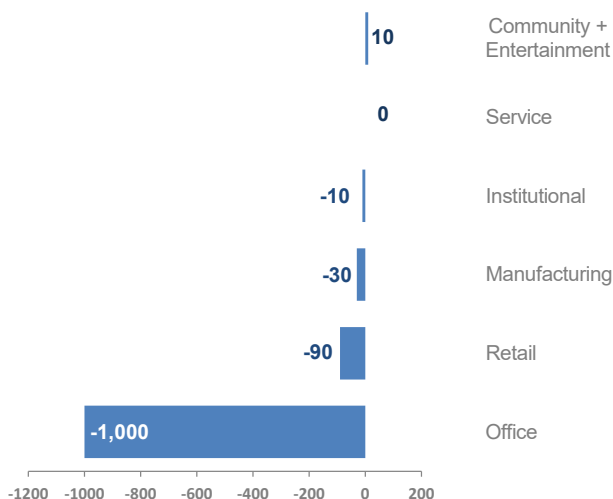


Figure 17b: Yonge-Eglinton Employment Change by Category 2021-2022



The Centres

The four Centres are home to 73,820 jobs or 5.0% of all jobs in the city. In 2022, the Centres lost a combined 2,500 jobs or 3.3% (see Table 5). This represents greater change than the previous year when employment decreased by 1.7%. In total, the Centres have 8,500 (10.3%) fewer jobs than they did in 2019.

In 2022, the decline in employment was led by the Yonge-Eglinton Centre (1,130 jobs), followed by North York Centre (1,060 jobs), Scarborough Centre (160 jobs) and Etobicoke Centre (150 jobs).

Nearly three-quarters (74.1%) of all jobs in the Centres are in the Office category (see Figure 14) which declined by 5.3% or 3,320 jobs.

North York Centre

North York Centre is Toronto's largest Centre with 33,770 jobs, comprising 2.3% of jobs in the city. Three-quarters of jobs in North York Centre are Office jobs, representing 26,500 jobs (78.5%).

In 2022, North York Centre, sizeable losses were noted in Office (1,880 jobs or 6.6%). There were gains in the Service (480 jobs or 18.4%) and Institutional (290 jobs or 15.8%) categories (see Figure 17a).

Yonge-Eglinton Centre

Yonge-Eglinton Centre is Toronto's second largest Centre by employment with 15,970 jobs, or 1.1% of the city's total. Yonge-Eglinton contains the highest density of employment of any Centre with approximately 26,163 jobs per km². In 2022, employment in this Centre decreased by 1,130 jobs or 6.6%.

Over three-quarters (78.1%) of employment in Yonge-Eglinton Centre is in the Office category. Losses in 2022 were concentrated in Office (down 1,000 jobs or 7.4%) and Retail (down 90 jobs or 8.7%) (see Figure 17b).

Scarborough Centre

Employment in Scarborough Centre totaled 14,120 jobs in 2022, comprising 1.0% of the city's total. The Survey counted a decrease of 160 jobs or 1.1%, however, this is a much smaller decline than the total 5-year total decrease of 18.0% or 3,090, the largest 5-year decline observed among the Centres. The majority (60.3%) of employment is in Office, followed by Retail with 21.1%, the highest share of retail employment observed among the Centres.

Losses were experienced by Institutional (210 jobs or 28.4%), Office (230 jobs or 2.6%) and Community and Entertainment (10 jobs or 3.8%). Gains were observed in Retail (110 jobs or 3.8%), Service (100 jobs or 9.1%) and Manufacturing and Warehousing (70 jobs or 12.1%) (see Figure 17c).

Etobicoke Centre

Etobicoke Centre is the smallest Centre in Toronto by employment. The Centre has 9,960 jobs total, representing 0.7% of employment in Toronto. Most employment is Office (7,210 jobs or 72.4%). Etobicoke Centre gained 150 jobs, or 1.5%, in 2022. Gains were experienced by Service (100 jobs or 10.1%) and Retail (20 jobs or 3.8%). Community and Entertainment lost 130 jobs (41.9%), Office is down by 110 jobs (1.5%), and Institutional lost 40 jobs (4.2%) (see Figure 17d).

Figure 17c: Scarborough Employment Change by Category 2021-2022

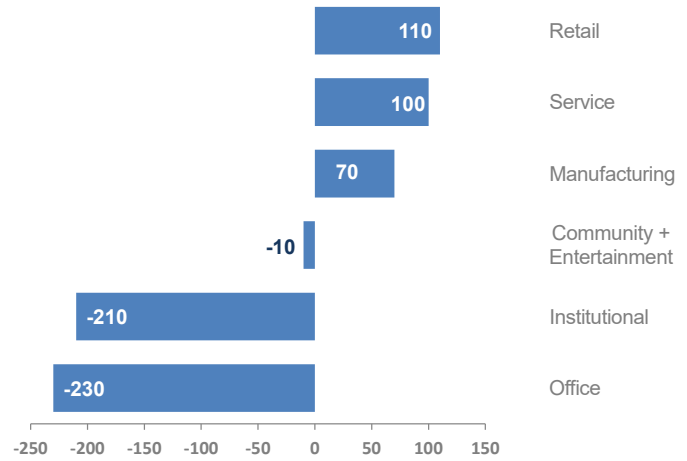
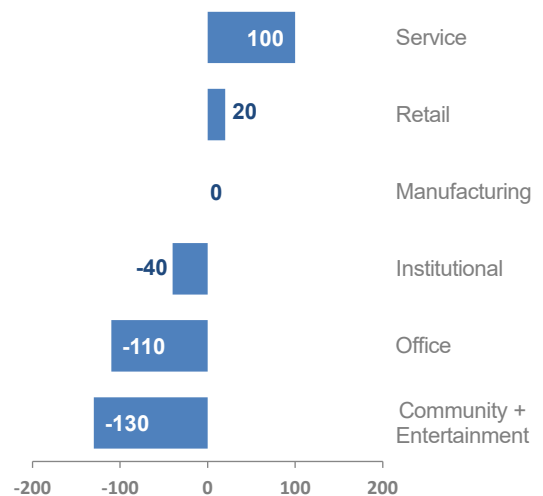


Figure 17d: Etobicoke Employment Change by Category 2021-2022



Employment in Secondary Plan Areas

With over half of all city-wide employment in 2022, 823,970 or 56.8% jobs, Secondary Plan areas reflect much of the city's more recent urban growth. When the Survey reported on Secondary Plan areas in 2021, Secondary Plan areas accounted for 52.6% of employment or 767,530 jobs, a difference of 56,440 jobs.

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. There are multiple areas of the city that belong to a Secondary Plan area or to more than one Secondary Plan area. For example, businesses in the area of King St. East and Parliament St. fall within Central Waterfront, Downtown, and King-Parliament. The Downtown Secondary Plan overlaps with ten Secondary Plan areas. Note that the employment numbers in Table A3 are for each Secondary Plan area individually, and therefore some businesses fall into overlapping areas.

The Secondary Plan areas for Downtown, North York Centre, and Yonge-Eglinton Centre have marginal differences in 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 six Secondary Plan areas which collectively contain 71.4% of all the jobs contained within the City's 49 Secondary Plan areas. The largest Secondary Plan area in terms of employment is the Downtown Plan area with 556,690 jobs (see Figure 18). This represents an increase of 16,460 jobs from 2021 when it was 540,230 jobs. Downtown contains nearly half (49.6%) of all jobs located within Secondary Plan areas. The number is calculated from the sum of all jobs in the Downtown Plan area as well as in any overlapping Secondary Plan areas. This is followed by the Central Waterfront (43,239 jobs), Railway Lands East (36,022 jobs), King-Spadina (35,312 jobs), North York Centre (33,773 jobs) and Yonge-Eglinton (31,125 jobs).

Of the remaining 43 Secondary Plan areas, approximately half contain between 2,000 to 30,000 jobs, with the other half containing less than 2,000 jobs each (see Figure 18).

Four Secondary Plan areas gained a significant number of jobs in 2022. Fort York Neighbourhood grew by 126.7%, or 869 jobs, Sherway Area by 122.8% or 8,776 jobs, Keele Finch by 39.9% or 954 jobs and Central Waterfront (30.0% or 9,981 jobs). The only Secondary Plan area with at least 1,000 jobs or more that saw a decline from 2021 was Agincourt with a loss of 41 jobs (1.0%). This was unlike 2021 which saw several Secondary Plan areas experience significant employment declines.

Secondary Plan Areas by Activity

This distribution of employment reflects the success of the Official Plan's growth management policies in directing growth to appropriate areas. Office was the dominant employment category 2022, representing 64.1% of all jobs and nearly half of all establishments (46.3%). This was followed by Institutional (15.8% of all jobs), Service (8.8% of all jobs), Retail (7.3% of all jobs), Community and Entertainment (2.5% of all jobs), and Manufacturing (1.5% of all jobs) (see Figures 19 and 20).

There are a number of Secondary Plan areas where Office is not the main employment category. Manufacturing jobs comprise the bulk of employment in Warden Woods (48.4%) and the Downsview Area (43.2%). Retail jobs represent the majority of employment in Fort York Neighbourhood (59.0%) and Queen River (48.8%). Service jobs make up the majority of employment in Davenport Village (50.0%) and Mimico-Judson (41.7%). Institutional jobs make up most of the employment for Morningside Heights (100%), York University (86.6%), University of Toronto (84.9%) and Highland Creek (73.2%).

Figure 18: Secondary Plan Area Employment, 2022

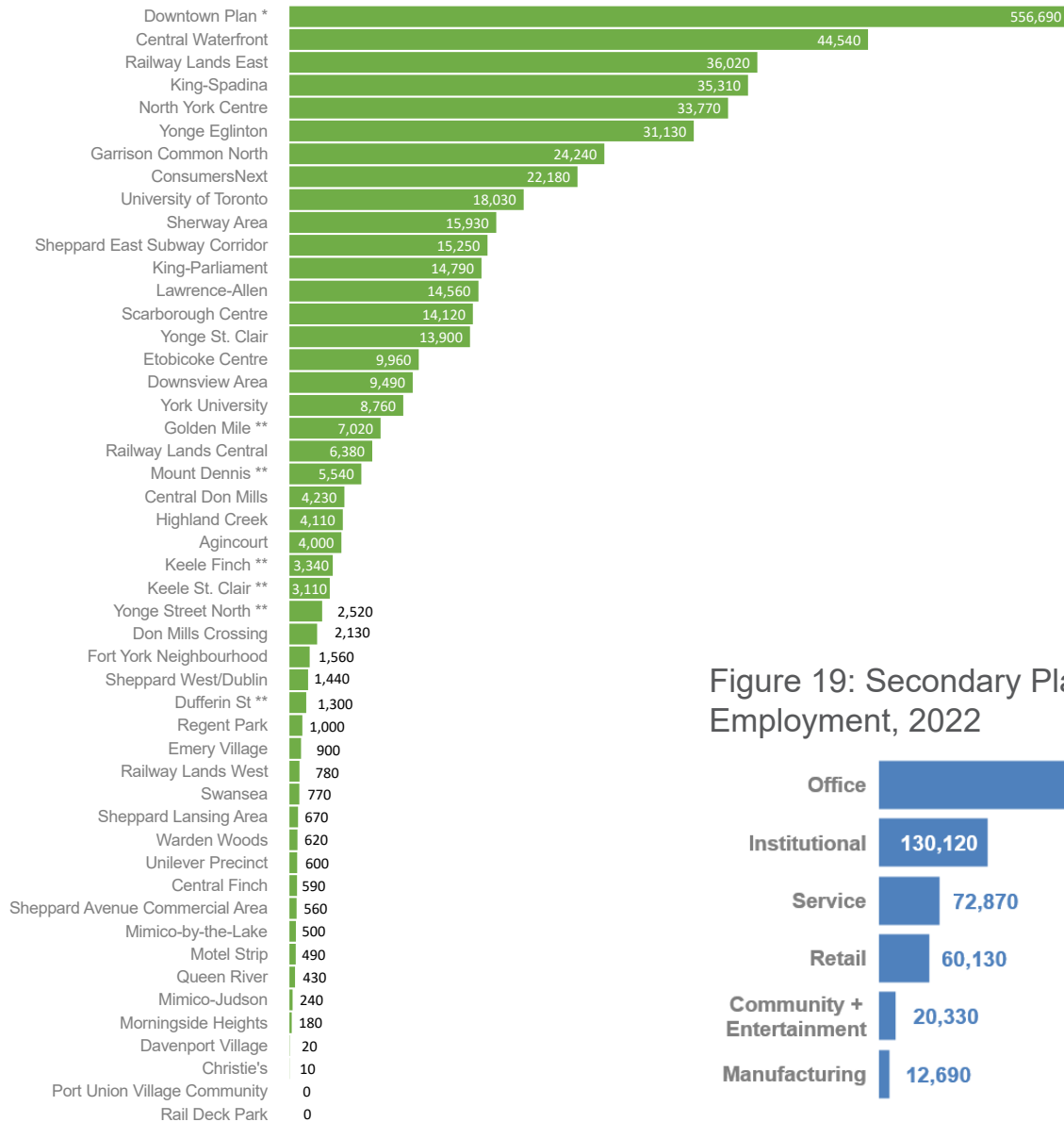


Figure 19: Secondary Plan Area Employment, 2022

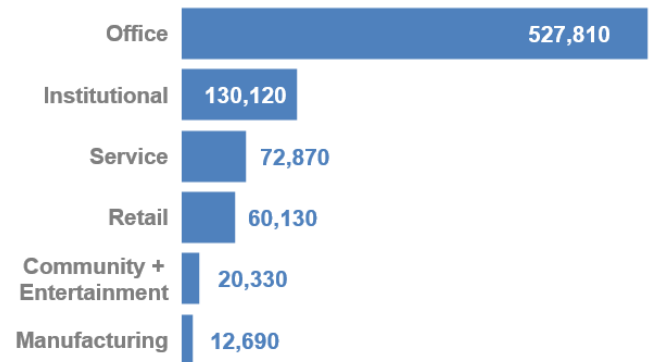
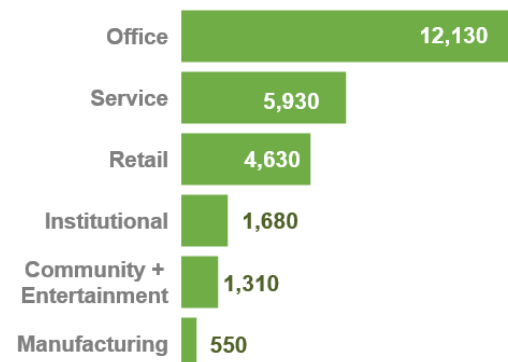


Figure 20: Secondary Plan Area Establishments, 2022



Note: Sum of employment exceeds total employment in Secondary Plan Areas due to overlap of multiple Secondary Plan geographies. Employment totals are accurate for each individual Secondary Plan Area.

* 148,099 jobs within Downtown are also captured in other Secondary Plan Areas, including King-Parliament, University of Toronto, Regent Park, Central Waterfront, Fort York Neighbourhood, Rail Deck Park, Queen River, King-Spadina, Railway Lands East, Railway Lands West, and Railway Lands Central. The overlap by six sectors include 961 Manufacturing & Warehousing jobs, 6,008 Retail jobs, 13,756 Service jobs, 99,276 Office jobs, 19,356 Institutional jobs and 9,402 Community and Entertainment jobs.

** 6 Secondary Plan Areas have been adopted by Council but have not yet been approved by the Province or are under appeal and thus may be subject to change, pending Ontario Land Tribunal decisions.

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 2 shows the location and boundaries of *Core* and *General Employment Areas* identified in the City of Toronto's Official Plan. In 2022, there were 21,690 establishments (30.2% of city total) and 398,080 jobs (26.8% of the city total) in Toronto's Employment Areas. This represents an increase in the share of jobs and establishments from 2021 when 29.4% of establishments and 25.0% of jobs were located in these areas. This is an increase of 6,410 jobs and 1,090 establishments from 2021.

Employment Areas are particularly important to the Manufacturing category, with 81.7% of the establishments and 89.4% of all Manufacturing jobs located in Toronto's Employment Areas.

New businesses continue to be attracted to Employment Areas, with 34.8% of new establishments or 2,248 establishments in the city located in Employment Areas in 2022.

Employment Areas play a role in accommodating a range of businesses including those that offer attainable employment opportunities for people of various education levels and skill sets.

The relationship between Employment Areas also provide important economic opportunities for visible minority households. Jobs in distribution, manufacturing and other goods-producing sectors are commonly identified as low-barrier employment opportunities for recent newcomers and other individuals who tend to face challenges related to having their professional certifications recognized along with those individuals where English is not their first language.

Core and General Employment Areas

Section 4.6 of the Official Plan differentiates *Core* and *General Employment Areas*.

Core Employment Areas are, for the most part, geographically located within the interior of employment lands. 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* and along major roads. In addition to the uses permitted in *Core Employment Areas*, 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 NAICS sectors in Employment Areas include Manufacturing, Wholesale and Retail Trade, and Professional, Scientific and Technical Services. Manufacturing employment is the largest component of Employment Areas, making up 19.3% of all jobs (76,830 jobs), an increase of 2.3% or 1,700 jobs from 2021. This increase is a positive sign after this sector lost close to 8,600 jobs

in 2020 and 2021 combined. Wholesale and Retail Trade maintained its share of employment in 2022 at 16.3%, noting that the number of jobs increased by 1,428 to a total of 64,950 jobs. The share of Professional, Scientific and Technical Services employment also remained stable at 11.0% or 43,692 jobs, including an increase of 1,045 jobs.

Employment Areas accommodate important concentrations of jobs citywide in several sectors, led by Wholesale and Retail Trade (93.2%), Transportation and Warehousing (90.22%), Manufacturing (89.3%), Utilities (80.9%), and Construction (76.0%).

The sector with the largest increase in employment was Accommodation and Food Services which was up 13.6% or 1,730 jobs. The majority of this was close to the Airport and could be attributed to the increase of travel due to the easing of pandemic-related restrictions.

Core Employment Area Activity

Core Employment Areas 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 63.6% or 253,250 of all jobs in Employment Areas in 2022, an increase of 4,475 jobs over 2021. These areas had an average of 4,170 jobs per km² or 41.7 jobs per hectare.

In 2022, the sectors with the greatest amount of jobs in Core Employment Areas were Manufacturing with 65,830 jobs (26.0%), Wholesale and Retail Trade with 36,300 jobs (14.3%), and Transportation and Warehousing with 31,350 jobs (12.4%) (see Figure 21).

Core Employment Areas are leading locations citywide for employment in Transportation and Warehousing (84.3%), Manufacturing (76.5%), and Construction (64.8%).

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* contained 36.4% or 144,830 of all Employment Area jobs, which was an increase of 1,930 jobs over 2021. They had an average employment density of 6,830 jobs per km² or 68.3 jobs per hectare.

Sectoral employment in *General Employment Areas* was led by Wholesale and Retail Trade, having 19.8% of *General Employment Area* jobs (28,650 jobs), followed by Professional, Scientific, and Technical Services (11.5% or 16,610 jobs), and Administrative and Support, Waste Management and Remediation Services (8.2% and 11,850 jobs) (see Figure 22).

General Employment Areas are leading locations citywide for employment in Utilities (59.4%), Wholesale and Retail Trade (41.1%), and Finance and insurance (27.1%).

Figure 21: Core Employment by NAICS 2022

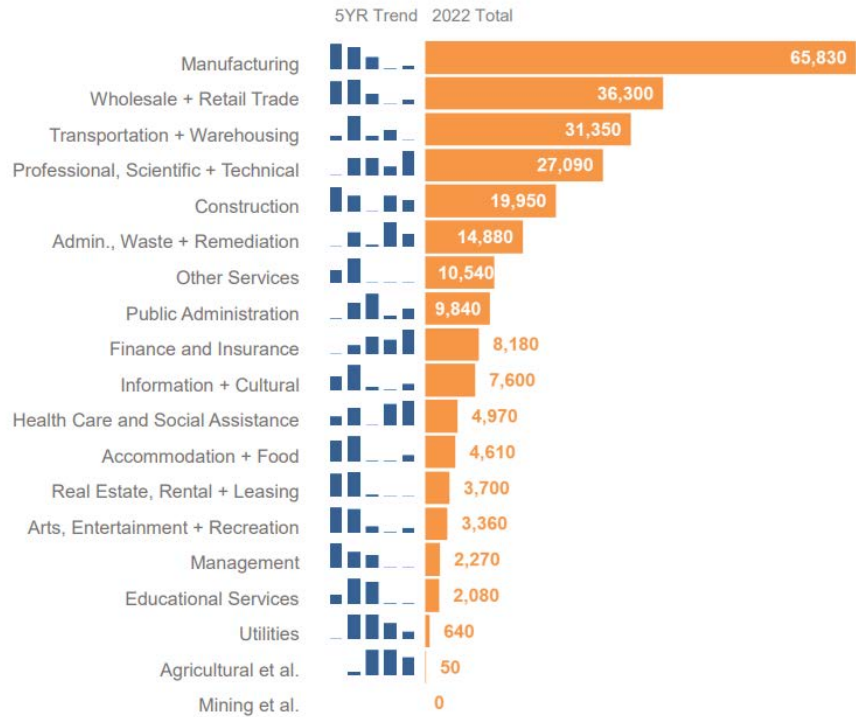
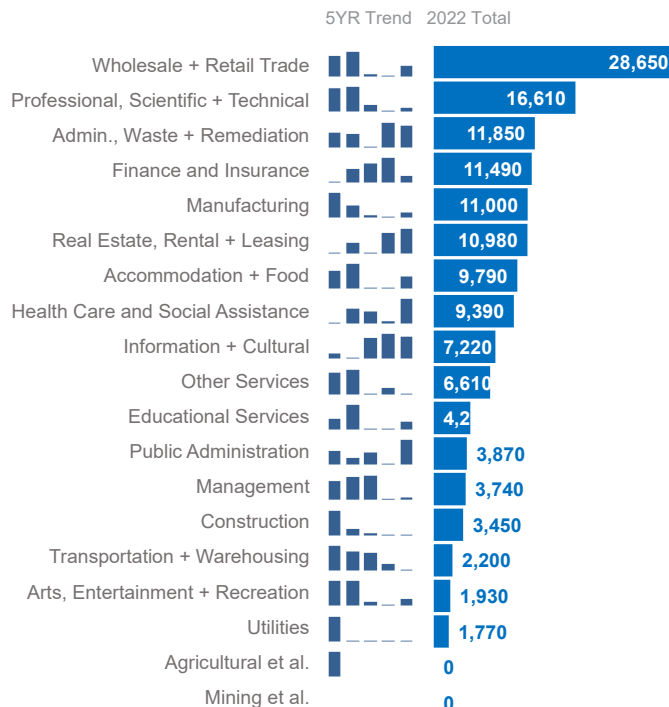


Figure 22: General Employment by NAICS 2022



Areas of Employment

This is the first year in which the Toronto Employment Survey bulletin is reporting on Areas of Employment (AOEs) and the activity on designated *Employment Area* uses within the AOE boundaries. According to the Ontario Planning Act,¹⁸ an “area of employment” means an area of land designated in an official plan for clusters of business and economic uses including, without limitation, the uses listed in subsection (5) [of the Act], or as otherwise prescribed by regulation”. These uses include manufacturing, warehousing, office, associated retail uses ancillary facilities. In Toronto, there are 23 AOEs which represent geographic clusters of lands designated as either *Core Employment Area* or *General Employment Area* in the Official Plan.

Employment in the AOEs accounts for 398,290 jobs, or 26.8% of all citywide employment, and 21,650 establishments, or 30.2% of the total. These proportions of employment have remained constant in the past five years, indicating stability in these areas. In 2021, there were 6,500 fewer jobs (391,790 jobs) than in 2022, while in 2017 there was an employment count of 406,560 jobs or 8,280 more jobs in 2022. This shows the strength of these areas to regain lost employment in an uncertain economic environment.

The AOEs are comprised almost exclusively of designated Employment Areas, therefore all employment statistics and figures in this section are calculated for those establishments on those lands. The Portlands and Central Waterfront AOE contains land designated as Regeneration Area. These establishments and employment

numbers have been removed from the calculations. Please see the note on Table 6.

Top AOEs by employment

The top five AOEs comprise nearly half of the employment with 179,480 jobs, each with greater than 30,000 jobs (see Table 6). This includes Rexdale-Airport (41,940 jobs or 10.5%), South Etobicoke (38,370 jobs or 9.6%), Downsview (35,400 jobs or 8.9%), Highway 400 (32,490 jobs or 8.2%), and Tapscott (31,290 jobs or 7.9%). Ten AOEs have employment between 10,000 to 30,000 jobs. Coronation Drive, Liberty Village, Scarborough Highway 401 each experienced over 10% growth since 2021, while Tapscott was the only AOE to have a decrease in the number of jobs by more than 10% since 2021.

Map 3: Areas of Employment

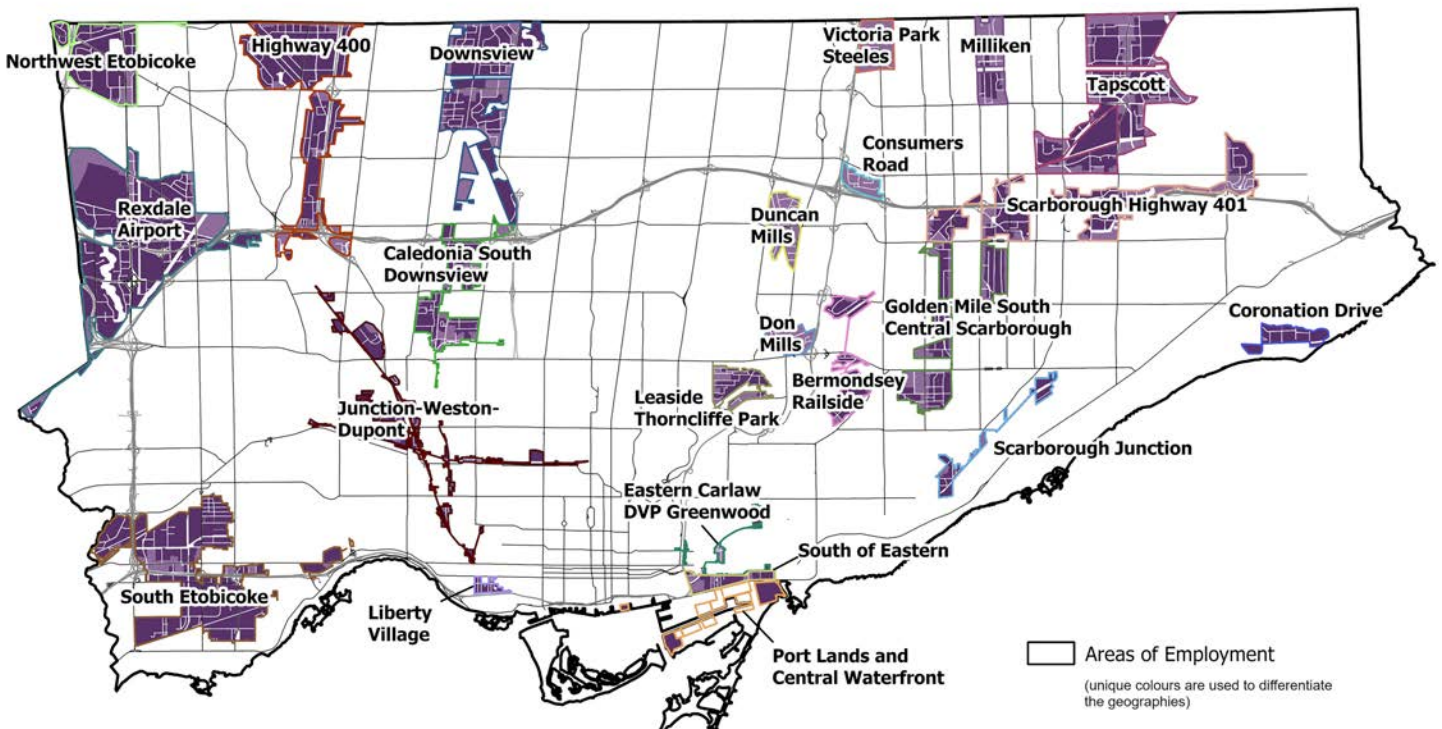


Table 6: Total Employment by Area of Employment, 2017-2022

Area of Employment	2017	2021	2022	2022 % of Total Employment	2017- 2022	% Change	2021- 2022	% Change
Bermondsey-Railside	9,410	8,880	9,380	2.4%	-30	-0.3%	500	5.7%
Caledonia-South Downsview	19,260	18,810	17,280	4.3%	-1,980	-10.3%	-1,530	-8.1%
Consumers Road Office-Focussed Area	17,890	18,270	18,700	4.7%	810	4.5%	430	2.3%
Coronation Drive	950	910	1,050	0.3%	100	10.2%	130	14.7%
Don Mills Office-Focussed Employment Area	10,470	10,950	10,610	2.7%	150	1.4%	-330	-3.0%
Downsview	35,440	34,320	35,400	8.9%	-40	-0.1%	1,080	3.1%
Duncan Mills Office-Focussed Area	21,410	20,590	20,150	5.1%	-1,260	-5.9%	-440	-2.1%
Eastern-Carlaw-DVP-Greenwood	4,270	4,440	4,510	1.1%	240	5.5%	70	1.6%
Golden Mile-South Central Scarborough (east part)	22,560	22,650	22,590	5.7%	40	0.2%	-60	-0.3%
Highway 400	34,590	31,020	32,490	8.2%	-2,110	-6.1%	1,470	4.7%
Junction-Weston-Dupont	20,240	19,530	18,690	4.7%	-1,560	-7.7%	-840	-4.3%
Leaside-Thorncliffe Park	9,420	8,490	8,800	2.2%	-620	-6.6%	320	3.7%
Liberty Village	8,900	11,690	13,200	3.3%	4,300	48.4%	1,510	13.0%
Milliken	7,630	7,400	7,640	1.9%	10	0.1%	240	3.2%
Northwest Etobicoke	16,900	15,570	16,820	4.2%	-90	-0.5%	1,240	8.0%
Portlands and Central Waterfront*	340	1,250	1,140	0.3%	790	229.9%	-120	-9.4%
Rexdale-Airport	44,120	42,040	41,940	10.5%	-2,180	-4.9%	-110	-0.3%
Scarborough Highway 401	27,870	26,270	29,570	7.4%	1,710	6.1%	3,310	12.6%
Scarborough Junction	3,170	2,650	2,880	0.7%	-300	-9.4%	230	8.7%
South Etobicoke (Central part)	42,300	39,400	38,370	9.6%	-3,940	-9.3%	-1,030	-2.6%
South of Eastern	4,680	4,280	4,100	1.0%	-580	-12.4%	-180	-4.2%
Tapscott	30,620	29,300	31,290	7.9%	670	2.2%	1,990	6.8%
Victoria Park-Steeles Office-Focussed Area	14,140	13,090	11,710	2.9%	-2,420	-17.1%	-1,380	-10.6%
Total	406,560	391,790	398,290	100.0%	-8,280	-2.0%	6,500	1.7%

Note: Numbers have been rounded to the nearest ten.

* There are 58 establishments with 4,227 jobs on the lands designated *Regeneration Area* in the Portlands and Central Waterfront AOE. The totals in this table do not include them.

AOE Employment by Activity

The leading employment activity in 2022 is Manufacturing, comprising 76,850 jobs or 19.3% of all jobs located in an AOE. Warehousing and Retail Trade (65,000 jobs or 16.3%) and Professional, Scientific and Technical Services (43,790 jobs or 11.0%) also contain a high concentration of employment within these areas. The activity with the most growth since 2021 was Accommodation and Food Services with an additional 1,730 jobs.

Health Care and Social Assistance (950 jobs), Management of Companies and Enterprises (390 jobs), Arts, Entertainment and Recreation (290 jobs) also experienced growth from 2021 in the 6-7% range. Transportation and Warehousing lost 1,330 jobs or 4% between 2021 and 2022, while Administrative and Support, Waste Management and Remediation Services lost 750 jobs or 3%.

Table 7: Total Employment in Area of Employment by Major NAICS Sectors, 2017-2022

NAICS Sector	2017	2021	2022	2022 % of Total Employment	2017- 2022 Change	% Change	2021- 2022 Change	% Change
Agriculture, Forestry, Fishing and Hunting	10	70	50	0.0%	50	980.0%	-10	-20.6%
Mining, Quarrying, and Oil and Gas Extraction	20	0	0	0.0%	-20	-85.7%	0	0.0%
Utilities	3,720	2,340	2,400	0.6%	-1,310	-35.3%	60	2.6%
Construction	25,370	23,670	23,480	5.9%	-1,890	-7.4%	-190	-0.8%
Manufacturing	81,590	75,200	76,850	19.3%	-4,740	-5.8%	1,660	2.2%
Transportation and Warehousing	34,090	35,070	33,750	8.5%	-350	-1.0%	-1,330	-3.8%
Information and Cultural Industries	14,820	14,550	14,800	3.7%	-20	-0.1%	250	1.7%
Finance and Insurance	16,330	19,190	19,470	4.9%	3,140	19.2%	280	1.5%
Real Estate and Rental and Leasing	14,340	14,580	14,740	3.7%	400	2.8%	160	1.1%
Professional, Scientific and Technical Services	41,530	42,700	43,790	11.0%	2,260	5.4%	1,090	2.6%
Management of Companies and Enterprises	5,430	5,620	6,010	1.5%	580	10.7%	390	6.9%
Administrative and Support, Waste Management and Remediation Services	26,190	27,360	26,620	6.7%	430	1.6%	-750	-2.7%
Educational Services	6,810	6,210	6,390	1.6%	-420	-6.2%	180	2.8%
Health Care and Social Assistance	13,850	13,460	14,410	3.6%	560	4.1%	950	7.1%
Arts, Entertainment and Recreation	6,290	5,020	5,310	1.3%	-980	-15.6%	290	5.7%
Accommodation and Food Services	16,120	12,510	14,240	3.6%	-1,880	-11.7%	1,730	13.8%
Other Services (Except Public Administration)	18,810	17,330	17,210	4.3%	-1,600	-8.5%	-120	-0.7%
Public Administration	13,000	13,370	13,710	3.4%	710	5.5%	350	2.6%
Wholesale and Retail Trade	68,230	63,530	65,000	16.3%	-3,230	-4.7%	1,470	2.3%
Not Coded	30	10	50	0.0%	20	76.9%	40	475.0%
Total	406,560	391,790	398,290	100.0%	-8,280	-2.0%	6,500	1.7%

Note: Numbers have been rounded to the nearest ten. There are 58 establishments with 4,227 jobs on the lands designated as *Regeneration Area* in the Portlands and Central Waterfront AOE. The totals in this table do not include them.

Regional Employment Policies

The 2019 Growth Plan contained employment growth forecasts for the City of Toronto to 2041, and forecasted employment growth to reach 1,720,000 jobs by 2041. Schedule 3 of the Growth Plan was amended in 2020. *A Place to Grow, the Provincial Growth Plan 2020* contains an employment forecast of 1,980,000 for the City of Toronto in 2051. This forecast was updated in 2020 based on the Technical Report *The Greater Golden Horseshoe: Growth Forecasts to 2051* by Hemson Consulting Ltd., released August 26, 2020. Under the Reference scenario, employment within the city of Toronto was forecasted to grow to 1,979,000 by 2051. The forecasted rate of job growth is approximately 0.6% per annum (see Table 8).

From 2009 to 2019, the Toronto Employment Survey measured employment growth at a rate of 2.0%, accelerating to 2.6% during the years 2016 to 2019. These rates of growth would have led Toronto to reach the 2019 Growth Plan forecast sometime around 2032, at least 19 years before the forecast.

The effects of the COVID-19 pandemic have slowed employment growth considerably. In 2022, the measured ten-year growth rate is much lower at 1.1%. However, much of this may be due to the reduced response rate of the Survey over the past three years due to pandemic conditions.

Regardless, the 2022 results indicate that if current growth rates continue, then Toronto's job growth would still be on track to reach the 2051 Growth Plan forecast sometime before 2046. This scenario would represent a degree of economic recovery going forward.

As noted in Hemson's 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.

Table 8: Employment Forecast Scenarios, 2016-2051

Scenario	2016	2051	2016-2051	Per Annum	Per Annum % (CAGR)	Years
Growth Plan Reference	1,608,000	1,979,000	371,000	10,600	0.6%	35
	2009	2019	2009-2019			
TES 10 Years to 2019	1,293,190	1,569,800	276,610	27,660	2.0%	13
	2011	2021	2011-2021			
TES 10 Years to 2021	1,317,300	1,451,520	134,220	13,420	1.0%	28
	2012	2022	2012-2022			
TES 10 Years to 2022	1,331,570	1,484,600	153,030	15,300	1.1%	24

Note: CAGR abbreviates Compound Annual Growth Rate.

Our Plan Toronto

Toronto is currently undertaking its Provincially required Municipal Comprehensive Review (MCR) of its Official Plan to ensure conformity with *A Place to Grow: the Growth Plan for the Greater Golden Horseshoe*. This process is reviewing the City of Toronto's Official Plan with a focus on how Toronto will grow between now and the year 2051 to support its communities, environment, and economy.

With the expectation of adding at least 450,000 new jobs by 2051, the Review will answer growth questions including: where Toronto can accommodate this employment, what types of jobs will be added, and how much land will need to be preserved for different types of jobs while balancing the needs of employment and population growth. During the Review, the City is evaluating requests to convert employment and industrial lands to other uses, such as residential.

The City Planning Division has received approximately 150 requests to convert lands designated *Core Employment Areas* or *General Employment Areas* for non-employment uses as part of the city-initiated MCR. The year-long City Council approved window to receive conversion requests closed on August 3, 2021. The City is also considering the conversion of some lands designated Employment Areas resulting from the outcome of a city-initiated planning study; as directed by Planning and Housing Committee to expand Preliminary Assessments for specific conversion requests; and, complete applications for an Official Plan Amendment. City Planning and Economic Development and Culture staff are finalizing the staff recommendations with respect to the requests to convert Employment Areas.

At its meeting on July 19 – 22, 2022, City Council adopted a Final report on Item PH35.15 on Employment policies and the first group of land use conversion requests. Staff's final recommendation for the remaining conversion requests will be considered by Planning and Housing Committee and Council in the coming months.

Special Topic: Pandemic Impact

The third year of the COVID-19 pandemic has impacted Toronto's employment levels to a lesser extent compared to its first two years. In 2020, over 5,000 businesses and in 2021, over 1,500 businesses indicated a significant change in employment (establishments with 11 employees or more that experienced a change in employment of 20% or more) as a result of the pandemic. In 2022, approximately 500 businesses reported a positive or negative change caused by the pandemic representing over 26,000 jobs. The total number of jobs (26,560) impacted by the pandemic decreased this year (42,210 jobs in 1,500 establishments impacted in 2021) reflecting Toronto's economic recovery as the city continues to navigate through and beyond COVID-19. Of the impacted employment, 260 establishments reported growth caused by the pandemic, adding 21,660 jobs (81.6%), which is a slight increase from last year. Meanwhile, around 250 establishments reported a loss of 4,900 jobs (18.4%) (see Table 9).

All 2022 employment and establishment statistics in this section are focused on these 500 businesses that reported significant employment change directly as a result of the pandemic.

COVID-19 Impact by Category

In 2022, the categories that reported the highest percentage employment impact from the COVID-19 pandemic were the Service, Office and Institutional categories.

Similar to 2021, the Service sector reported being negatively impacted the most by COVID-19 while also reporting employment increases (see Table 10). This duality represents fluctuating employment conditions at establishments most impacted by capacity limits and other Provincial regulations regarding the COVID-19 pandemic response.^{19, 20} The regulations were revoked in March 2022. Within this category, the largest job losses reported were at restaurants (down 620 jobs or 39.5%), hotels (310 jobs or 19.8%), and fast food outlets (180 jobs or 11.6%). Meanwhile,

the largest job increases were also reported at restaurants (up 3,200 jobs or 54.8%) and hotels (770 jobs 13.1%).

Significant employment decreases were also reported in the Office category with 70 establishments collectively losing 1,100 jobs. The highest losses were reported in advertising services (160 jobs or 14.7%), finances (130 jobs or 12.1%), and general civic association offices (110 jobs or 10.4%).

The Institutional category reported being the most positively impacted by COVID-19 with 20 establishments gaining approximately 8,000 jobs. Within this category, the largest employment increases were reported

at public community colleges (4,750 jobs or 60.6%) and hospitals (2,020 jobs or 25.7%). This reflects the revocation of restrictions that permitted many educational institutions to resume in-person learning, with the option for remote learning.²¹

In all three categories, employment gains outweighed employment losses as a result of the pandemic.

Table 9: Net Employment Change by Type of COVID-19 Impact Reported by Establishments, 2021-2022

Type of COVID-19 Impact	2021	2022	2021 - 2022	% Change
Significant Employment Decrease	24,000	4,900	-19,100	-79.6%
Significant Employment Increase	18,210	21,660	3,450	18.9%
Total Employment Impacted	42,210	26,560	-15,650	-37.1%

Table 10: COVID-19 Reported Employment Change by Category, 2022

Category	Significant Employment Loss			Significant Employment Growth		
	Establishments	Employment	% of Employment	Establishments	Employment	% of Employment
Manufacturing & Warehousing	20	560	11.4%	10	590	2.7%
Retail	40	920	18.8%	40	1,440	6.7%
Service	90	1,570	32.1%	120	5,830	26.9%
Office	70	1,090	22.3%	60	4,860	22.4%
Institutional	20	430	8.8%	20	7,840	36.2%
Community & Entertainment	10	330	6.7%	20	1,090	5.0%
Total	250	4,900	18.5%	260	21,660	81.5%

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

COVID-19 Impact Classification

As part of the Toronto Employment Survey's standard methodology, establishments that experience significant employment change from the previous year are asked to provide detailed reasons for the change, such as business restructuring, expansion, or seasonal fluctuation. In 2020 and 2021, the Toronto Employment 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 Conditions²²:

- 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 in employment loss due to the pandemic for the third year in a row. Around one-third (36.3%) of establishments in 2022 that reported employment decreases due to the pandemic attributed this to consumer behaviour, which was similar to 2021. The next most commonly reported reasons for employment decreases by establishments were staffing (29.1%), business decisions (21.1%), regulatory (12.7%), and accounts-related factors (0.8%).

Consumer behaviour factors were the most frequently reported reason for employment increases due to the pandemic in 2022. Approximately one-half (47.9%) of establishments reported employment increases due to the pandemic that were attributed to consumer behaviour, almost double what was reported in 2021 (23.8%).

COVID-19 Impact by Geography

Establishments within Downtown and the Centres each reported similar city-wide proportion employment losses and gains due to the pandemic in 2022. Downtown reported the highest loss of employment as well as the largest gain of employment. Collectively, Downtown and the Centres reported employment losses of 1,660 jobs (33.8% of total losses across the city) caused by COVID-19 compared to 2,780 jobs (29.0%) in 2021. Despite this loss, Downtown and the Centres were able to gain 7,190 jobs (33.2% of total gains across the city), with Downtown representing 29.6% of those jobs. This demonstrates that establishments in Downtown and the Centres reported disproportionately fewer impacts due to the COVID-19 pandemic in 2022 in comparison to businesses in other parts of the city.

COVID-19 Impact on Work-From-Home

The COVID-19 pandemic accelerated the shift to work-from-home employment for many categories. However, in 2022, there was a noticeable return to in-person employment with the adoption of a hybrid work model by many employers.

In the third year of tracking work-from-home employment, the Survey expanded on 2020 and 2021's initial citywide collection of work-from-home data to ask establishments additional questions about the percentage of total employees working from home on an ongoing, long-term or temporary basis; the expectation of the temporary work-from-home employees returning to on-site locations in 2022; and the average number of days per week employees work from home. Data was collected and recorded as percentages to allow for a balance between collecting precise employment data for each establishment, as compared to the changing configuration of employment undertaken by many businesses.

In 2022, just under half of the establishments answered the additional questions resulting in 42.4% (30,440) of establishments providing insights on work-from-home trends. Of those businesses, 85.1% (25,890) reported having no work-from-home employees while 14.9% (4,540) do. Approximately 100,000 jobs were reported as work-from-home, 77,000 are ongoing or long term and 23,000 are temporary, representing 6.8% of employment in the city. When compared to establishments from which the Survey received responses in 2021, establishments reporting work-from-home employment represented 16% of all Toronto establishments and 14% of employment in the city.

Among the establishments that reported work-from-home employment, the vast majority were in the Office category (74.7%). This trend reflects the lasting impact of the pandemic on the traditional work model that has contributed to establishments adopting a hybrid work model.²³ Three in ten establishments that adopted a hybrid work model reported having employees work from home on average three days a week (29.5%).

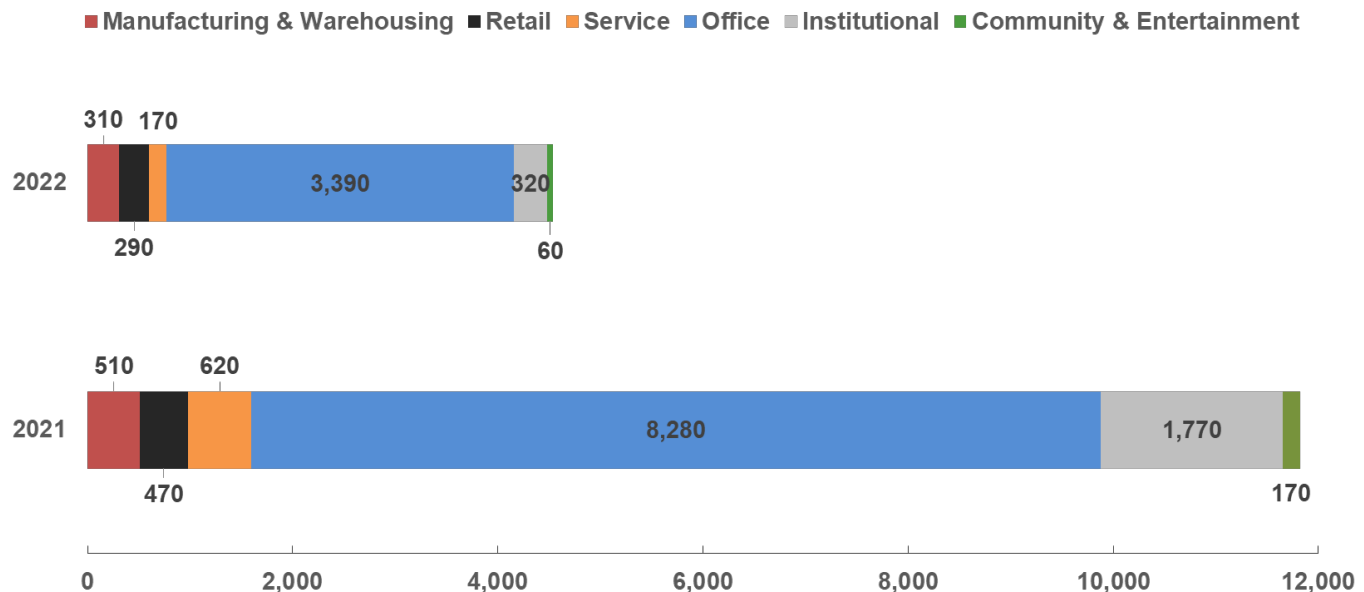
The Institutional category reported 7.1% of establishments with work-from-home employment, which decreased from 15% in 2021. The remaining categories of Manufacturing and Warehousing, Retail, Service, and Community and Entertainment each reported less than 7.0% work-from-home employment – a similar composition to 2021 (see Figure 23).

The highest work-from-home percentages amongst all establishments were reported within legal services, computer services, investment services, and financing sectors where either the nature of work more easily allows for work-from-home, or where work-from-home was adopted under the pandemic restrictions. The lowest reported work-from-home percentages from the Toronto Employment Survey were in indoor entertainment and indoor sporting and recreation, where an in-person presence is central to service provision. These results align with the Canadian Survey on Business Conditions that identified finance and insurance services, professional, scientific and technical services, and information and cultural industries as the top three

industries that reported some degree of work-from-home employment.²⁴

Since many employers adopted a hybrid work model in 2022, there is a need to continue to monitor in-person and remote work trends and changes as these insights will influence policy directions and future approaches. Therefore, the bulletin is not a static reflection of the state of employment across the city but rather a vital informative document that impacts policy outcomes for the city.

Figure 23: Number of Establishments Reporting Work-From-Home Employment by Category, 2021-2022



Appendix

Data Limitations and Response Rate

In 2022, 44,843 establishments out of 71,714 responded to the Toronto Employment Survey, representing a 62.5% response rate from identified business establishments. Responses represent 789,010 jobs or 53.1% of all employment in the city. This is slightly higher than the Survey's response rate of 60% in 2021 but lower than the rate of 85 to 90% in pre-pandemic years.

The highest average response rate amongst all establishments were reported within the Retail, Service, and Manufacturing, categories that rely heavily on in-person interaction. Response rates were lower in other categories as either the nature of work in these establishments more easily allows for work-from-home, or where work-from-home was required by pandemic-related restrictions, or because of limited ability for in-person interaction (see Table A1 and A2). As a result, rates of employment change in categories with lower response rates may not represent the full degree of change experienced in those categories.

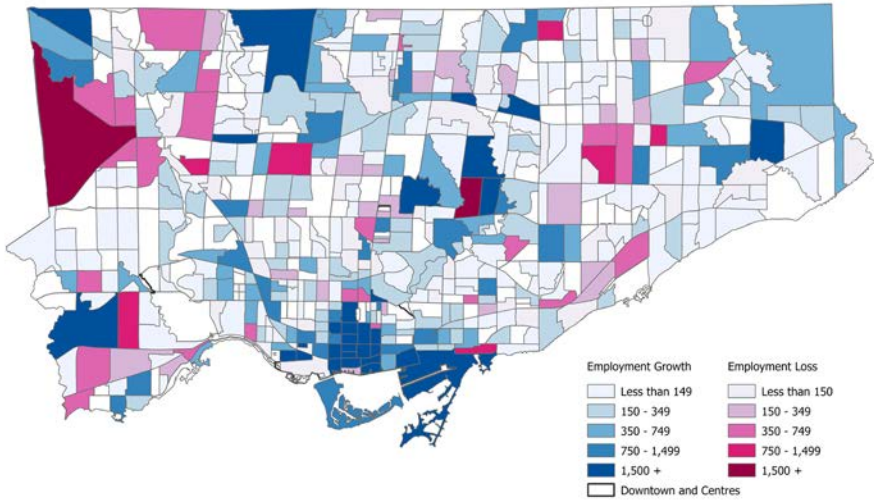
Table A1: Average Response Rate by Six Category Breakdown, 2022

Sector	Average Response Rate
Manufacturing and Warehousing	65%
Retail	78%
Service	71%
Office	58%
Institutional	48%
Community and Entertainment	24%
Total	63%

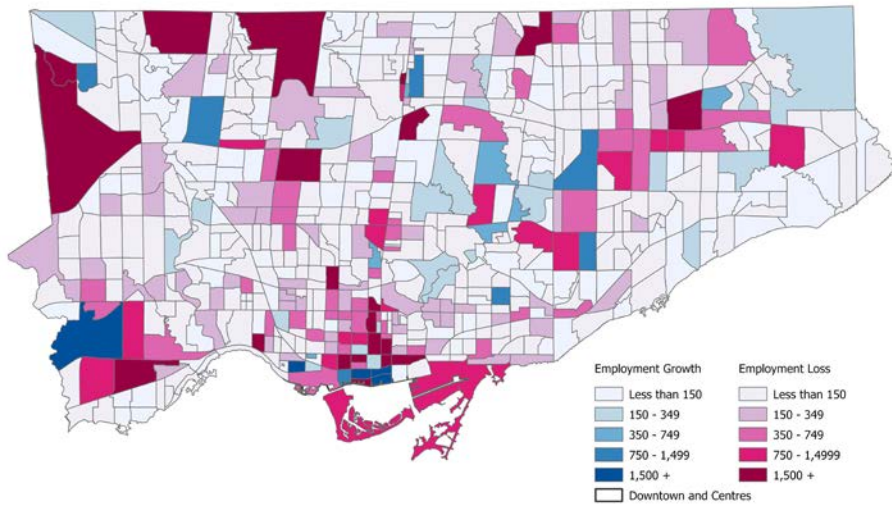
Table A2: Average Response Rate by Major NAICS Sector Breakdown, 2022

NAICS Major Sector	Average Response Rate
Not Coded	90%
Agriculture, Forestry, Fishing and Hunting	90%
Utilities	44%
Construction	63%
Manufacturing	70%
Wholesale Trade	70%
Retail Trade	81%
Transportation and Warehousing	67%
Information and Cultural Industries	55%
Finance and Insurance	60%
Real Estate and Rental and Leasing	63%
Professional, Scientific and Technical Services	59%
Management of Companies and Enterprises	49%
Administrative and Support, Waste Management and Remediation Services	59%
Educational Services	46%
Health Care and Social Assistance	66%
Arts, Entertainment and Recreation	56%
Accommodation and Food Services	73%
Other Services (Except Public Administration)	70%
Public Administration	58%
Total	63%

Map A1: 2001 - 2022 Employment Change by Census Tract



Map A2: 2019 - 2022 Employment Change by Census Tract



Map A3: 2021 - 2022 Employment Change by Census Tract

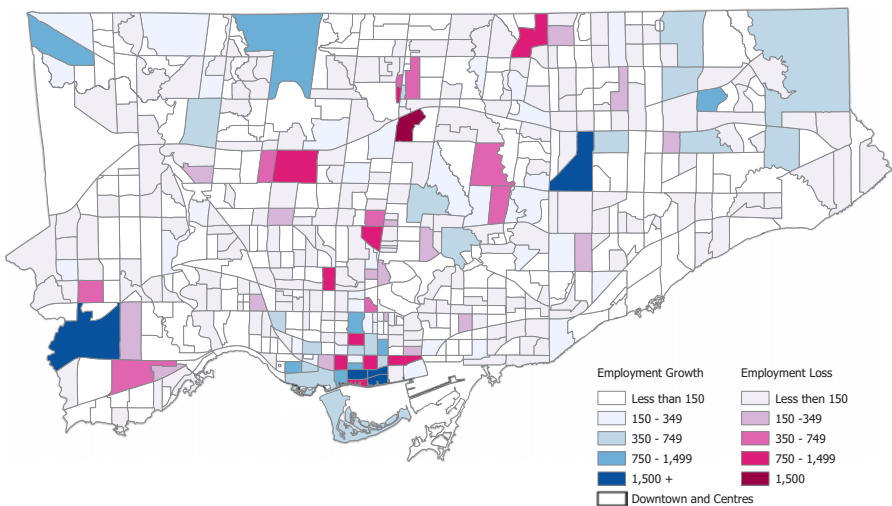


Table A3: Secondary Plan Area Employment by Six Categories, 2022

Number	Secondary Plan Area	Manufacturing & Warehousing	Retail	Service	Office	Institutional	Community & Entertainment	Total
1	Agincourt	694	636	453	2,033	181	5	4,002
2	Highland Creek	3	66	440	293	3,014	296	4,112
3	Morningside Heights	4	0	0	0	175	0	179
4	Port Union Village Community	0	0	2	0	0	0	2
5	Scarborough Centre	648	2,978	1,197	8,523	526	252	14,124
6	Yonge St. Clair	27	642	930	11,170	993	136	13,898
7	Downsview Area	4,097	811	1,989	753	1,546	296	9,492
8	North York Centre	62	2,753	3,089	25,297	2,123	449	33,773
9	Sheppard East Subway Corridor	3	3,907	1,332	4,973	4,833	204	15,252
10	York University	0	48	552	503	7,589	70	8,762
11	Motel Strip	15	59	173	138	102	1	488
12	Etobicoke Centre	30	542	1,086	7,209	907	182	9,956
13	Fort York Neighbourhood	0	919	70	41	476	49	1,555
14	Garrison Common North	372	1,650	2,659	15,559	3,357	642	24,239
15	King-Parliament	41	1,153	1,729	9,727	1,694	446	14,790
16	King-Spadina	452	1,842	5,979	24,497	944	1,598	35,312
17	Railway Lands East	88	283	1,665	29,808	71	4,107	36,022
18	Railway Lands Central	0	72	1,685	2,630	19	1,975	6,381
19	Railway Lands West	0	196	252	183	67	78	776
20	University of Toronto	0	193	315	1,700	15,309	517	18,034
21	Yonge Eglinton	27	3,121	3,683	20,021	3,245	1,028	31,125
22	Central Finch	10	25	40	450	65	0	590
23	Sheppard West/Dublin	0	307	344	530	258	1	1,440
24	Central Don Mills	11	743	890	1,522	964	101	4,231
25	Swansea	138	103	61	208	231	31	772
26	Emery Village	32	111	207	313	229	4	896
27	Davenport Village	0	0	5	13	0	0	18
28	Regent Park	15	146	102	350	310	73	996
29	Sheppard Avenue Commercial Area	0	34	38	452	25	12	561
30	Warden Woods	303	18	27	11	225	38	622
31	Central Waterfront	1,412	1,417	4,233	33,240	1,472	2,764	44,538

Table A3 continues on next page

Table A3 continued

Number	Secondary Plan Area	Manufacturing & Warehousing	Retail	Service	Office	Institutional	Community & Entertainment	Total
32	Lawrence-Allen	12	5,933	1,284	4,333	2,839	162	14,563
33	Mimico-by-the-Lake	13	140	102	230	18	0	503
34	Queen River	12	214	1	2	205	0	434
35	Mimico-Judson	75	36	99	26	0	0	236
36	Dufferin St **	17	400	468	410	2	0	1,297
37	Sheppard Lansing Area	2	9	28	541	78	9	667
38	ConsumersNext	129	575	955	19,506	965	49	22,179
39	Rail Deck Park	0	0	0	0	0	0	0
40	Don Mills Crossing	0	265	21	1,746	82	14	2,128
41	Downtown Plan *	2,420	23,469	43,205	391,004	82,691	13,901	556,690
42	Unilever Precinct	0	0	0	598	0	0	598
43	Sherway Area	29	4,012	1,648	1,144	9,092	0	15,925
44	Keele Finch **	177	775	599	1,521	268	3	3,343
45	Golden Mile **	901	3,196	727	1,782	312	105	7,023
46	Christie's	0	0	0	12	0	0	12
47	Keele St. Clair **	476	1,076	756	435	278	90	3,111
48	Mount Dennis **	856	369	987	1,262	1,979	86	5,539
49	Yonge Street North **	5	959	669	667	196	19	2,515

Note: Totals may not equal sums due to rounding. Sum of employment exceeds total employment in Secondary Plan areas due to Note: Sum of employment exceeds total employment in Secondary Plan Areas due to overlap of multiple Secondary Plan geographies. Employment totals are accurate for each individual Secondary Plan Area.

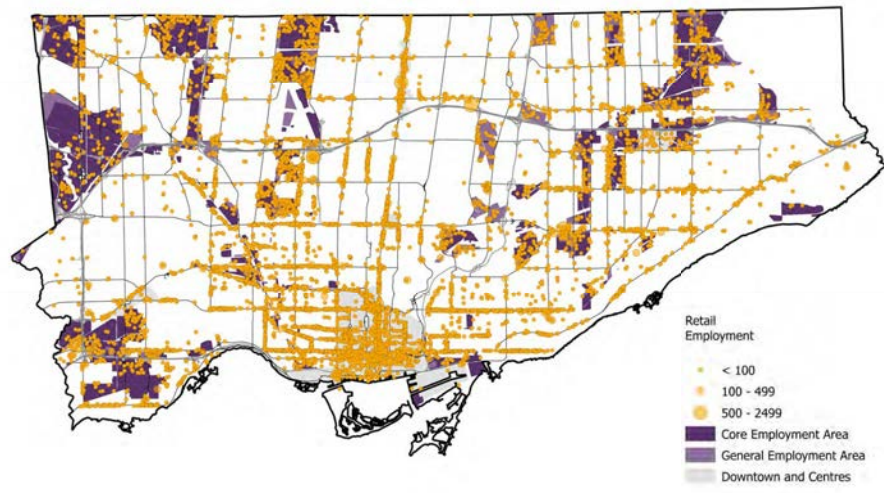
* 148,099 jobs within Downtown are also captured in other Secondary Plan Areas, including King-Parliament, University of Toronto, Regent Park, Central Waterfront, Fort York Neighbourhood, Rail Deck Park, Queen River, King-Spadina, Railway Lands East, Railway Lands West, and Railway Lands Central. The overlap by six sectors include 961 Manufacturing & Warehousing jobs, 6,008 Retail jobs, 13,756 Service jobs, 99,276 Office jobs, 19,356 Institutional jobs and 9,402 Community and Entertainment jobs.

** 6 Secondary Plan Areas have been adopted by Council but have not yet been approved by the Province or are under appeal and thus may be subject to change, pending Ontario Land Tribunal decisions.

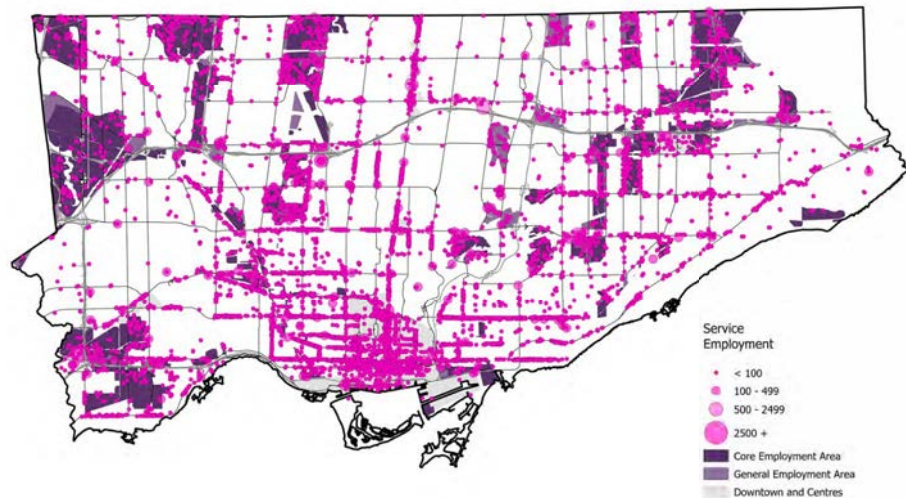
Map A4: Spatial Distribution of Manufacturing and Warehousing Employment



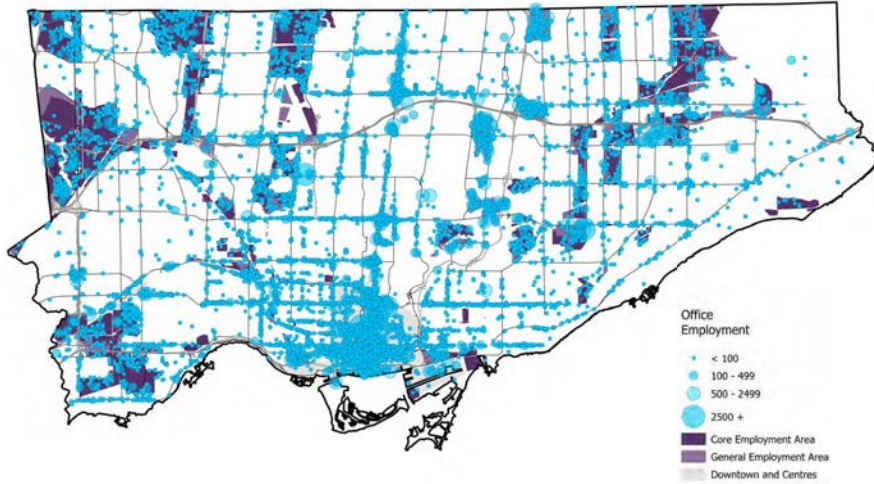
Map A5: Spatial Distribution of Retail Employment



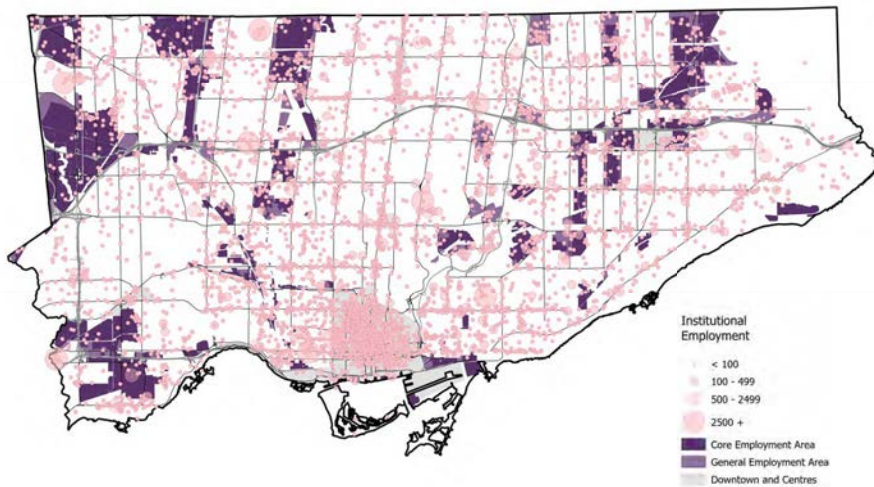
Map A6: Spatial Distribution of Service Employment



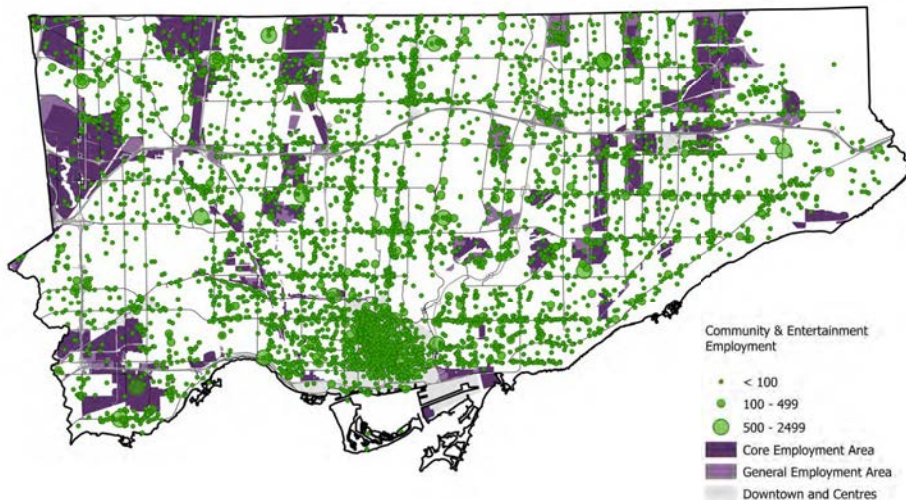
Map A7: Spatial Distribution of Office Employment



Map A8: Spatial Distribution of Institutional Employment



Map A9 Spatial Distribution of Community & Entertainment Employment



Endnotes

1. ["In a tight labour market, this is where Canadian workers are going" CBC News_6556305.mht](#)
2. TD Provincial Economic Forecast (December 19, 2022). <https://economics.td.com/domains/economics.td.com/documents/reports/pef/ProvincialEconomicForecastDec2022.pdf>
3. TD Provincial Economic Forecast (December 19, 2022). <https://economics.td.com/domains/economics.td.com/documents/reports/pef/ProvincialEconomicForecastDec2022.pdf>
4. TD Provincial Economic Forecast (December 19, 2022). <https://economics.td.com/domains/economics.td.com/documents/reports/pef/ProvincialEconomicForecastDec2022.pdf>
5. Hemson Consulting Ltd., Greater Golden Horseshoe: Growth Outlook to 2051, p. 20, <https://www.hemson.com/wp-content/uploads/2020/08/HEMSON-GGH-Growth-Outlook-Report-26Aug20.pdf>
6. City of Toronto, Economic Development and Culture. Toronto Economic Dashboard. <https://www.toronto.ca/city-government/data-research-maps/toronto-economy-labour-force-demographics/toronto-economic-dashboard/#detail/1.05>
7. Statistics Canada. (2022) Labour Force Survey.
8. Statistics Canada. (2022) Labour Force Survey.
9. Statistics Canada, Canadian Survey of Business Conditions, third quarter of 2022, Toronto Census Division.
10. Statistics Canada, Canadian Survey of Business Conditions, third quarter of 2022, Toronto Census Division.
11. Statistics Canada, Canadian Survey of Business Conditions, third quarter of 2022, Toronto Census Division.
12. Colliers (2022). Toronto Office Market Report Q3 2022.
13. Strategic Regional Research Alliance (2023). Occupancy Index. <https://srrresearch.org/covid/category/Occupancy%20Index>
14. Colliers (2022). Toronto Industrial Market Report Q3 2022.
15. Colliers (2021). Toronto Industrial Market Report Q3 2021.
16. BlogTO (2022) Toronto restaurants no longer want you to have their phone number. <https://www.blogto.com/eat/drink/2022/02/toronto-restaurants-phone-number/>
17. Strategic Regional Research Alliance (2023). Occupancy Index. <https://srrresearch.org/covid/category/Occupancy%20Index>
18. Planning Act, R.S.O. 1990, as of January 11, 2023. See <https://www.ontario.ca/laws/statute/90p13>
19. Queen's Printer for Ontario (2020). O. Reg 263/20: Rules for areas in Step 2. <https://www.ontario.ca/laws/regulation/200263>
20. Queen's Printer for Ontario (2021). O. Reg. 520/21: Rules for Areas in Stage 3. <https://www.ontario.ca/laws/regulation/r21520>
21. Government of Ontario (2022). Archived - COVID-19: Health, safety and operational guidance for schools (2021-2022). <https://www.ontario.ca/document/covid-19-health-safety-and-operational-guidance-schools-2021-2022>
22. Statistics Canada (2020). Canadian Survey on Business Conditions. https://www.statcan.gc.ca/eng/statistical-programs/instrument/5318_Q1_V1
23. Government of Canada (2022). Common hybrid work model for the Federal Public Service. <https://www.canada.ca/en/government/publicservice/staffing/common-hybrid-work-model-federal-public-service.html>
24. Statistics Canada, Canadian Survey of Business Conditions, third quarter of 2022, Toronto Census Division.

Please direct information inquiries and publication orders to:

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

Tel: 416-392-9787
Fax: 416-392-3821
Email: cityplanning@toronto.ca
