

Toronto Employment Survey 2023

Survey Highlights

2023 Employment 1,535,290

Employment Net Gain 50,690

Employment Increase 3.4%

Full-Time Employment Gain 38,270

Part-Time Employment Gain 12,410

Business Establishments 72,530

New Business Establishments 7,580

Office Employment Growth 18,390

Office Employment Increase 2.5%

Institutional Employment Growth 16,510

Institutional Employment Increase 6.2%

Downtown Employment Growth 36,020

Downtown Employment Increase 6.4%

Monitoring Toronto's Employment

The 2023 Toronto Employment Survey continues the annual collection of employment information from business establishments across Toronto following the 40-year milestone reached last year. Since 1983, the Survey programme represents a commitment to understanding the changing nature of the city's economic landscape through its consistent yearly collection of employment and land use information.

The collection of survey information allows the City of Toronto 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.

Emerging from the Pandemic

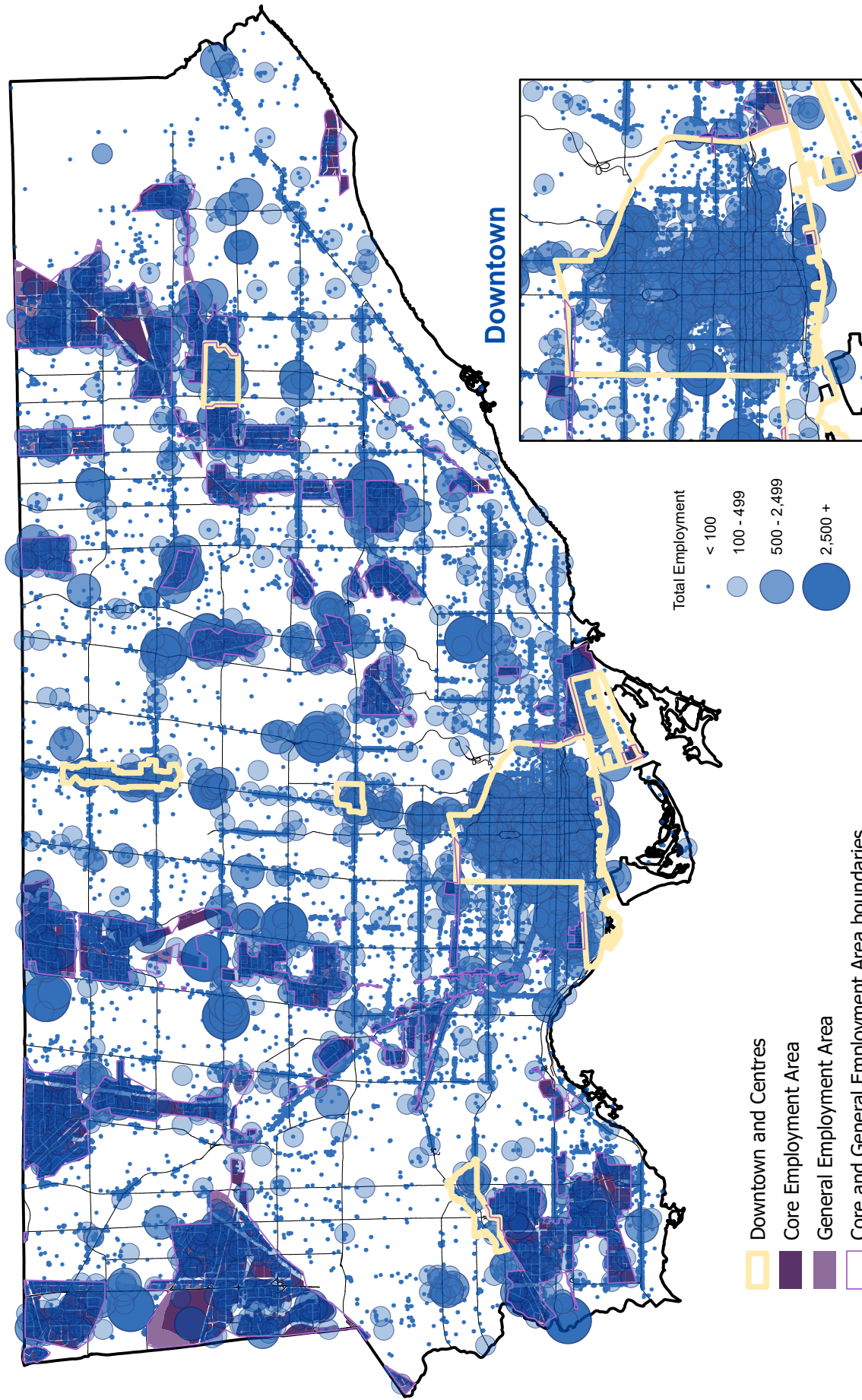
As the first calendar year without pandemic-related public health restrictions on businesses, 2023 has been a time of returning to "business

as usual" while adjusting to new ways of working and new economic conditions. Toronto's economy continues to recover from the significant impacts of the COVID-19 pandemic.

The Canadian economy experienced a mild contraction in the first half of 2023, in part due to climate and geopolitical events but also due to continued high inflation and increasing borrowing rates.¹ Ontario's economy was buoyed by its housing market, continued job growth, high population growth, and exports.² In the next year, continued high borrowing rates may translate to a tightening in consumer demand, and weaker economic conditions abroad may reduce the demand for Ontario exports. TD forecasts little growth in real GDP in the next two years, with 0.4% in 2024 and 1.5% in 2025. Similarly, employment is expected to remain stable with forecasted growth of 0.2% in 2024 and 1.1% in 2025.³ This economic forecast is echoed in the Province's Fall Economic Statement.⁴

The Bank of Canada anticipates that inflation will remain stable for at least another year and yet may require further rate increases.⁵ The central bank has noted that high housing costs, despite many increases to borrowing rates, are maintaining the level of inflation. This will continue to impact consumer demand and business input costs.

Map 1: 2023 Employment Concentrations, City of Toronto





Employment Gains

In 2023, Toronto's employment grew by 3.4% from 2022, an increase from the 2.3% growth observed in the previous year, and virtually no growth in 2021. The year-over-year growth is higher than the average growth of 2.5% over the past five years and is the second-highest growth rate in the past twenty years.

The Toronto Employment Survey recorded 1,535,290 jobs in 2023, for a net gain of 50,690 jobs. Map 1 shows the concentration of employment across the city. Total employment continues to remain below the pre-pandemic total of 1,569,800 in 2019, a difference of 2.2% or 34,510 jobs (see Figure 1).

The city has now regained about 7 in 10 jobs lost during the first year 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.⁶

In 2023, 50,910 establishments out of 72,530 responded to the Survey, representing a 70% response rate from identified business establishments. Responses represent 891,320 jobs or 58.1% of all employment in the city. This is higher than the Survey's response

rate of 62% in 2022 but lower than the typical rate of 85% to 90% in pre-pandemic years.

Additional information was reviewed to provide added context. Statistics Canada's monthly Labour Force Survey (LFS) gives an ongoing picture of national and regional employment trends. Unlike the Toronto Employment Survey which counts jobs and establishments, the LFS counts workers. Although they are measuring different things, both the Survey and the LFS provide regular updates and trends of the broader economy.

In August 2023, the LFS reported an employment total of 1,670,640 for the City of Toronto, a 6.9% increase from August 2022.⁷ This is a count of workers living in Toronto, and not the jobs performed in Toronto. The changes in total employment between the two surveys are similar. LFS results for the Toronto CMA, which includes surrounding municipalities, indicated a regional increase of 2.3% in the employed labour force over the same period.⁸

As discussed in the 2020 Toronto Employment Survey bulletin's "Retrospective", the transformation of Toronto's economy over the last three decades has been positive and has positioned the city well to recover from the COVID-19 pandemic. However, the economic growth has not been uniformly experienced across the city by sectors, population,

or neighbourhoods. Certain areas of Toronto have never fully recovered from the 1990s recession.

Map A1 on page 39 shows how employment in Downtown and the northern and eastern suburbs of the city have grown while the inner suburbs have remained flat or experienced losses between 2002 and 2023. Map A2 emphasizes the pronounced employment changes since the beginning of the COVID-19 pandemic in 2020, showing which parts of the city have recovered from the significant losses of 2020 and which are still feeling that impact. The biggest losses are dispersed throughout the city, including in Downtown, selected locations in the inner suburbs, and across the outer suburbs. In contrast, the areas with the highest employment growth since 2020 are concentrated in Downtown and the South Etobicoke and Downsview Areas of Employment, which have experienced stronger growth over the last two decades. The 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. The spatial disparity is less pronounced in the year-over-year employment change shown in Map A3.

What Data is Collected?

The Toronto Employment Survey collects information directly from businesses across the city through in-person visits by a team of surveyors, with follow-up phone calls as required. The annual survey typically takes place between May and September.

The Survey uses a unique data collection process that involves one-on-one interviews with each of the 72,530 business establishments in Toronto. Unlike some business surveys that rely on sampling and indirect sources, the Toronto Employment Survey team confirm information directly with the business owners, managers, and employees of each establishment.

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 recent years, additional information has been collected about volunteers, remote work, the tech sector, and key reasons for significant increases or decreases in staffing.

For 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 (NAICS) used by Statistics Canada, 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 and Warehousing, Retail, Service, Office, Institutional, and Community and 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 LUACs that relate employment to the use of the land it occupies.

In 2023, a new GIS-driven interactive map application custom-built by City Planning staff was used for field data collection and allowed for more efficient data entry, coding, and validation.

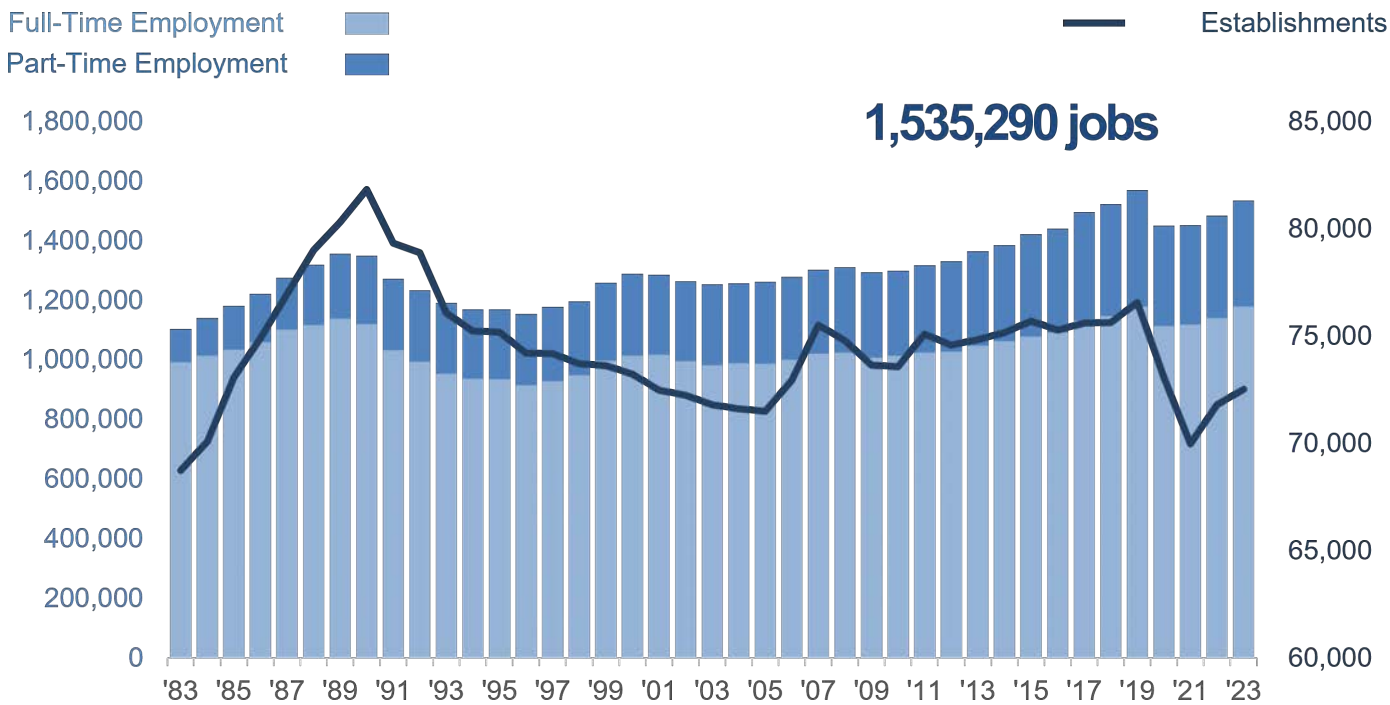
Survey Geography

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 and across the city, 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. Due to the COVID-19 pandemic accelerating the shift to hybrid work, information about remote work arrangements was captured for all business establishments surveyed. 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. Establishments whose employees are fully remote without a physical business location and self-employed individuals without a business location are not captured by the Survey.

Figure 1: Full and Part-Time Employment in the City of Toronto, 1983-2023



Key Citywide Trends

- Toronto continues to build back from the losses in employment and establishments from the COVID-19 pandemic.
- Recovery has been uneven across the city, with strong growth Downtown but many Areas of Employment lagging.
- All categories except Manufacturing and Warehousing have had year-over-year growth, but only the Office and Institutional categories have surpassed their 2019 employment totals.
- The number of newer businesses has jumped in 2023; three out of ten businesses are less than five years old.

Full- and Part-time Employment

In 2023, 1,179,370 or 76.8% of jobs were full-time (defined as 30 hours a week or more) and 355,910 or 23.2% were part-time (see Table 1). This breakdown has been virtually the same since 2020. Over the last decade, both full-time and part-time employment have seen an average annual growth rate of 1.3%. Over the last five years, there has been more volatility with part-time employment, with an average annual decline of 1.1%. This is due to faster growth in part-time jobs prior to 2020, followed by a higher proportion of part-time jobs lost as a result of the COVID-19 pandemic. Between 2022 and 2023, full-time and part-time employment increased strongly, by 3.4% and 3.6%, respectively.

Table 1: Total Employment - 2013, 2022, 2023

Employment	Total Number of Employees			Net Change	% Change	Net Change	% Change
	2013	2022	2023	2013-2023		2022-2023	
Full-time	1,048,300	1,141,100	1,179,370	131,070	12.5%	38,270	3.4%
Part-time	315,560	343,500	355,910	40,350	12.8%	12,410	3.6%
Total	1,363,850	1,484,600	1,535,290	171,440	12.6%	50,690	3.4%

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

Business Establishments

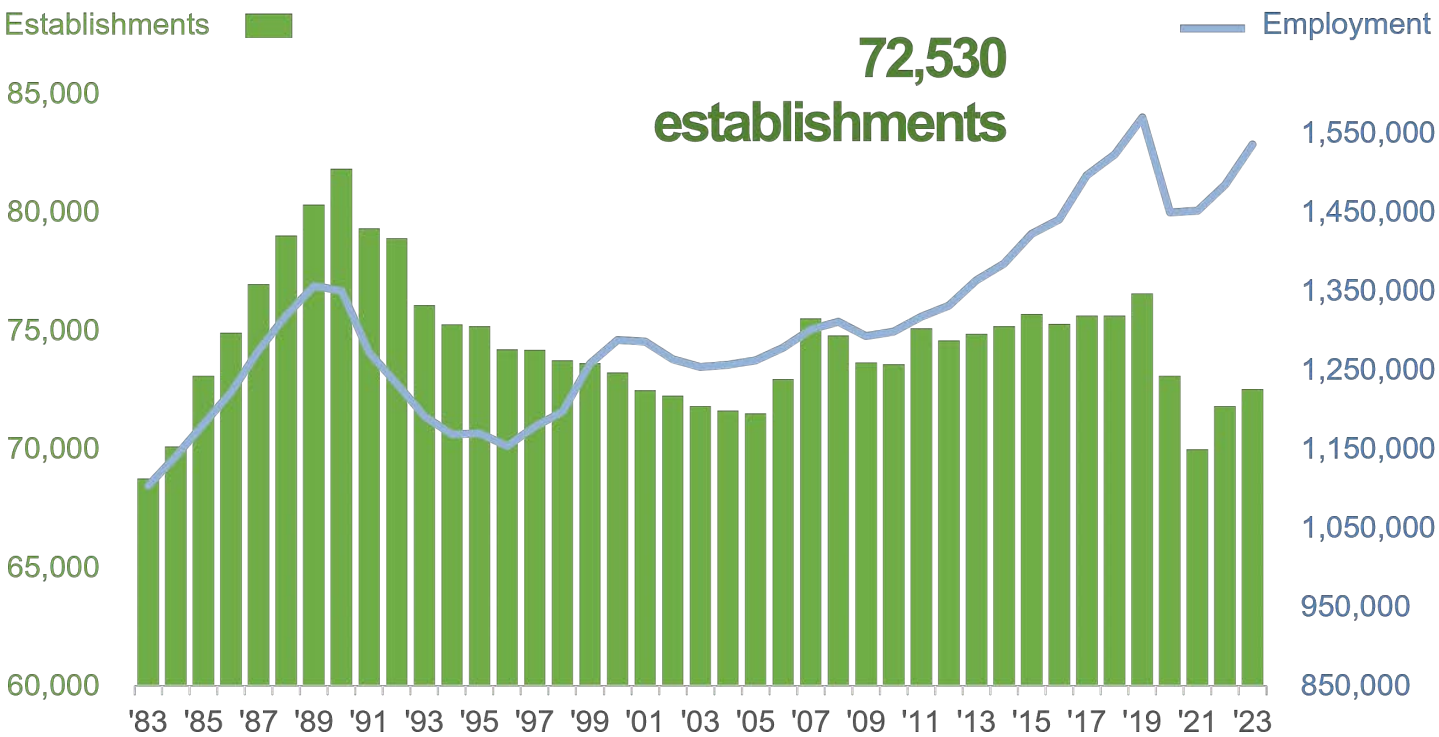
In 2023, the Survey counted 72,530 business establishments in the city, an increase of 780 or 1.1% from 2022 (see Figure 2). The city lost 3,110 businesses over the last five years, reflecting the magnitude of the losses in 2020 and 2021. The city has regained six in ten businesses lost due to pandemic impacts. These are not the same businesses as were lost and represent the resilience of previous business owners and new start-ups.

Total establishment counts increased in most categories, except Community and Entertainment which appears to have lost 1,300 establishments since 2022 (see Figure 3). Closer analysis of this category showed that in 2022, the number of establishments was inflated by 1,840 due to the inclusion of establishments that had not been coded. The Survey’s new data collection application involved built-in validations to ensure all establishments

were properly coded. Therefore, the 2023 total of 2,400 establishments is more accurate for Community and Entertainment as the survey team was able to better verify the status of establishments and the category to which they belong. The result is a net increase of 540 establishments in Community and Entertainment since 2021, and no change since 2018.

It should be noted that the total number of establishments across all categories includes 5,620 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 where surveyors could not confirm employment information. Placeholders are continually reviewed as part of the field survey programme.

Figure 2: Establishment Count in the City of Toronto, 1983-2023



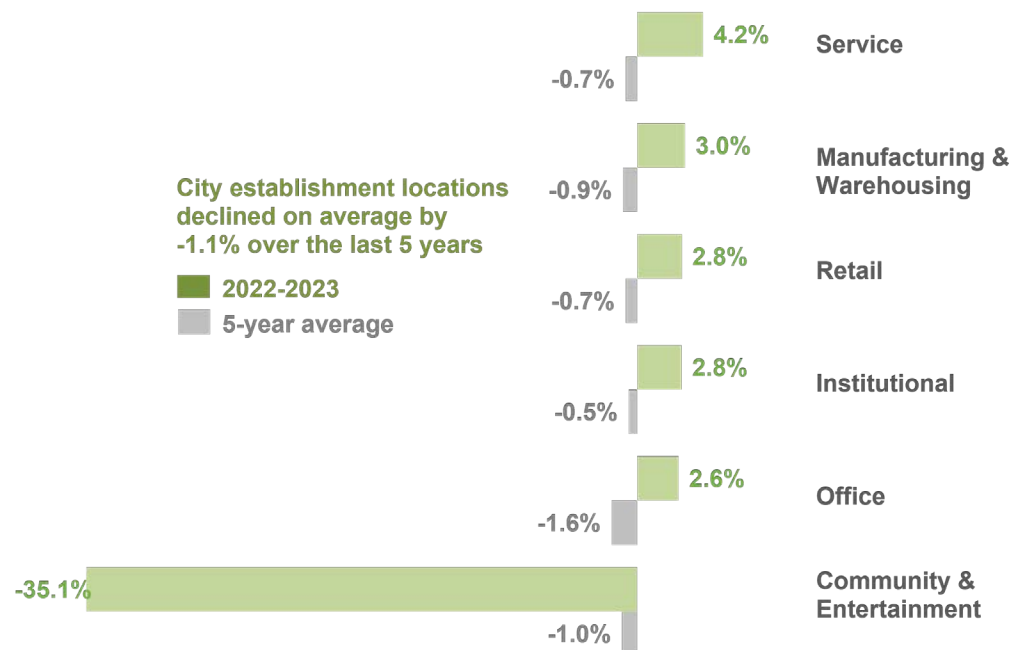
Employees per Establishment

In 2023, the average number of employees per establishment increased to 21.2 (see Figure 4). As in 2022, this was the highest ratio yet as documented by the Survey. In 2023, the number of large establishments (with 100 or more employees) decreased by two to 2,300. Large businesses comprise 3.2% of all establishments but account for 57.5% of all employment. Conversely, small businesses (with fewer than 50 employees) make up 93.3% of all businesses but only 31.2% of jobs.

Longevity

Changes in the longevity of business establishments at specific locations can offer insights into the economic health of a city or region. In 2023, 30.9% of Toronto's business establishments reported being at the same location for less than five years, compared with 22.2% in 2022. Coupled with the growth in total business establishments observed across the city, this trend shows that new businesses are opening and may indicate that Toronto's economic conditions are favourable for new businesses. However, the proportion of businesses that have been at their location for less than five years has not reached the 35.7% share observed before the COVID-19 pandemic in 2019. At the other end of the spectrum, 26.8% of the city's establishments have been at the same location for more than two decades, demonstrating a strong degree of stability in the local economy despite economic cycles (see Figure 5).

Figure 3: 2022-2023 Establishment Change vs 5-Year Average



Note: As described above, the decrease in Community & Entertainment establishments is due to a methodological change. This decrease offsets the 98.9% increase in establishments seen from 2021-2022 – many of which were coded as Community & Entertainment in error.

Figure 4: Employees per Establishment, 2003-2023

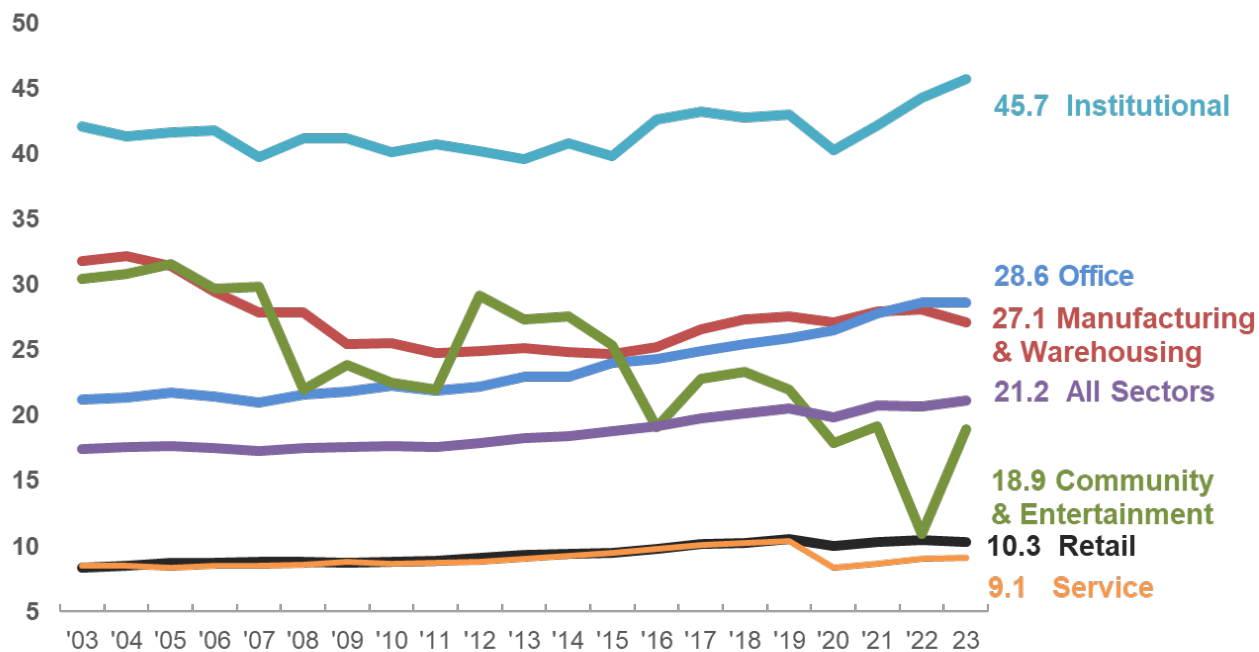
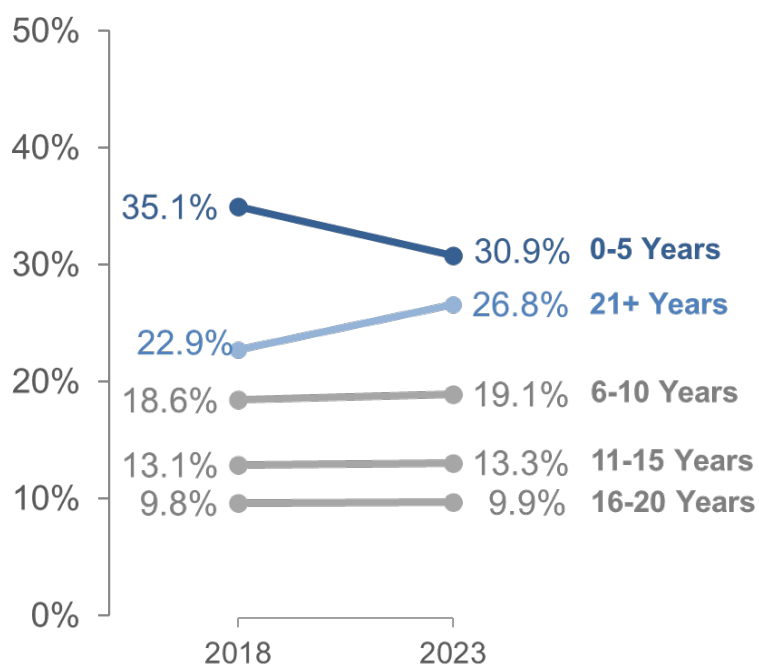


Figure 5: Longevity of City Establishments, 2018-2023



New Establishments in the City

The Survey measured an overall increase of 1.1% in the number of businesses in 2023. For the second year in a row, the Survey counted a large number of establishments which opened or moved to a new location, 7,580 or 10.5% of all establishments. As in 2022 when the Survey counted 6,470 new businesses, compared with 800 and 820 new establishments in 2020 and 2021 respectively, this large increase is likely due to a combination of factors (see Table 2). Some of the increase in new establishments can be attributed to economic recovery from the COVID-19 pandemic, but others may not have been counted in 2020 and 2021 when the survey was conducted by telephone and e-mail and businesses were harder to reach.

New Establishments by Category

The Office category had the most new establishments in the city with 2,870, or 37.9% of all new establishments (see Table 3). The Service category also saw a large increase and accounts for 26.3% of new businesses in 2023.

New Establishments by Employment

New establishments contributed 1.9% or 29,070 jobs to citywide employment in 2023. This is a higher share of citywide employment than the 1.1% and 1.2% in 2021 and 2022 respectively, and also higher than the 1.6% three-year average prior to the pandemic. Of the top 20 largest new establishments, 11 were in Downtown and contributed 20.0% of the total new employment.

New Establishments by Location

The new establishments reported in 2023 are spread throughout the city, with 2,500 in Employment Areas (33.0%), 1,610 in Downtown (21.2%), 410 in Centres (5.4%), and 3,060 (40.4%) in the rest of the city (see Figure 6). Downtown saw the highest increase in businesses opening with a 29.8% more new establishments than in 2022.

Table 2: New Establishments, 2019-2023

2019	2020	2021	2022	2023
3,810	800	820	6,470	7,580

Figure 6: Share of New Establishments by Location, 2023

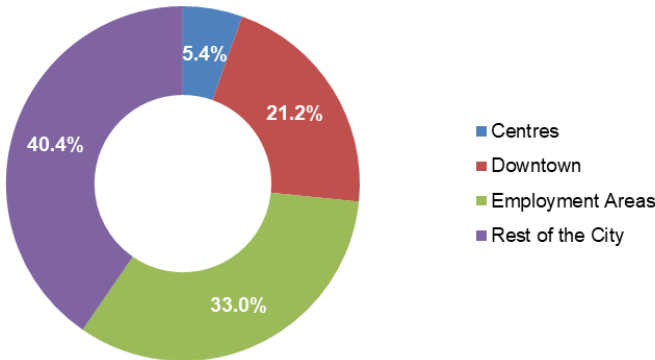


Table 3: New Establishments, 2022-2023

Location	2022	2023	Category	2022	2023
Centres	340	410	Manufacturing & Warehousing	250	360
Downtown	1,240	1,610	Retail	860	1,160
Employment Areas	2,250	2,500	Service	1,340	1,990
Rest of the City	2,640	3,060	Office	1,670	2,870
			Institutional	240	400
			Community & Entertainment	2,120	810
City Total	6,470	7,580	City Total	6,470	7,580

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

Employment Categories

The Survey uses six employment categories derived from LUACs to reflect the underlying land use and occupancy of employment across the city: Manufacturing and Warehousing, Retail, Service, Office, Institutional, and Community and Entertainment. See Maps A4 to A9 in the Appendix for the spatial distributions of each category's employment across Toronto.

In 2023, gains were observed in all employment categories except Manufacturing and Warehousing. This continues the growth generally observed in 2022 among all categories except Office. The Community and Entertainment category experienced the most year-over-year growth with an increase of 12.4% or 5,020 jobs (see Figure 7 and Table 4).

Institutional and Office were the only categories in 2023 with positive five-year trends in total employment growth. These categories, in addition to Manufacturing & Warehousing and Service, had positive ten-year employment growth trends. Retail and Community & Entertainment jobs were both much lower in 2023 than they were in 2018 and slightly lower than in 2013, suggesting they were hit hardest by the COVID-19 pandemic and are taking longer to recover. The decline in these categories could also reflect changes in consumer behaviour and demand.

Figure 7: 2022-2023 Employment Change and % Change by Category

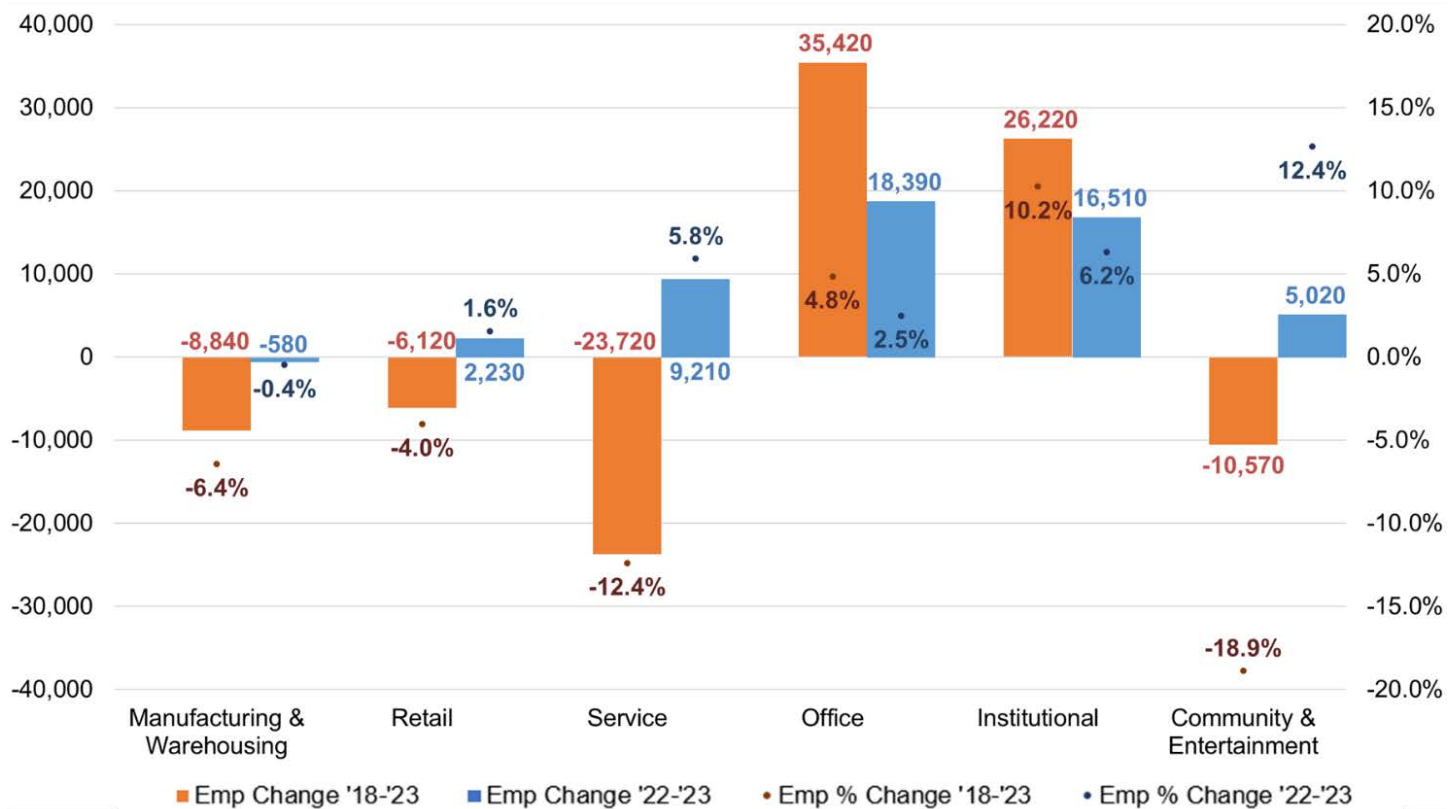
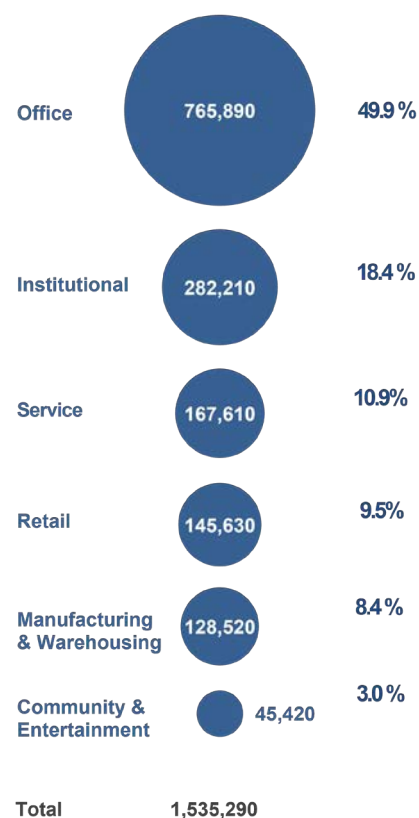


Figure 8: Total Employment by Category, 2023



City Employment Share

Toronto's top employment categories by total share of jobs are Office (49.9%), Institutional (18.4%) and Service (10.9%) (see Figure 8). The Office category continues to comprise half of all jobs in Toronto. As in 2022, the share of Institutional employment continues to expand and is Toronto's fastest growing category with a 26.7% increase of jobs in the last decade.

The remaining shares of city employment are Retail (9.5%), Manufacturing and Warehousing (8.4%), and Community and Entertainment (3.0%). These categories all experienced negative five-year growth rates in 2023.

City Establishment Share

Among Toronto's business establishments, Office (36.9%), Service (25.3%), and Retail (19.4%) made up the largest shares, followed by Institutional (8.5%), Manufacturing and Warehousing (6.5%), and Community and Entertainment (3.3%). The Institutional category has the most employees per establishment with an average of 44.3, compared to Retail and Service with 10.5 and 9.0 respectively, which have the fewest.

Category Totals

Office led employment growth in the last five years, adding 35,420 jobs since 2018. This marks an average annual increase of 1.0%, despite a dramatic increase (3.2%) in jobs in 2019, followed by a large decrease in 2020 (-1.4%). The Office category added 18,390 jobs in 2023, the highest of all the categories.

Institutional increased by 2.0% annually on average in the last five years, adding 26,220 jobs since 2018. In 2023, the category saw the second-highest increase in the number of jobs, adding 16,510.

Table 4: Employment by Category, 2013, 2018, 2022, 2023

Category	Total Number of Employees				Net Change	% Change	Net Change	% Change	Net Change	% Change
	2013	2018	2022	2023	2013-2023		2018-2023		2022-2023	
Manufacturing & Warehousing	126,140	137,360	129,100	128,520	2,380	1.9%	-8,840	-6.4%	-580	-0.4%
Retail	146,840	151,750	143,400	145,630	-1,210	-0.8%	-6,120	-4.0%	2,230	1.6%
Service	164,530	191,330	158,400	167,610	3,080	1.9%	-23,720	-12.4%	9,210	5.8%
Office	656,870	730,470	747,500	765,890	109,020	16.6%	35,420	4.8%	18,390	2.5%
Institutional	222,760	255,990	265,700	282,210	59,450	26.7%	26,220	10.2%	16,510	6.2%
Community & Entertainment	46,710	55,990	40,400	45,420	-1,290	-2.8%	-10,570	-18.9%	5,020	12.4%
Total	1,363,850	1,522,880	1,484,600	1,535,290	171,440	12.6%	12,410	0.8%	50,690	3.4%

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

Service category grew by 9,210 jobs or 5.8% in 2023. This is a beginning of a recovery for the category after experiencing the largest absolute decline in 2020 of almost one-quarter of its jobs. Despite these gains in 2023, the Service category has had an average annual decline of 2.5% over the last five years.

Retail has had a 0.8% average annual decline in the number of jobs since 2018. There has been volatility in Retail over the last five years, with growth in 2019, a large loss of 9.1% in 2020, and moderate growth since then that has not reached pre-pandemic levels. In 2023, Retail added 2,230 jobs, an increase of 1.6%.

Manufacturing and Warehousing employment decreased by 580 jobs or 0.4% between 2022 and 2023. Over the last five years, this category had an average annual decline of 1.3%. Declining manufacturing employment has been a general trend across Ontario over the last five years.⁹

Community and Entertainment saw a second year of large gains in 2023, adding 5,020 jobs or 12.4% following a loss of one-third of employment during the pandemic. This is reflected in the five-year annual average decline of 3.8%. This occurred at the same time that the number of Community and Entertainment businesses decreased by 35.1% from 2022, but as discussed earlier in “Business Establishments”, the number of businesses in this category in 2022 was artificially high due to the inclusion of a large number of incorrectly coded establishments, which were correctly coded in 2023. There was no net change in Community and Entertainment establishments over the past five years, whereas there was a 4.1% decline in total establishments over the same period.

Figure 9: Total Establishments by Category, 2023

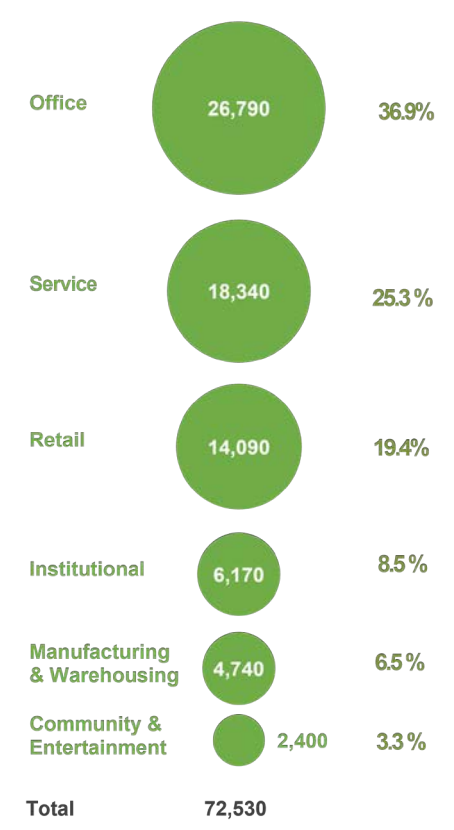
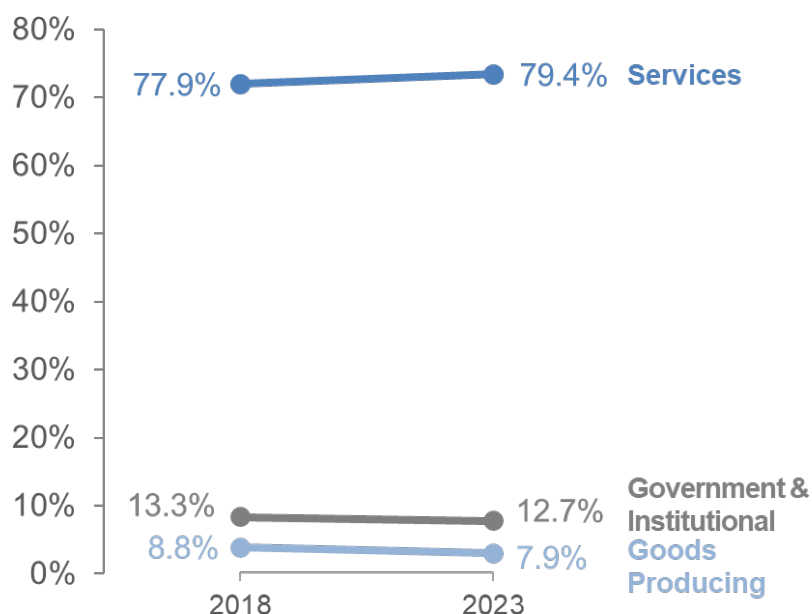


Figure 10: Employment Share by Major NAICS Sector, 2018-2023



Employment by NAICS

Employment by NAICS Economic Sector

In 2011, the Survey incorporated the North American Industry Classification System (NAICS) into its data coding. NAICS is a North American coding standard and allows for the comparison of Toronto's results with other jurisdictions and surveys using the same system. Using NAICS coding allows for a more robust picture of Toronto's economic structure, in contrast to the employment categories which describe the general land use activity of employment in the city.

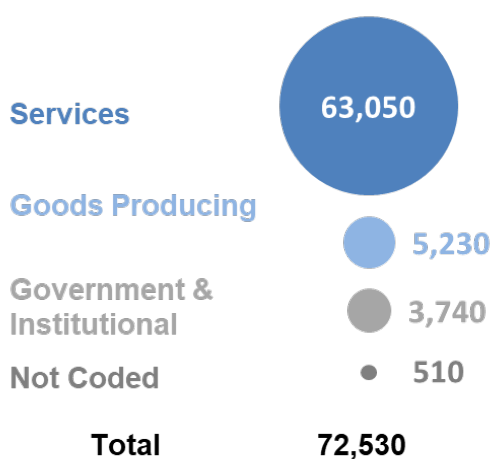
In 2021, a review was conducted of the NAICS coding for the Management of Companies and Enterprises sector in the Survey, to code establishments more precisely and to more closely align the Survey's coding with those of other data sources, such as the Labour Force Survey conducted by Statistics Canada.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

Toronto's Economy

Toronto's economy is made up of three major sectors: Service-based industries (79.4% of employment share), Government and Institutional industries (12.7%), and Goods Producing industries (7.9%) (see Figure 10). These shares are virtually unchanged from 2022. Looking at establishments, Service-based industries make up a share of 87.0% of citywide establishments, while Goods Producing Industries and Government and Institutional make up 7.2% and 5.9% respectively.

In 2023, Service-based employment grew by 42,510 jobs or 3.6%. This sector experienced the greatest job losses in 2020. The Service sector has not recovered to its 2019 employment count but has made gains every year since 2020 with an overall change of 2.7% between 2018 and 2023. Government and Institutional added 7,450 jobs (4.0%) in 2023, however, both it and Goods Producing industries have been steadily decreasing as a share of total employment over the last five years.

Figure 11: Establishments by Major NAICS Sector, 2023



Major Sectors

The Survey uses NAICS to classify the economy into 20 major industry sectors. Finance and Insurance continues to be the largest NAICS sector since 2020, representing 212,420 or 13.8% of all jobs in 2023. A close second, Health Care and Social Assistance accounts for 205,430 or 13.4% of jobs.

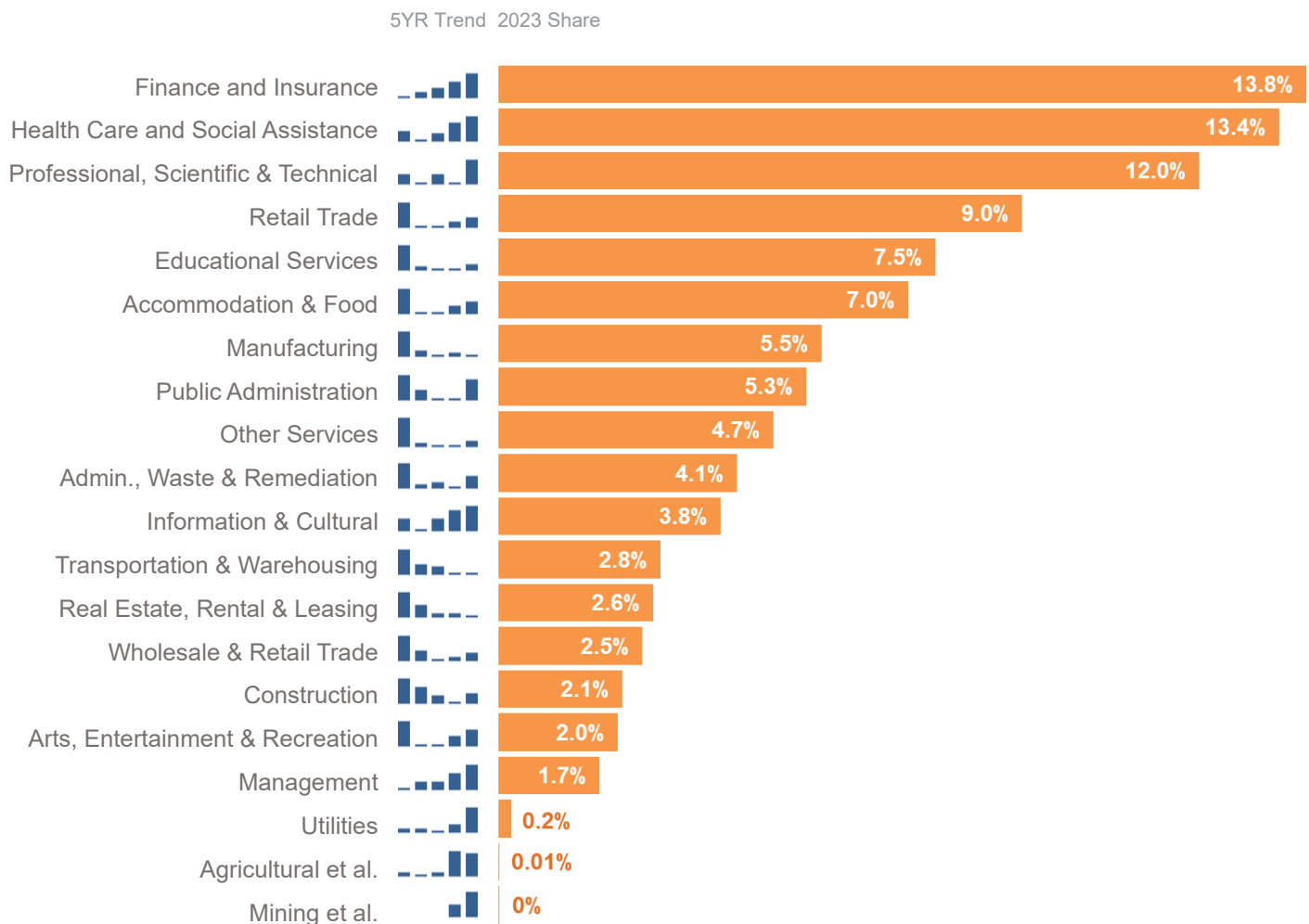
In 2023, 55.7% of all jobs in Toronto belonged to five NAICS sectors, the same as in 2022. Since 2020, the top five sectors have consistently been: Finance and Insurance; Health Care and Social Assistance; Professional, Scientific and Technical Services; Retail Trade; and Educational Services.

In 2023, the sectors that added the most jobs were Professional, Scientific and Technical Services (10,750 jobs or 6.2%), Finance and Insurance (8,140 jobs or 4.0%), and Accommodation and Food Services (7,480 or 7.5%).

The following six NAICS sectors show positive growth over the past five years:

- Management of Companies and Enterprises added 7,910 jobs, averaging 8.5% annual growth.
- Finance and Insurance added 31,330 jobs, averaging 3.5% annual growth.
- Professional, Scientific and Technical Services added 19,990 jobs, averaging 2.4% annual growth.
- Health Care and Social Assistance added 21,240 jobs, averaging 2.3% growth.
- Agriculture, Forestry, Fishing and Hunting added 130 jobs to reach a total of 150, which averages to 130% annual growth but comprises a very small share of overall employment.
- Mining, Quarrying, and Oil and Gas Extraction added 10 jobs to reach a total of 20, which averages to 20% annual growth but makes up a very small share of overall employment.

Figure 12: City Employment Share by NAICS, 2023



Urban Economic Structure

Toronto's Official Plan manages and directs both employment and residential growth towards specific areas of the city including Downtown, the Centres, the Avenues, and the Employment Areas (see Map 2). Downtown and the Centres are planned to encourage both residential and employment growth. Avenues are corridors along major streets well served by transit important for the creation of new housing opportunities. Employment Areas are designated primarily for intensification of business and economic activities. These areas are connected by transit and transportation arteries, maximizing existing infrastructure and services in order to best accommodate growth. Together, they form the backbone of the city's urban economic structure.

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

The *Places to Grow Act* governs long-range planning for growth and development in a way that supports economic prosperity, protects the environment, and helps communities achieve a high quality of life. This 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"). The Growth Plan reinforces Toronto's Official Plan, its Urban Structure and growth management strategy by encouraging intensification of Strategic Growth Areas including Urban Growth Centres, Major Transit Station Areas, and infill sites such as brownfields or greyfields.

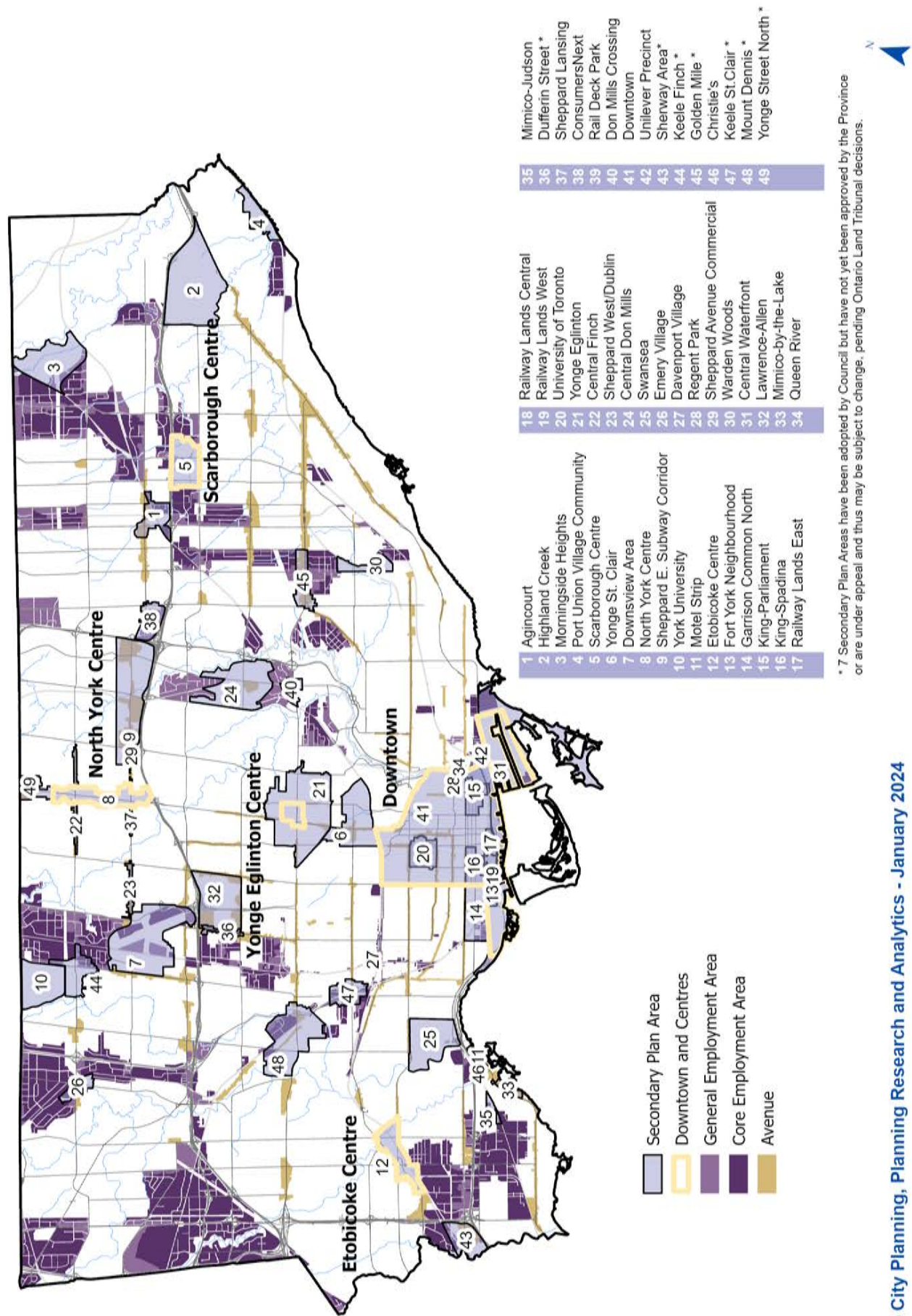
Toronto contains five Urban Growth Centres: Downtown Toronto, North York Centre, Yonge-Eglinton Centre, Scarborough Centre, and Etobicoke Centre. The Growth Plan defines these areas as existing or emerging downtown areas, which are targeted to each achieve a minimum density of 400 residents and jobs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

Table 5: Total Employment in the Centres and Downtown, 2018-2023

							2018-2023		2022-2023	
	2018	2019	2020	2021	2022	2023	Net Change	% Change	Net Change	% Change
Downtown	565,220	584,660	537,310	547,700	564,990	601,010	35,790	6.3%	36,020	6.4%
North York Centre	34,910	35,920	34,920	34,830	33,770	34,770	-140	-0.4%	1,000	3.0%
Yonge-Eglinton	18,120	18,720	17,510	17,100	16,010	15,480	-2,640	-14.6%	-530	-3.3%
Scarborough Centre	17,980	16,830	15,250	14,280	14,120	13,720	-4,260	-23.7%	-400	-2.8%
Etobicoke Centre	10,460	10,850	9,960	10,110	9,960	9,780	-680	-6.5%	-180	-1.8%
Downtown and the Centres	646,690	666,980	614,950	624,020	638,850	674,760	28,070	4.3%	35,910	5.6%
Rest of City	876,190	902,820	834,960	827,500	845,750	860,530	-15,660	-1.8%	14,780	1.7%
City Total	1,522,880	1,569,800	1,449,910	1,451,520	1,484,600	1,535,290	12,410	0.8%	50,690	3.4%

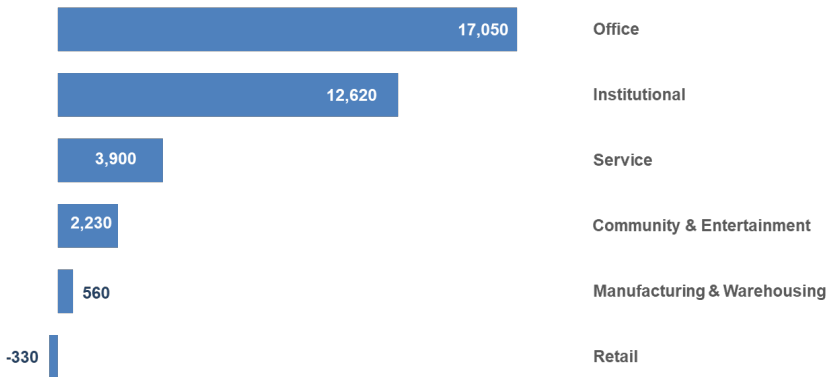
Note: Numbers have been rounded to the nearest ten. Centres are in descending order by size of employment base.

Map 2: Urban Economic Structure



* 7 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 2022-2023

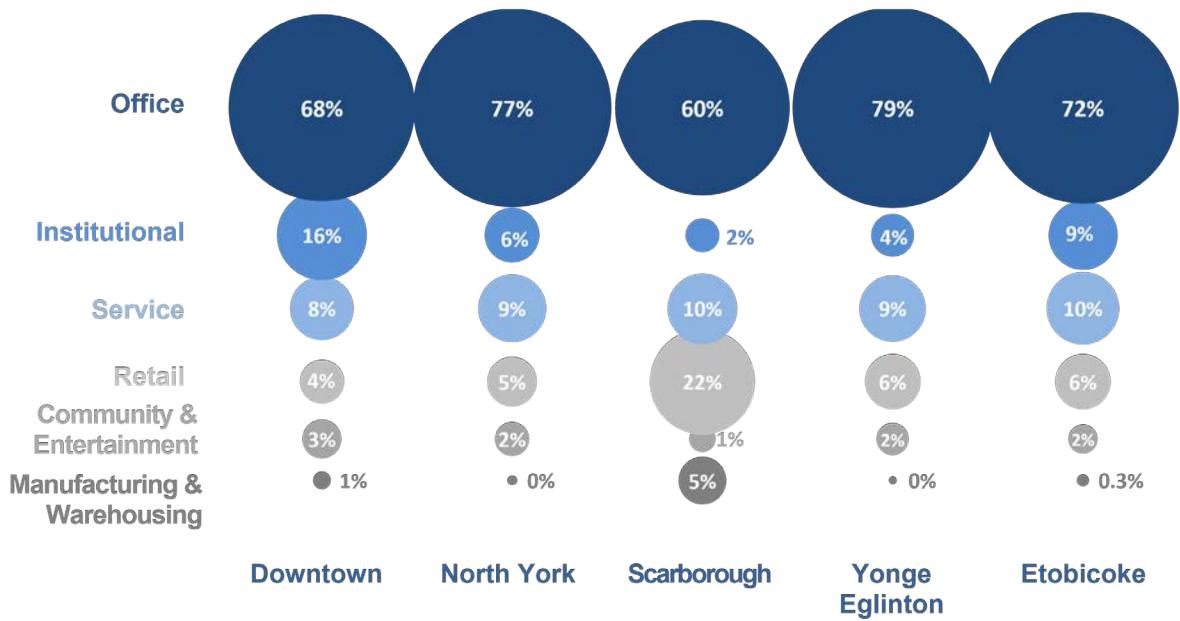


Employment in Downtown

Toronto’s Downtown is a local and national economic hub. In 2023, Downtown contained over 600,000 jobs for the first time, a total of 601,010 jobs, the highest employment count reported in the last five years. This represents 39.1% of the city’s total employment.

Downtown has an average employment density of 28,000 jobs per km² or 280 jobs per hectare. This represents an increase from the 2022 average employment density of 26,320 jobs per km² or 260 jobs per hectare, showcasing the continued recovery from the pandemic impacts and densification in Downtown.

Figure 14: Downtown and Centres, Share of Employment by Category, 2023



Downtown grew faster than the citywide average of 3.4%, gaining 36,020 jobs or 6.4% in 2023 (see Figure 15). Since the loss of 47,350 jobs in 2020, Downtown has been able to bounce back from the COVID-19 pandemic, gaining 63,700 jobs.

All categories gained employment except for Retail which lost 330 jobs or 1.4%. Office employment made up the largest share of Downtown employment at 68.4%. Job growth in the Office category tripled from the previous year as it grew by 17,050 jobs or 4.2% in 2023 (see Figures 13 and 14).

Downtown continues to attract a significant share of new establishments, adding 1,610 this year. In 2023, 21.2% of all new business establishments in the city were counted in Downtown, up from 19.1% in 2022.

Figure 15: 2022-2023 Employment Growth vs. 5-Year Average by Urban Economic Structure Area

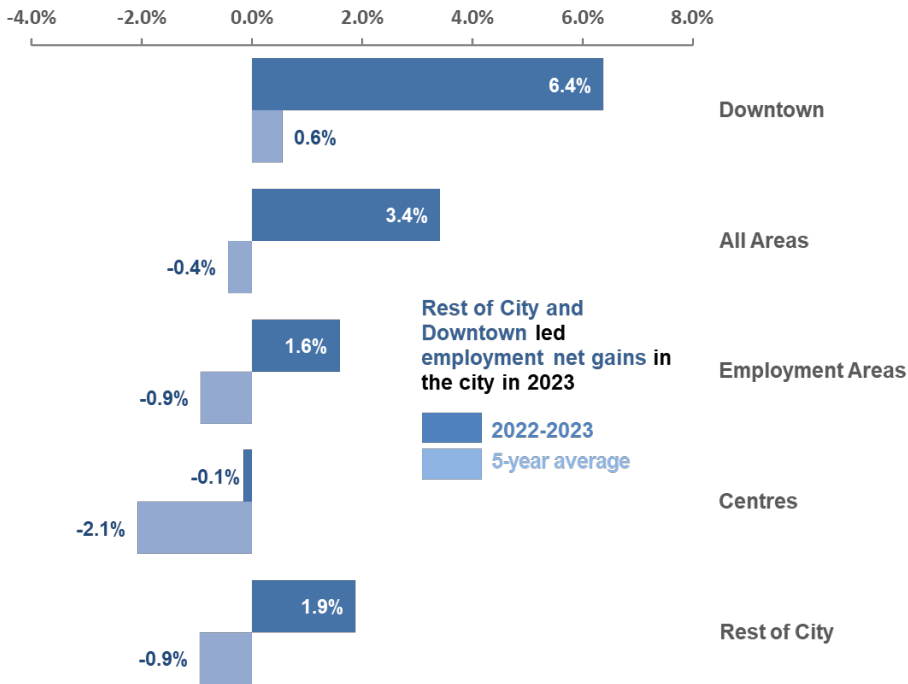


Figure 16: Downtown and Centres, Share of Establishments by Category, 2023

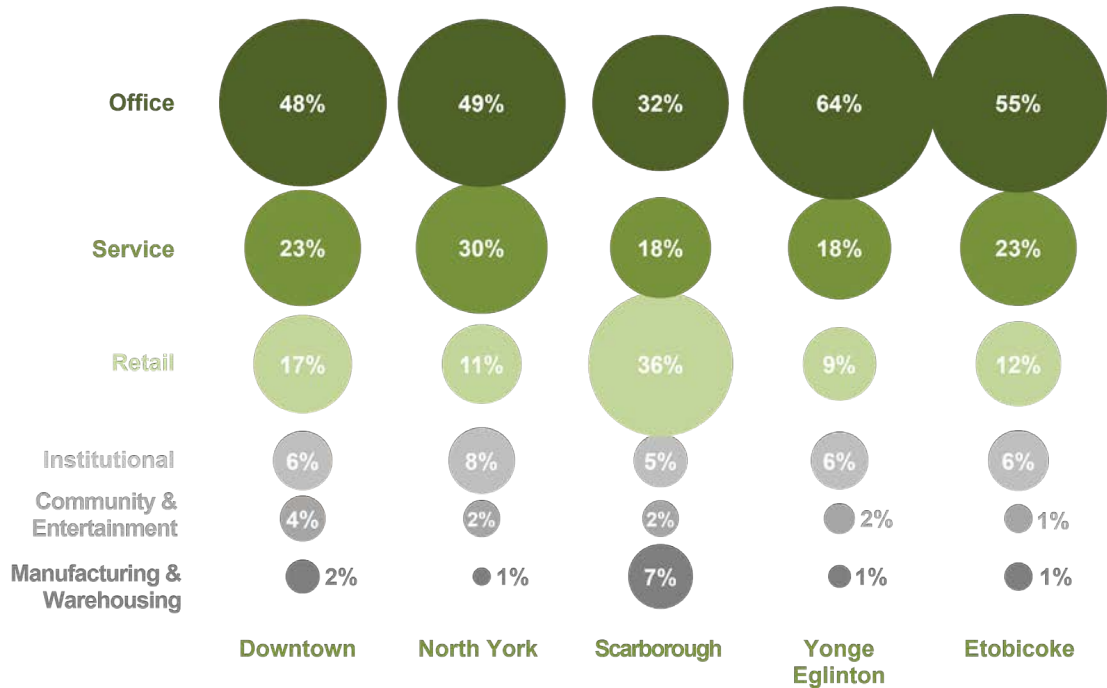


Figure 17a: North York Centre Employment Change by Category 2022-2023

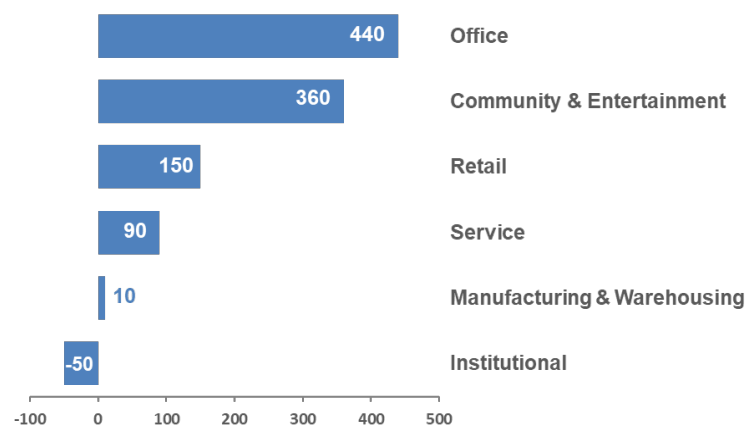
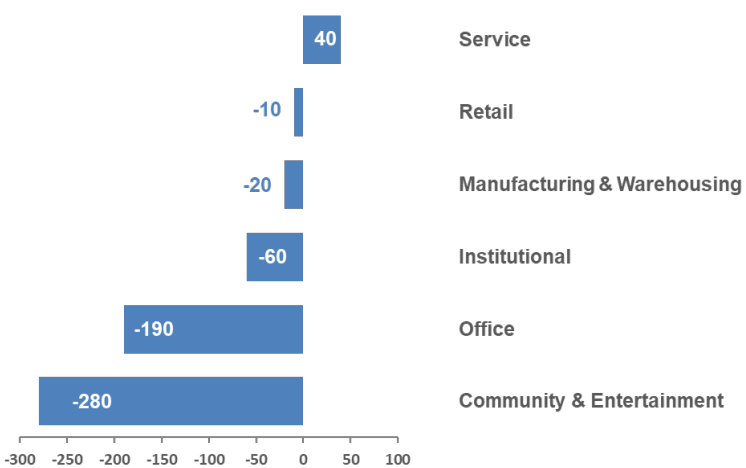


Figure 17b: Yonge-Eglinton Employment Change by Category 2022-2023



The Centres

The four Centres comprised 73,750 jobs or 4.8% of all jobs in the city. In 2023, the Centres employment held steady, only losing a combined 110 jobs or 0.1% (see Table 5). In the previous year, employment decreased by 2,500 jobs or 3.3%.

In 2023, North York Centre gained 1,000 jobs, while Yonge-Eglinton Centre lost 530 jobs, followed by Scarborough Centre (-400 jobs) and Etobicoke Centre (-180 jobs).

Nearly three-quarters (74.0%) of all jobs in the Centres are in the Office category (see Figure 14). It declined by 0.3% or 160 jobs. The majority of jobs in the Office, Service, and Institutional categories are found in North York Centre while jobs in Manufacturing and Warehousing and in Retail are in Scarborough Centre.

North York Centre

North York Centre remains as Toronto’s largest Centre with 34,770 jobs, comprising 2.3% of jobs in the city.

Three-quarters of jobs in North York Centre are Office jobs, representing 26,940 jobs (77.5%), the highest share of office employment observed among the Centres.

In 2023, North York Centre had a net increase in employment with gains in every category except for Institutional (down 50 jobs or 2.4%). The largest gain was in Office (440 jobs or 1.7%) followed by Community and Entertainment (360 jobs or 80.0%) (see Figure 17a). Among the Centres, North York Centre has the smallest five-year decline at 140 jobs or 0.4%.

Yonge-Eglinton Centre

Yonge-Eglinton Centre is Toronto’s second largest Centre with 15,480 jobs or 1.0% of the city’s total.

Yonge-Eglinton contains the highest density of employment of any Centre with approximately 25,360 jobs per km² or 250 jobs per hectare. In 2023, this Centre experienced the largest employment decrease, losing 530 jobs or 3.3%. Yonge-Eglinton Centre has been experiencing

widespread development along with the construction of the Eglinton Crosstown LRT which has made access difficult and may contribute to this decrease in employment. It will be important to continue to monitor employment trends as construction progresses and the LRT goes into service.

Over three-quarters (79.4% or 12,290 jobs) of employment in Yonge-Eglinton Centre is in the Office category. Losses in 2023 were reported in Community and Entertainment (280 jobs or 46.7%) and Manufacturing and Warehousing (20 jobs or 50.0%) (see Figure 17b).

Scarborough Centre

Employment in Scarborough Centre totaled 13,720 jobs in 2023, comprising 0.9% of the city’s total.

Although there was a 400 job decrease or 2.8%, this is a significantly smaller decline than the total five-year total decrease of 4,260 jobs or 23.7%, the largest five-year decline observed among the Centres.

The majority of employment is in Office (8,280 jobs or 60.3%) followed by Retail (3,000 jobs or 21.9%) which is the highest share of retail employment observed among the Centres.

Losses were concentrated in Office (240 jobs and 2.8%) and Institutional (220 jobs or 41.5%). Gains were observed in Service (120 jobs or 2.8%) and Retail (20 jobs or 0.7%) (see Figure 17c).

Etobicoke Centre

Etobicoke Centre is the smallest Centre in Toronto by employment with 5,971 jobs per km² or 60 jobs per hectare. The Centre has 9,780 jobs total, representing 0.6% of employment in Toronto. Like the other Centres, most of Etobicoke Centre’s employment is in Office (7,040 jobs or 72.0%).

In 2023, Etobicoke Centre lost 180 jobs or 1.8%. The largest employment decrease was in Office (170 jobs or 2.4%) while the largest employment increase was in Retail (60 jobs or 11.1%) (see Figure 17d).

Figure 17c: Scarborough Employment Change by Category 2022-2023

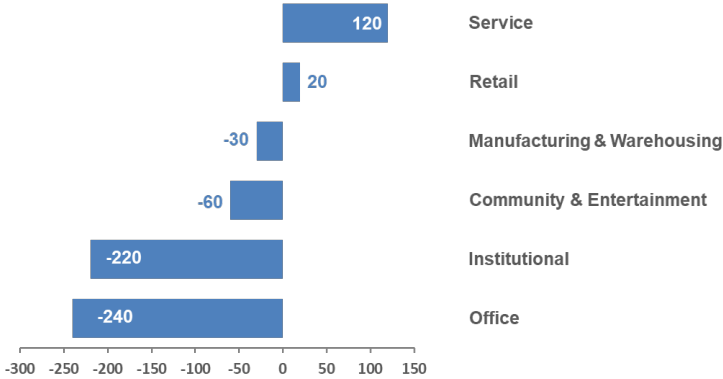
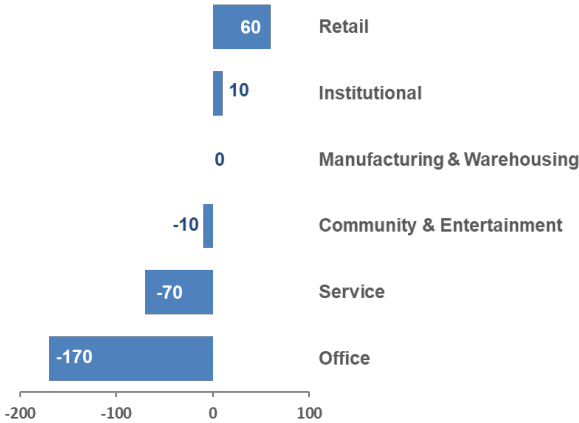


Figure 17d: Etobicoke Employment Change by Category 2022-2023



Employment in Secondary Plan Areas

In 2023, Secondary Plan areas accounted for over half of all citywide employment with 862,500 jobs or 56.2%. These areas reflect much of the city's more recent urban growth, adding 38,560 jobs in 2023. 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 such, the employment and establishment counts in Secondary Plan areas should each be considered in relation to the city as a whole, and not compared to Downtown, the Centres, or Employment Areas. Although they have the same names, the Secondary Plan areas for Downtown, North York Centre, and Yonge-Eglinton Centre are somewhat different than the geographic areas of the Centres and Downtown identified in the Official Plan's Urban Structure map and the reported employment and establishment counts are not directly comparable.

There are cases where areas of the city belong 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 Secondary Plan areas. The Downtown Secondary Plan, in particular, overlaps with eleven Secondary Plan areas, each of which provides a local focus for growth management. The employment totals in Table A3 in the Appendix are for each Secondary Plan area individually, and in that table, some businesses are counted in more than one Secondary Plan area.

Secondary Plan Areas by Employment

While Secondary Plan areas make important contributions to Toronto's overall economy, 72.3% of jobs are contained in six of the city's 49 Secondary Plan areas. The largest Secondary Plan area in terms of employment is the Downtown Plan area with 593,080 jobs, an increase of 36,390 from 2022 when there were 556,690 jobs. This is followed by the Central Waterfront (46,390 jobs), King-Spadina (38,870 jobs), Railway Lands East (36,530 jobs), North York Centre (34,770 jobs), and Yonge Eglinton (30,850 jobs).

Of the remaining 43 Secondary Plan areas, 21 contain between 2,000 and 30,000 jobs and 22 contain fewer than 2,000 jobs each.

Four Secondary Plan areas had employment growth of 15.0% or more. Mimico-Judson grew by 24.2% or 60 jobs, Sheppard Avenue Commercial Area grew by 20.5% or 120 jobs, Railway Lands West grew by 17.7% or 140 jobs, and Sheppard West/Dublin grew by 15.1% or 220 jobs.

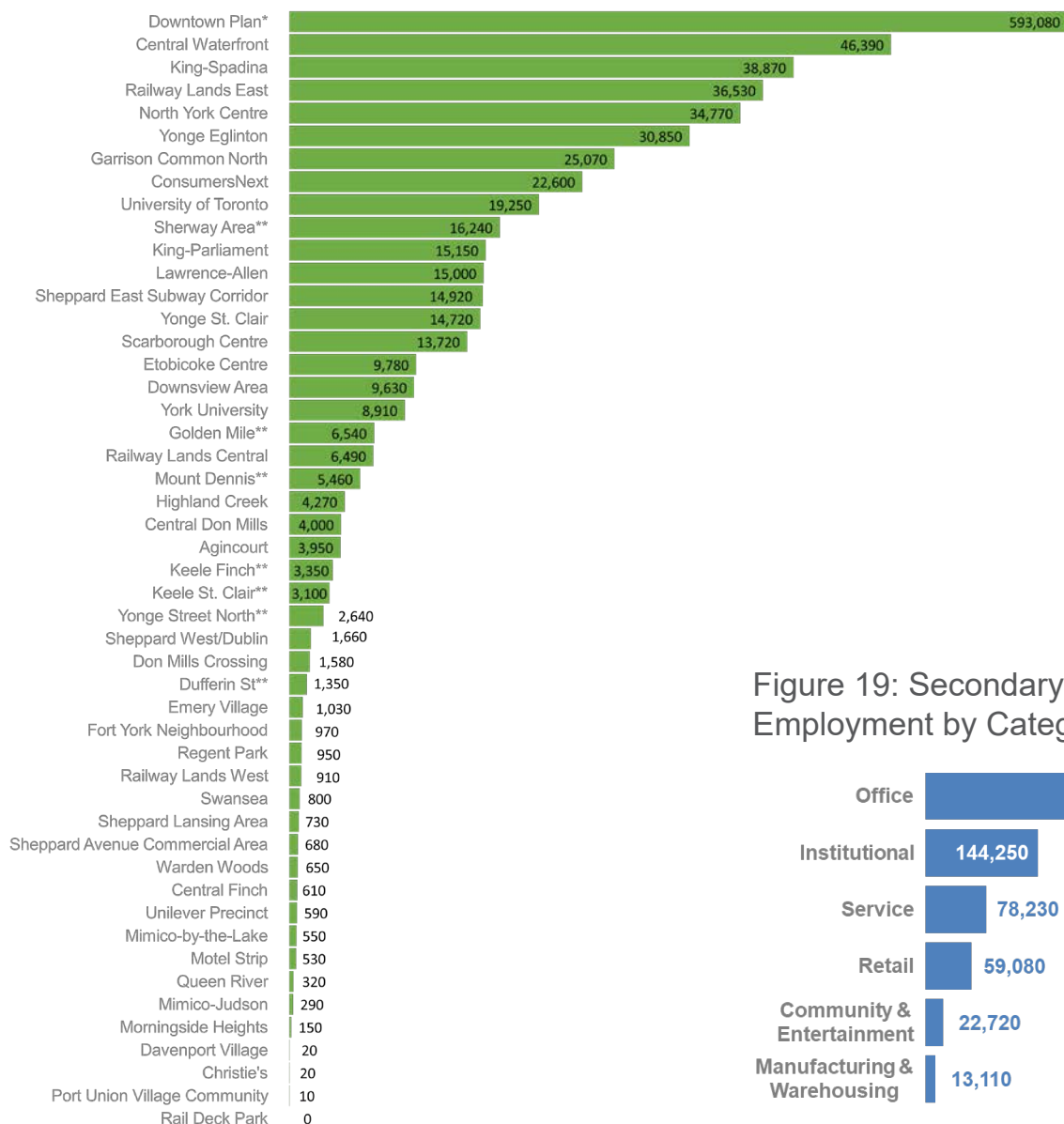
Unlike last year when nearly all Secondary Plan areas with at least 1,000 jobs experienced growth, one-third of these Secondary Plan areas lost employment in 2023. Of these, the largest declines were observed in Don Mills Crossing with a loss of 26.0% or 550 jobs, followed by Golden Mile with a loss of 6.9% or 480 jobs, and Central Don Mills with a loss of 5.4% or 230 jobs. These changes reflect major redevelopment projects underway that will result in considerable housing and employment growth in future years.

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. In 2023, Office continues to be the largest employment category in Secondary Plan areas with 63.2% of employment and 47.2% of establishments. This was followed by Institutional (16.7% of all jobs), Service (9.1% of all jobs), Retail (6.8% of all jobs), Community and Entertainment (2.6% of all jobs), and Manufacturing and Warehousing (1.5% of all jobs).

There are several Secondary Plan areas where Office is not the dominant employment category. Manufacturing and Warehousing jobs comprise the bulk of employment in Warden Woods (50.8%) and Downsview Area (42.8%). Retail jobs are the largest share of employment in Golden Mile (50.8%) and Lawrence-Allen (39.0%). The largest shares of Service jobs are found in Davenport Village (50.0%) and Mimico-Judson (37.9%). Institutional jobs account for most jobs in Morningside Heights (100.0%), York University (85.2%), University of Toronto (83.8%), and Highland Creek (74.5%).

Figure 18: Secondary Plan Area Employment, 2023



Note: Totals of Secondary Plan areas may not equal employment sums due to rounding. Sums of employment exceed total employment in Secondary Plan areas due to the overlap of multiple Secondary Plan geographies. Employment totals are accurate for each individual Secondary Plan area.

* 156,840 jobs within Downtown are also captured in other Secondary Plan areas, including King-Parliament, University of Toronto, Regent Park, Central Waterfront, Fort York Neighbourhood, Queen River, King-Spadina, Railway Lands East, Railway Lands West, and Railway Lands Central. The overlap by six categories includes 1,040 Manufacturing & Warehousing jobs, 5,550 Retail jobs, 15,480 Service jobs, 103,770 Office jobs, 21,270 Institutional jobs, and 9,750 Community & Entertainment jobs.

** Seven 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 19: Secondary Plan Area Employment by Category, 2023

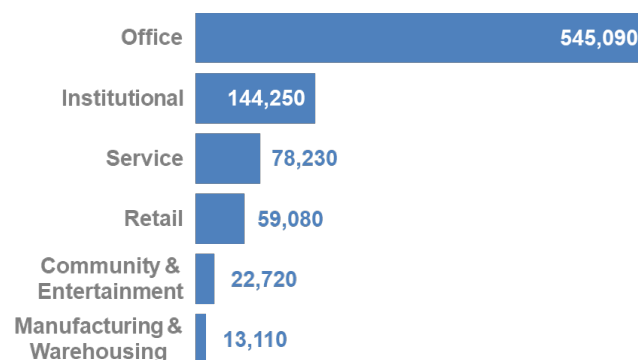
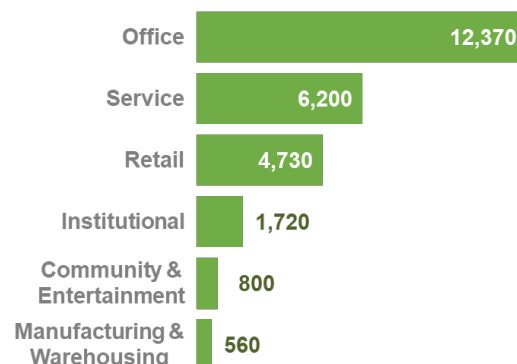


Figure 20: Secondary Plan Area Establishments by Category, 2023



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 property tax revenue base.

Map 2 shows the location and boundaries of Core and General Employment Areas identified in the City of Toronto's Official Plan. The Employment Areas geography used for this analysis reflects the Land Use Designations of the June 2023 Official Plan consolidation, prior to the approval of Official Plan Amendment 591 in December 2023. OPA 591 contains recommendations for citywide employment policies and employment conversion requests.

In 2023, Toronto's Employment Areas contained 21,930 establishments (30.2% of city total) and 397,910 jobs (25.9% of the city total). Although 240 establishments have been added to Employment Areas, the share of citywide establishments has stayed consistent with the year prior due to new businesses being founded across the city. The share of jobs represents a decrease from 2022 when 26.8% of jobs were located in these areas, again due to stronger growth in other areas.

Out of the six employment categories, Employment Areas are particularly important to the Manufacturing category, with 84.4% of the establishments and 90.1% of all Manufacturing jobs located in Toronto's Employment Areas.

New businesses continue to be attracted to Employment Areas, with 33.0% of new establishments or 2,500 establishments in the city located in Employment Areas in 2023.

Employment Areas play an important role in accommodating a range of businesses including those that offer attainable employment opportunities for people of various education levels and skill sets. For example, jobs in distribution, manufacturing, and other goods producing sectors are commonly identified as low-barrier employment opportunities for a wide range of individuals.

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.

Residential uses are prohibited on lands designated Core Employment Areas and General Employment Areas.

Employment Area Sector Activity

The top three NAICS sectors in Employment Areas include Manufacturing, Wholesale and Retail Trade, and Professional, Scientific and Technical Services (see Table A4). Manufacturing employment is the

largest component of Employment Areas, making up 18.9% of all jobs (75,319 jobs).

Wholesale and Retail Trade remained stable at 16.5%, continuing to hold its spot as the second highest NAICS sector in Employment Areas. The number of jobs slightly increased by 880 to a total of 65,830 jobs.

The share of Professional, Scientific and Technical Services employment decreased by 680 jobs to 43,010 jobs or 10.8%.

Administrative and Support, Waste Management and Remediation Services reported the largest increase in employment with a gain of 1,750 jobs in 2023.

Employment Areas accommodate important concentrations of jobs citywide in several sectors, led by Manufacturing (88.9%), Utilities (82.7%), and Transportation and Warehousing (78.8%).

Core Employment Area Activity

Core Employment Areas host land consumptive uses. They cover 58.4 km² in Toronto, which represents 9.2% of the city's total land area. Core Employment Areas accounted for 63.5% or 252,690 of all jobs in Employment Areas in 2023, a decrease of 560 jobs over 2022. These areas had an average of 4,330 jobs per km² or 43.3 jobs per hectare.

In 2023, the sectors with the greatest amount of jobs in Core Employment Areas were Manufacturing with 65,160 jobs (25.8%), Wholesale and Retail Trade with 36,470 jobs (14.4%), and Transportation and Warehousing with 31,100 jobs (12.3%) (see Figure 21).

Core Employment Areas are leading locations citywide for employment in Manufacturing (76.9%), Transportation and Warehousing (73.3%), and Construction (64.5%).

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 21.7 km² in Toronto, which represents 3.4% of the city's land area. In 2023, General Employment Areas contained 36.5% or 145,220 of all jobs in Employment Areas which was an increase of 390 jobs over 2022. They had an average employment density of 6,690 jobs per km² or 66.8 jobs per hectare.

Sectoral employment in General Employment Areas continues to be led by Wholesale and Retail Trade with 29,360 jobs (20.2%), a gain of 710 jobs in 2023. Professional, Scientific, and Technical Services followed with 16,830 jobs (11.6%) along with Administrative and Support, Waste Management and Remediation Services with 13,170 jobs (9.1%) (see Figure 22).

General Employment Areas are leading locations citywide for employment in Utilities (62.7%), Real Estate and Rental and Leasing (24.5%), and Administrative and Support, Waste Management and Remediation Services (21.1%).

Figure 21: Core Employment by NAICS 2023

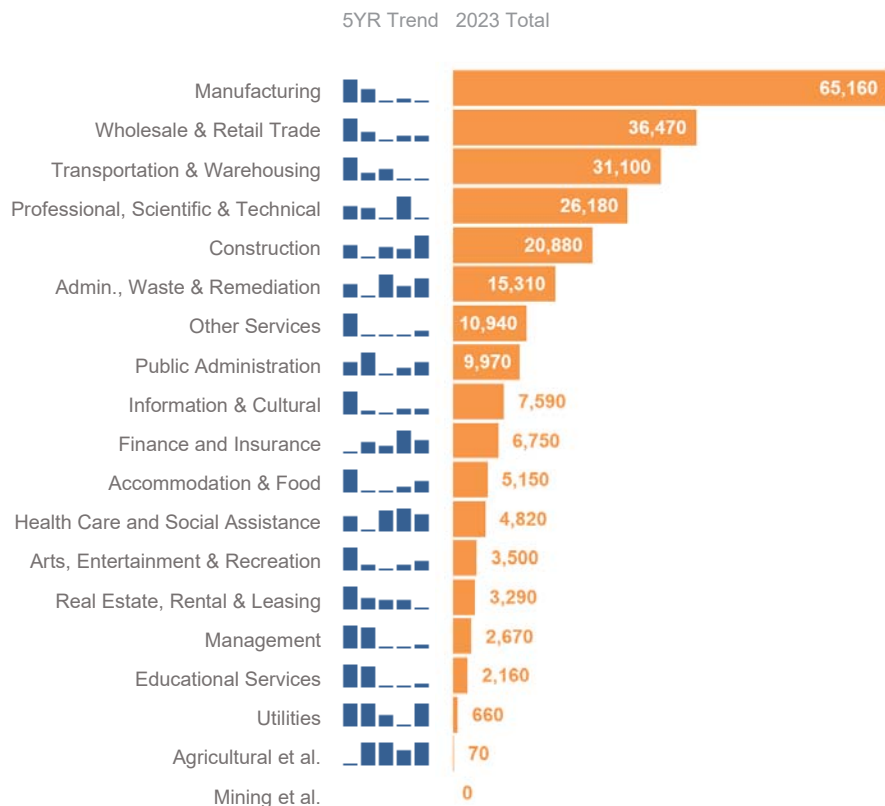
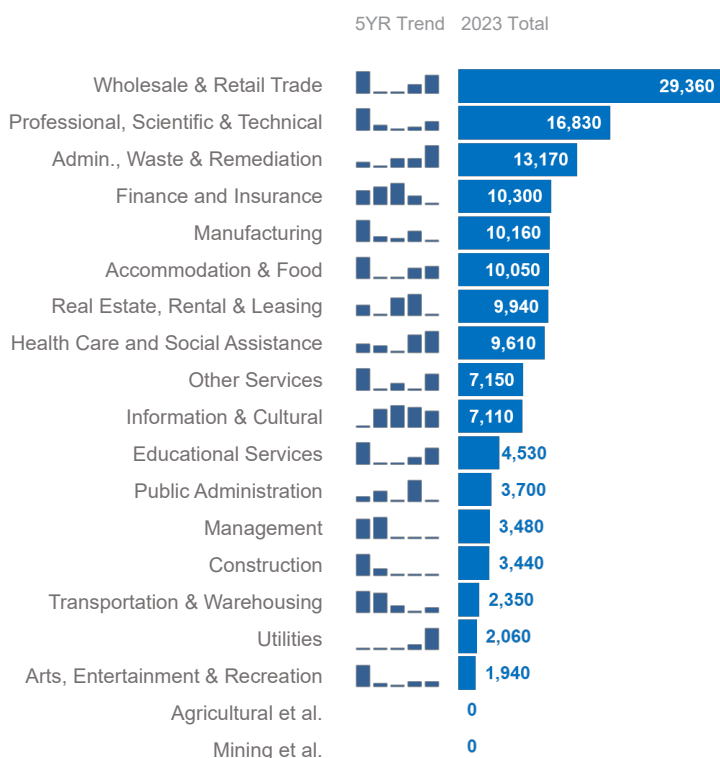


Figure 22: General Employment by NAICS 2023



Areas of Employment

In Toronto, there are 23 Areas of Employment (AOEs) which represent geographic clusters of lands designated as either *Core Employment Area* or *General Employment Area* in the Official Plan (see Map 3). According to the Ontario *Planning Act*,¹⁰ 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, and associated retail uses ancillary facilities.

Employment in the AOEs accounts for 383,860 jobs, or 25.0% of all citywide employment, and 21,900 establishments, or 30.0% of the total. These proportions of employment have

remained relatively consistent in the past five years, indicating stability in these areas.

Though AOEs have seen a decrease in employment of 6.3% from 2018 to 2023, 61.5% of this decrease is attributed to the Wholesale and Retail Trade sector. Employment in many sectors has remained relatively constant while others such as Administrative and Support, Waste Management and Remediation Services, Management of Companies and Enterprises, and Health Care and Social Assistance have seen job growth.

The AOEs are composed almost exclusively of designated Employment Areas, therefore all employment statistics and figures in this section are calculated for those establishments on those lands. The Port Lands and Central Waterfront AOE contains some

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 175,970 jobs (see Table 6). This includes Rexdale-Airport (42,040 jobs or 10.9%), South Etobicoke (36,760 jobs or 9.6%), Downsview (34,570 jobs or 9.0%), Highway 400 (32,960 jobs or 8.6%), and Tapscott (29,640 jobs or 7.7%). The next ten largest AOEs range from 10,000 to 27,000 jobs, while the eight smallest AOEs have under 10,000 jobs.

Since 2018, the largest increase in jobs has been in Liberty Village, increasing nearly 30.0% from 9,790 to 12,170 in 2023. Three other AOEs have also seen

Map 3: Areas of Employment

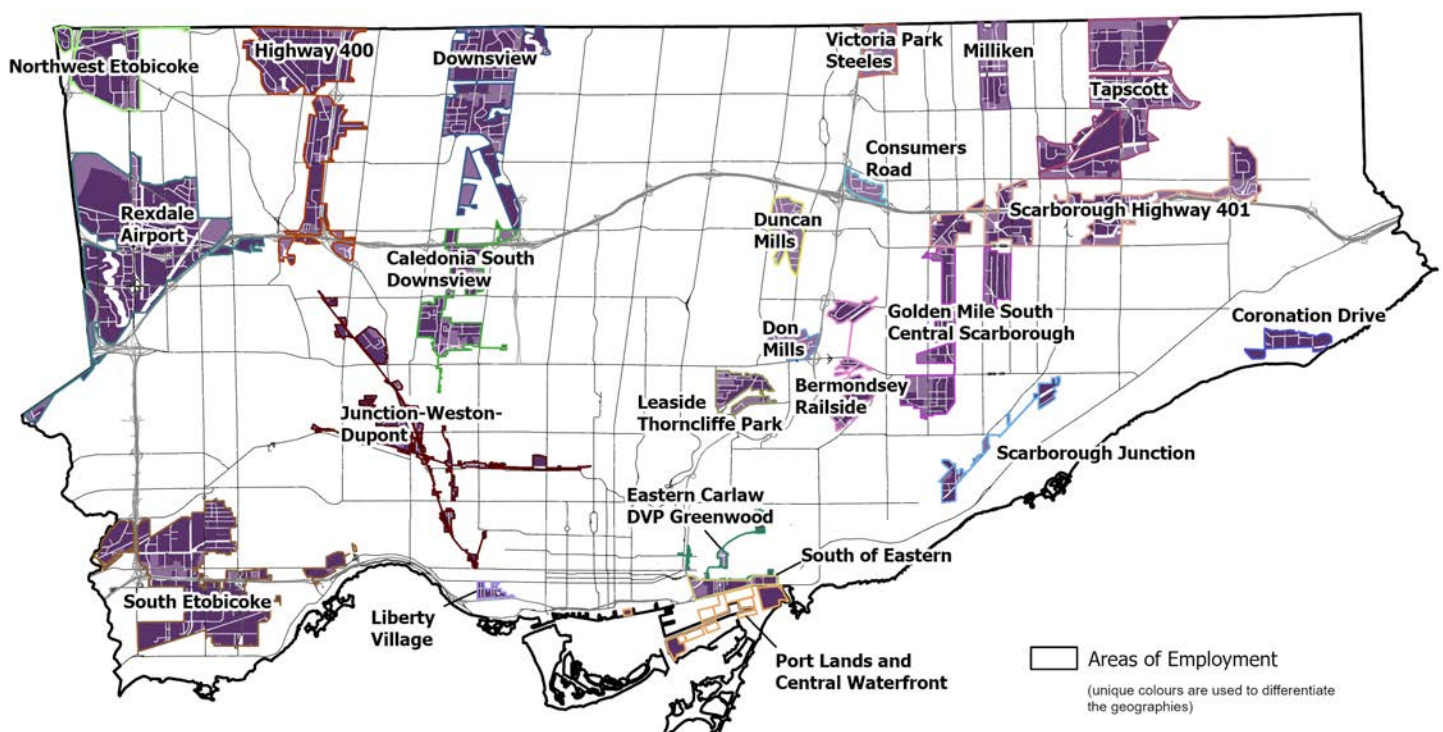


Table 6: Total Employment by Area of Employment, 2018-2023

Area of Employment	2018	2022	2023		2018-2023	% Change	2022-2023	% Change
				% of Total Employment				
Bermondsey-Railside	9,630	9,380	9,180	2.4%	-450	-4.7%	-200	-2.1%
Caledonia-South Downsview	20,070	17,280	16,470	4.2%	-3,600	-17.9%	-810	-4.7%
Consumers Road Office-Focussed Area	17,830	18,700	18,760	4.8%	930	5.2%	60	0.3%
Coronation Drive	1,030	1,050	1,110	0.3%	80	7.8%	60	5.7%
Don Mills Office-Focussed Employment Area	10,650	10,610	11,260	2.9%	610	5.7%	650	6.1%
Downsview	35,340	35,400	34,570	8.9%	-770	-2.2%	-830	-2.3%
Duncan Mills Office-Focussed Area	21,160	20,150	21,080	5.4%	-80	-0.4%	930	4.6%
Eastern-Carlaw-DVP-Greenwood	4,720	4,510	4,770	1.2%	50	1.1%	260	5.8%
Golden Mile-South Central Scarborough (east part)	22,620	22,590	22,430	5.8%	-190	-0.8%	-160	-0.7%
Highway 400	34,540	32,490	32,960	8.5%	-1,580	-4.6%	470	1.4%
Junction-Weston-Dupont	20,660	18,690	17,210	4.4%	-3,450	-16.7%	-1,480	-7.9%
Leaside-Thorncliffe Park	9,310	8,800	5,950	1.5%	-3,360	-36.1%	-2,850	-32.4%
Liberty Village	9,790	13,200	12,710	3.3%	2,920	29.8%	-490	-3.7%
Milliken	7,460	7,640	7,550	1.9%	90	1.2%	-90	-1.2%
Northwest Etobicoke	16,670	16,820	15,300	3.9%	-1,370	-8.2%	-1,520	-9.0%
Port Lands and Central Waterfront*	4,990	5,360	4,910	1.3%	-80	-1.6%	-450	-8.4%
Rexdale-Airport	44,790	41,940	42,040	10.8%	-2,750	-6.1%	100	0.2%
Scarborough Highway 401	28,420	29,570	26,970	6.9%	-1,450	-5.1%	-2,600	-8.8%
Scarborough Junction	3,100	2,880	2,660	0.7%	-440	-14.2%	-220	-7.6%
South Etobicoke (Central part)	43,180	38,370	36,760	9.4%	-6,420	-14.9%	-1,610	-4.2%
South of Eastern	4,770	4,100	4,030	1.0%	-740	-15.5%	-70	-1.7%
Tapscott	31,390	31,290	29,640	7.6%	-1,750	-5.6%	-1,650	-5.3%
Victoria Park-Steeles Office-Focussed Area	13,600	11,710	11,530	3.0%	-2,070	-15.2%	-180	-1.5%
Total	415,710	402,510	38 9,860	100.0%	-25,850	-6.2%	-12,650	-3.1%

Note: Numbers have been rounded to the nearest ten. *There are 60 establishments with 4,230 jobs on the regeneration area in the Core Employment-Ashbridges Bay WWTP and TTC AOE. The totals in this table do not include them.

job increases of 5.0% or more in this timeframe: Consumers Road Office-Focussed Area, Coronation Drive, and Don Mills Office-Focussed Employment Area. Notably, three of these four AOE's have high concentrations of office employment, consistent with citywide growth in the Office category.

From 2018 to 2023, 17 AOE's have experienced declining job counts with the largest decreases occurring in South Etobicoke (Central Part) (6,480 jobs), Caledonia-South Downsview

(3,390 jobs), and Leaside-Thorncliffe Park (3,360 jobs).

AOE Employment by Activity

The leading employment activity in 2023 is Manufacturing, comprising 75,310 jobs or 19.6% of all jobs located in an AOE. Wholesale and Retail Trade (52,330 jobs or 13.6%) and Professional, Scientific and Technical Services (43,000 or 11.2%) also make up a significant proportion of employment within these areas. The

activity with the most growth since 2022 was Administrative and Support, Waste Management and Remediation Services with an additional 1,820 jobs. Other Services (Except Public Administration) (960 jobs), Accommodation and Food Services (870 jobs), and Educational Services (320 jobs) all saw increases of 5.0% or greater.

Table 7: Total Employment in Area of Employment by Major NAICS Sectors, 2018-2023

NAICS Sector	2018	2022	2023	2023	2018-2023	%	2022-2023	%
				% of Total Employment				
Agriculture, Forestry, Fishing and Hunting	10	50	70	0.0%	60	600.0%	20	40.0%
Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0.0%	0	--	0	--
Utilities	3,520	2,400	2,720	0.7%	-800	-22.7%	320	13.3%
Construction	25,590	23,400	24,320	6.3%	-1,270	-5.0%	920	3.9%
Manufacturing	82,060	76,820	75,310	19.6%	-6,750	-8.2%	-1,510	-2.0%
Transportation and Warehousing	35,330	33,460	33,450	8.7%	-1,880	-5.3%	-10	0.0%
Information and Cultural Industries	14,840	14,800	14,710	3.8%	-130	-0.9%	-90	-0.6%
Finance and Insurance	16,840	19,470	16,860	4.4%	20	0.1%	-2,610	-13.4%
Real Estate and Rental and Leasing	14,850	14,670	13,230	3.4%	-1,620	-10.9%	-1,440	-9.8%
Professional, Scientific and Technical Services	42,740	43,520	43,000	11.2%	260	0.6%	-520	-1.2%
Management of Companies and Enterprises	5,170	6,010	6,150	1.6%	980	19.0%	140	2.3%
Administrative and Support, Waste Management and Remediation Services	25,870	26,620	28,440	7.4%	2,570	9.9%	1,820	6.8%
Educational Services	6,570	6,340	6,660	1.7%	90	1.4%	320	5.0%
Health Care and Social Assistance	13,020	14,330	14,390	3.7%	1,370	10.5%	60	0.4%
Arts, Entertainment and Recreation	6,290	5,280	5,440	1.4%	-850	-13.5%	160	3.0%
Accommodation and Food Services	16,320	14,090	14,960	3.9%	-1,360	-8.3%	870	6.2%
Other Services (Except Public Administration)	19,220	17,120	18,080	4.7%	-1,140	-5.9%	960	5.6%
Public Administration	13,350	13,710	13,670	3.6%	320	2.4%	-40	-0.3%
Wholesale and Retail Trade	68,390	64,890	52,330	13.6%	-16,060	-23.5%	-12,560	-19.4%
Not Coded	20	50	70	0.0%	50	250.0%	20	40.0%
Total	406,560	391,790	398,290	100.0%	-26,140	-6.4%	-13,170	-3.3%

Note: Numbers have been rounded to the nearest ten.

Regional Employment Policies

A Place to Grow, the 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 jobs by 2051. The forecasted rate of job growth is approximately 0.6% per annum (see Table 8).

In 2023, the measured ten-year rate of job growth is 1.2%, double the rate set out in the Reference scenario. The 2023 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 2045, six years before the forecast. This scenario would represent a continued economic recovery going forward.

As noted earlier in this bulletin, Toronto's employment has not yet reached the pre-pandemic 2019 numbers, but about 70% of the jobs have been regained. This is consistent with Hemson's Technical Report which assumes a recovery period of approximately three years, despite the unpredictability of potential outcomes and prolonged challenges that specific industries, firms, and individuals may face. Within this context, subsequent Toronto Employment Surveys will be essential for assessing the depth and diversity of the recovery on a sub-sector and geographic 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
	2010	2020	2010-2020			
TES 10 Years to 2020	1,298,300	1,449,910	151,610	15,161	1.1%	24
	2012	2022	2012-2022			
TES 10 Years to 2022	1,331,570	1,484,600	153,030	15,303	1.1%	24
	2013	2023	2013-2023			
TES 10 Years to 2023	1,363,850	1,535,290	171,440	17,144	1.2%	22

Note: CAGR abbreviates Compound Annual Growth Rate.

Our Plan Toronto

From August 4, 2020 to July 20, 2023, Toronto undertook the 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 was to review 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 addressed 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 evaluated requests to convert employment and industrial lands to other uses, such as residential.

City Planning received approximately 150 requests to convert lands designated Core Employment Areas or General Employment Areas in the Official Plan for non-employment uses, including some of which were City-initiated. The conversion requests were considered by City Council in three separate reports throughout the review.

On December 12, 2023, the Ministry of Municipal Affairs and Housing approved Official Plan Amendment 591, the *Our Plan Toronto: Recommended Official Plan Amendment for City-wide Employment Policies and Conversion Requests* without modifications. As of December 13, 2023, the revised employment policies are now in effect as well as the first grouping of employment land conversions. The remaining groupings of employment land conversions are still pending approval from the Province and are not yet in effect. For more information, see the "Official Plan Review" page on the City's website.

The analysis for this bulletin was completed prior to the approval of Official Plan Amendment 591. The Employment Areas geography used for this analysis reflect the Land Use Designations of the June 2023 Official Plan consolidation, prior to the approval of Official Plan Amendment 591.

Special Topic: Pandemic Recovery

The COVID-19 pandemic has had numerous impacts on Toronto's economy, employment landscape, and the Survey itself. Some of these have been temporary while others have led to lasting changes. Given the elapsed time and changes since the initial emergence of COVID-19 and the City of Toronto's declared emergency order in 2020, it is fruitful to consider the recovery over the past three years.

In 2020, over 5,000 businesses with 11 or more employees indicated a significant change in employment or 20% or more as a result of the pandemic, representing 107,180 jobs. Since then, Toronto's economy has seen significant recovery with only 210 businesses reporting a positive or negative change caused by the pandemic in 2023, representing about 22,690 jobs.

Approximately 120 establishments experiencing significant employment change due to the pandemic reported growth caused by the pandemic, adding 20,150 jobs (88.8%), which is a slight increase from the previous year. Meanwhile, 90 establishments reported a loss of 2,540 jobs (11.2%) (see Table 10).

All 2023 employment and establishment statistics in this section are focused on these 210 businesses that reported significant employment change directly as a result of the pandemic.

COVID-19 Impact on Way of Working

This year marks the first year of surveying that was most similar to pre-pandemic times. The first two years of the pandemic involved a hybrid method of telephone, e-mail, and internet research. In 2022, the Survey saw a return to in-person field visits, but the effects of COVID-19 still lingered, affecting the workflow and response rate. In 2023, the Survey was conducted completely in-person by a full team of 26 surveyors enabling visits to all businesses across the city.

The in-person one-on-one interviews resulted in a notably higher response rate than in recent years, better quality data, and better verification of business closures and new businesses. The field team was larger than in the intervening years, having more capacity to follow up with businesses and confirm information in 2023 that could not be confirmed in the past few years due to pandemic restrictions.

This year also involved a new interactive map-driven application for fieldwork and data collection that was custom-built by City Planning staff which was faster and more efficient than the previous iterations. The team was able to easily collect and update the data for businesses that were existing, newly opened, relocated, or closed. This streamlined process improved and enhanced field surveying which, in turn, contributed to the overall success of the Survey. The application also had built-in checks and validations that increased the accuracy and quality of the data. Feedback received from the field team this year will be incorporated into further improvements for 2024.

COVID-19 Impact by Category

In 2023, the categories that reported the highest percentage employment impact from the COVID-19 pandemic were the Institutional, Community and Entertainment, and Office categories.

The Institutional category reported the largest employment increases as an impact of COVID-19 with 20 establishments gaining approximately 7,110 jobs. The largest employment increases were reported at public community colleges, up 3,030 jobs or 42.6%, and hospitals, up 3,070 jobs or 43.1%. Community and Entertainment reported the largest job increase at indoor stadiums and arenas of 3,660 jobs or 71.7% while Office gained jobs

in retail trade administration, 2,000 jobs or 39.8%. In all three categories, employment gains outweighed employment losses as a result of the pandemic.

Both Retail and Manufacturing & Warehousing experienced an overall decrease in employment in 2023. Retail was negatively impacted the most by COVID-19 as the category lost 1,030 jobs (see Table 11). Nearly half of the job losses reported were at furniture, carpet, and electronics stores, down 500 jobs or 48.6%, while in Manufacturing and Warehousing, the clothing subcategory was down 140 jobs or 61.2%.

Table 9: Net Employment Change by Type of COVID-19 Impact Reported by Establishments, 2022-2023

Type of COVID-19 Impact	2022	2023	2022-2023	% Change
Significant Employment Decrease	4,900	2,540	-2,360	-48.2%
Significant Employment Increase	21,660	20,150	-1,510	-7.0%
Total Employment Impacted	26,560	22,690	-3,870	-14.6%

Table 10: COVID-19 Reported Employment Change by Category, 2023

Category	Significant Employment Loss			Significant Employment Growth		
	Establishments	Employment	% of Employment	Establishments	Employment	% of Employment
Manufacturing & Warehousing	10	280	11.0%	10	130	0.6%
Retail	20	1,030	40.5%	10	740	3.7%
Service	30	430	16.9%	40	2,270	11.3%
Office	30	580	22.8%	30	4,790	23.8%
Institutional	10	60	2.4%	20	7,110	35.3%
Community & Entertainment	10	160	6.3%	10	5,110	25.4%
Total	110	2,540	11.2%	120	20,150	88.8%

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 Conditions¹¹:

- 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 reason for employment increases due to the pandemic. About one fifth (21.6%) of establishments in 2023 attributed the employment increases caused by the pandemic to consumer behaviour. The next most reported reasons for employment gain by establishments were regulatory (4.3%), business decisions (4.3%), staffing (3.4%), and accounts-related factors (0.9%).

The most commonly reported factor in employment loss due to the pandemic was also consumer behaviour. In 2023, 12.2% of establishments reported employment loss due to the pandemic to consumer behaviour which is a third of what was reported in the year prior (36.3%). Even though this is the fourth year in a row where employment decreases due to the pandemic were attributed to consumer behaviour, the share is noticeably lower, reflecting the

continuing recovery of these businesses from the pandemic.

COVID-19 Impact on Remote Work

Remote work and hybrid work arrangements have continued at many employers since the onset of the pandemic. The Survey was modified to begin tracking remote work trends for employers in the Office and Institutional categories in 2020. Given the popularity in the hybrid work model, the Survey continued to monitor in-person and remote work trends and changes as these insights will influence policy directions and future approaches.

The Survey tracked work-from-home employment during the first three years of the pandemic, looking at 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. In 2023, the Survey shifted towards tracking remote work employment to reflect the changing nature of work, and in particular, hybrid working, due to the pandemic. The citywide collection of information on remote work was targeted to collect the number of active total employees working remotely and the number of days those employees work on-site during an average week.

Data was collected and recorded as percentages to allow for a balance between collecting precise employment data for each establishment versus the changing configuration of employment undertaken by many businesses.

In 2023, 70.9% of the establishments across the city answered the additional questions providing insights on remote work trends. Of those businesses, 85.8% reported having no active employees working remotely while 14.2% did.

About 10.1% of establishments in the city confirmed having staff who are working remotely at least some of the time, which is noticeably higher than last year (6.8%). One in four establishments (25.6%) that adopted a hybrid work model reported having employees work on-site three days a week on average.

Consistent with last year, the majority of remote work was reported in establishments in the Office category (74.0%). This trend reflects the continued use of a hybrid work model that was accelerated by the pandemic. Geographically, remote work was highest in Downtown which has high proportions of office-based employment. In 2023, 30.2% of Downtown establishments reported 142,880 employees working remotely, or 9.3% of total jobs across the city. The Downtown Office Occupancy Index, a calculation by Strategic Regional Research Associates of the number of downtown Toronto office employees working in-person compared to pre-pandemic levels, has been steadily rising in 2023 with an index of 56% in November compared to 36% in November 2022.¹²

Reporting on the Occupancy Index also notes that office occupancy still varies significantly throughout the week, with a peak of 69% on Wednesdays and only 33% on Fridays, which results in uneven demand on the transportation system and for service and retail uses patronized by office workers. As the prevalence of hybrid work arrangements continues in the Office category, there will be ongoing consequences for the demand for office space. Toronto's downtown office vacancy rate continues to increase, up from 8.7% in Q3 2022 to 10.7% in Q3 2023.¹³ City Planning continues to monitor these trends and explore possibilities for adding new uses to these spaces.

The Institutional category reported 8.0% of establishments with remote work employment, which is a slight increase of from 2022 (7.1%). The remaining categories of Manufacturing and Warehousing, Retail, Service, and Community and Entertainment each reported less than 8.0% remote work employment – a similar composition to 2022 and 2021 (see Figure 23).

The highest remote work percentages amongst all establishments were reported within legal services, computer services, and investment services again this year. The nature of work for these businesses more easily allows for remote work, or remote work continues where it was adopted under the pandemic restrictions. The lowest remote work percentages were again reported in entertainment and recreation establishments such as indoor sporting and recreation, where an in-person presence is central to service provision.

Monitoring in-person and remote work trends and changes will continue to be important to policy directions and future approaches. This bulletin is not a static reflection of the state of employment across the city but instead reflects

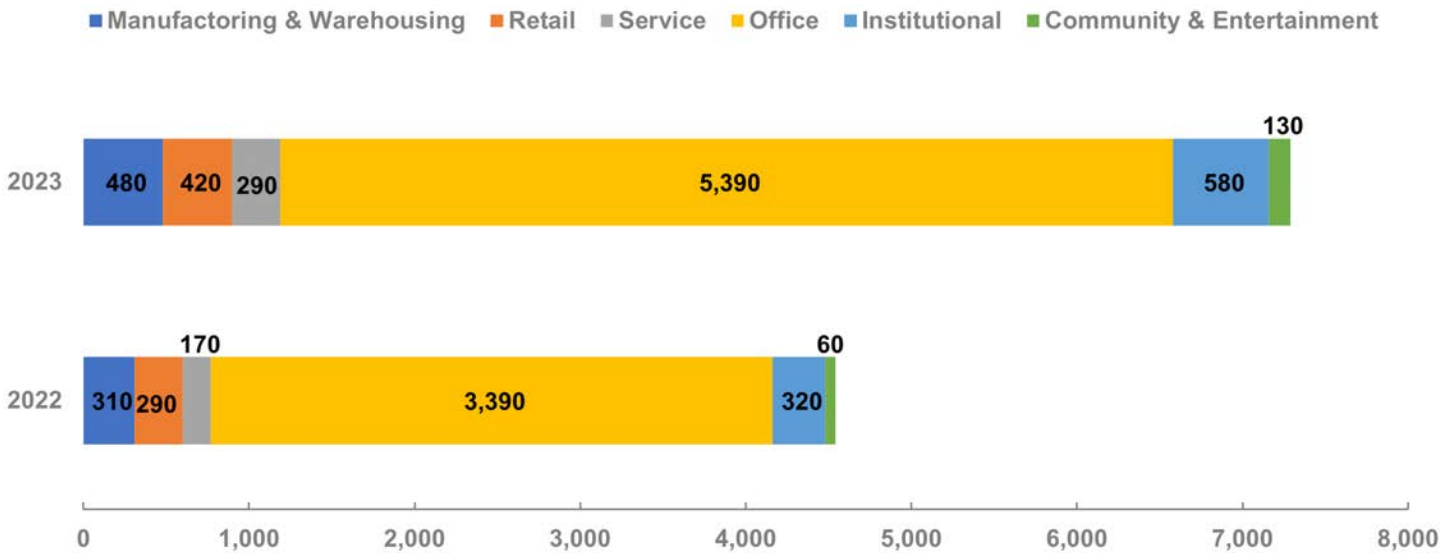
the changing nature of work and the locations of work that impact land use policy outcomes for the city.

This year, Statistics Canada released information collected by the 2021 Census related to place of work, which is useful to better understand the emergence of remote work arrangements. As the Census reference week was in May 2021, when there were public health measures in place and COVID-19 pandemic-related impacts on employment, this information may be interpreted as reflecting a mid-pandemic moment in time rather than evidence of a broader shift in places of work. Nevertheless, remote work has proven to be a new reality for many employers. According to the Census, almost half (49.6%) of employed Toronto residents worked at a usual place of work, 39.0% worked from home and 11.5% did not have a usual place of work.¹⁴ A significantly higher proportion of Toronto residents worked from home than other residents of the GTHA (31.5%) and the Canadian average (24.3%).¹⁵ This is a major shift from the 2016 Census, when approximately 80% of employed Toronto residents reported working at a

usual place of work, 7.4% worked from home, and 11.5% did not have a usual place of work.¹⁶

The 2021 Toronto Employment Survey reported that among establishments that responded to the survey, which took place between May and September 2021, 28% of businesses reported having some form of work-from-home employment. These businesses represented 27% of employment in Toronto. The higher work-from-home figure from the Census data may reflect differences in the timing of data collection and may include respondents who are self-employed and/or who worked for a business without a physical location.

Figure 23: Number of Establishments Reporting Remote Work Employment by Category, 2022-2023



Special Topic: TES Benchmarks 2018-2023

In the context of the many changes over the last five years, with the COVID-19 pandemic disrupting long-term trends, significant local and global economic events, and accelerated shifts in the nature of work, it is interesting to look at where employment in Toronto is today in relation to the employment picture in 2018. The 2018 Toronto Employment Survey bulletin observed strong economic growth in the city with Office employment as a “growth driver” and the city’s Downtown attracting most new establishments and employment. This was taking place in the context of rising consumer and business confidence. In addition, part-time employment was found to be growing at a faster pace than full-time employment over the previous decade. In the following year, the 2019 bulletin observed that these key trends were ongoing.

In 2023, Toronto is three years along from the onset of the COVID-19 pandemic. In 2022 and 2023, the city is building back from the significant losses of 2020 and 2021. The 2023 employment total of 1,535,290 is comparable to the 2018 employment count of 1,522,880, although it is still shy of the record number of 1,569,800 jobs reached in 2019. Conversely, the number of establishments in Toronto, while also growing in the last two years to reach 72,530 in 2023, is still much lower than the 2018 count of 75,640 and the higher figure of 76,560 establishments in 2019, showing the lingering impact of the pandemic on businesses and growing job concentration.

In the broader economy, the booming growth observed before the pandemic has been replaced by a more stable or a slow-growth context, which is forecasted to continue in the short-term.¹⁷ Office continues to comprise approximately half of all jobs in the city, however Institutional jobs have experienced the most growth in the last five years and comprise 18.4% of Toronto’s employment in 2023, compared to 16.8% in 2018.

Community and Entertainment jobs and Service jobs were most impacted by the pandemic and have declined significantly since 2018, marking 18.9% and 12.4% decreases, respectively. Similarly, a higher proportion of part-time jobs were lost due to the pandemic than full-time jobs, a break in the trend of faster growth in 2018 and 2019. While full-time jobs have exceeded pre-pandemic levels in 2023, the same is not true for part-time jobs. There were 355,910 part-time jobs in 2023, compared to 375,870 in 2018 and 390,850 in 2019.

Over the past five years, Downtown has contained just under 40% of the jobs in the city. Due to the pandemic, Downtown reported a drastic decline in 2020 losing 47,350 jobs. This is the lowest share of employment in Downtown over the last five years. Downtown has been continuing to recover since the stresses of the pandemic and three years later, in 2023, Downtown reported the highest employment count reported in the last five years at 601,010 jobs. This represents a gain of 35,790 jobs or 6.3% since 2018. This year also reported the highest density of employment over the five years at 28,000 jobs per km² or 280 jobs per hectare versus 26,420 jobs per km² or 264 jobs per hectare in 2018. This increase of 1,500 jobs within Downtown highlights the growing economy and intensification of business and economic activities in this area over the years.

Between 2018 and 2023, Employment Areas experienced the most growth among the growth management areas with a 125.0% increase of new establishments which reinforces the need to maintain these areas which are critical for business formation.

A notable trend that has emerged since 2018 is the rise in remote work and hybrid working arrangements. This was not counted in the Toronto Employment Survey until 2020, but its prevalence among establishments still in 2023 and after the public health measures of the early pandemic suggest it is here to stay in some capacity.

Appendix

Data Limitations and Response Rate

In 2023, 50,910 establishments out of 72,530 responded to the Survey, representing a 70% response rate from identified business establishments. Responses represent 891,320 jobs or 58.1% of all employment in the city. This is higher than the Survey's response rate of 62% in 2022 but lower than the typical 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 and Warehousing 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 remote work, or where remote work 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, 2023

Sector	Average Response Rate
Manufacturing and Warehousing	72%
Retail	81%
Service	75%
Office	64%
Institutional	65%
Community and Entertainment	49%
Total	70%

Table A2: Average Response Rate by Major NAICS Sector Breakdown, 2023

NAICS Major Sector	Average Response Rate
Not Coded	11%
Agriculture, Forestry, Fishing and Hunting	62%
Mining, Quarrying, and Oil and Gas Extraction	31%
Utilities	39%
Construction	68%
Manufacturing	74%
Wholesale Trade	74%
Retail Trade	82%
Transportation and Warehousing	64%
Information and Cultural Industries	60%
Finance and Insurance	60%
Real Estate and Rental and Leasing	60%
Professional, Scientific and Technical Services	62%
Management of Companies and Enterprises	56%
Administrative and Support, Waste Management and Remediation Services	60%
Educational Services	73%
Health Care and Social Assistance	71%
Arts, Entertainment and Recreation	60%
Accommodation and Food Services	70%
Other Services (Except Public Administration)	74%
Public Administration	59%
Total	70%

Table A3: Secondary Plan Area Employment by Six Categories, 2023

Number	Secondary Plan Area	Manufacturing & Warehousing	Retail	Service	Office Institutional	Community & Entertainment	Total
1	Agincourt	640	650	490	2,000	160	3,950
2	Highland Creek	10	80	400	290	3,180	4,270
3	Morningside Heights	0	0	0	0	150	150
4	Port Union Village Community	0	0	10	0	0	10
5	Scarborough Centre	620	3,000	1,320	8,280	310	13,720
6	Yonge St. Clair	30	550	890	12,120	1,000	14,720
7	Downsview Area	4,120	840	2,030	770	1,550	9,630
8	North York Centre	70	1,700	3,180	26,940	2,070	34,770
9	Sheppard East Subway Corridor	10	3,600	1,470	4,660	4,980	14,920
10	York University	0	50	560	640	7,590	8,910
11	Motel Strip	20	50	200	140	130	530
12	Etobicoke Centre	30	600	1,020	7,040	920	9,780
13	Fort York Neighbourhood	0	340	70	30	480	970
14	Garrison Common North	220	1,590	2,740	15,050	4,950	25,070
15	King-Parliament	60	1,230	1,790	9,640	1,920	15,150
16	King-Spadina	500	1,770	6,790	26,800	1,170	38,870
17	Railway Lands East	90	420	2,070	29,970	30	36,530
18	Railway Lands Central	0	70	1,710	2,540	20	6,490
19	Railway Lands West	0	270	280	180	110	910
20	University of Toronto	50	200	520	1,820	16,140	19,250
21	Yonge Eglinton	40	3,350	3,920	19,830	2,910	30,850
22	Central Finch	10	30	40	470	50	610
23	Sheppard West/Dublin	0	320	380	590	290	1,660
24	Central Don Mills	10	680	810	1,510	900	4,000
25	Swansea	140	130	70	200	200	800
26	Emery Village	30	110	200	470	220	1,030
27	Davenport Village	0	0	10	10	0	20
28	Regent Park	20	150	110	260	310	950
29	Sheppard Avenue Commercial Area	0	30	50	550	30	680
30	Warden Woods	330	20	30	10	230	650

Table A3 continues on next page

Table A3 continued

Number	Secondary Plan Area	Manufacturing & Warehousing	Retail	Service	Office Institutional	Community & Entertainment	Total
31	Central Waterfront	1,250	1,360	4,230	35,130	1,510	46,390
32	Lawrence-Allen	10	5,850	1,760	4,410	2,800	15,000
33	Mimico-by-the-Lake	20	160	120	230	20	550
34	Queen River	10	90	0	10	210	320
35	Mimico-Judson	120	30	110	40	0	290
36	Dufferin St **	20	490	410	430	10	1,350
37	Sheppard Lansing Area	0	20	60	560	80	730
38	ConsumersNext	90	590	970	19,580	1,260	22,600
39	Rail Deck Park	0	0	0	0	0	0
40	Don Mills Crossing	30	260	20	1,140	110	1,580
41	Downtown Plan *	3,150	23,170	47,240	408,310	95,300	593,080
42	Unilever Precinct	0	0	0	590	0	590
43	Sherway Area **	30	4,240	1,820	1,060	9,060	16,240
44	Keele Finch **	170	780	630	1,480	300	3,350
45	Golden Mile **	900	3,320	800	1,100	330	6,540
46	Christie's	0	0	0	10	0	10
47	Keele St. Clair **	440	1,130	810	370	270	3,100
48	Mount Dennis **	850	350	990	1,220	1,960	5,460
49	Yonge Street North **	10	990	730	680	200	2,640

Note: Totals may not equal sums due to rounding. 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.

* 156,840 jobs within Downtown are also captured in other Secondary Plan areas, including King-Parliament, University of Toronto, Regent Park, Central Waterfront, Fort York Neighbourhood, Queen River, King-Spadina, Railway Lands East, Railway Lands West, and Railway Lands Central. The overlap by six categories include 1,040 Manufacturing & Warehousing jobs, 5,550 Retail jobs, 15,480 Service jobs, 103,770 Office jobs, 21,270 Institutional jobs, and 9,750 Community & Entertainment jobs.

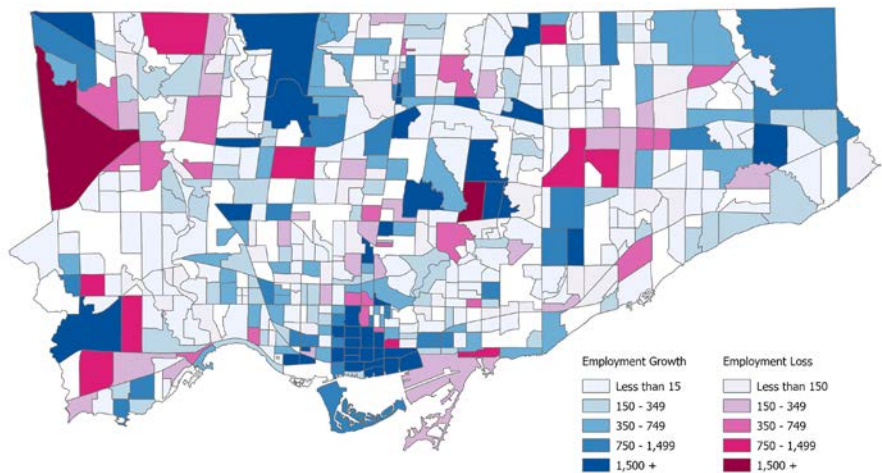
** Seven Secondary Plan areas have been adopted by Council but have not yet been approved by the Province or are under appeal and thus may be subject to change, pending Ontario Land Tribunal decisions.

Table A4: Employment in Employment Areas by Major NAICS Sector Breakdown, 2023

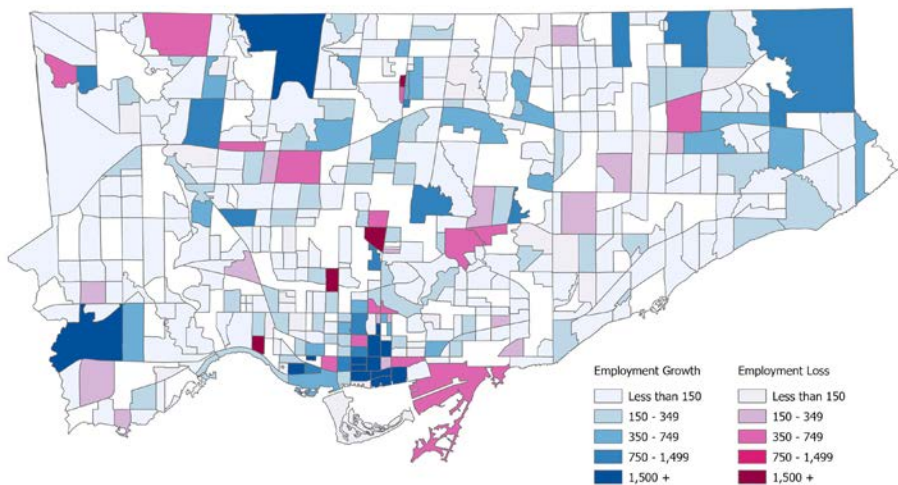
NAICS Sector	Employment
Manufacturing	75,320
Wholesale and Retail Trade	65,830
Professional, Scientific and Technical Services	43,010
Transportation and Warehousing	33,450
Administrative and Support, Waste Management and Remediation Services	28,480
Construction	24,320
Other Services (Except Public Administration)	18,090
Finance and Insurance	17,050
Accommodation and Food Services	15,190
Information and Cultural Industries	14,710
Health Care and Social Assistance	14,430
Public Administration	13,670
Real Estate and Rental and Leasing	13,230
Educational Services	6,690
Management of Companies and Enterprises	6,150
Arts, Entertainment and Recreation	5,440
Utilities	2,720
Agriculture et al.	70
Mining et al.	0
Total	397,910

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

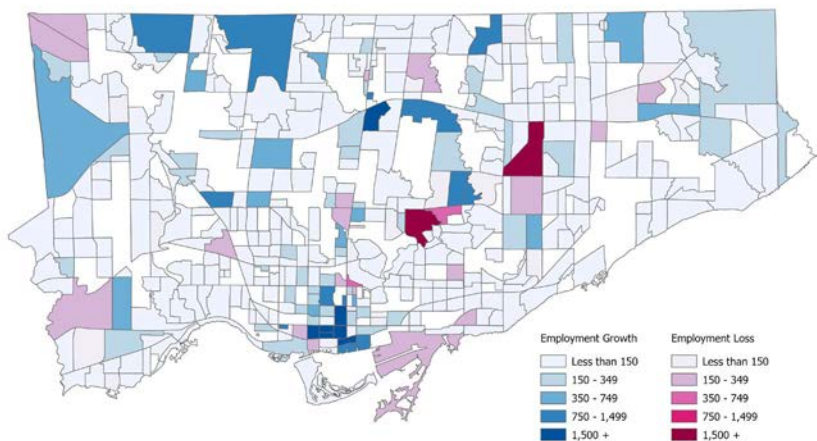
Map A1: 2002 - 2023 Employment Change by Census Tract



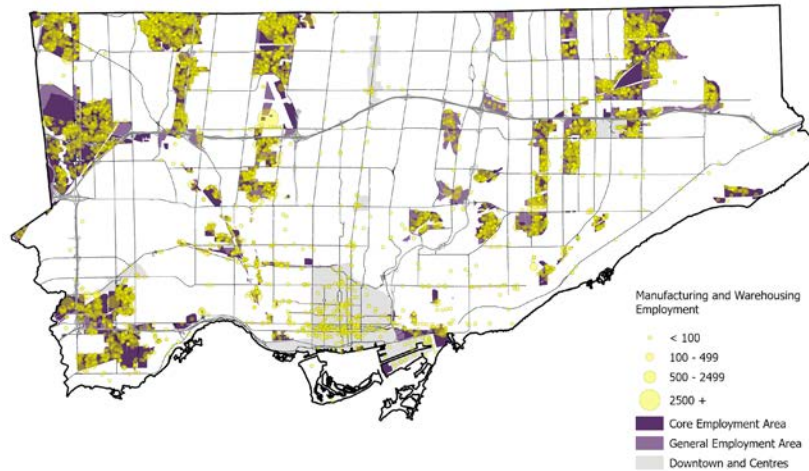
Map A2: 2020 - 2023 Employment Change by Census Tract



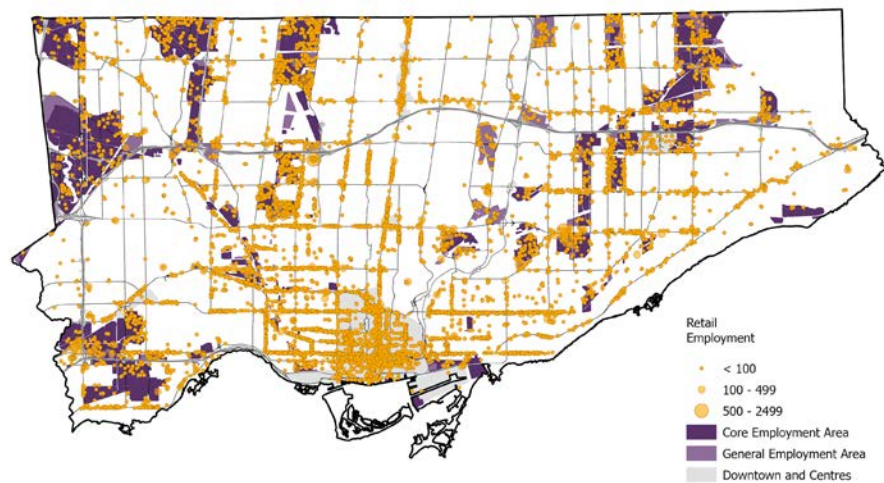
Map A3: 2022 - 2023 Employment Change by Census Tract



Map A4: Spatial Distribution of Manufacturing and Warehousing Employment



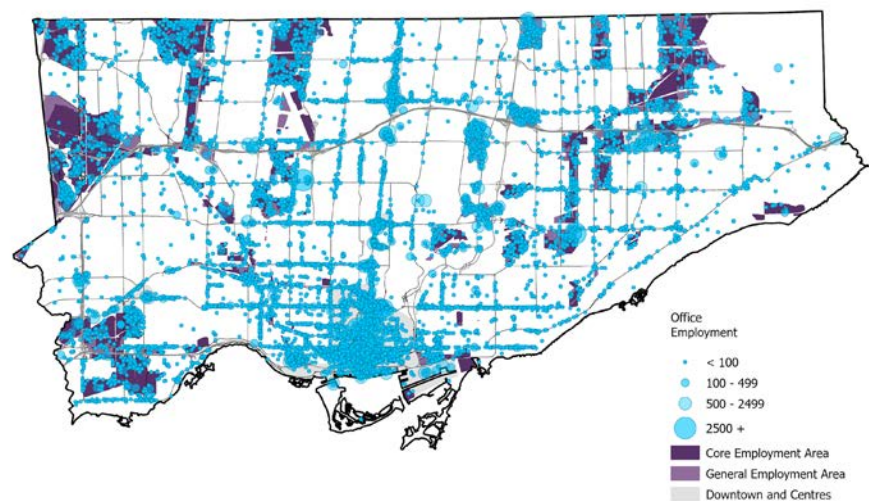
Map A5: Spatial Distribution of Retail Employment



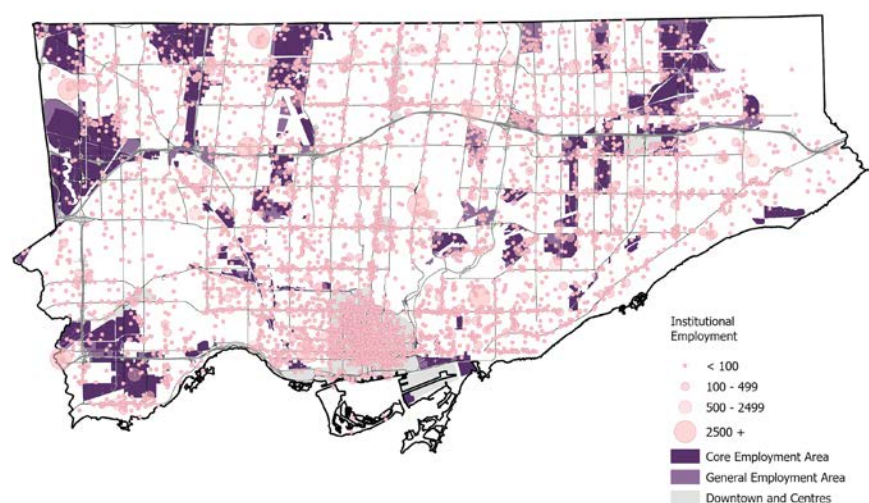
Map A6: Spatial Distribution of Service Employment



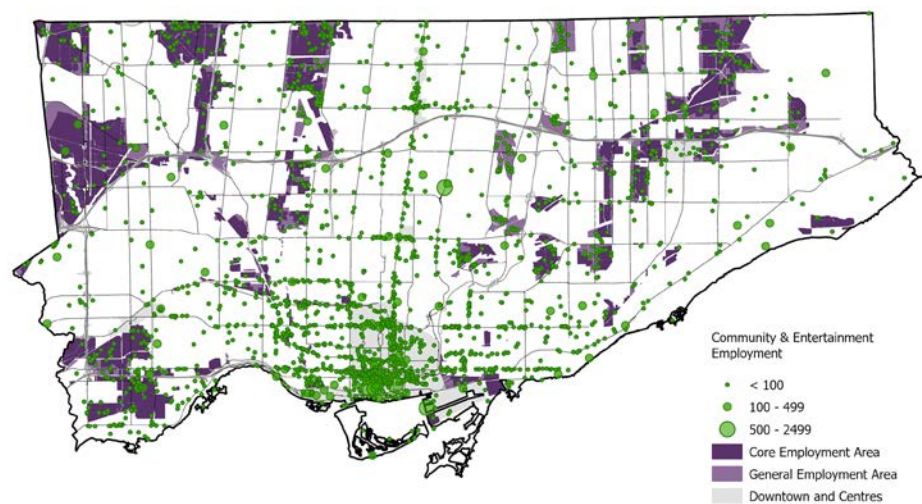
Map A7: Spatial Distribution of Office Employment



Map A8: Spatial Distribution of Institutional Employment



Map A9 Spatial Distribution of Community & Entertainment Employment



Endnotes

1. TD Provincial Economic Forecast (September 20, 2023) <https://economics.td.com/domains/economics.td.com/documents/reports/pef/ProvincialEconomicForecast-Sep2023.pdf>
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