

Toronto Employment Survey 2025

Date: November 19, 2025

To: Planning and Housing Committee

From: Chief Planner and Executive Director, City Planning

Wards: All

SUMMARY

The attached Bulletin summarizes the results of the 2025 Toronto Employment Survey, the 43rd annual survey, highlighting key findings and counts of employment and business establishments in Toronto, such as:

- In 2025, the Toronto Employment Survey recorded 1,623,710 jobs citywide, marking a new record high.
- Full-time employment increased by 24,940 jobs from 2024 to 1,243,620 jobs while part-time employment decreased by 1,530 jobs to 380,090 jobs.
- There are 74,560 establishments, a net increase of 1,380 or 1.9% over 2024.
- The Office category continued to make up the largest share of Toronto employment, with 50.1% of jobs.
- Downtown has a total of 664,650 jobs, exceeding last year's record high and representing 40.9% of the city's total employment.
- Employment Areas contained 21,440 establishments or 28.8% of the city total and 381,270 jobs or 23.5% of the city total.
- Consistent since 2023, a quarter of businesses have reported having employees work on-site three days a week on average.
- Tariff-exposed sectors experienced a 2.8% decrease in employment, while all other sectors had a 2.1% increase, a difference of 4.9%.

The Bulletin reports on the type and longevity of establishments and employment activity in Downtown, the Districts, the Centres, designated Employment Areas, Secondary Plan areas and Areas of Employment across the city. The Bulletin also discusses the impacts of tariffs on Toronto's employment and hybrid work, which the Toronto Employment Survey has been tracking since the onset of the COVID-19 Pandemic.

RECOMMENDATIONS

The Chief Planner and Executive Director, City Planning recommends that:

1. Planning and Housing Committee receive this report for information.

FINANCIAL IMPACT

The City Planning Division confirms that there are no financial implications resulting from the recommendations included in this report in the current budget year or in future years.

The Chief Financial Officer and Treasurer has reviewed this report and agrees with the information as presented in the Financial Impact Section.

DECISION HISTORY

Since 1983, the City has conducted an annual survey of Toronto business establishments to monitor economic activity, provide information for policy and decision-making, and offer additional context for the planning of public works and city services. Using a consistent coding system of land parcel uses and occupant activities, the Survey provides over forty years of time-series information for long-term analysis of employment activity and land use in Toronto.

Aggregated results of the Toronto Employment Survey are used by City Planning and other City divisions to monitor economic conditions, to review the progress of Official Plan policies, and to inform emerging policy directions that may be required to respond to economic changes. The Survey's results are used to develop long-range employment projections and in the planning of municipal infrastructure and services. This Bulletin summarizes the results of the Toronto Employment Survey conducted between May and September 2025. For more information, please visit us at:

<https://www.toronto.ca/employmentsurvey>.

COMMENTS

The Toronto Employment Survey collects land use and employment information that is unique to the city of Toronto. Each year, a team of surveyors collects information directly from businesses through in-person visits, with follow-up phone calls and e-mails as required. Unlike some business surveys that rely on sampling and indirect sources, the Survey collects information directly from business owners, managers, and employees of the 74,560 establishments in all areas of Toronto. The Survey questions evolve based on Toronto's changing economic conditions. In recent years, additional information has been collected about volunteers, remote work, key reasons for significant increases or decreases in staffing, and this year, exposure to tariffs.

The sections below contain highlights from the 2025 Toronto Employment Survey. The attached Bulletin is a more detailed look at these results with accompanying figures, tables and maps for additional context.

Total Employment

- The Toronto Employment Survey counted 1,623,710 jobs in 2025.
- In 2025, total employment increased 1.5%, up 23,410 jobs over 2024.
- Full-time employment increased by 24,940 jobs (2.0%) from 2024 to 1,243,620 jobs.
- Part-time employment decreased by 1,530 jobs (-0.4%) from 2024 to 380,090 jobs.

Number of Establishments

- In 2025, the Survey counted 74,560 establishments, a net increase of 1,380 or 1.9% over 2024.
- A total of 5,160 establishments were new to the city in 2025. Of these, 1,550 are located in Employment Areas (30.1%), 1,190 in Downtown (23.1%), 290 in the Centres (5.6%), and 2,120 (41.2%) in the rest of the city.
- Three out of ten businesses are less than five years old.
- The Office category had the most new establishments in 2025 with 1,830.

Employment by Category

- Manufacturing and Warehousing experienced a slight increase of 40 establishments or 0.8% in 2025 but had the largest year-over-year decline in employment, with a loss of 4,000 jobs or 3.1%
- Retail employment declined 2,820 jobs or 1.9% and was the only category to lose establishments (-0.2%) in 2025.
- Service gained 5,150 jobs or 2.9% this year and had the second largest share of establishments citywide at 26.3%.
- The Office category continued to make up the largest share of Toronto employment, with 50.1% of jobs, demonstrating its importance to Toronto's economy.
- Institutional lost 3,010 jobs or 1.0% in 2025 after four consecutive years of growth but leads the six categories with a 20.8% growth over the past decade.
- Community and Entertainment gained 4,230 new jobs or 7.9%, being the category with the largest relative employment growth among the six categories for the fourth year in a row.

Downtown

- Downtown has a total of 664,650 jobs, exceeding last year's record high and representing 40.9% of the city's total employment in 2025.
- Job intensification continues in Downtown as the average employment density increased to 30,970 jobs per square kilometre or 310 jobs per hectare in 2025.
- The majority Downtown jobs are in the Office category with 447,310 jobs or 67.3%.

Districts and Centres

- The majority of jobs are located in Toronto and East York District (53.4%), followed by North York (19.2%), Etobicoke York (15.4%) and Scarborough (12.0%).
- The four Centres, Yonge-Eglinton Centre, North York Centre, Scarborough Centre, and Etobicoke Centre, had an overall employment increase of 1.5% in 2025 amounting to 77,460 jobs or 4.8% of the city's total employment.

Employment Areas

- Employment Areas contained 21,440 establishments or 28.8% of the city total and 381,270 jobs or 23.5% of the city total.
- In 2025, 30.8% of new establishments in the city were located in Employment Areas.
- Employment Areas continue to be one of the primary concentrations of employment in the city with most Manufacturing (91.9%), Utilities (81.6%), and Construction (74.2%) jobs being in these areas.
- Core Employment Areas contained 63.4% of all jobs in Employment Areas, 14.9% of all citywide employment.
- General Employment Areas contained 36.6% of all jobs in Employment Areas, 8.6% of citywide employment.

Secondary Plan Areas

- Secondary Plan areas account for 926,897 jobs or 57.1% of citywide employment, an increase of 10,130 jobs or 1.1% from last year.
- The Downtown Plan area remains the largest Secondary Plan area in terms of employment, having grown by 3.1% to 652,260 jobs.
- Office continues to be the largest employment category in Secondary Plan areas with 63.2% of employment and 45.7% of establishments.

Areas of Employment

- According to the Planning Act, an “‘area of employment’ means an area of land designated in an official plan for clusters of business and economic uses”. These uses include manufacturing, uses related to research and development in connection with manufacturing, warehousing, associated retail and office uses, and ancillary facilities.
- There are 23 Areas of Employment (AOEs) in Toronto which represent geographic clusters of lands designated as either Core Employment Area or General Employment Area in the Official Plan.
- In 2025, employment in the AOEs accounted for 412,100 jobs, or 25.4% of all citywide employment, and 22,530 establishments, or 30.2% of the total.
- Manufacturing remains the largest sector within AOEs with 76,450 jobs in 2025.

Regional Employment Policies

- Toronto is forecast to accommodate 1.98 million jobs by the year 2051, as per the Official Plan and the Reference forecast scenario supporting the Provincial Growth Plan for the Greater Golden Horseshoe, 2020.

- Policy 2.1.2 of Provincial Planning Statement, 2024 allows municipalities to continue to forecast growth using forecasts previously issued by the Province for the purposes of land use planning.
- Toronto is on track to achieve the 2051 forecast by or before 2043, based on the 2025 Toronto Employment Survey results which show a ten-year rate of growth that is more than double the rate anticipated by the Growth Plan forecast.

Hybrid Work

The Toronto Employment Survey has been tracking work-from-home employment since the onset of the COVID-19 Pandemic. The collected remote work data provides valuable insights into the changing nature of the traditional work model, allowing the City to monitor in-person and hybrid work trends.

- Despite a higher response rate in 2025 for questions related to remote work, the shares of businesses reporting remote work or not remained relatively consistent with 85.7% of businesses reporting having no remote work and 14.3% having remote work.
- The majority of establishments reporting remote work are found in the Office category at 75.9%.
- Consistent since 2023, a quarter of businesses have reported having employees work on-site three days a week on average.
- Geographically, remote work remains highest in Downtown with 33.2% of establishments reporting hybrid work, accounting for 156,730 employees working remotely, an increase of 29,840 employees from 2024.

Tariff Impacts

In 2025, a new question was added to the Toronto Employment Survey to assess the direct and indirect impacts of tariffs on targeted businesses engaged in international trade. Understanding the link between the level of direct exposure to tariffs and employment outcomes will help guide future research on tariffs and the industries most affected by them.

- Tariff-exposed businesses were selected from the NAICS sectors: Construction, Manufacturing, Wholesale Trade, Transportation and Warehousing, and all NAICS codes related to Film Production.
- There was a response rate of 53.9% as 4,890 out of the 9,070 businesses in tariff-exposed sectors responded to the Import/Export question.
- Tariff-exposed sectors experienced a 2.8% decrease in employment, while all other sectors had a 2.1% increase, a difference of 4.9%.
- The most exposed sector is Wholesale Trade (52.9% of responses) followed by Manufacturing (39.7%), and Transportation and Warehousing (35.9%).
- In 2025, 42.1% of employment taking place in AOE's were tariff-exposed.

Data Collection

- In 2025, 59,540 establishments out of 74,560 responded to the survey, a response rate of 80%.
- Responses represent 1,068,690 jobs or 65.8% employment in the city.

2026 Toronto Employment Survey

The annual Toronto Employment Survey is important for land use planning and economic development purposes as it provides a time-series dataset for analysis of employment and land use change over time. The 2026 Survey will begin in May 2026, with the fieldwork scheduled to be completed by August 2026. This will be the 44th year of the Survey program.

City Planning will continue to monitor changes in employment, and report on notable changes such as trends in working from home, as this will have an impact on future policy directions.

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SIGNATURE

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ATTACHMENTS

Attachment 1: Toronto Employment Survey 2025 Bulletin