

This bulletin summarizes the highlights of the 2014 City of Toronto annual Employment Survey, marking its 32<sup>nd</sup> consecutive year.

This information resource presents a picture of change in Toronto's economy throughout the past three decades.

For more information, please visit us at [www.toronto.ca/demographics/surveys](http://www.toronto.ca/demographics/surveys)



## Highlights

- The 2014 survey counted 1,384,390 jobs.
- Toronto's overall employment in 2014 is up by 1.5% from 2013 adding 20,850 jobs to Toronto's employment base.
- Full-time employment has continued to stay above the 1 million mark for the eighth consecutive year.
- Part-time jobs increased by 1.7% over 2014, totalling 320,860 jobs.
- The Office sector remains the largest sector in Toronto, accounting for almost 1 out of every 2 jobs.
- The Institutional sector was the fastest growing sector in 2014, growing by 4.9% and adding 11,010 jobs.
- The number of establishments surveyed in 2014 was 75,180, a net gain of 430 establishments.
- In 2014, there were approximately 562,370 jobs in Toronto's Downtown and Centres, comprising 40.6% of all jobs in the City.
- Etobicoke Centre was the only Centre to gain employment in 2014, adding 690 jobs and growing by 7.9%.
- North York Centre remains Toronto's largest employment Centre outside of the Downtown with 34,830 jobs.
- In 2014, there were approximately 398,750 jobs in Toronto's Employment Districts, accounting for 28.8% of jobs in Toronto.
- 83.2% of all Manufacturing sector establishments in the City reside in the Employment Districts, representing 92.1% of all Manufacturing jobs in Toronto.
- The number of Manufacturing sector establishments in Toronto remained the same over 2014 with no net loss of establishments.

# Toronto Employment Survey 2014



77.1% Toronto jobs are Service Based.



5,030 business establishments were new to Toronto in 2014.

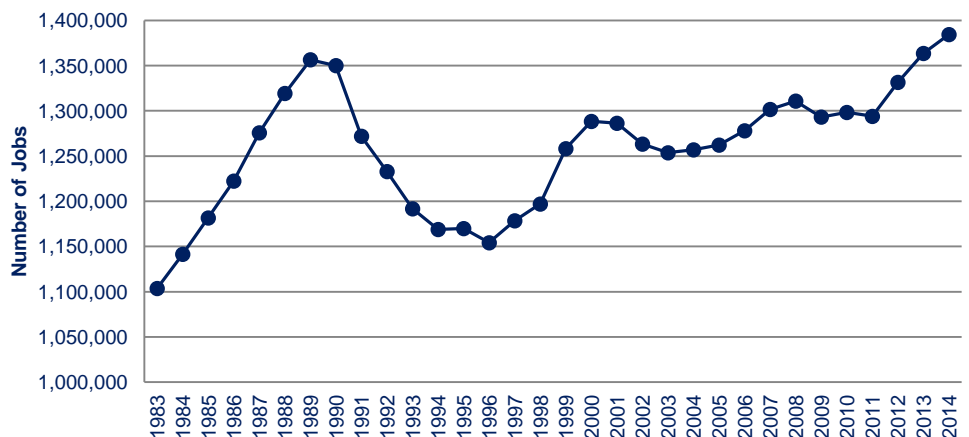


The Institutional sector was the fastest growing sector in Toronto in 2014.

## Toronto Job Count 1,384,390



47.9% of Toronto jobs are in the Office sector.



## Introduction

In 2014, the Toronto Employment Survey counted 1,384,390 jobs in the City of Toronto, surpassing 2013's employment count by 1.5% and adding 20,840 jobs to Toronto's employment base, in the course of one year (see Figure 1). Over the past decade, the City's total employment has grown by 127,450 jobs or 10.1% (see Table 1).

The City of Toronto is home to 2.8 million people and spans over 634.5 km<sup>2</sup> of land, making it Canada's largest city and the fourth largest city in North America.<sup>1</sup> Toronto's workforce constitutes one sixth of Canada's workforce, and is a major economic driver in the country.<sup>2,3</sup> The City's GDP of 157.3 billion dollars accounts for nearly one quarter (24.9%) of Ontario's gross domestic product and 9.2% of our national GDP in 2013.<sup>4,5</sup>

The Toronto region's economy has performed well over the last year,

generating retail sales of 62.3 billion dollars. The region's GDP is estimated to have grown by 2.4% in 2013, far outpacing the provincial growth rate of 1.3% and the national growth rate of 2.0%.<sup>6,7,8</sup>

This bulletin summarizes the results of the 2014 Toronto Employment Survey. It highlights the key findings by sector, the longevity of establishments and emerging patterns in the Centres, Downtown and Employment Districts. The results from the Employment Survey are used to gauge the City's economic and investment health and to monitor the progress of the Official Plan policies.

It is also used to provide background information for the forecasting and planning of infrastructure and services. This annual survey offers a timely insight into the business climate across the City of Toronto to facilitate, accelerate and achieve economic growth. Toronto's 32<sup>nd</sup> Employment Survey was undertaken in the summer of 2014.

Map 1 shows the distribution of employment across the City, with distinct concentrations in the Downtown, Centres and Employment Districts, demonstrating their continued vitality. In 2014, the largest employer in the City of Toronto was the Toronto District School Board (see Table 2). It accounts for more than 32,400 jobs with more than 610 locations throughout the City, representing 2.3% of all jobs in Toronto.

The second largest employer is the Government of Ontario, followed by the City of Toronto, employing 28,550 and 27,620 people in Toronto respectively. Of the ten largest employers in Toronto, five were financial institutions. This indicates the strong presence of major financial institutions as well as government establishments in Toronto's employment landscape.

Figure 1: Toronto Employment, City of Toronto, 1983 - 2014

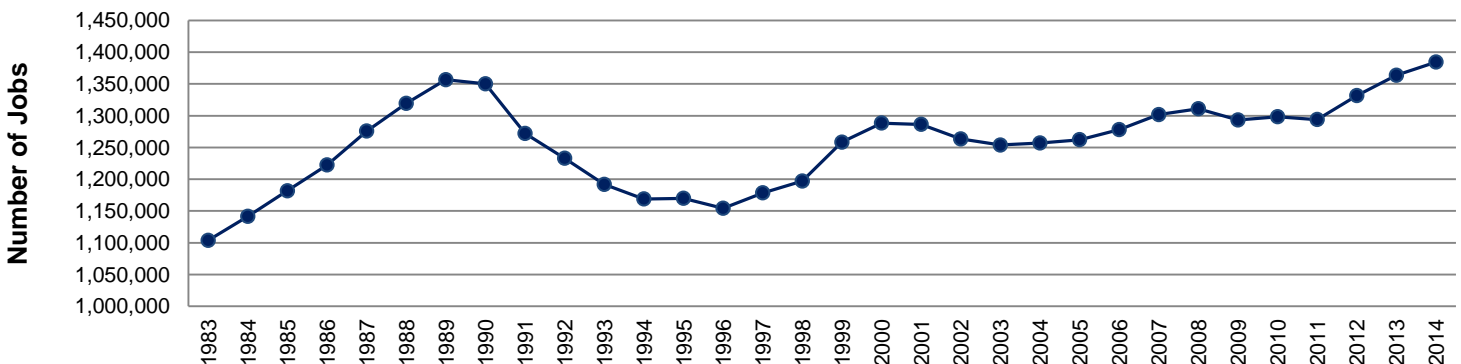


Table 1: Total Employment, 2004, 2013, 2014

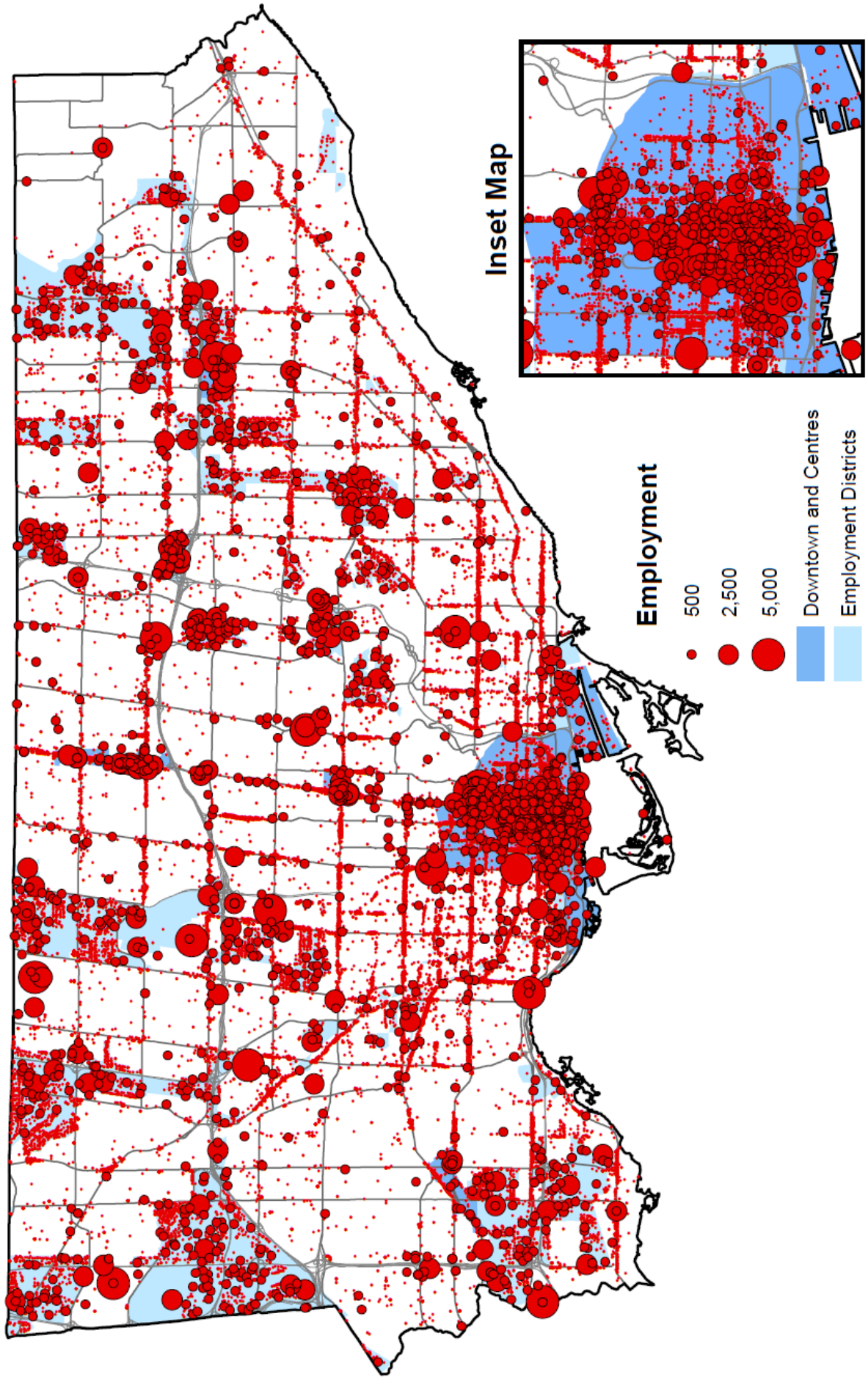
Table 1: Total Employment, 2004, 2013, 2014

Employment	Total Number of Employees			Net Change	Growth Rate %	Net Change	Annual Growth Rate %
	2004	2013	2014				
Full-time	989,100	1,048,150	1,063,540	74,440	7.5%	15,390	1.5%
Part-time	267,850	315,410	320,860	53,010	19.8%	5,450	1.7%
<b>Total</b>	<b>1,256,950</b>	<b>1,363,560</b>	<b>1,384,400</b>	<b>127,450</b>	<b>10.1%</b>	<b>20,840</b>	<b>1.5%</b>

Note: Numbers have been rounded to the nearest ten.

Table 2: 10 Largest Employers, 2014

Employer	Total Employees
Toronto District School Board	32,400
Government of Ontario	28,550
City of Toronto	27,620
RBC Royal Bank	20,670
CIBC	18,850
TD Canada Trust	18,600
Scotiabank	15,270
BMO	12,970
Toronto Transit Commission	12,940
Government of Canada	11,300



# Toronto Employment by Land Use Activity



Over the last year, the number of jobs in Toronto has increased by 1.5% or 20,850 jobs. The Office sector remains the largest employment sector, accounting for nearly half (47.9%) of all jobs found in Toronto (see Figure 2). The Office sector grew by 1.0% over the last year adding 6,290 jobs (see Table 3).

The Institutional sector is Toronto's second largest employment sector. It represents 16.9% of jobs in the City and was the fastest growing sector over 2014, up by 4.9% (see Figure 3). This sector added 11,010 jobs, more than any other sector over 2014.

The Service sector represents 12.3% of jobs in Toronto. Over 2014, this sector experienced moderate growth adding 6,120 jobs and growing by 3.7%.

The Manufacturing sector contains 9.0% of jobs in Toronto, making it

Figure 2: Sectoral Changes Over Time, 2004, 2009, 2014

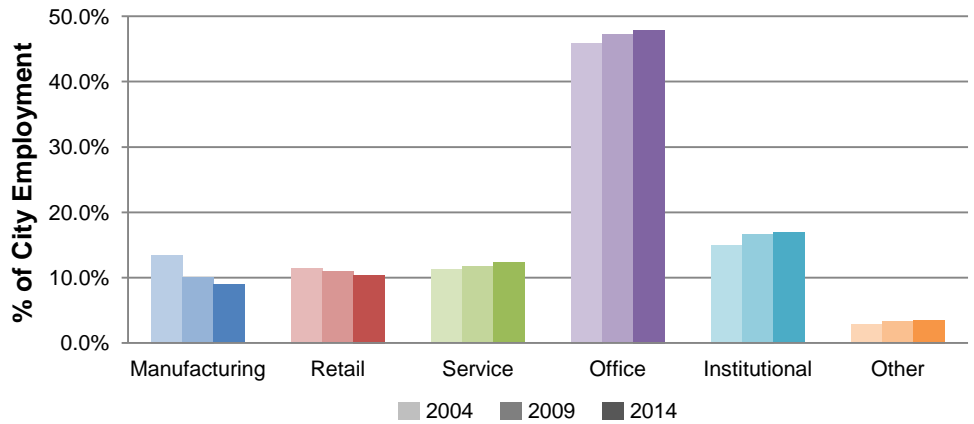
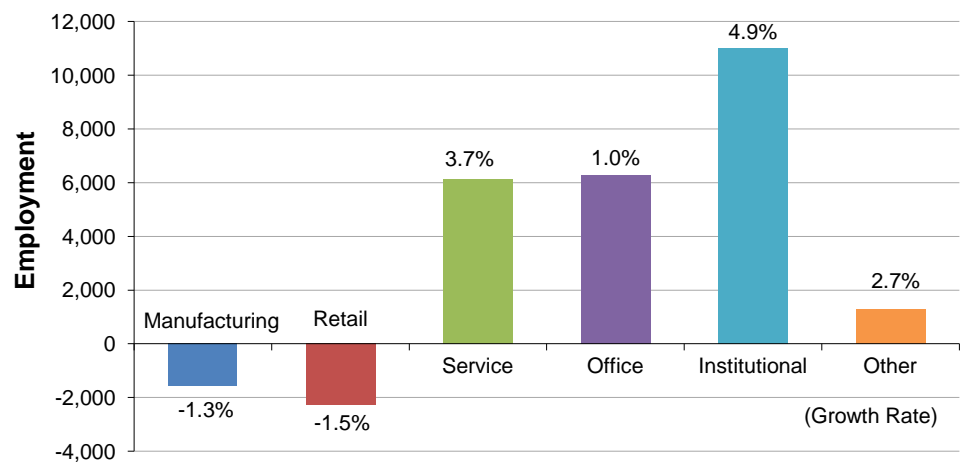


Figure 3: Change in Total Employment by Sector, 2013-2014



the second smallest sector in the City. Over 2014, the sector lost 1,580 jobs shrinking by 1.3%.

The Retail sector saw the greatest loss of employment of all sectors, losing 2,270 jobs in one year, shrinking by 1.5%. The smallest sector in Toronto is the Other sector

which includes entertainment venues, community and recreation uses. It represents 3.5% of jobs in the City. Over 2014, the Other sector grew by 2.7%.

Table 3: Employment by Sector

Table 3: Employment by Sector

Employment	Total Number of Employees				Net Change	Growth Rate %	Net Change	Growth Rate %	Net Change	Growth Rate %
	2004	2009	2013	2014						
Manufacturing	169,210	130,130	126,190	124,610	-44,600	-26.4%	-5,520	-4.2%	-1,580	-1.3%
Retail	144,110	142,280	146,810	144,540	430	0.3%	2,260	1.6%	-2,270	-1.5%
Service	141,910	150,960	164,510	170,630	28,720	20.2%	19,670	13.0%	6,120	3.7%
Office	577,500	610,870	656,680	662,970	85,470	14.8%	52,100	8.5%	6,290	1.0%
Institutional	189,110	216,500	222,720	233,730	44,620	23.6%	17,230	8.0%	11,010	4.9%
Other	35,110	42,460	46,640	47,920	12,810	36.5%	5,460	12.9%	1,280	2.7%
<b>Total</b>	<b>1,256,950</b>	<b>1,293,200</b>	<b>1,363,550</b>	<b>1,384,400</b>	<b>127,450</b>	<b>10.1%</b>	<b>91,200</b>	<b>7.1%</b>	<b>20,850</b>	<b>1.5%</b>

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

## The Past Decade

Over the decade, there have been notable changes in the sectoral composition of Toronto's economy. The number of jobs in Toronto has grown from 1.26 million jobs in 2004 to 1.38 million in 2014, an increase of 10.1%. All sectors with the exception of the Manufacturing sector have grown over the last ten years.

## The Office Sector



Nearly half of all jobs in Toronto reside in the Office sector, representing 47.9% of Toronto's jobs. The Office sector has been Toronto's predominant sector for over thirty years, maintaining its dominance in Toronto's economy. Over the last ten years, Toronto employment has continued to concentrate in the Office sector, adding 85,470 jobs and growing by 14.8%. Over the last five years, the Office sector has continued its steady increase from 610,870 jobs in 2009 to 662,970 jobs in 2014, an increase of 52,100 jobs or 8.5%.

## The Institutional Sector



The Institutional sector has been Toronto's second largest employment sector for nearly twenty years, surpassing the Retail sector in 1984 and the Manufacturing sector in 1992. Currently, the Institutional

sector is the fastest growing sector in Toronto, adding 11,010 jobs in the last year alone. Over the last five years, the sector has added 17,230 jobs and grown by 8.0%.

## The Service Sector



The Service sector represents 12.3% of Toronto's employment. Over the last ten years the sector has consistently maintained its share of employment in Toronto. Over ten years, the Service sector has added 28,720 jobs, growing by 20.2%. While over the last five years, the sector added 19,670 jobs, growing by 13.0%.

## The Retail Sector



Toronto's Retail sector has seen significant change since 2004. At the beginning of the decade, the Retail sector experienced consistent growth in Toronto. The sector declined sharply over the following years due to the global recession, losing more than 10,990 jobs between 2007 and 2010. By 2011, the sector began to recover, showing steady growth. Between 2004 and 2014 the Retail sector managed a very modest net gain of 430 jobs overall, increasing just 0.3%. Over the last year, the sector again lost 2,270 jobs, shrinking by 1.5%. Retail sector employment has yet to recover from the 1991-1992

recession and the 2007-2008 recession. Over the past twenty years, the sector has restructured its built form, use of technology and service delivery methods.

## The Manufacturing Sector



All sectors except the Manufacturing sector have grown over the last ten years. The sector has transformed from what was once Toronto's second *largest* employment sector into Toronto's second *smallest* sector. Manufacturing sector employment continues to decline as a result of the evolution of the North American economy from goods production to services. This sector has shrunk from 169,210 jobs in 2004 to 124,610 jobs in 2014. This is a loss of 44,600 jobs in the last ten years, shrinking this sector by 26.4%. However, over the last five years, the rate of job loss has slowed with just 5,520 jobs lost since 2009 with nine out of ten jobs being lost prior to 2009. Further, over 2014 the Manufacturing sector lost just 1,580 jobs or 1.3%, with the number of Manufacturing establishments remaining the same over the last year.

## The Other Sector



The Other sector is Toronto's smallest employment sector. This sector includes entertainment venues, community and recreation uses. This

sector has shown strong growth over the last decade, increasing its size by 36.5%, much more than any other sector but with a net addition of just 12,810 jobs. Over the last five years, the sector has added 5,460 jobs and grew by 12.9%.

### Employment by Economic Sector



In 2011, City Planning undertook to incorporate the North American Industry Classification System (NAICS) into the data collection process of the Toronto Employment Survey. NAICS was established by Statistics Canada and the statistics agencies of Mexico and the United States to provide a coding standard that allows for data analysis and comparison across municipal, provincial and national boundaries. NAICS coding is extremely detailed and highly specific. Determining the precise industrial classification of individual business establishments requires rigorous training, standards and discipline.

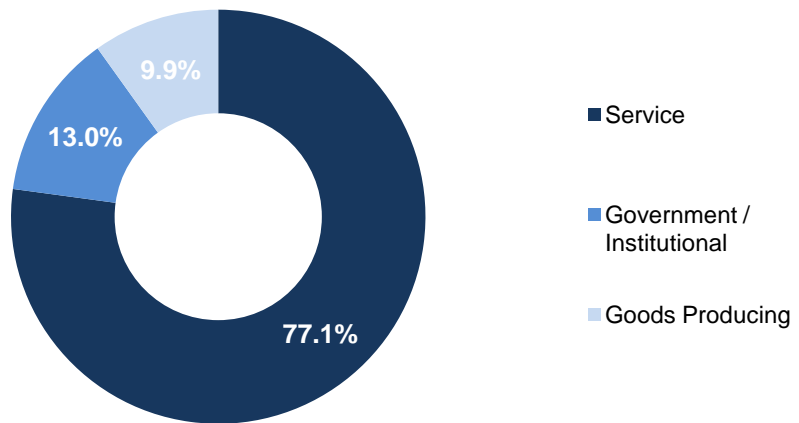
Coding the data to the lowest, most detailed coding enables it to be aggregated to higher levels during analysis and when making comparisons. The NAICS coding for establishments is now quite stable, enabling comparisons over time as well as comparisons to other municipalities in Canada and elsewhere. The Employment Survey was extremely successful in coding

Toronto's establishments with 99.8% of businesses assigned a full 6-digit code.

At the broadest level of analysis, NAICS categories can be broken down into three major industries: Goods Producing, Service Based and Government/Institutional (see Figure 4). More than three quarters (77.1%) of all jobs in the City are Service-Based Industries while 13.0% of employment is in Government/Institutional-Based industries. The remaining 9.9% of jobs in the City

The Health and Social Assistance sector remained the largest NAICS sector in 2014 with 168,830 employees, comprising 12.2% of total employment. This sector grew by 5.6% over 2014 and saw the greatest net increase of any sector, adding 8,940 jobs. This sector is followed closely by the Professional, Scientific and Technical Services sector with 153,360 jobs or 11.1% of all employment. This sector grew by 4.8% over 2014, adding 7,040 jobs.

Figure 4: 2014 Employment by Major Economic Sector

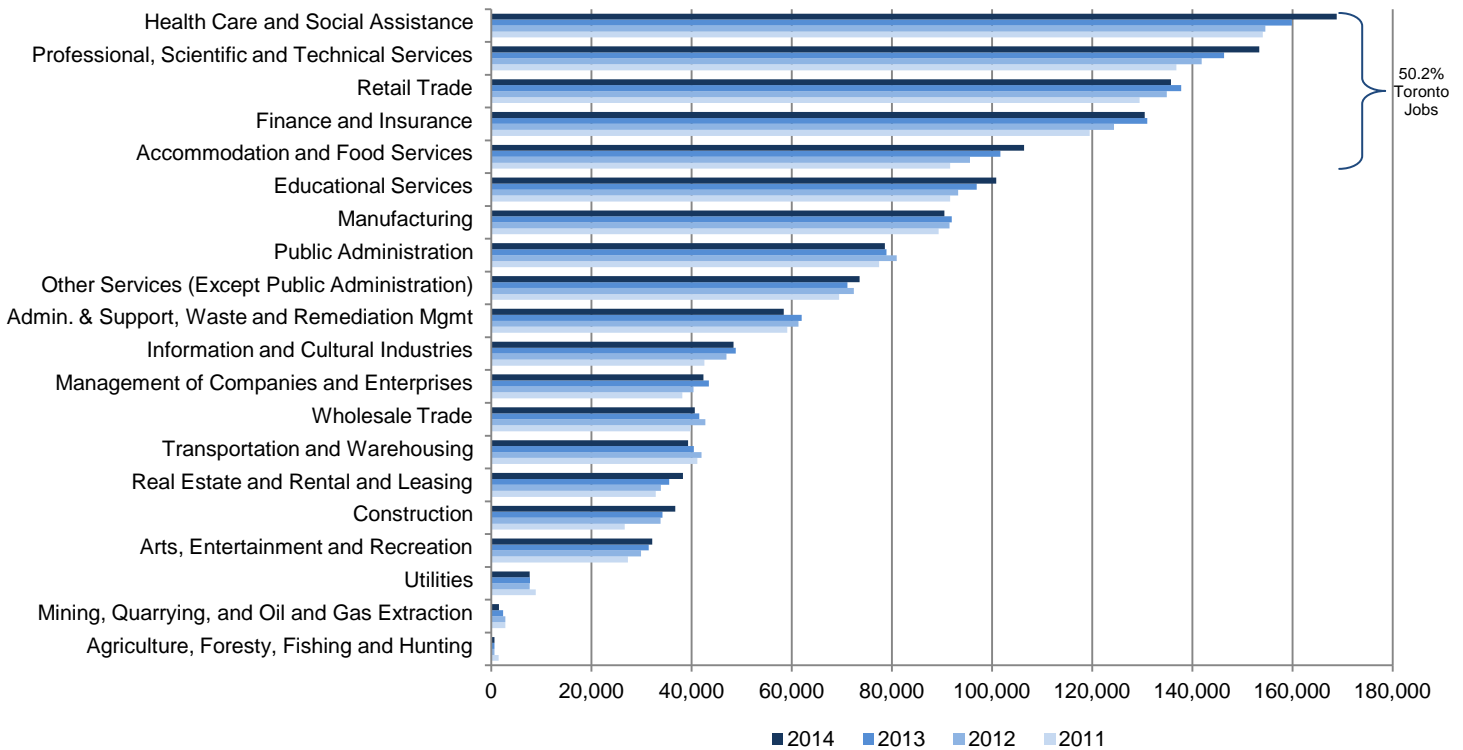


are in Goods Producing industries. All three industries experienced growth over 2014 with Service-Based Industries growing 1.6% or 16,970 jobs, the Government and Institutional sector gaining 3,530 jobs or 2.0% and the Goods Producing Industries growing a modest 0.2% or just 340 jobs in 2014.

NAICS classifies the economy into 20 major sectors. In 2014, just over half (50.2%) of all jobs in Toronto fell into the top five NAICS sectors, indicating that while Toronto's economy is varied, there is a large concentration in certain fields. The top five categories are: Health and Social Assistance; Professional, Scientific and Technical Services; Retail Trade; Finance and Insurance; and Accommodation and Food Services (see Figure 5).

Over 2014, the Real Estate and Rental and Leasing sector and the Construction sector saw the greatest rate of growth with both increasing by 7.6%, adding 2,710 jobs and 2,610 jobs respectively. Other significant gains were seen in the Accommodation and Food Services sector (4.7%). The largest net loss was seen in the Administrative and Support, Waste Management and Remediation Services sector with 3,600 jobs lost (-5.8%).

**Figure 5: 2014 Employment by Economic Sector**

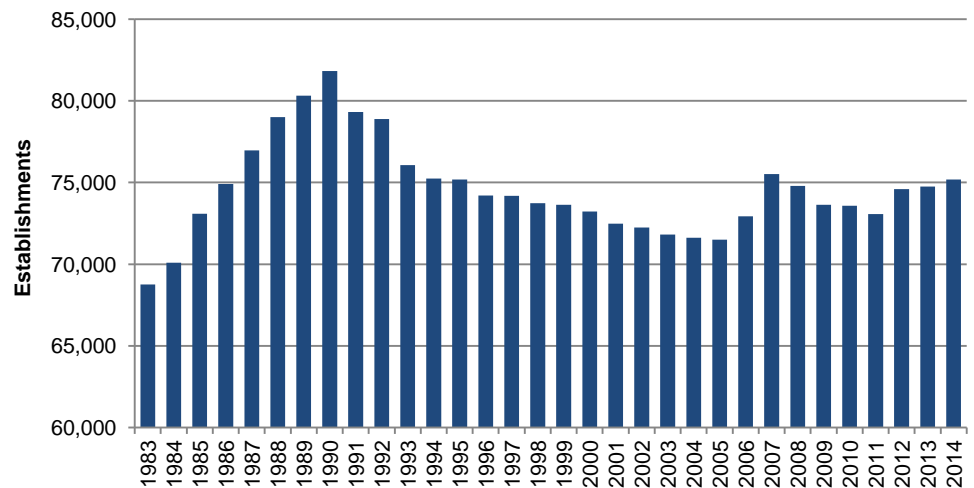


## Number of Establishments

In 2014, the Employment Survey identified 75,180 business establishments in the City of Toronto (see Figure 6). After steadily declining due to the 2008/2009 global recession, the number of establishments in Toronto began to grow in 2012. For the third consecutive year, the number of establishments has increased, adding 430 establishments and growing by 0.6% in the last year alone and adding 1,540 (2.1%) establishments over the last five years. The number of establishments in 2014 is 330 establishments shy of 2007's pre-recession high of 75,570.

While the percentage of establishments increased moderately by 430 establishments (0.6%) in 2014, employment in the City of Toronto has grown by 28,850 jobs in that same time or 1.5%. This means that the average number of people employed per establishment has increased over 2014, to 18.4 versus 18.2 in 2013. The number of "large"

**Figure 6: Total Number of Establishments 1983-2014**



establishments, those with more than 100 employees, has grown by 15 establishments or 0.7% this year. Currently, 2.8% of establishments in Toronto have more than 100 employees.

Manufacturing sector employment has seen a consistent downward trend over the last 10 years, reflecting a similar decline internationally as the North American economy has

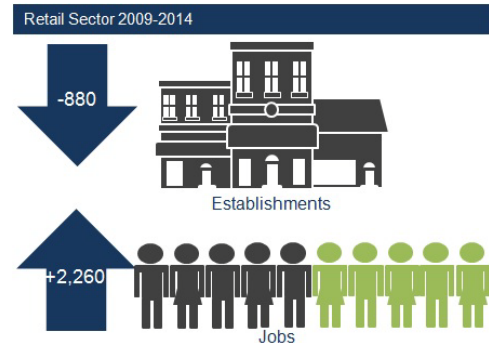
continued to shift from a goods-producing economy to a service-based economy. However, the loss of Manufacturing sector establishments stabilized this year with the net number of Manufacturing establishments holding steady over 2014 with 5,010 establishments, accounting for 6.7% of establishments in the City.

Toronto's sectoral composition reflects an evolving urban economy which remains competitive in a changing national and global market. The decline of Manufacturing sector employment in Toronto has begun to slow since the economic downturn of 2008, demonstrating a continuing demand for Manufacturing activities in the City. Still a centre for opportunity and industrial innovation, 4.7% of establishments new to the City in 2014 are part of the Manufacturing sector, bringing 1,360 Manufacturing jobs to the City.

The Service sector saw the greatest net gain of establishments in 2014, adding 240 establishments or 1.3%, totaling 18,400 establishments in 2014. Over the last decade, the number of Service sector establishments has grown by 10.0% or 1,680 establishments.

Since 2004, the Retail sector has lost 1,560 establishments, down by 9.2% to 15,360 establishments in 2014, the greatest decline by any sector over the period, by far outpacing the Manufacturing sector's losses of 250 establishments or 4.8% (see Figure 7). Over the last five years, the Retail sector outpaced the Manufacturing sector's rate of establishment loss, losing 780 more establishments than the Manufacturing sector. In 2014, the number of Retail establishments declined, losing 310 establishments (2.0%) and was in fact the only sector to lose establishments.

The number of Retail establishments in Toronto has been declining, primarily since 2007. While the number of establishments has been falling, the number of jobs within the sector has not seen the same loss and in fact, has achieved modest net gains over the decade and growing by 2,260 jobs over the last five years.



The continued growth of the Retail sector combined with the decline of Retail establishments has resulted in an increase in the average number of employees per Retail establishment (see Figure 8). In 2004, an average Retail store employed 8.5 employees whereas in 2014, on average, 9.4 employees were employed per establishment. This increase can also be seen over the last five years where the average number of employees per Retail store increased from 8.8 employees to 9.4 employees. This reflects the continued growth of larger retail formats.

### Full-Time, Part-Time and the Retail Sector

Of the nearly 1.4 million jobs in the City; 76.8% are classified as full-time jobs, and growing by 1.5% over the last year (see Figure 9). In 2014, 23.2% of jobs in Toronto were classified as part-time (less than 30 hours per week).

Figure 7: Change in the Number of Establishments, 2004-2014

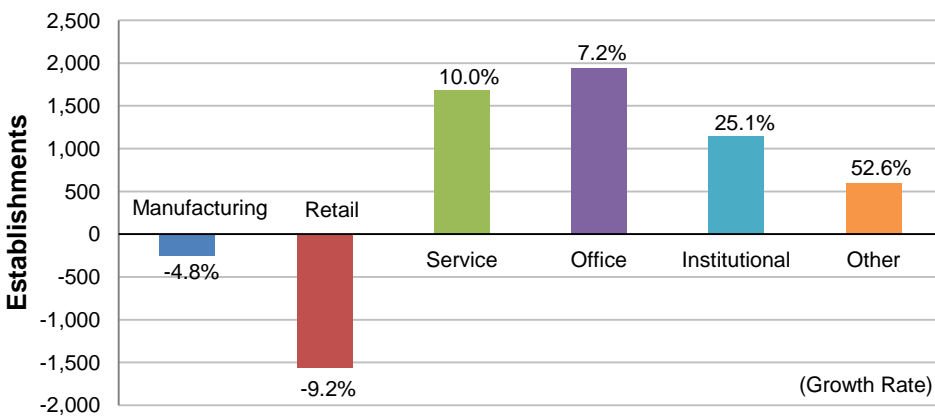


Figure 8: Number of Employees per Establishment, 1983-2014

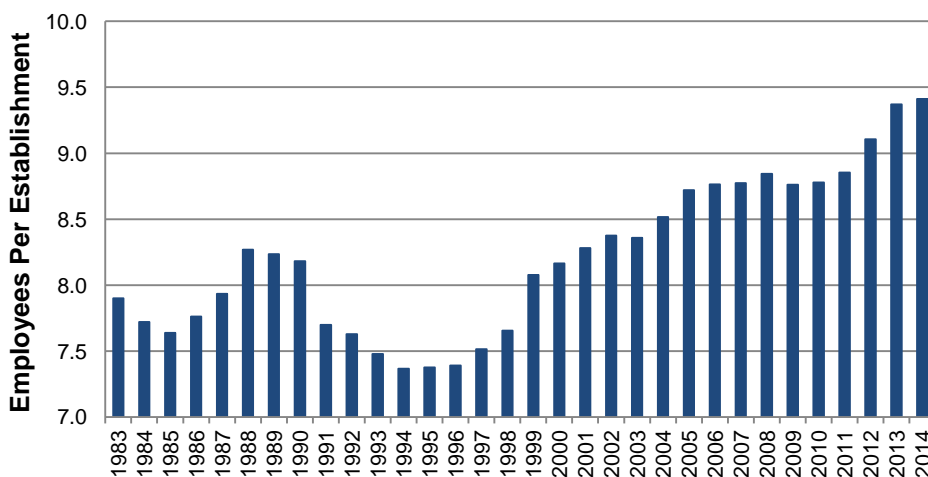


Figure 9: Full-Time and Part-Time Employment in Toronto, 2014

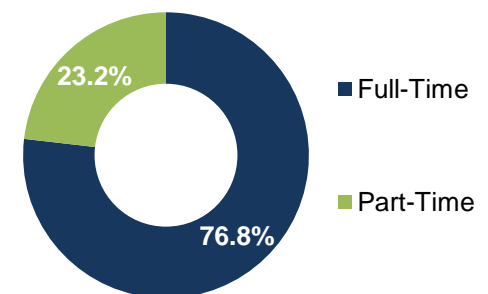
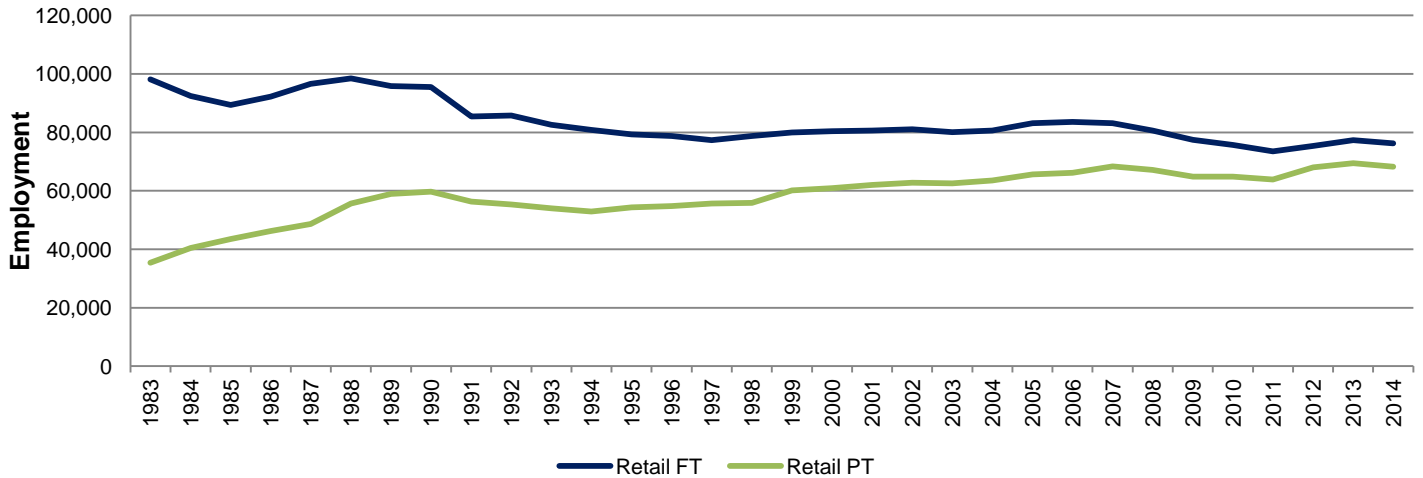




Figure 10: Full-Time and Part-Time Retail Employment, 1983-2014



The proportion of jobs that are categorized as part-time have increased steadily over thirty years. In 1984, only 11.4% of Toronto's jobs were part-time while in 2014, 23.2% are defined as part-time employment; adding 194,470 part-time jobs over thirty years. Since 2009, the percentage of part-time jobs has increased by 1.2% or 36,050 jobs.

The trend of increased part-time employment can be seen most strongly in the Retail sector where in 2014 nearly half of all jobs were part-time (47.2%). The evolution of the sector shows a steady trend towards part-time work from 1984 to present (see Figure 10). The prevalence of stable forms of employment such as permanent full-time jobs with benefits have declined significantly.

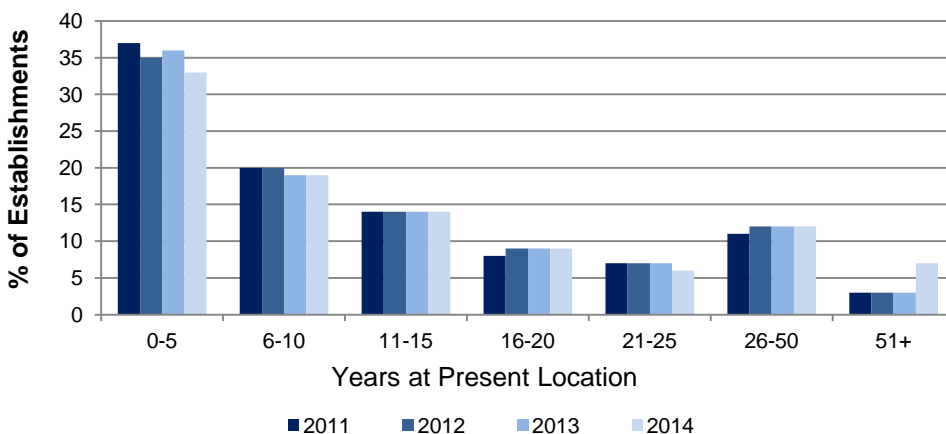
The changes in the Retail sector are consistent with trends seen in a "jobless recovery". This is a phenomenon characterized by slow or declining employment growth despite economic gains.<sup>9</sup> As mentioned previously, Toronto is home to a strong retail economy with the region generating more than 62.3 billion dollars in sales annually, yet the employment growth in this sector has declined over 2014.<sup>10</sup> This jobless recovery is further characterized by the loss of higher paying full-time jobs replaced by part-time jobs with fewer benefits and less security.

The evolution of the Retail sector is unlike other sectors in that it has not recovered to the employment levels prior to the 1991/1992 recession. Employment in the Retail sector peaked in 1990 with 155,220 jobs.

### Longevity

Despite the unsettled global economic conditions, Toronto remains an attractive place for new start-ups and for business to relocate from elsewhere. In 2014, 32.7% of Toronto's business establishments were 5 years old or younger. They comprised the largest number of establishments by length of tenure. This is a decrease over 2013 of 3.5% or -1,500 establishments (see Figure 11). The proportion of establishments in the same location for five years or less has declined over the last five years from 38.4% in 2009 to 32.7% in 2014. This demonstrates that while Toronto remains an attractive place for new business to locate, many of its existing establishments are stable with one quarter (25.2%) of all establishments remaining in the same location for 20 years or longer. The percentage of establishments present between 11 and 15 years in the same location has remained consistent since 2009, between 13.3% and 13.5%. The proportion of establishments that have been well established in Toronto for sixteen years or more stands at 34.5% or 25,960 establishments. This reflects the long-run stability of the local economy despite recessions, economic slumps and continued suburbanization of employment in the areas outside the City. This

Figure 11: Longevity of Existing Establishments



proportion has grown by 4.1% or 3,250 establishments during the past year alone. Further, 19.1% of establishments have operated at their present location for over 25 years, showing a great degree of stability in the City.

## New Establishments in the City

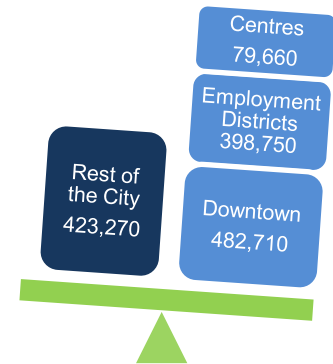
The 2014 Toronto Employment Survey identified more than 5,030 establishments that were new to the City, accounting for 40,870 jobs (see Table 4). In 2014, 6.7% of business establishments were new to Toronto. This number is much greater than the 4,340 establishments that chose to locate in Toronto the previous year. It should be noted that these establishments were not necessarily all new business start-ups, but also includes firms relocating from outside the City or new locations of multi-location firms such as banks

and coffee shops.

Of the 5,030 newly located establishments, more than half (53.3%) were located in the Downtown and in the Employment Districts and employment-related lands, with 1,110 and 1,570 establishments respectively. Another 190 new establishments were in the Centres, and the balance of 2,160 establishments were found elsewhere in the City (see Figure 12).

The greatest number of new establishments in Toronto are in the Office sector and account for 42.6% of all new establishments in 2014. The Service sector followed with 24.2% of new establishments (see Figure 13). Retail sector establishments represented 16.5% of new establishments, and 830 Retail jobs, followed by the Institutional and Other sectors with 7.0% and 5.0% respectively demonstrating the variety of the types of establishments the City attracts and contributing to Toronto's overall economic health.

Despite the trend of reduced Manufacturing sector presence in North American cities, Toronto remains an attractive location for industrial establishments with 230 new Manufacturing establishments choosing to locate in Toronto in 2014 accounting for 1,360 Manufacturing jobs.



## Downtown and Centres

The strength of the regional economy is evident by the concentration of jobs in the Downtown and the four Centres identified in the Official Plan. Downtown Toronto is the largest employment area in the Greater Golden Horseshoe. The Downtown and Centres are critical to the City's growth management strategy as attractive mixed use settings for a diverse range employment and residential growth, making them, and Toronto, an attractive place to live, work, and do business. Map 1 shows the locations and boundaries of the Downtown and Centres, as outlined in the City's Official Plan.

Figure 12: New Establishments by Location, 2014

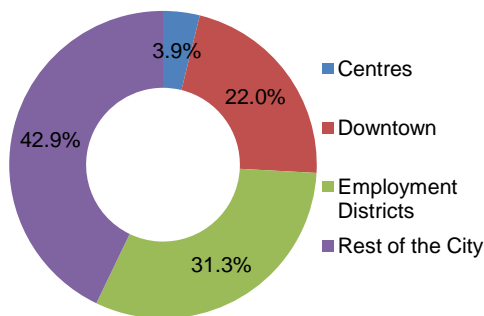


Figure 13: New Establishments by Sector, 2014

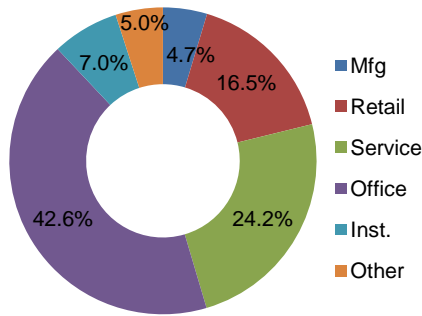


Table 4: New Establishments 2013-2014

Location	2013	2014	Sector	2013	2014
Centres	190	190	Manufacturing	200	230
Downtown	970	1,110	Retail	820	830
Employment District	1,180	1,570	Service	1,070	1,220
Rest of the City	2,000	2,160	Office	1,690	2,150
			Institutional	330	350
			Other	230	250
<b>City Total</b>	<b>4,340</b>	<b>5,030</b>	<b>City Total</b>	<b>4,340</b>	<b>5,030</b>

Note: Numbers have been rounded to the nearest 10.

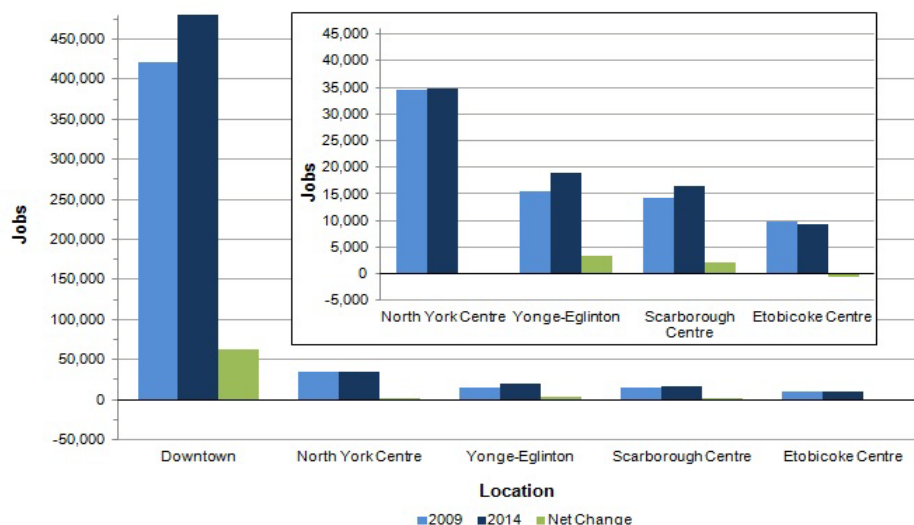
## Downtown



Employment in the Downtown increased 3.2% or 14,890 jobs over 2014, growing 14.8% or 62,250 jobs over five years (see Table 5). The Downtown continues to attract new establishments and in 2014, 22.0% of business establishments new to Toronto chose to locate in Toronto's Downtown.

The Office sector is by far the largest sector in the Downtown, accounting for two of every three jobs (65.4%). The next largest sector is the Institutional sector, which accounts for 13.8% of employment. The Institutional sector grew significantly in 2014, comprising a larger share of employment in the Downtown than in years past. Over the last year, the Institutional sector was also the fastest growing sector in the Downtown, adding 8,090 jobs and growing by 13.8% in just one year.

Figure 14: Employment Change in Downtown and Centres 2009-2014



The sector far outpaced the Office sector which grew by 4,640 jobs or 1.5%, a lower level when compared to last year's growth of 13,200 jobs (4.3%) between 2012 and 2013.

The smallest sector is the Manufacturing sector, representing just 0.9% of employment in the Downtown. Since 2009, all sectors have experienced some growth with the exception of the Manufacturing sector which lost 580 jobs, shrinking 12.0%. The Service sector was the fastest growing sector between 2009 and 2014, growing a substantial 24.2% and adding 10,040 jobs to the Downtown. The Other sector showed strong growth, increasing by 16.7%

over the last five years adding some 2,590 jobs.

## The Centres

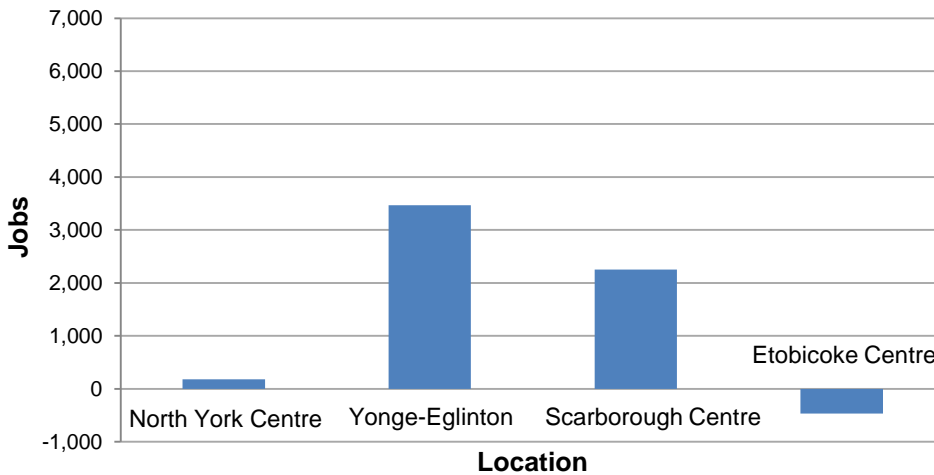
In total, the Centres are home to 79,660 jobs, representing 5.8% of employment in the City. The Centres shrunk by 1,010 jobs in the last year or 1.3%. However, over the last decade, the Centres have grown by 15.8% and 10,850 jobs. Over the last five years, the Centres have grown considerably, increasing by 7.3% and 5,430 jobs (see Figure 14 and 15). Employment is predominantly Office-related with more than three quarters (75.4%) of all employment in this sector (see Figure 16).

Table 5: Total Employment in the Centres and Downtown, 2009-2014

	2009	2010	2011	2012	2013	2014	2009-2014		2013-2014	
							Net Change	% Change	Net Change	% Change
Downtown	420,460	432,810	441,920	446,840	467,820	482,710	62,250	14.8%	14,890	3.2%
North York Centre	34,650	38,790	36,520	36,060	35,350	34,830	180	0.5%	-520	-1.5%
Yonge-Eglinton	15,540	15,840	16,820	17,740	19,760	19,010	3,470	22.3%	-750	-3.8%
Scarborough Centre	14,190	14,700	15,030	15,400	16,870	16,440	2,250	15.9%	-430	-2.5%
Etobicoke Centre	9,850	9,190	8,840	8,660	8,690	9,380	-470	-4.8%	690	7.9%
Downtown and the Centres	494,690	511,330	519,130	524,700	548,490	562,370	67,680	13.7%	13,880	2.5%
Rest of City	798,500	786,970	774,830	806,870	815,060	822,020	23,520	2.9%	6,960	0.9%
<b>City Total</b>	<b>1,293,190</b>	<b>1,298,300</b>	<b>1,293,960</b>	<b>1,331,570</b>	<b>1,363,550</b>	<b>1,384,390</b>	<b>91,200</b>	<b>7.1%</b>	<b>20,840</b>	<b>1.5%</b>

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

**Figure 15: Net Change in Centres Employment 2009-2014**



The Institutional sector grew the most over 2014 adding 250 jobs and growing by 17.1%. Both the Manufacturing and Service sectors saw very modest employment gains of 10 jobs each. All other sectors lost employment, totalling 780 jobs lost from the Retail, Office and Other sectors combined with the Office sector losing the greatest number of jobs (530 or 1.8%).

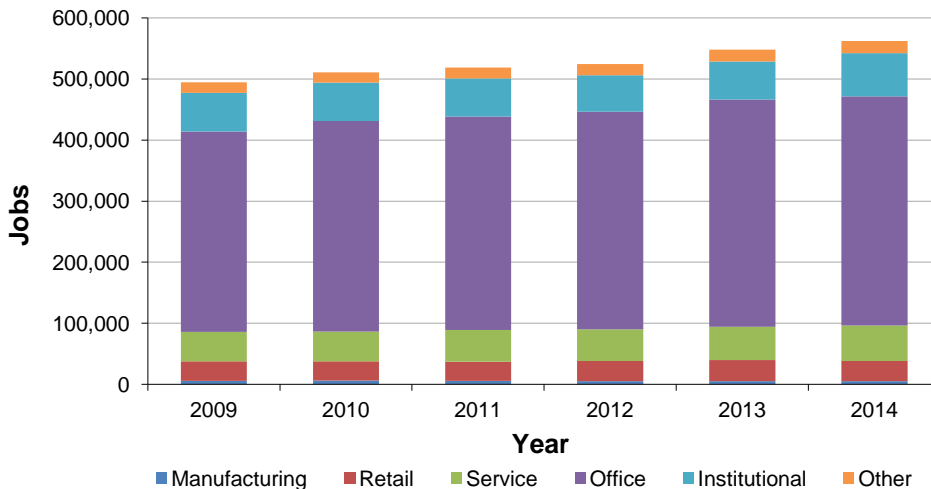
### Yonge-Eglinton



Yonge-Eglinton Centre is the second largest Centre in Toronto. The Centre contains 19,010 jobs representing 1.4% of employment in the City. Employment in this Centre declined for the first time in five years, down 750 jobs or 3.8% over 2014. However, over the last five years, Yonge-Eglinton has grown by 22.3%, adding 3,470 to the Centre.

Employment in the Yonge-Eglinton Centre is overwhelmingly Office-related, with nearly 8 out of every 10 jobs in this sector (79.9%). Over the last five years, the Office sector has increased in size, growing an impressive 29.8% over five years but declining by 4.6% in the last year. Only the Service and Other sectors achieved employment growth in the last year, with all other sectors showing modest losses since 2013.

**Figure 16: Total Employment in Downtown and Centres by Six Sectors, 2009-2014**



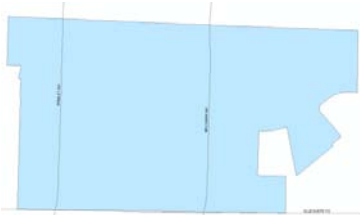
### North York Centre



North York Centre is Toronto's largest Centre and is home to 34,830 jobs, representing 2.5% of jobs in the City. Over the last five years, the Centre has grown by 180 jobs and has consistently lost employment since 2010 with 520 jobs lost this past year.

The Office sector is by far the predominant sector in North York Centre, representing 82.3% of employment, totalling 28,680 jobs. Over 2014, the Office sector shrank by 1.8%, losing 530 jobs and declining for the fourth consecutive year. Over the last five years however, the Office sector has declined by just 0.3%, losing 90 jobs.

## Scarborough Centre



Scarborough Centre contains 16,440 jobs, representing 1.2% of employment found in Toronto. In 2014, Scarborough Centre lost 430 jobs, shrinking by 2.5%. Over the last five years, Scarborough Centre has grown by 15.9%, adding 2,250 jobs and weathering the recession remarkably well. The majority of employment in Scarborough Centre is Office-related. However, unlike North York and Yonge-Eglinton Centres, Scarborough Centre has greater sectoral diversity. The Office sector in Scarborough represents 55.1% of jobs, followed by the Retail sector with 24.7% of jobs in the Centre.

## Etobicoke Centre



Etobicoke Centre is the smallest Centre in Toronto. It is home to 9,380 jobs, representing just 0.7% of employment in Toronto. Etobicoke Centre was the only Centre in 2014 to gain employment, adding 690 jobs and growing by 7.9%. Over the last five years, the Centre has lost 470 jobs, shrinking 4.8% since 2009. This decline in jobs is attributed to downsizing by a number of businesses in the Service, and Retail sectors, which have shrunk by 22.6% and 14.3% since 2009. Similar to Toronto's other Centres, employment in this Centre is dominated by the Office sector with 7 out of every 10 jobs (70.3%) and totalling 6,590 of

jobs found in Etobicoke Centre. In fact, Etobicoke Centre is the only Centre where Office sector employment grew.

## Employment Districts and Employment-Related Lands

Employment Districts and other employment-related lands are characterized by manufacturing, warehousing and product assembly activities as well as commercial business parks. These are regionally and globally competitive locations for national and international business and are areas for business formation. They provide a broad range of job opportunities for Toronto residents and the regional labour force.

Map 2 shows the location, boundaries and sectoral breakdowns of the Employment Districts identified in the City's Official Plan at the time of the 2014 Toronto Employment Survey. The lands represented by the Employment Districts are structural elements of Toronto's economic future in order to ensure a stable environment for investment and to maintain and grow the City's revenue base.

## The Importance of Employment Lands

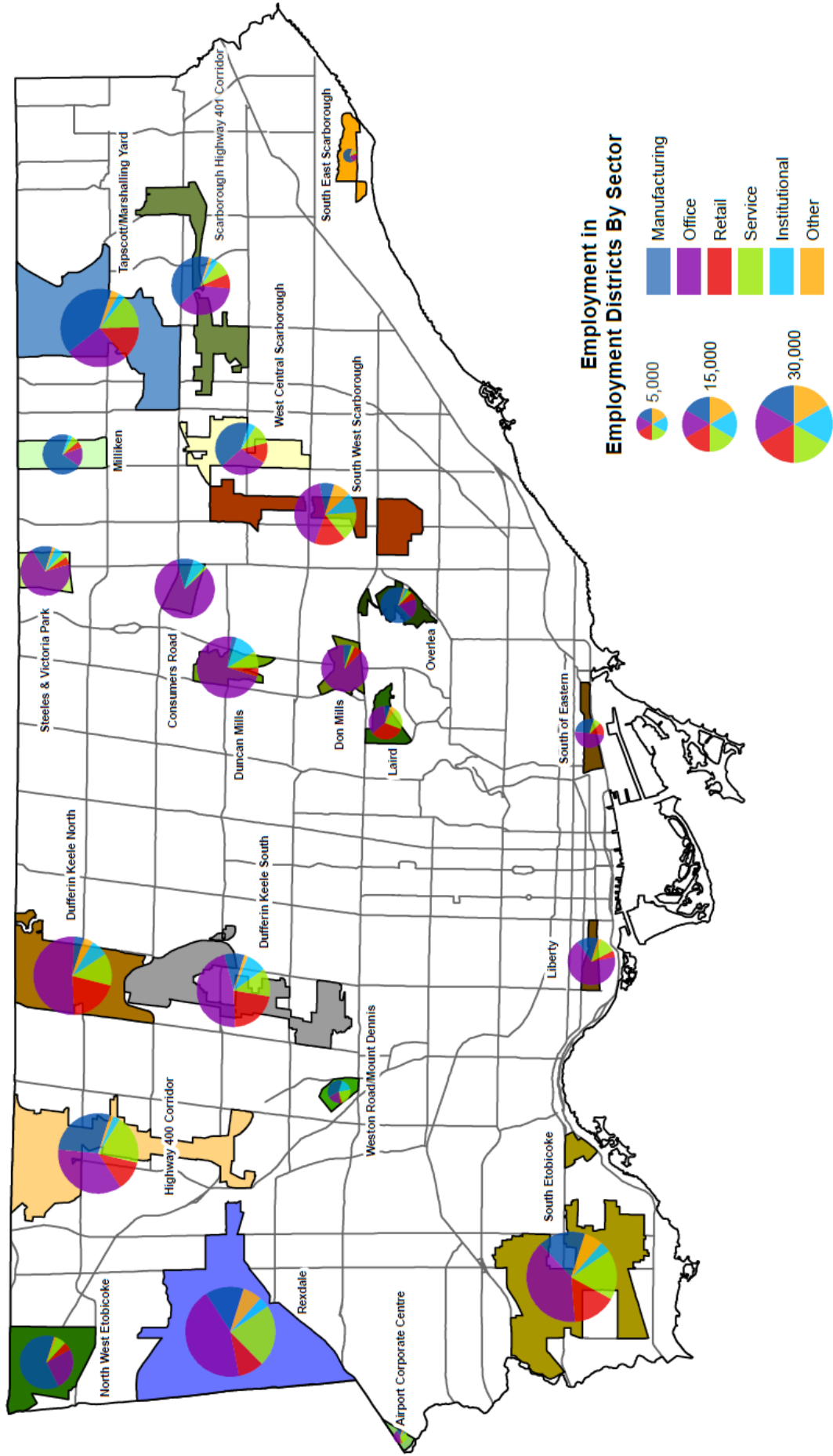
*Places to Grow is the Ontario government's program to plan for growth and development in a way that supports economic prosperity, protects the environment and helps communities achieve a high quality of life across the province. Through Places to Grow, we develop regional growth plans that guide government investments and policies.*  
- Ontario Ministry of Infrastructure<sup>11</sup>

The Provincial Growth Plan for the Greater Golden Horseshoe was amended in 2013 with revised forecasts. The City of Toronto is forecasted to reach employment of



1,640,000 jobs by 2031 and 1,720,000 jobs by 2041. This anticipates that the City will add approximately 7,000 jobs per year over 40 years (2001-2041), increasing the employment base by 19.4%.<sup>12</sup> Employment Districts and employment-related lands are of particular importance to Toronto's economic health. Currently, 21,670 establishments are located in Toronto's Employment Districts. This accounts for more than a quarter (28.8%) of all business establishments in the City and accounts for 398,750 jobs, representing 28.8% of all jobs in Toronto. Further, 83.2% of all Manufacturing establishments reside in Employment Districts, accounting for 92.1% of all Manufacturing jobs in Toronto. Over the last five years, 100 Manufacturing establishments closed their doors in Toronto, and with them 5,060 Manufacturing jobs were lost from Toronto.

The continued loss of Manufacturing sector jobs in Toronto and the conversion of the land they once occupied highlights the need to protect employment lands for other employment uses. The presence of sensitive uses, such as residential uses in an Employment District can destabilize an Employment District, resulting in further losses of Manufacturing establishments. It is the diversity of Toronto's economy that has enabled the City to weather the recent recession reasonably well. The protection of Employment Districts is imperative.



## Employment Districts



Toronto's Employment Districts contain 398,750 jobs; comprising 28.8% of all jobs found in the City (see Table 6). The Employment Districts continued to attract new businesses with 31.3% of new businesses in Toronto in 2014 choosing to locate in Employment Districts. Of those 1,570 new establishments in Employment Districts, 180 were Manufacturing establishments. In fact, four of every five new Manufacturing establishments in Toronto chose to locate in Employment Districts. Employment Districts are particularly important to the Manufacturing sector with 83.2% of all Manufacturing establishments in the City residing in Employment Districts, representing

92.1% of all Manufacturing jobs. Over 2014, the net number of Manufacturing establishments in Toronto remained constant at 5,010 establishments, while the number of Manufacturing jobs declined by 1,690 or 1.5%. Since 2009, Toronto has lost 100 Manufacturing establishments and 5,060 Manufacturing jobs, or 4.2% of the sector. Nearly one third of all Employment District jobs are in the Manufacturing sector, totalling 114,760 jobs (see Figure 17).

Nearly a quarter (24.7%) of all Office sector employment resides in the Employment Districts with 163,720 jobs. The Office sector is now the largest sector in the Employment Districts, representing 41.1% of all District Employment. The Office sector saw a net increase of 3,660 jobs or 2.3% over 2014, this is a greater rate of growth than the Centres and the Downtown saw over the year. In the last five years, the Office sector gained 1,190 jobs, growing by 0.7%.

The third largest sector is the Service sector, representing 12.6% of District employment, and is followed closely by the Retail sector comprising 10.5% of Employment District jobs. The Service sector has continued to grow adding 1,100 jobs last year and 2,880 jobs or 6.1% over the past five years.

The Retail sector has declined by 140 jobs over the last year or -0.3%. Over the last five years, the Retail sector has grown modestly, adding 2,020 jobs and 5.1%. The Institutional and Other sectors are the smallest sectors in the Employment Districts with 17,430 and 10,710 jobs respectively. Both of these sectors saw employment growth over 2014, adding a combined 2,270 jobs to the Employment Districts.

The following section presents trends of the Employment Districts in descending order of employment base (see Figure 18). Employment Districts by sector for 2011 to 2014 are profiled in Table 7 on page 22.

**Table 6: Total Employment in Employment Districts, 2009-2014**

	2009	2010	2011	2012	2013	2014	2009-2014		2013-2014	
							Net Change	% Change	Net Change	% Change
1. South Etobicoke	43,180	40,960	39,820	40,390	41,080	41,040	-2,140	-5.0%	-40	-0.1%
2. Rexdale	44,690	40,000	38,940	39,510	40,790	40,730	-3,960	-8.9%	-60	-0.1%
3. Highway 400 Corridor	32,380	31,470	32,810	33,540	32,490	32,430	50	0.2%	-60	-0.2%
4. Tapscott/Marshalling Yard	30,290	30,420	30,950	30,960	31,440	30,900	610	2.0%	-540	-1.7%
5. Dufferin Keele North	29,500	31,540	32,430	31,080	30,350	30,850	1,350	4.6%	500	1.6%
6. Dufferin Keele South	24,320	23,990	24,610	25,100	26,400	27,100	2,780	11.4%	700	2.7%
7. South West Scarborough	17,830	18,020	18,990	18,670	19,030	19,240	1,410	7.9%	210	1.1%
8. Duncan Mills	17,780	17,900	17,560	18,580	19,090	19,110	1,330	7.5%	20	0.1%
9. Consumers Road	19,790	19,040	18,140	17,490	17,660	18,080	-1,710	-8.6%	420	2.4%
10. Scarborough Highway 401 Corridor	17,410	16,080	16,670	16,820	16,990	17,210	-200	-1.1%	220	1.3%
11. North West Etobicoke	13,160	12,810	12,820	13,010	13,450	14,320	1,160	8.8%	870	6.5%
12. West Central Scarborough	15,060	15,490	15,360	14,730	14,270	13,790	-1,270	-8.4%	-480	-3.4%
13. Steeles & Victoria Park	13,260	12,420	12,500	13,270	13,020	12,360	-900	-6.8%	-660	-5.1%
14. Liberty	7,710	7,550	8,140	8,300	9,450	11,240	3,530	45.8%	1,790	18.9%
15. Don Mills	11,380	11,910	11,390	11,990	11,550	11,140	-240	-2.1%	-410	-3.5%
16. Milliken	7,140	7,070	7,430	7,300	7,550	8,030	890	12.5%	480	6.4%
17. Overlea	6,060	6,270	6,090	6,220	6,150	6,370	310	5.1%	220	3.6%
18. Laird	4,380	4,680	4,550	4,390	4,960	5,620	1,240	28.3%	660	13.3%
19. South of Eastern	5,080	4,650	4,000	3,970	4,280	4,190	-890	-17.5%	-90	-2.1%
20. Weston Road / Mount Dennis	1,720	1,730	1,650	1,850	1,940	2,520	800	46.5%	580	29.9%
21. South East Scarborough	950	970	920	980	980	970	20	2.1%	-10	-1.0%
22. Airport Corporate Centre	1,060	1,040	1,140	1,230	890	900	-160	-15.1%	10	1.1%
23. Other Employment Related Lands	28,430	29,540	28,780	29,480	29,720	30,610	2,180	7.7%	890	3.0%
<b>All Employment Districts</b>	<b>392,560</b>	<b>385,550</b>	<b>385,690</b>	<b>388,860</b>	<b>393,530</b>	<b>398,750</b>	<b>6,190</b>	<b>1.6%</b>	<b>5,220</b>	<b>1.3%</b>
Rest of the City	900,630	912,750	908,270	942,710	970,020	985,640	85,010	9.4%	15,620	1.6%
<b>City Total</b>	<b>1,293,190</b>	<b>1,298,300</b>	<b>1,293,960</b>	<b>1,331,570</b>	<b>1,363,550</b>	<b>1,384,390</b>	<b>91,200</b>	<b>7.1%</b>	<b>20,840</b>	<b>1.5%</b>

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

Figure 17: Total Employment in Employment Districts by Six Sectors, 2009-2014

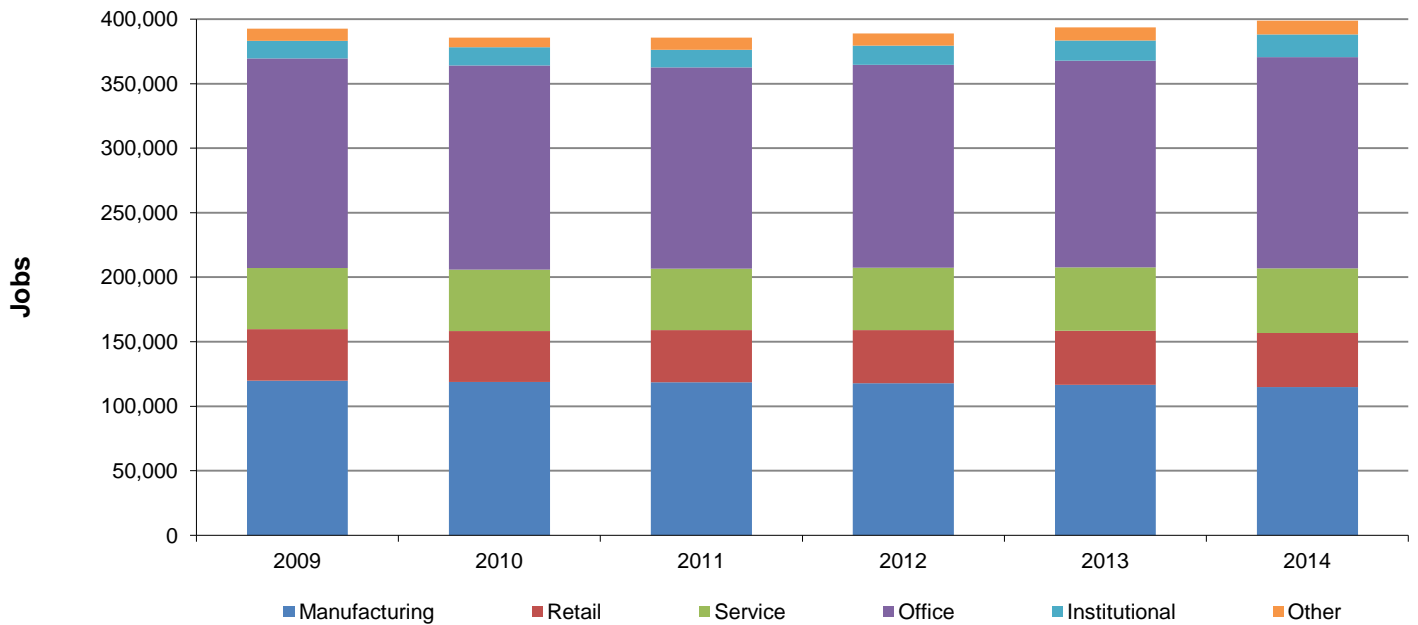
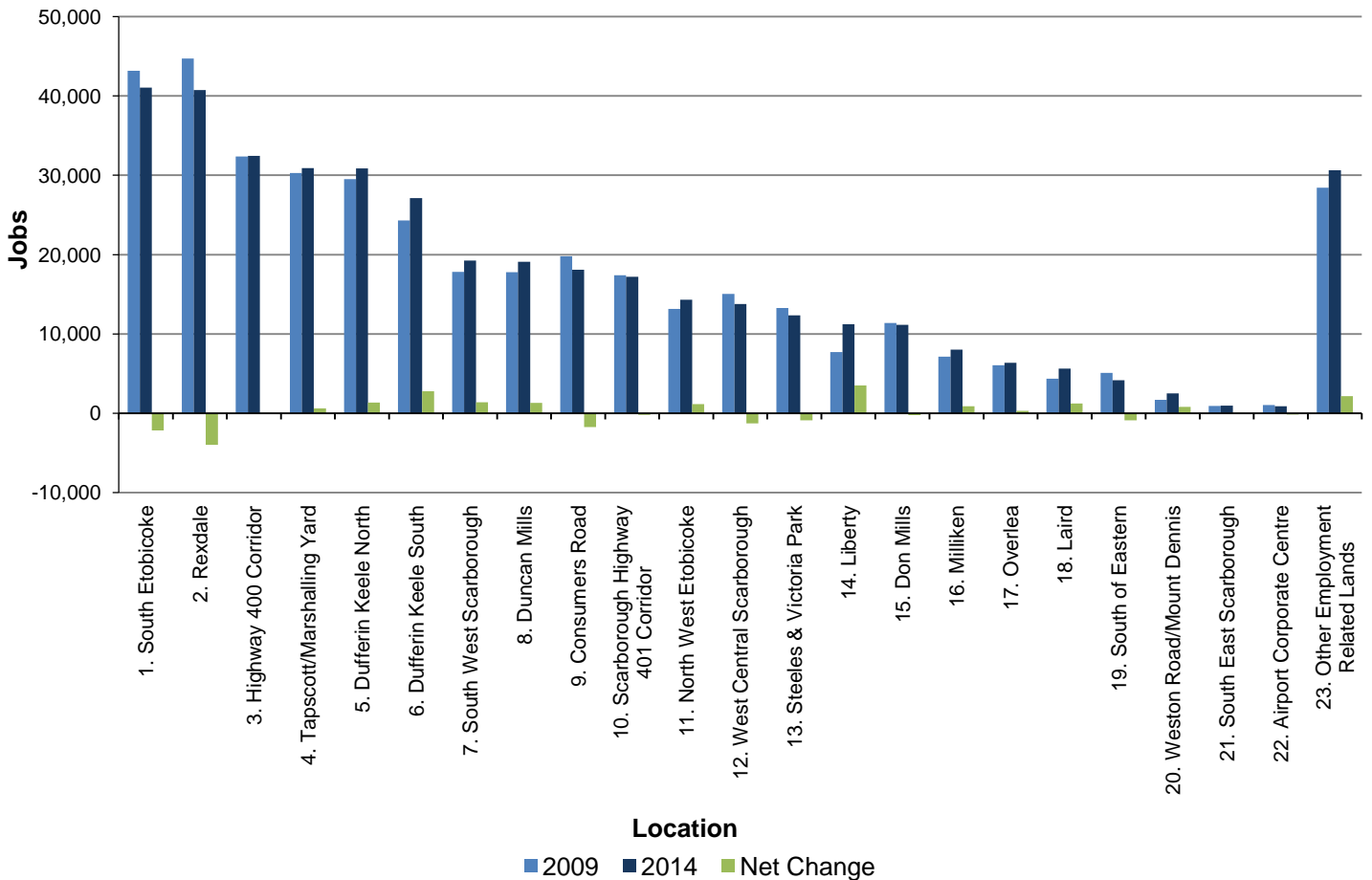


Figure 18: Employment Change in Employment Districts 2009-2014





# Employment Districts

## 1. South Etobicoke



The South Etobicoke Employment District is Toronto's largest concentration of employment

outside of the Downtown, containing 41,040 jobs or 10.3% of all Employment District employment. Employment has declined in the District by 0.1% over past year and 5.0% over the past five years. Manufacturing is the largest sector in the District accounting for 33.5% of jobs. Employment in this sector has decreased significantly over the past five years, losing 2,770 jobs or 16.8%. Over the past year, the Manufacturing sector lost 1,730 jobs declining by 10.5%, the greatest rate of loss seen in the District in the last five years. Declining employment in the Manufacturing sector has been offset by growth in other sectors, particularly the Office, Institutional and Other sectors. The Office sector is the second largest sector in the District, accounting for 31.3% of employment. Over the past five years, employment in this sector has fluctuated, falling from 2009 to 2011 then rising from 2011 to 2014. In 2014, the Office sector added 740 jobs for an increase of 6.1%. The Institutional sector has seen the largest percentage increase over the last five years, increasing from 630 jobs in 2009 to 1,260 in 2014.

## 2. Rexdale



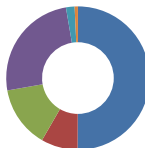
Rexdale is home to 40,730 jobs, accounting for 10.2% of all employment found in the Employment

Districts. Its share of Employment District employment has decreased from 11.4% in 2009, when Rexdale was the largest Employment District in the City with 44,690 jobs. Over the last year, employment in the

District remained relatively stable, decreasing by only 0.1%. The Office sector is the largest sector in the District accounting for 35.3% of employment. This sector has fluctuated over the past five years, shedding 2,110 jobs since 2009 and 1,220 jobs since 2013.

Manufacturing is the second largest sector in the District, accounting for 31.1% of jobs. This sector gained 650 jobs in 2014 after experiencing two consecutive years of employment decline. Manufacturing sector employment remains 1.6% lower than in 2009. Rexdale has the largest number of Service sector jobs of all Toronto Employment Districts with 7,210. In 2014, the Service sector added 320 jobs, an increase of 4.6%.

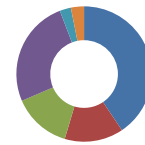
## 3. Highway 400 Corridor



The Highway 400 Corridor contains 32,430 jobs, or 8.1% of employment found in the Employment

Districts. Since 2009, total employment in the District has remained relatively stable, increasing by only 0.2%. Over the past year, the District experienced a modest loss of 60 jobs, decreasing by 0.2%. The District contains the highest number of Manufacturing sector jobs of all Employment Districts with 16,230, representing 13.0% of all Manufacturing employment in the City. Manufacturing sector jobs account for 50.0% of employment in the Highway 400 Corridor. The Processed Goods Processing subsector accounts for 47.8% of the District's Manufacturing sector employment. The Office sector accounts for 25.1% of employment in the District. Over the last year, this sector added 550 jobs, an increase of 7.3%. The Retail sector experienced the largest percentage employment change over the last year, declining by 330 jobs or 11.0%.

## 4. Tapscott-Marshalling Yard



There are 30,900 jobs in Tapscott-Marshalling Yard, accounting for 7.7% of all employment found

in the Employment Districts. The District lost 540 jobs in 2014, decreasing by 1.7%. Since 2009, total employment in the District has increased by 2.0% or 610 jobs. The Manufacturing sector is the largest sector in the District, accounting for 40.6% of employment. In the past five years, the District has seen a 5.1% decrease in Manufacturing sector employment, shedding 670 jobs. The Office sector has grown for three consecutive years and is the second largest sector in the District, accounting for 25.6% of employment. Despite these sectoral gains, Office employment remains 10.1% lower than in 2009. The Retail and Service sectors in Tapscott-Marshalling Yard are significant, and account for 14.0% and 13.9% of employment in the District respectively. The Service sector in particular has increased in importance over the past five years, adding 1,350 jobs for an increase of 45.8%.

## 5. Dufferin Keele North



Dufferin Keele North contains 7.7% of employment found in the Employment Districts, with a

total of 30,850 jobs. Over the past year, the District added 500 jobs, an increase of 1.6%. The Office sector and Manufacturing sector are the largest sectors in the District, accounting for 37.6% and 29.8% of employment respectively. Since 2009, Manufacturing sector employment has increased by 15.3%, adding 1,220 jobs. The Office sector in contrast, lost 540 jobs since 2009, a decrease of 4.4%. Since 2013, Office sector employment increased by 150 jobs or 1.3%.

In the past five years, the Service sector has increased in importance in Dufferin Keele North, adding 350 jobs, an increase of 13.1%.

### 6. Dufferin Keele South



Dufferin Keele South is home to 27,100 jobs, accounting for 6.8% of Employment

District employment. An increase of 700 jobs or 2.7% was recorded in the District in 2014. Dufferin Keele South has grown by 2,780 jobs in the past five years, increasing by 11.4%. The Office sector is the largest sector in Dufferin Keele South, representing 40.5% of employment, followed by the Manufacturing sector with 21.1% and the Retail sector at 18.6%. Office sector employment has grown for three consecutive years, and now exceeds the 2009 total by 14.5% or 1,390 jobs. After losing 540 Manufacturing sector jobs between 2009 and 2010, employment has increased steadily; adding 790 jobs over the past four years. Employment in the Retail sector has grown by 10.5% in the last five years, increasing by 450 jobs.

### 7. South West Scarborough

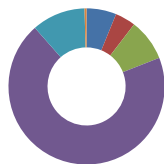


There are 19,240 jobs in South West Scarborough, accounting for 4.8% of jobs found in the Employment

Districts. An increase of 1.1% or 210 jobs was recorded in the District in 2014. The District is dominated by two sectors, the Office sector and the Manufacturing sector, accounting for 31.3% and 30.4% of jobs in the District respectively. Office sector employment reached 6,350 jobs in 2013, the highest number of jobs recorded in the past five years, then declined this year by 5.2% losing 330 jobs. Manufacturing employment has grown over the past five years adding 300 jobs, increasing by 5.4%.

The Institutional sector experienced a significant increase of 21.8% over the past year, adding 270 jobs.

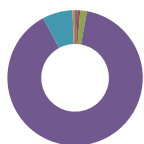
### 8. Duncan Mills



Duncan Mills contains 4.8% of employment found in the Employment Districts, with a total of 19,110 jobs. Employment

remained relatively stable in 2014 as only a net 20 additional jobs were recorded. The District is heavily dominated by the Office Sector, accounting for 69.5% of employment. The Institutional sector and the Service sector account for 11.1% and 8.6% of employment respectively. Office sector employment, while the largest in the District, has grown at a slower rate than other sectors over the past five years. The Institutional sector has grown by 1,010 jobs since 2009, increasing by 91.0%. Manufacturing sector employment has increased by 23.2% over the past five years, adding 220 jobs, and Service sector employment has increased by 24.1%, adding 320 jobs. The Office sector in comparison has decreased by 2.2% since 2009, losing 320 jobs.

### 9. Consumers Road

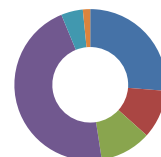


The Consumers Road Employment District contains 18,080 jobs or 4.5% of employment found

in the Employment Districts. In 2013, the District experienced an increase of 2.4% or 420 jobs. The Consumers Road Employment District contains 16,150 Office sector jobs, the highest of any Employment District in the City. Office sector jobs account for 89.3% of employment in the District. The largest Office subsectors in the District are Finance, Insurance and Real Estate and Business Services, together accounting for 52.7% of total employment. Since 2009,

employment in the Office sector has declined, losing 2,370 jobs or 12.8%. In the past year, an increase of 750 jobs in the Institutional sector has partially offset this decrease. The Manufacturing, Service, Retail and Other sectors together account for only 3.4% of employment in the District.

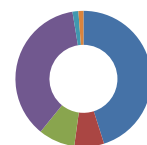
### 10. Scarborough Highway 401 Corridor



The Scarborough Highway 401 Corridor is home to 17,210 jobs, representing 4.3% of Employment

District employment. Over 2014, an additional 220 jobs were recorded in the District, an increase of 1.3%. Total employment in the District experienced a sharp decrease of 7.6% between 2009 and 2010 but has increased steadily over the past four years. The Office sector accounts for 46.2% of jobs in the District and is the largest employment sector. Office sector employment has fluctuated over the past five years, losing 760 jobs since 2009 but adding 310 jobs in the past year. The Manufacturing sector is the second largest sector in the District, accounting for 4,520 jobs or 26.3% of employment. In the past five years, this sector has added 1,170 jobs, increasing by 34.9%.

### 11. North West Etobicoke

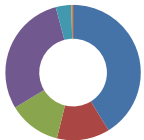


There are 14,320 jobs in North West Etobicoke or 3.6% of all jobs in the Employment

Districts. Over the past year, total employment in the District increased by 6.5%, adding 870 jobs. Since 2009, total employment in North West Etobicoke has increased by 8.8%. This District contains a diversity of jobs across industry sectors. The Manufacturing sector is the largest sector in the District, accounting for 45.0% of employment. The Processed Goods

Processing subsector accounts for 59.3% of Manufacturing sector employment in the District. The Office sector is the second largest sector in the District with 36.5% of employment, followed by the Service sector with 8.7% and the Retail sector at 7.1%. Since 2009, North West Etobicoke has lost 1,150 Manufacturing jobs, a decrease of 15.2%. Gains in the Office sector have more than offset this loss of Manufacturing sector employment. Over the same five-year period, 2,240 Office sector jobs were added to the District, an increase of 75.2%. This past year saw the addition of 970 Office sector jobs, an increase of 22.8%.

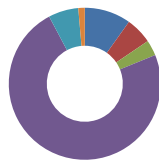
### 12. West Central Scarborough



West Central Scarborough contains 3.5% of employment found in the Employment Districts, a total of

13,790 jobs. Employment in the District has decreased for four consecutive years, losing 480 jobs in 2014. Over the past five years, West Central Scarborough has lost 1,270 jobs, decreasing by 8.4%. All sectors except for the Office sector have lost employment in the past five years. The Manufacturing sector remains the largest sector in the District, despite losing 16.5% of employment since 2009. It accounts for 5,690 jobs or 41.3% of employment in the District. In the past five years, the Office sector has increased in importance, adding 440 jobs for a total of 4,070 jobs. In 2014, a 9.7% increase in Office sector employment was recorded, adding 360 jobs to West Central Scarborough.

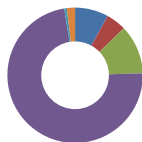
### 13. Steeles/Victoria Park



Steeles & Victoria Park is home to 12,360 jobs or 3.1% of Employment District employment. The District lost 660

jobs in 2014, a decrease of 5.1%. Since 2009, total employment in Steeles & Victoria Park has fluctuated significantly. The District has seen declining employment for two consecutive years, and contains 900 fewer jobs than in 2009. The Office sector is the largest employment sector in the District by a significant margin, accounting for 73.5% of jobs. This sector has experienced a similar pattern of employment fluctuation, decreasing by 8.9% since 2009. Manufacturing sector employment has decreased by 25.6% in the past five years, losing 420 jobs. The Manufacturing sector accounts for 9.9% of employment in the District.

### 14. Liberty

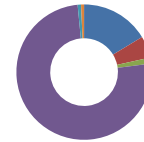


The Liberty Employment District contains 2.8% of employment found in the Employment

Districts, with a total of 11,240 jobs. In 2014, Liberty recorded the largest employment increase of all Toronto Employment Districts, adding 1,790 jobs. Over the past five years, the District has added 3,530 jobs, an increase of 45.8%. The Office sector is the largest employer in Liberty, accounting for 73.0% of jobs, followed by the Service sector with 11.7% and the Manufacturing sector at 8.0%. Since 2009, Office sector employment has increased by 52.7%, adding 2,830 jobs. The Service sector has also grown since 2009, increasing by 530 jobs or 69.2%. Manufacturing sector employment has decreased by 15.8% in the past five years, losing 170 jobs. The Business Services subsector, part of the Office sector, is the largest subsector in the District by a

significant margin, accounting for 42.2% of employment.

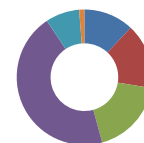
### 15. Don Mills



The Don Mills Employment District contains 11,140 jobs, or 2.8% of jobs found in the Employment

Districts. Over the past year, employment in the District declined by 3.5% or 410 jobs. The Office sector is the most significant sector in Don Mills, accounting for 75.5% of employment. In the past five years, this sector has increased in importance, growing by 10.9% or 830 jobs. In 2013, Office sector employment reached 8,830 jobs, the highest number of jobs recorded in the past five years. Over the past year, however, the District lost 420 Office sector jobs. The Manufacturing sector and Service sector are the second and third largest sectors in the District, accounting for 16.3% and 5.2% of employment respectively. Over the past five years, both sectors have experienced employment decreases. Manufacturing sector employment has decreased by 29.5% or 760 jobs, and Retail sector employment has decreased by 25.6% or 200 jobs.

### 16. Milliken



Milliken is home to 8,030 jobs, accounting for 2.0% of jobs found in the Employment Districts. In 2014, the District

recorded an increase of 480 jobs or 6.4%. The Office sector is the largest sector in the District and, in the past year, recorded the largest employment increase. Office sector employment accounts for 44.8% of employment in the Milliken Employment District. Since 2013, the Office sector experienced an increase of 13.9% or 440 jobs. Significant Service and Retail sectors also exist in the District, accounting

for 18.2% and 15.6% of employment respectively. The Service sector lost 80 jobs in 2014, while the Retail sector remained stable. The Manufacturing sector added 100 jobs in 2014, ending a four-year run of declining employment.

Manufacturing sector jobs account for 12.0% of employment in the Milliken Employment District. In the past twenty-five years, the employment composition of Milliken has evolved to include fewer Manufacturing jobs and a greater number of jobs in other sectors. Manufacturing sector employment in the District has decreased by 61.0% since 1989, while employment in the Office, Retail, Service and Institutional sectors has increased.

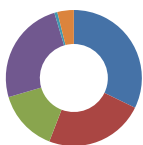
### 17. Overlea



There are 6,370 jobs found in the Overlea Employment District, accounting for 1.6% of

employment in the Employment Districts. Over the past year, Overlea experienced an increase of 220 jobs or 3.6%. The District is dominated by the Office sector and Manufacturing sector, accounting for 36.6% and 33.3% of employment respectively. In 2014, employment in the Office sector surpassed the Manufacturing sector for the first time in the past five years. This year, the loss of 280 Manufacturing jobs was almost entirely offset by an increase of 270 jobs in the Office sector. Small employment increases occurred over the past year in the Service, Retail, Institutional and Other sectors, adding a total of 210 jobs to the Overlea Employment District.

### 18. Laird

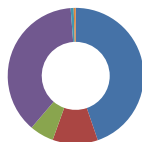


The Laird Employment District contains 1.4% of employment found in the Employment

Districts, with a total of 5,620 jobs. The District grew by 13.3% or 660 jobs in 2014. Since 2009, the Laird Employment District has experienced significant growth adding 1,240 jobs, an increase 28.3%. The Manufacturing sector and Office sector are the largest sectors in the District, accounting for 32.2% and 24.9% of employment respectively. In 2014, Manufacturing sector employment grew by 28.1%, adding 470 jobs to the District. The 1,400 Office sector jobs recorded in the District this year represent the highest number of jobs recorded since 2009.

The Retail sector is also an important sector in the District, accounting for 1,330 jobs. Since 1989, Retail sector employment as a share of total employment in the district has risen from 4.0% to 23.7%. Over the past five years, the Service sector has seen significant growth, increasing by 241.7% or 560 jobs.

### 19. South of Eastern



The South of Eastern Employment District contains 4,190 jobs, accounting for 1.0% of

employment found in the Employment Districts. Employment recorded in the District declined by 90 jobs in the past year and 890 jobs in the past five years. The Manufacturing sector is the largest sector in this District, accounting for 44.6% of employment. Between 2009 and 2011, the Manufacturing sector lost 530 jobs, decreasing by 22.8%. Over the past three years, Manufacturing sector employment remained stable due to the continuing presence of a major employer in the Printing, Data Processing and Sorting subsector. Office sector employment accounts for 37.5% of employment in the South of Eastern Employment District. Over the past five years, this sector has fluctuated, decreasing by 170 jobs or 9.8%. The Retail sector

and Service sector have also experienced declining employment in the past five years, losing 80 jobs and 90 jobs respectively.

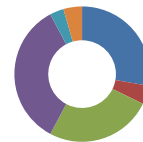
### 20. Weston Road/Mount Dennis



The Weston Road/Mount Dennis Employment District is home to 2,520 jobs and 0.6% of jobs found

in the Employment Districts. Employment in the District has increased for three consecutive years. This year, an additional 580 jobs were recorded, an increase of 29.9%. The Service sector and Office sector are the largest sectors in the District, accounting for 30.6% and 23.4% of employment respectively. Over the past twenty-five years, Office sector employment has decreased from 2,760 jobs to 590 jobs, while Service sector employment has increased from 0 to 770 jobs. The Terminal and Dispatch subsector accounts for 750 of the District's 770 Service sector jobs. The Manufacturing sector is the third largest in the District, accounting for 21.4% of jobs. Over the past year, the Office sector and Institutional sector were the fastest growing sectors in Weston Road/Mount Dennis. Office sector employment grew by 210.5% or 400 jobs and the Institutional sector grew by 170 jobs, an increase of 47.2%.

### 21. South East Scarborough

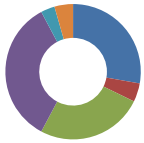


There are 970 jobs found in the South East Scarborough Employment District, representing 0.2%

of Employment District employment. This year 10 fewer jobs were recorded in the District, a decrease of 1.0%. The Manufacturing sector is the dominant sector in South East Scarborough, accounting for 60.8% of employment, or 590 jobs. The Processed Goods Processing subsector is the largest

Manufacturing subsector, accounting for 320 jobs. The Manufacturing sector lost 30 jobs over the past year and 80 jobs over the past five years. Over 2014, the Retail and Other sectors were the only sectors to record employment increases, adding 10 and 30 jobs respectively.

## 22. Airport Corporate Centre

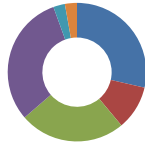


The Airport Corporate Centre is part of a much larger "Airport node" associated with Pearson

International Airport, most of which is in the City of Mississauga and contains 34,540 jobs.<sup>13</sup> The Toronto portion is the smallest Employment District and contains 0.2% of employment found in the Employment Districts, a total of 900 jobs. Over the past five years, employment has decreased in the District by 15.1%. Employment losses in the Manufacturing sector and Other sector are largely responsible for this decrease.

The Raw Material Processing subsector accounts for 240 of the District's 250 Manufacturing sector jobs. In 2013, the Office sector surpassed the Manufacturing sector as the largest employment sector in the District, accounting for 33.4% of employment. The Service sector accounts for 230 jobs, or 25.6% of employment in the District.

## 23. Other Employment Related Lands



Other Employment Related Lands include all designated employment lands in the City

that do not fall within one of the twenty-two Employment Districts. They account for 7.7% of Employment District employment and contain 30,610 jobs.

This year's employment total is the highest recorded in the last five years, increasing by 890 jobs or 3.0% since last year. Office, Manufacturing and Service sector jobs account for the majority of employment in the Other Employment Related Lands. Over the last five years, Office sector employment has seen the largest increase, growing by 22.6% or 1,760 jobs.

The Office sector accounts for 31.2% of employment in the Other Employment Related Lands. The Manufacturing sector accounts for 28.9% of jobs in the District and has declined by 4.0% of its total in the past five years. In 2014, a modest increase of 190 jobs was recorded in the Manufacturing sector. In 2014, Service sector employment reached its lowest point in the last five years, but still accounts for 23.9% of jobs in the Other Employment Related Lands.



**Table 7: Total Employment in Employment Districts by Sector, 2011-2014**

Employment Districts	Sector	Manufacturing				Retail				Service			
	Year	2011	2012	2013	2014	2011	2012	2013	2014	2011	2012	2013	2014
South Etobicoke		16,420	15,980	15,470	13,740	4,390	5,040	5,210	5,180	5,260	5,450	5,650	5,900
Rexdale		13,310	12,560	12,030	12,680	2,540	2,710	3,200	3,060	6,690	6,750	6,890	7,210
Highway 400 Corridor		15,810	16,840	16,440	16,230	3,180	2,920	3,010	2,680	4,540	4,510	4,560	4,500
Tapscott/Marshalling Yard		12,530	12,710	12,940	12,530	4,270	4,100	4,160	4,340	4,090	4,170	4,180	4,300
Dufferin Keele North		9,050	8,600	9,100	9,180	4,710	4,670	4,600	4,630	2,870	2,870	2,940	3,020
Dufferin Keele South		5,100	5,250	5,640	5,710	4,950	4,880	5,070	5,050	2,830	2,860	2,780	2,930
South West Scarborough		5,970	5,770	5,820	5,840	2,310	2,270	2,320	2,350	2,070	2,160	2,070	2,250
Duncan Mills		1,060	1,070	1,180	1,170	800	800	830	810	1,300	1,500	1,550	1,650
Consumers Road		100	40	80	100	130	130	120	120	400	350	350	290
Scarborough Highway 401 Corridor		4,580	4,610	4,490	4,520	1,740	1,900	1,840	1,780	1,820	1,840	1,870	1,880
North West Etobicoke		6,410	6,530	6,750	6,440	870	920	940	1,010	1,120	1,180	1,170	1,240
West Central Scarborough		6,630	6,640	6,020	5,690	1,970	1,900	1,830	1,740	2,320	1,920	1,820	1,730
Steeles & Victoria Park		1,160	1,270	1,290	1,220	620	710	740	700	360	380	370	410
Liberty		1,050	950	890	900	430	460	510	540	900	900	1,010	1,320
Don Mills		1,950	2,070	1,830	1,820	750	780	590	580	140	150	140	160
Milliken		930	920	860	960	1,260	1,210	1,250	1,250	1,350	1,360	1,540	1,460
Overlea		2,700	2,490	2,400	2,120	900	900	860	930	400	520	470	520
Laird		1,570	1,360	1,340	1,810	1,110	1,140	1,390	1,330	310	280	790	820
South of Eastern		1,860	1,860	1,870	1,870	550	550	500	450	330	210	250	240
Weston Road/Mount Dennis		310	410	520	540	60	80	90	90	800	820	780	770
South East Scarborough		610	600	620	590	20	30	30	40	40	90	70	60
Airport Corporate Centre		440	450	220	250	0	30	40	40	230	240	230	230
Other Employment Related Lands		9,080	8,690	8,660	8,850	2,790	3,060	2,940	3,200	7,520	7,860	7,650	7,320
<b>All Employment Districts</b>		<b>118,630</b>	<b>117,670</b>	<b>116,460</b>	<b>114,760</b>	<b>40,350</b>	<b>41,190</b>	<b>42,070</b>	<b>41,900</b>	<b>47,690</b>	<b>48,370</b>	<b>49,130</b>	<b>50,210</b>
Rest of the City		6,550	10,570	9,730	9,850	96,960	102,120	104,740	102,640	104,070	109,960	115,380	120,420
City Total		125,180	128,240	126,190	124,610	137,310	143,310	146,810	144,540	151,760	158,330	164,510	170,630

Employment Districts	Sector	Office				Institutional				Other				Total			
	Year	2011	2012	2013	2014	2011	2012	2013	2014	2011	2012	2013	2014	2011	2012	2013	2014
South Etobicoke		11,420	11,590	12,090	12,830	740	720	840	1,260	1,680	1,610	1,820	2,140	39,820	40,390	41,080	41,040
Rexdale		13,090	14,240	15,580	14,360	1,190	1,120	1,190	1,210	2,160	2,110	1,910	2,200	38,940	39,510	40,800	40,730
Highway 400 Corridor		8,610	8,550	7,580	8,130	440	480	610	630	240	240	280	260	32,810	33,540	32,480	32,430
Tapscott/Marshalling Yard		7,760	7,510	7,620	7,920	660	730	740	830	1,650	1,740	1,800	970	30,950	30,960	31,440	30,900
Dufferin Keele North		13,680	12,770	11,450	11,600	1,600	1,610	1,740	1,580	530	560	530	840	32,430	31,080	30,360	30,850
Dufferin Keele South		9,850	10,190	10,800	10,970	1,670	1,670	1,770	2,080	210	260	340	370	24,610	25,100	26,400	27,100
South West Scarborough		6,190	6,090	6,350	6,020	1,270	1,220	1,240	1,510	1,180	1,160	1,230	1,270	18,990	18,670	19,030	19,240
Duncan Mills		13,100	13,100	13,370	13,280	1,300	1,900	2,060	2,120	100	100	100	80	17,560	18,580	19,090	19,110
Consumers Road		16,900	16,320	16,440	16,150	450	480	550	1,300	160	170	130	110	18,140	17,490	17,670	18,080
Scarborough Highway 401 Corridor		7,420	7,290	7,640	7,950	970	1,000	980	800	140	170	190	270	16,670	16,820	17,010	17,210
North West Etobicoke		4,100	4,110	4,250	5,220	160	110	180	200	150	150	170	210	12,820	13,010	13,460	14,320
West Central Scarborough		3,840	3,250	3,710	4,070	460	830	830	510	160	180	70	60	15,360	14,730	14,280	13,790
Steeles & Victoria Park		9,510	10,090	9,740	9,080	690	710	750	790	160	120	130	170	12,500	13,270	13,020	12,360
Liberty		5,580	5,790	6,780	8,200	50	70	70	70	120	130	190	220	8,140	8,300	9,450	11,240
Don Mills		8,350	8,820	8,830	8,410	100	90	80	90	90	80	90	80	11,390	11,990	11,560	11,140
Milliken		3,170	3,070	3,160	3,600	630	660	650	650	90	80	90	100	7,430	7,300	7,550	8,030
Overlea		1,710	1,930	2,060	2,330	300	300	300	310	60	80	70	150	6,090	6,220	6,160	6,370
Laird		1,480	1,530	1,290	1,400	40	20	40	40	40	50	120	220	4,550	4,390	4,970	5,620
South of Eastern		1,200	1,300	1,610	1,570	30	50	30	30	30	10	20	20	4,000	3,970	4,280	4,190
Weston Road/Mount Dennis		150	180	190	590	330	360	360	530	0	0	0	0	1,650	1,850	1,940	2,520
South East Scarborough		200	220	210	190	30	20	20	20	30	30	30	60	920	980	980	970
Airport Corporate Centre		410	440	330	310	30	30	30	30	40	40	40	40	1,140	1,230	890	900
Other Employment Related Lands		8,340	8,790	8,960	9,540	590	700	820	840	480	410	700	870	28,780	29,480	29,730	30,610
<b>All Employment Districts</b>		<b>156,060</b>	<b>157,170</b>	<b>160,040</b>	<b>163,720</b>	<b>13,730</b>	<b>14,880</b>	<b>15,880</b>	<b>17,430</b>	<b>9,500</b>	<b>9,480</b>	<b>10,050</b>	<b>10,710</b>	<b>385,690</b>	<b>388,860</b>	<b>393,530</b>	<b>398,750</b>
Rest of the City		463,950	480,950	496,640	499,250	203,080	203,540	206,840	216,300	33,380	35,680	36,590	37,210	908,270	942,710	970,020	985,640
City Total		620,010	638,120	656,680	662,970	216,810	218,420	222,720	233,730	42,880	45,160	46,640	47,920	1,293,960	1,331,570	1,363,550	1,384,390

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

## Clusters

The City of Toronto features prominently within Canada's economy, accounting for one sixth of all jobs in the country and 25% of Ontario's GDP.<sup>14</sup> Toronto's size, density and proximity to the United States creates a unique environment that supports and enables concentrations of industrial activities not seen elsewhere in Canada. The presence of world class universities, hospitals and government institutions generate and attract a diverse, highly educated and skilled workforce able to support specialized industries. Toronto's Employment Districts provide large contiguous areas for goods production separated from sensitive uses that are within the City's borders, for more seamlessly connected industry clusters. These employment concentrations add to Toronto's overall economic diversity and resilience within the Canadian economy.

Toronto is home to several clusters of related industries. Clusters are geographic concentrations of inter-related firms and institutions in the same economic field.<sup>15</sup> They include firms that share buyer/supplier relationships, competing businesses, and institutions that provide specialized services and training to a particular industry. Companies in a cluster may benefit from several factors, including: shared innovation, access to a skilled labour force, ready access to customers and suppliers, and partnerships with local government and educational institutions.

Various clusters fulfill different roles in the economy. Some clusters are geographic, such as a neighbourhood retail cluster or cluster of medical offices, and provide goods and services primarily to local customers. Other clusters are sectoral, referred to as "traded clusters," and provide goods and services to customers in other regions and countries. When

traded clusters are also spatially concentrated, they are important because they bring outside wealth into a region, and often represent the unique sectors of a local economy, its specialization. Research has shown that regions with a high proportion of employment occurring in traded clusters experience higher incomes on average and more robust employment growth.<sup>16</sup> Well-known traded clusters include the Silicon Valley information technology cluster, the Hollywood film cluster, and the Bay Street financial services cluster.

### Important Clusters in the Toronto Economy

In order to identify and analyze clusters, industries must be grouped together based on detailed industry classification systems such as the North American Industry Classification System. A cluster includes many industry sectors involved in different aspects of an economic activity. Researchers at the University of Toronto and University of Waterloo have developed a method for defining clusters and comparing them in the Canadian context.<sup>17</sup> They analyzed the concentration and co-location of 300 industry sectors across 140 Canadian city regions. Using the results of this analysis, 19 traded clusters of related industries were identified that can be compared across Canadian cities.

Using this method for defining clusters, industrial clusters in Toronto can be identified by comparing their relative concentration against the national average. For example, the Financial Services Cluster accounts for 9.9% of employment in the City of Toronto compared to only 5.8% of employment in Canada as a whole. This means that Financial Services employment as a share of total employment in Toronto is 1.7 times that sector's share of national employment. This ratio is referred to as a location quotient. Measuring relative concentration is useful for

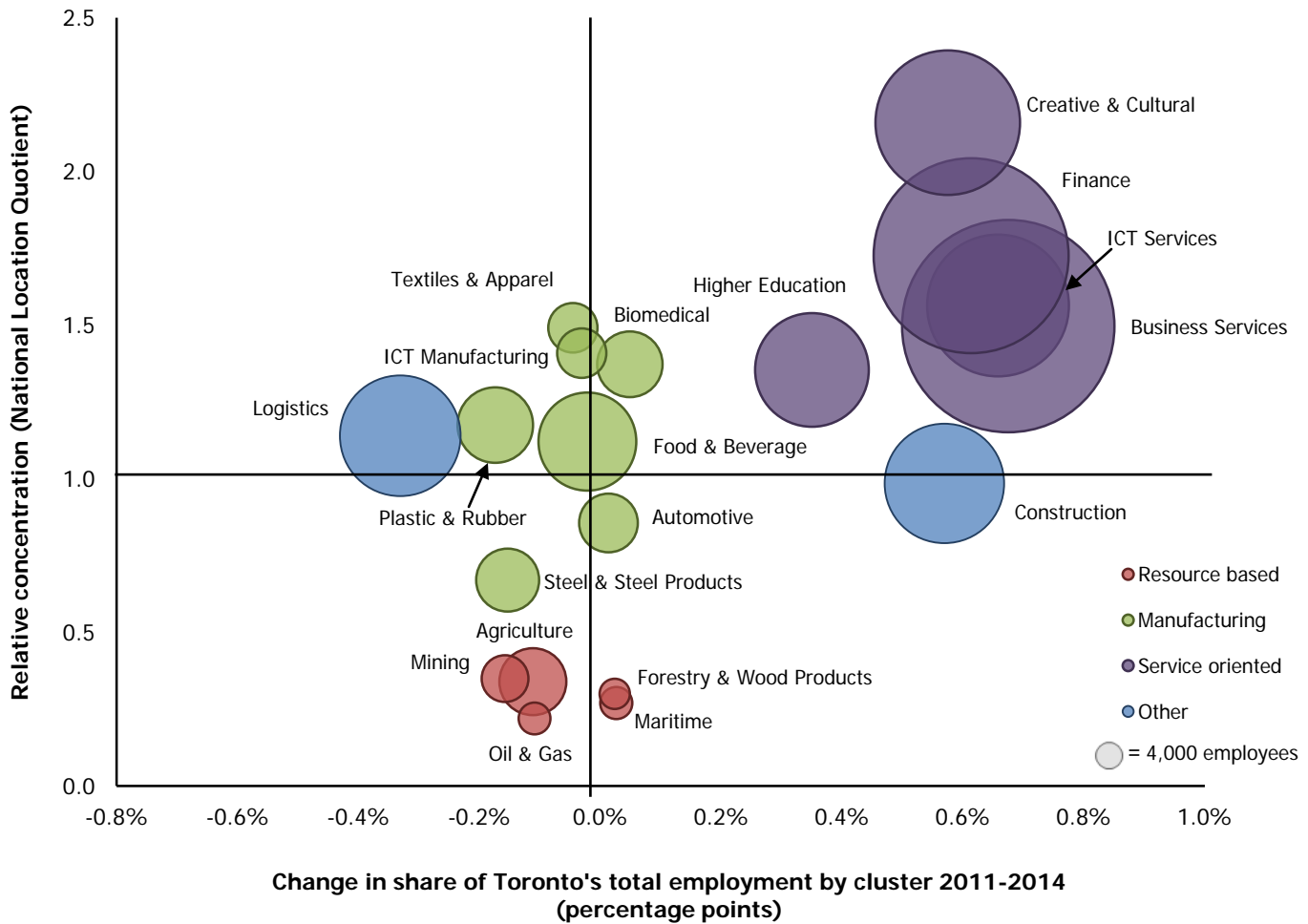
identifying unique aspects of Toronto's economy and the prevalent traded clusters that exist within it.

Figure 19 summarizes the relative concentration of 19 traded clusters in Toronto, along with the total employment in each cluster and the change in share of Toronto employment over the last three years.<sup>18</sup>

The following Figure illustrates four variables related to the size, type, relative concentration and growth of traded clusters in the City of Toronto.<sup>19</sup> Circles representing the 19 traded clusters are sized proportionate to the number of jobs in each cluster in the City of Toronto. Clusters are categorized into four activity types, each represented on the graph by a different colour circle. The vertical axis represents the relative concentration of each cluster, measured by national location quotient, which compares the City of Toronto to the nation as a whole. A location quotient greater than 1 indicates that a cluster is more concentrated in the City of Toronto than in Canada as a whole. The horizontal axis represents percentage point change in share of total employment in the City of Toronto between 2011 and 2014. A percentage point increase greater than 0 indicates a cluster has gained a higher share of total employment in the City over the last three years.

The city's changing economic specialization is depicted by the location of the clusters on the graph. Clusters located towards the top-right corner of the graph are the most significant due to their high relative concentration and increasing employment share. Clusters located towards the lower-left of the graph exhibit low relative concentration in the City and a declining share of Toronto's total employment.

Figure 19: Sectoral Specialization



Results of this cluster identification are consistent with the findings of the Toronto Employment Survey and identify some of the strengths of the City's economy. Clusters that are service-oriented, including the Creative, Cultural & Multimedia Cluster and Finance Cluster, have the highest sectoral concentration compared to the country as a whole and have increased their share of Toronto's employment over the last three years. Despite the gradual decline in Manufacturing employment, the City retains a relative concentration in most manufacturing clusters versus the national average. Clusters related to heavy manufacturing, such as the Automotive Cluster and Steel & Steel

Products Cluster are less concentrated in the City than they are in Canada's economy. Resource-based clusters are less concentrated in the City compared to Canada as a whole. The majority of employment in Toronto's resource-based clusters is accounted for by processing and support sectors that are co-related to resource-based industrial activity. Examples include Dairy Processing in the Agriculture Cluster and Wood Product Manufacturing in the Forestry Cluster. Employment may also occur in the head offices of resource extraction companies.

The trends identified in this analysis reflect the economic diversity of Toronto as a centre for service-

oriented industries and manufacturing. These trends reflect the continued growth and national significance of Toronto's vibrant knowledge-based and creative industries. Despite losses in employment share, several of Toronto's Manufacturing Clusters remain important in the national context, exhibiting a high relative concentration by comparison to Canada as a whole. Since 2002, the share of Canada's GDP produced by the Manufacturing sector has declined from 8.9% to 4.9% and in Ontario from 21.7% to 12.7%.<sup>20</sup> In this climate of declining manufacturing production, Toronto has maintained nationally significant concentrations of Manufacturing employment.



### Location Quotients

Location quotients are a method for comparing the concentration of industries in a city or region against the national average. This tool is important in the analysis of industrial clusters because it can be used to identify sectors of an economy that are concentrated by comparison to the country as a whole. To calculate the location quotient for a particular industry, the share of employment in the industry locally is compared to the share of national employment in the same industry.

$$\text{Location Quotient} = \frac{\text{total employment in local industry} / \text{total local employment}}{\text{total employment in national industry} / \text{total national employment}}$$

A location quotient greater than 1.0 indicates that there is a greater proportion of employment in this industry in the local economy by comparison to the country as a whole.

### Cluster Definitions

The 19 cluster definitions cited in this Bulletin were developed by researchers of the University of Toronto and the University of Waterloo.<sup>17</sup> Their methodology was designed to allow for standardized comparison of clusters in the Canadian context. The researchers used a three-step process to identify industries that concentrate geographically and form clusters of related economic activity:

1. To identify industries that tend to be geographically concentrated, 300 industries classified by four-digit NAICS code were analyzed across 140 Canadian city regions, using data from the 2001 Canadian Census. Industries with a location quotient greater than 1.0 in 40% or fewer city regions were deemed to be geographically concentrated. The purpose of this step is to separate industries that form the basis of unique "traded" clusters from industries common in all locations, such as restaurants and doctor's offices.
2. To identify industries that commonly co-locate, the 218 industries deemed to be geographically concentrated were analyzed on a pair-wise basis. Patterns of co-location that were identified were used as the basis for determining the 19 cluster definitions.
3. To determine if a cluster exists in a particular city, the following criteria were used: scale (employment greater than or equal to 1,000), scope (an overall location quotient greater than or equal to 1) and concentration (a location quotient greater than or equal to 1 in at least half of the industries constituting the cluster).

## How the Information on Employment is Collected by the City of Toronto

The Toronto Employment Survey has successfully marked its thirty-second year. Since 1983, the Survey has been conducted to monitor economic activity, provide information for policy and decision-making and offer additional context for the planning of municipal infrastructure and services. Based on the use of a consistent coding system of parcel uses and occupant activities, it provides a rich resource of time-series data for the longitudinal analysis of employment and employment activity in the City. In 2011, for the first time in the Survey's history, employment activity was classified by NAICS (North American Industry Classification System) codes. This is an addition to the occupant activity code standard of the Regional Information Systems Working Group of the Regional Planning Commissioners Ontario, which has been used and updated over the past three decades. The use of NAICS will enable comparison of employment activity across municipalities, provinces, and other countries.

Between May and August, a team of surveyors visit all business establishments located in

commercial, industrial and institutional and mixed use areas throughout the City of Toronto. In 2014, employment data was acquired from 90.1% of business establishments that were identified. This marks a decrease over 2013's response rate of 91.0%. Data collected include the number of full-time and part-time employees, the primary type of employment activity taking place, and the length of time the business has been at that location. In the case of major, multi-branch employers, the information is collected through a questionnaire mailed to the primary contact at the head office.

The result is a rich dataset which provides a valuable profile of the economic activity across the City of Toronto. This survey does not capture people who work from home, or who have "no usual place of work" e.g. contract workers, and many involved in the film industry and other activities that are not place-specific on a daily basis. These results will necessarily differ with the results of the new voluntary National Household Survey, conducted for the first time in 2011, and was released in 2013.

## About Employment Districts & Other Employment Related Lands

On December 18, 2013, Council enacted Amendment 231 of the Official Plan regarding *Economic Health and Employment Lands Policies and Recommendations on Conversion Requests*. Among other items, OPA 231 amends Policy 2.1.2 of the Official Plan by deleting the term *Employment Districts* and replacing it with *Employment Areas*. Map 2 of the Official Plan, which depicts the Employment Districts, was replaced by a new Map 2 showing Employment Areas and a different geography of land use designations.

Pending Provincial approval of OPA 231, Employment Districts, as they are described in this and prior Bulletins, will change. In the interest of providing a thirty-year profile of employment and Employment Districts in Toronto, this Bulletin includes a final summary of each Employment District. To reflect the change of geographies in this bulletin, all other designated employment lands not included in Employment Districts are reported as *Other Employment-Related Lands*. These lands are included in our analysis of Employment Districts as a whole and are also profiled on pages 17 to 22.

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## End Notes

- <sup>1</sup> Statistics Canada. *Annual Demographic Estimates: Subprovincial Areas* Cat. No. 91-214-X, released February 2014 at <http://www5.statcan.gc.ca/olc-cel/olc.action?objId=91-214-X&objType=2&lang=en&limit=0>, last accessed December 9, 2014.
- <sup>2</sup> All data in this Bulletin are from the Toronto Employment Survey unless otherwise indicated.
- <sup>3</sup> Toronto Economic Development & Culture, *Toronto Facts, Business and Economic Development*, 2014 at <http://www1.toronto.ca/wps/portal/contentonly?vgnextoid=41e067b42d853410VgnVCM10000071d60f89RCRD&vgnextchannel=57a12cc817453410VgnVCM10000071d60f89RCRD>, last accessed December 9, 2014.
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