

ECONOMIC BASE ANALYSIS

Economic Vision for the City of Burlington

Prepared by the Burlington Economic Development Corporation



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Draft: September 2018

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1 Economic Baseline Analysis

The Economic Base Analysis presents demographic, occupational, and business statistics for the City of Burlington. These statistics highlight the various trends taking place in Burlington and the surrounding region, helping to identify potential opportunities and challenges in the community. This report updates a 2015 analysis by Millier Dickinson Blais.

Many of the statistical categories presented in the Economic Base Analysis are compared with Halton Region and the province of Ontario to better understand how Burlington is positioned compared to these larger areas that Burlington is a part of.

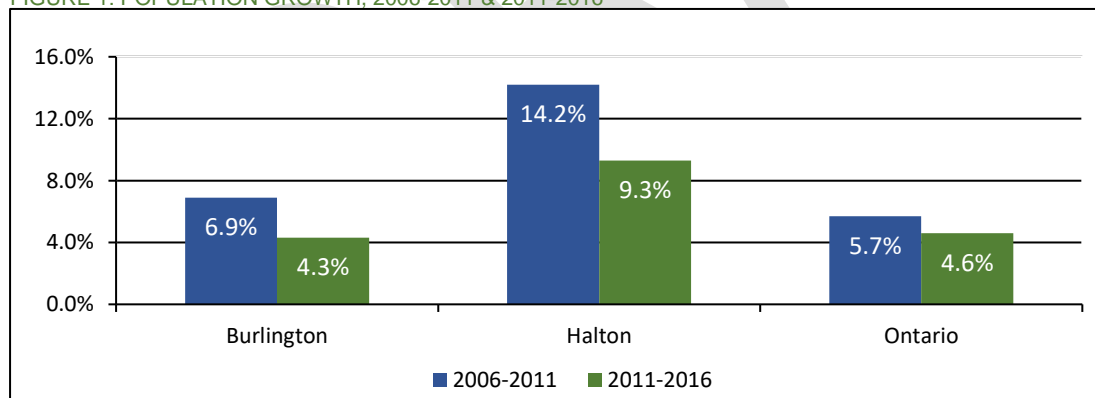
1.1 Demographic Profile

1.1.1 Population Characteristics

Population Growth

The population in the City of Burlington grew by 11.5% between 2006 and 2016 to reach a population of 183,314 (see Figure 1 and Figure 2). The largest growth period was recorded between 2006 and 2011, with the population increasing by 6.9% (11,364 people). Burlington's growth is compared to population changes in the Halton Region and the province of Ontario, which each saw large population growth rates from 2006 to 2016 as well (24.9% and 10.6% respectively). It should be noted that Halton's population during this time grew by over double the rate of growth in Burlington.

FIGURE 1: POPULATION GROWTH, 2006-2011 & 2011-2016



Source: Statistics Canada, 2011 and 2016 Census of Population

FIGURE 2: POPULATION STATISTICS, 2006-2016

| Jurisdiction | Population | | | 2006-2011 | | 2011-2016 | | 2006-2016 | |
|--------------|------------|------------|------------|------------|-------|------------|------|------------|-------|
| | 2006 | 2011 | 2016 | Absolute Δ | % Δ | Absolute Δ | % Δ | Absolute Δ | % Δ |
| Burlington | 164,415 | 175,779 | 183,314 | 11,364 | 6.9% | 7,535 | 4.3% | 18,899 | 11.5% |
| Halton | 439,206 | 501,669 | 548,435 | 62,463 | 14.2% | 46,766 | 9.3% | 109,229 | 24.9% |
| Ontario | 12,160,282 | 12,851,821 | 13,448,494 | 691,539 | 5.7% | 596,673 | 4.6% | 1,288,212 | 10.6% |

Source: Statistics Canada, 2011 and 2016 Census of Population

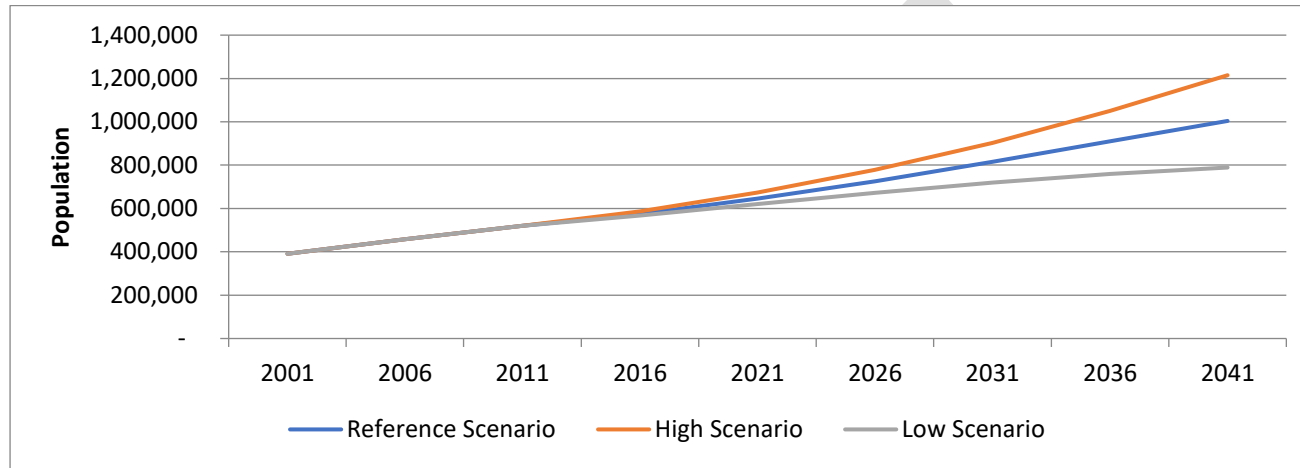
Population Growth Projections

Population projections released by the Government of Ontario for the Greater Golden Horseshoe Area (GGH)¹ estimate that population in the GGH will increase by 50%-98% between 2001 and 2041². This population projection is further broken down into each of the census divisions within the GGH. As seen in Figure 3, the population in Halton Region is expected to increase by 398,000-824,000 people (102%-211%) between 2001 and 2041. This growth in Halton Region represents an increase significantly above the projected overall population growth for the GGH during the same time period.

¹ The Greater Golden Horseshoe area includes communities in Durham Region, York Region, Simcoe County, Peel Region, County of Brant, Brantford, Halton Region, Waterloo Region, Niagara Region, Wellington County, Hamilton, Toronto

² Hemson Consulting for the Government of Ontario, "Greater Golden Horseshoe Growth Forecasts to 2041: Technical Report (November 2012) Addendum", June 2013

FIGURE 3: POPULATION PROJECTIONS TO 2041, HALTON REGION

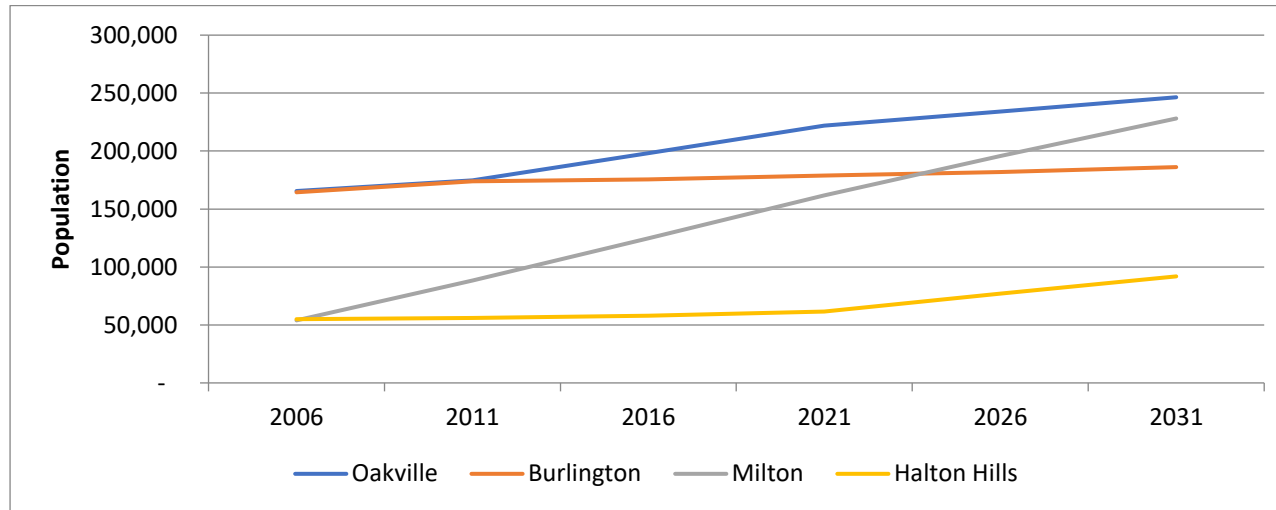


Source: Hemson Consulting for the Government of Ontario, "Greater Golden Horseshoe Growth Forecasts to 2041: Technical Report (November 2012) Addendum", June 2013

While the GGH estimates do not include projections for the municipalities in Halton Region, the Region has used the available data to create population projections for each of the municipalities within its boundaries³. As seen in Figure 4, these population growth projections highlight a projected population increase of 21,723 people in Burlington between 2006 and 2031 (a 13% increase). This growth is significantly lower than other neighbouring areas such as Oakville (80,871 people, 49% increase), Milton (174,146 people, 323% increase), and Halton Hills (36,907 people, 67% increase).

³ It is important to note that the data used in the Halton Region municipality projections has not been updated since 2011, whereas the GGH data was revised in 2013. As a result, Figure 3 and Figure 4 should not be compared directly to each other, but rather used as an indicator of general trends in the region.

FIGURE 4: POPULATION PROJECTIONS TO 2031, MUNICIPALITIES OF HALTON REGION

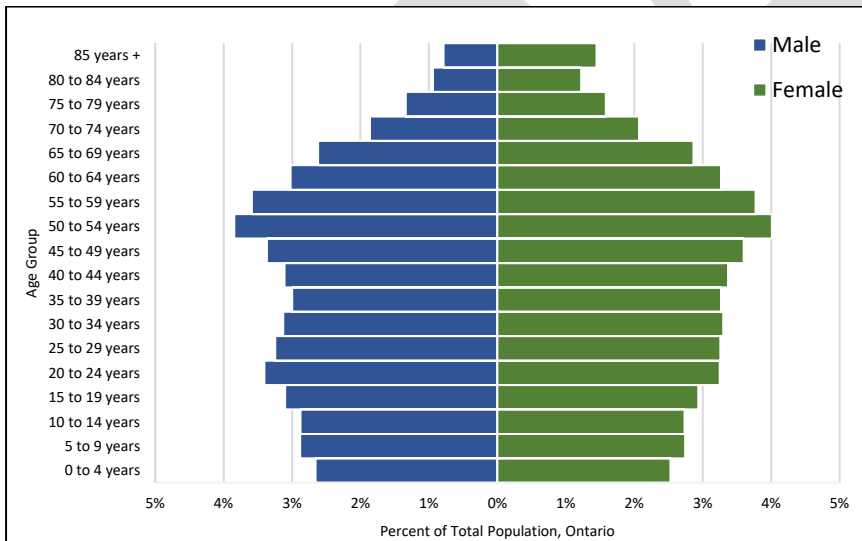
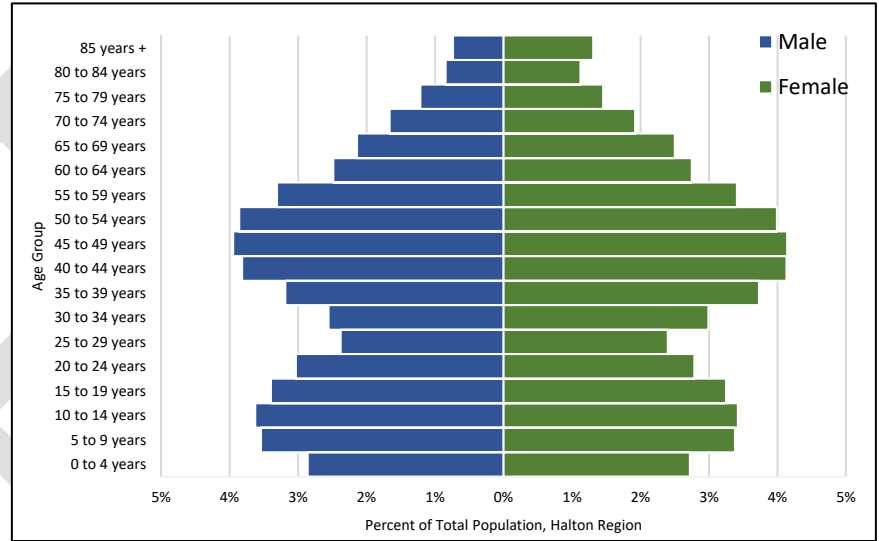
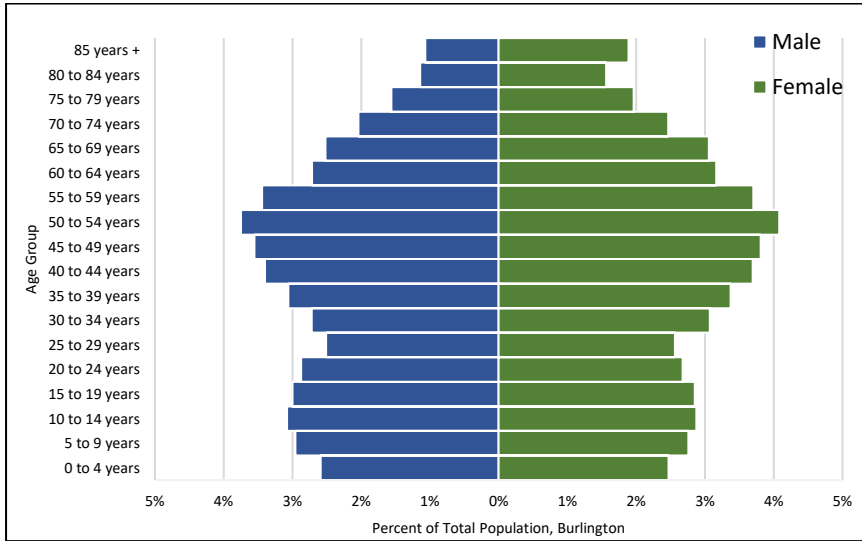


Source: Regional Municipality of Halton, "Best Planning Estimates of Population, Occupied Dwelling Units and Employment, 2011-2031", June 2011

Population by Age

In 2016, the median age of the population in Burlington was 43.3 years old. This age is relatively older compared with the median ages in Halton and Ontario (40.5 and 41.3 respectively). That being said, in 2016, Burlington had a comparable percentage of its population in the working age bracket (i.e. 25-64 years old) relative to Halton and Ontario (52.6% for Burlington, 53.1% for Halton, and 54.2% for Ontario). This statistic highlights the presence of a large working age population in Burlington (see Figure 5).

FIGURE 5: POPULATION PYRAMIDS FOR BURLINGTON, HALTON REGION, AND ONTARIO, 2016

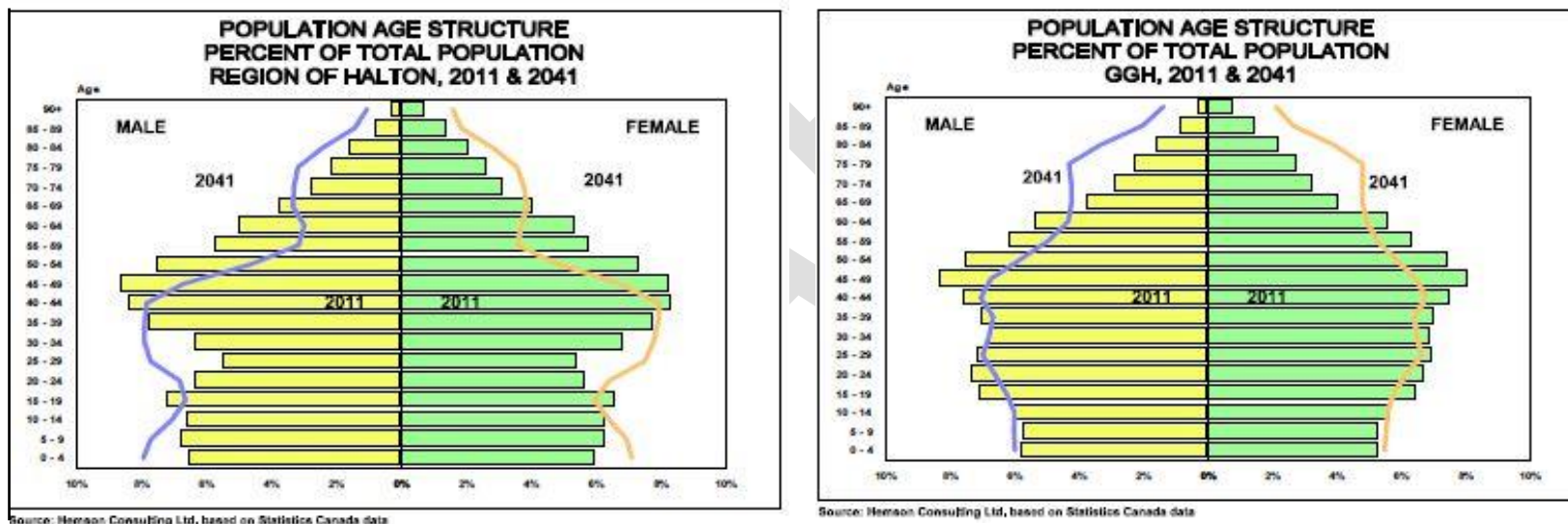


Source: Source: Statistics Canada, 2016 Census of Population

Population Projections by Age

As seen in Figure 6, population projections released by the Government of Ontario for the GGH estimate that Halton Region will have a relatively larger share of the population aged 0-39 years old by 2041 compared with estimates for the GGH. This relatively younger population is also complimented by a smaller elderly population aged 70-90+ years old in Halton Region compared to the GGH. It is difficult to determine exactly why these trends are forecast the way they are with little validating evidence presented in the Government of Ontario's release of these data findings.

FIGURE 6: POPULATION PROJECTIONS BY AGE



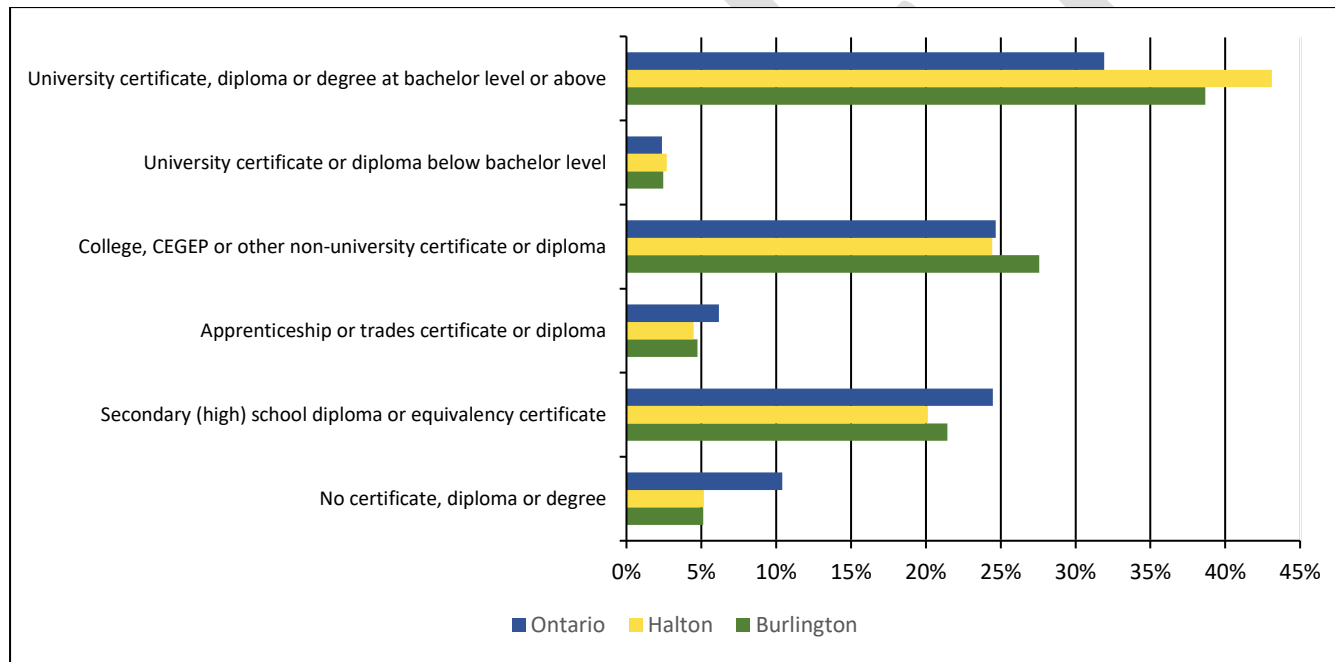
Source: Hemson Consulting for the Government of Ontario, "Greater Golden Horseshoe Growth Forecasts to 2041: Technical Report (November 2012) Addendum", June 2013

1.1.2 Education Characteristics

Educational Attainment

As of 2016, roughly 73% of the population of Burlington had a college or university certificate/diploma (compared with Halton at 75% and Ontario at 65%). Roughly 4% of Burlington's population had an apprenticeships or trades certificate or diploma, while 20% attained a high school diploma or equivalent as their highest level of education. Burlington and Halton have a much smaller percentage of the population with no certificate, diploma or degree compared with Ontario (see Figure 7).

FIGURE 7: TOTAL POPULATION AGED 25-64 YEARS BY HIGHEST CERTIFICATE, DIPLOMA OR DEGREE, 2016

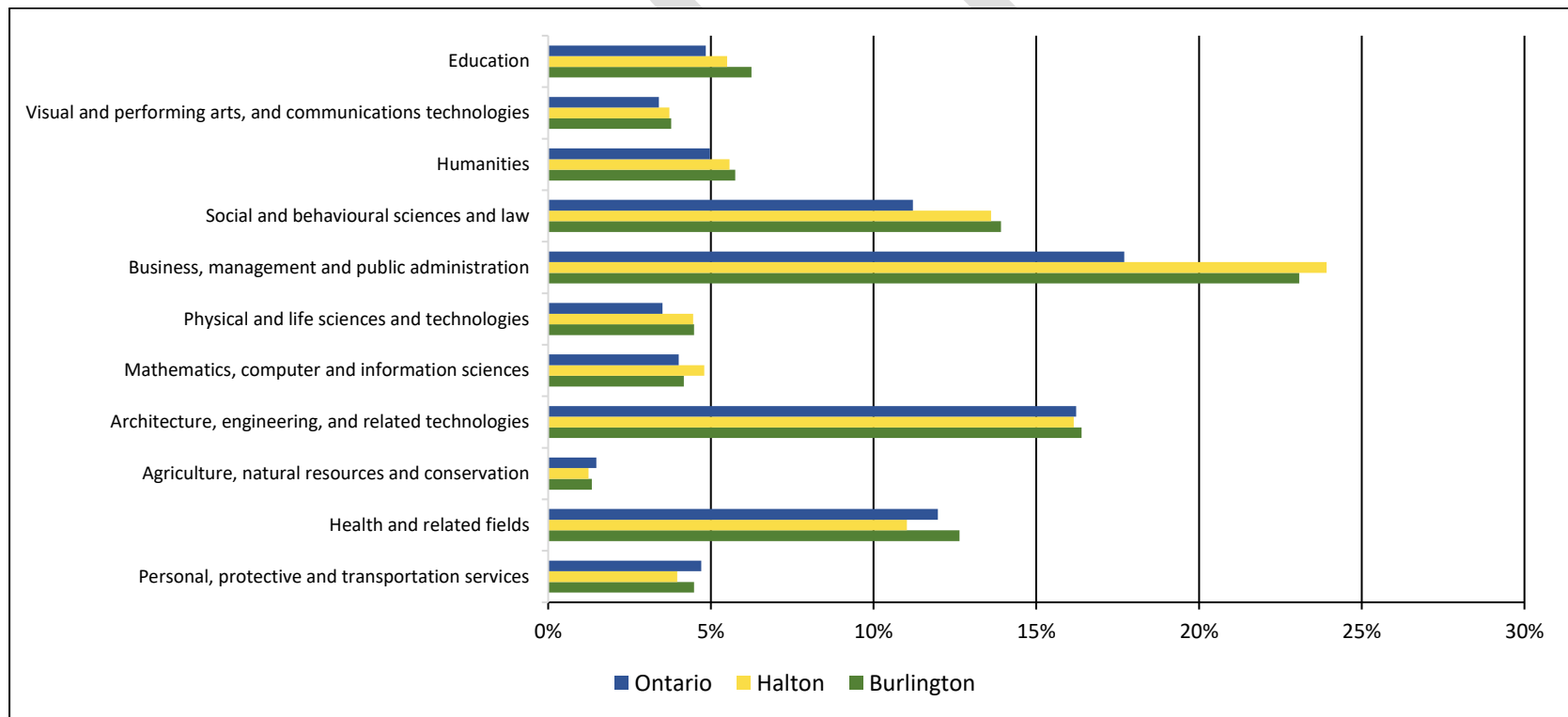


Source: Statistics Canada, 2016 Census of Population

Field of Study

As of 2016, the population of Burlington had the largest concentrations of educational background in two main areas (see Figure 8): Business, Management, and Public Administration (23%) and Architecture, Engineering, and Related Technologies (16%). The areas of Health and Related Fields (13%) and Social and Behavioural Sciences and Law (14%) also figured prominently in the educational background of the population of Burlington. These study areas are on trend with the educational background for the population of Halton and Ontario, with Business, Management, and Public Administration playing a much larger role for the populations of Burlington and Halton.

FIGURE 8: TOTAL POPULATION AGED 15 YEARS AND OVER BY MAJOR FIELD OF STUDY, 2016



Source: Statistics Canada, 2016 Census of Population

Note: 'Major Field of study' is defined as the main discipline or subject of learning. It is collected for the highest certificate, diploma or degree above the high school or secondary school level and classified according to the Classification of Instructional Programs (CIP) Canada 2011.

Looking at the changes in major field of study between 2011 and 2016 (see Figure 9), the largest increases in Burlington were seen in the Agriculture; natural resources and conservation (29.8%), the Social and behavioural sciences and law (22.7%), and Physical and life sciences and technologies (11.5%). These changes echo those of Halton and are greater than the changes seen in Ontario, with the notable exception of far greater increases in Halton and Ontario for Mathematics; computer and information sciences.

FIGURE 9: TOTAL POPULATION AGED 15 YEARS AND OVER BY MAJOR FIELD OF STUDY, 2011 AND 2016

| | 2011 | | | 2016 | | | % Δ | | |
|---|------------|---------|-----------|------------|---------|-----------|------------|--------|---------|
| | Burlington | Halton | Ontario | Burlington | Halton | Ontario | Burlington | Halton | Ontario |
| No postsecondary certificate; diploma or degree | 55,625 | 149,125 | 4,756,330 | 57,065 | 162,000 | 4,961,455 | 2.6% | 8.6% | 4.3% |
| Education | 6,325 | 16,960 | 387,620 | 5,995 | 15,900 | 349,745 | -5.2% | -6.3% | -9.8% |
| Visual and performing arts; and communications technologies | 3,645 | 10,245 | 222,150 | 3,630 | 10,765 | 246,075 | -0.4% | 5.1% | 10.8% |
| Humanities | 5,270 | 15,650 | 348,190 | 5,515 | 16,135 | 359,560 | 4.6% | 3.1% | 3.3% |
| Social and behavioural sciences and law | 10,890 | 30,835 | 682,335 | 13,360 | 39,370 | 810,410 | 22.7% | 27.7% | 18.8% |
| Business; management and public administration | 21,905 | 64,650 | 1,222,405 | 22,155 | 69,215 | 1,279,665 | 1.1% | 7.1% | 4.7% |
| Physical and life sciences and technologies | 3,855 | 11,100 | 229,270 | 4,300 | 12,890 | 253,905 | 11.5% | 16.1% | 10.7% |
| Mathematics; computer and information sciences | 3,980 | 11,660 | 267,625 | 4,005 | 13,870 | 290,045 | 0.6% | 19.0% | 8.4% |
| Architecture; engineering; and related technologies | 15,465 | 43,385 | 1,151,370 | 15,735 | 46,725 | 1,173,030 | 1.7% | 7.7% | 1.9% |
| Agriculture; natural resources and conservation | 990 | 3,070 | 103,815 | 1,285 | 3,600 | 106,895 | 29.8% | 17.3% | 3.0% |
| Health and related fields | 11,495 | 28,415 | 791,620 | 12,130 | 31,880 | 865,970 | 5.5% | 12.2% | 9.4% |
| Personal; protective and transportation services | 4,050 | 11,410 | 309,720 | 4,305 | 11,475 | 340,285 | 6.3% | 0.6% | 9.9% |

Source: Statistics Canada, 2011 and 2016 Census of Population

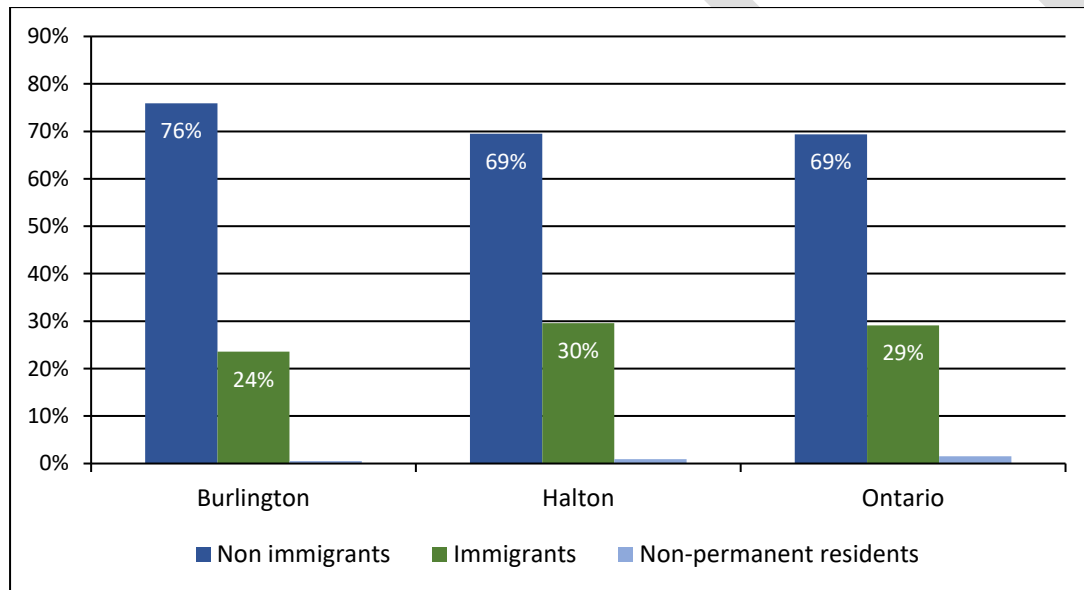
1.1.3 Immigration and Language

Immigration

As seen in Figure 10, roughly 24% of the population in Burlington in 2016 were immigrants to Canada. This proportion is relatively lower than immigrant levels for Halton (30%) and Ontario (29%).

The number of immigrants in Burlington increased by 12.1% from 2011 to 2016 (see Figure 11). This increase was lower than gains in Halton (24.4%) but higher than Ontario (6.7%) during the same time period.

FIGURE 10: TOTAL POPULATION IN PRIVATE HOUSEHOLDS BY IMMIGRANT STATUS AND SELECTED PLACES OF BIRTH, 2016



Source: Statistics Canada, 2011 and 2016 Census of Population

Immigrant refers to a person who is or has ever been a landed immigrant/permanent resident. This person has been granted the right to live in Canada permanently by immigration authorities. Some immigrants have resided in Canada for a number of years, while others have arrived recently. Some immigrants are Canadian citizens, while others are not. Most immigrants are born outside Canada, but a small number are born in Canada.

FIGURE 11: TOTAL POPULATION IN PRIVATE HOUSEHOLDS BY IMMIGRANT STATUS AND SELECTED PLACES OF BIRTH, 2011 AND 2016

| Immigration Status | 2011 | | | 2016 | | | % Change | | |
|-------------------------|------------|---------|-----------|------------|---------|-----------|------------|--------|---------|
| | Burlington | Halton | Ontario | Burlington | Halton | Ontario | Burlington | Halton | Ontario |
| Non-immigrants | 134,555 | 362,695 | 8,906,000 | 136,680 | 375,815 | 9,188,815 | 1.6% | 3.6% | 3.2% |
| Immigrants | 37,865 | 128,740 | 3,611,365 | 42,465 | 160,165 | 3,852,145 | 12.1% | 24.4% | 6.7% |
| Non-permanent residents | 1,070 | 4,010 | 134,425 | 980 | 5,000 | 201,200 | -8.4% | 24.7% | 49.7% |

Source: Statistics Canada, 2011 and 2016 Census of Population

As of 2016, the top locations in which immigrants to Burlington immigrated from were (see Figure 12): Europe (49.0%, with the United Kingdom accounting for 20.7% of that total), Asia (30.6%, with India accounting for 7.5% of that total), and the Americas (13.9%, with the United States accounting for 3.7% of that total).

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FIGURE 12: TOTAL IMMIGRANT POPULATION IN PRIVATE HOUSEHOLDS BY SELECTED PLACES OF BIRTH, 2016

| Place of Birth | | # of People | Proportion of Total |
|--------------------------|---------------------------|---------------|---------------------|
| Europe | | 20,820 | 49.0% |
| | United Kingdom | 8,775 | 20.7% |
| | Poland | 1,805 | 4.3% |
| | Germany | 1,215 | 2.9% |
| | Netherlands | 995 | 2.3% |
| | Italy | 980 | 2.3% |
| Asia | | 12,995 | 30.6% |
| | India | 3,190 | 7.5% |
| | Philippines | 1,890 | 4.5% |
| | China | 1,665 | 3.9% |
| | Pakistan | 880 | 2.1% |
| | Korea; South | 770 | 1.8% |
| Americas | | 5,885 | 13.9% |
| | United States | 1,570 | 3.7% |
| | Colombia | 780 | 1.8% |
| | Jamaica | 675 | 1.6% |
| | Trinidad and Tobago | 535 | 1.3% |
| | Guyana | 365 | 0.9% |
| Africa | | 2,550 | 6.0% |
| | Egypt | 815 | 1.9% |
| | South Africa; Republic of | 565 | 1.3% |
| | Kenya | 240 | 0.6% |
| | Nigeria | 65 | 0.2% |
| | Algeria | 40 | 0.1% |
| Oceania and other | | 220 | 0.5% |
| | Total | 42,465 | |

Source: Statistics Canada, 2016 Census of Population

Language

As of 2016, roughly 89% of the population of Burlington spoke English as the primary language spoken most often at home (see Figure 13). A further 6.1% of the population primarily spoke a non-official (i.e. not English or French) and non-Aboriginal language at home.

The top non-official languages spoken at home include Spanish, Arabic, Mandarin, Punjabi (Panjabi), Polish, and Tagalog (Pilipino, Filipino) (see Figure 14).

FIGURE 13: DETAILED LANGUAGE SPOKEN MOST OFTEN AT HOME - TOTAL POPULATION EXCLUDING INSTITUTIONAL RESIDENTS, BURLINGTON, 2016

| Language Category | # of Speakers | Proportion of Speakers |
|---|---------------|------------------------|
| English | 160,345 | 88.5% |
| French | 1,000 | 0.6% |
| Selected non-Aboriginal languages | 11,050 | 6.1% |
| Selected Aboriginal languages | - | 0.0% |
| English and non-official language | 6,405 | 3.5% |
| English and French | 350 | 0.2% |
| French and non-official language | 25 | 0.0% |
| English; French and non-official language | 160 | 0.1% |

Source: Statistics Canada, 2016 Census of Population

FIGURE 14: TOP NON-OFFICIAL LANGUAGES SPOKEN MOST OFTEN AT HOME, BURLINGTON, 2016

| Selected Non-Official Languages | # of Speakers |
|---------------------------------|---------------|
| Spanish | 1,510 |
| Arabic | 1,115 |
| Mandarin | 1,070 |
| Punjabi (Panjabi) | 1,045 |
| Polish | 850 |
| Tagalog (Pilipino, Filipino) | 555 |
| Korean | 525 |
| Urdu | 510 |
| Russian | 495 |
| Persian (Farsi) | 465 |
| Portuguese | 445 |
| Cantonese | 365 |
| Serbian | 345 |
| Gujarati | 255 |

Source: Statistics Canada, 2016 Census of Population

Moving beyond language spoken most often at home, Figure 15 highlights the top non-official languages that residents in Burlington are familiar with and able to speak. As seen in the figure, the top non-official languages spoken (as a percent of the total population that speaks a non-official language) are:

- Spanish – 8.3%
- Polish – 7.3%
- Arabic – 6.8%
- Italian – 5.7%

FIGURE 15: TOTAL POPULATION IN PRIVATE HOUSEHOLDS BY TOP NON-OFFICIAL LANGUAGES SPOKEN, BURLINGTON, 2016

| Languages | # of Speakers | % Share |
|------------------------------|---------------|---------|
| Spanish | 2,680 | 8.3% |
| Polish | 2,365 | 7.3% |
| Arabic | 2,205 | 6.8% |
| Italian | 1,845 | 5.7% |
| Punjabi (Panjabi) | 1,795 | 5.6% |
| German | 1,645 | 5.1% |
| Mandarin | 1,555 | 4.8% |
| Portuguese | 1,545 | 4.8% |
| Tagalog (Pilipino, Filipino) | 1,290 | 4.0% |
| Dutch | 1,080 | 3.4% |
| Urdu | 915 | 2.8% |
| Serbian | 905 | 2.8% |

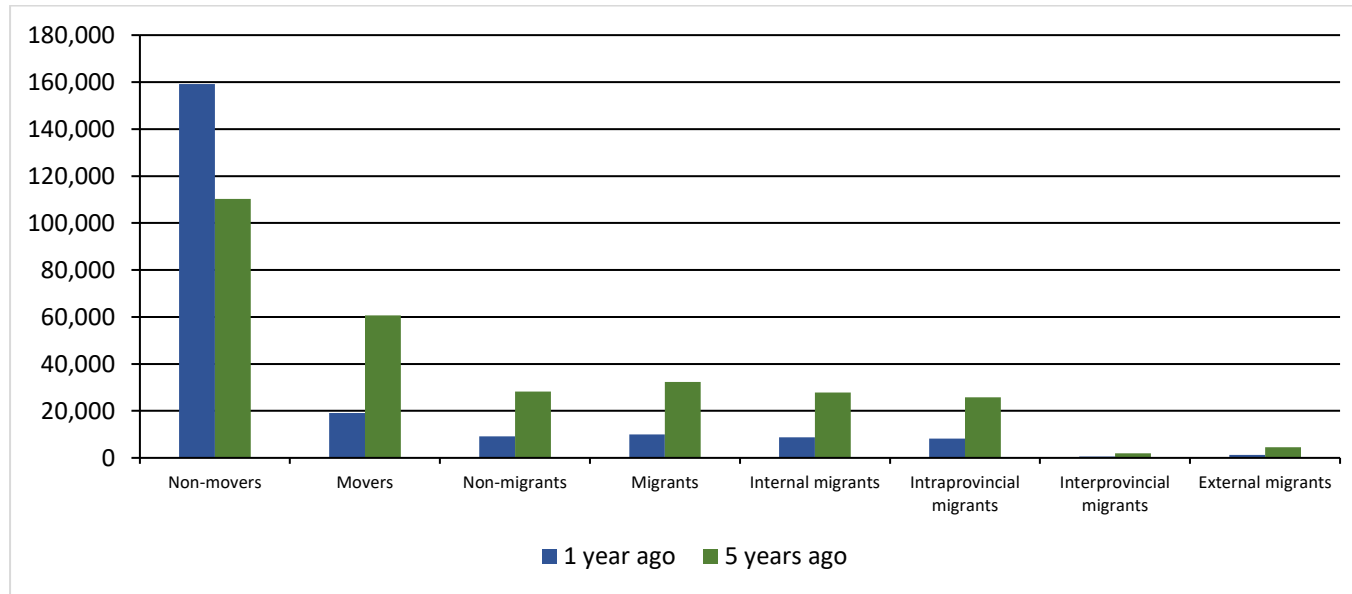
Source: Statistics Canada, 2016 Census of Population

Mobility

As seen in Figure 16, the overall levels of mobility in Burlington decreased between the 2011 and 2016 census period with an increase in the number of non-movers (65% to 89%) and a decrease in the number of movers (35% to 11%). These trends were also seen in Halton and Ontario during the same time period (see Figure 17).

Taken together, this decreasing mobility indicates that populations have become less mobile and more stable in the past five years. A less mobile population is an indicator that Burlington is less likely to be at risk of losing segments of the population.

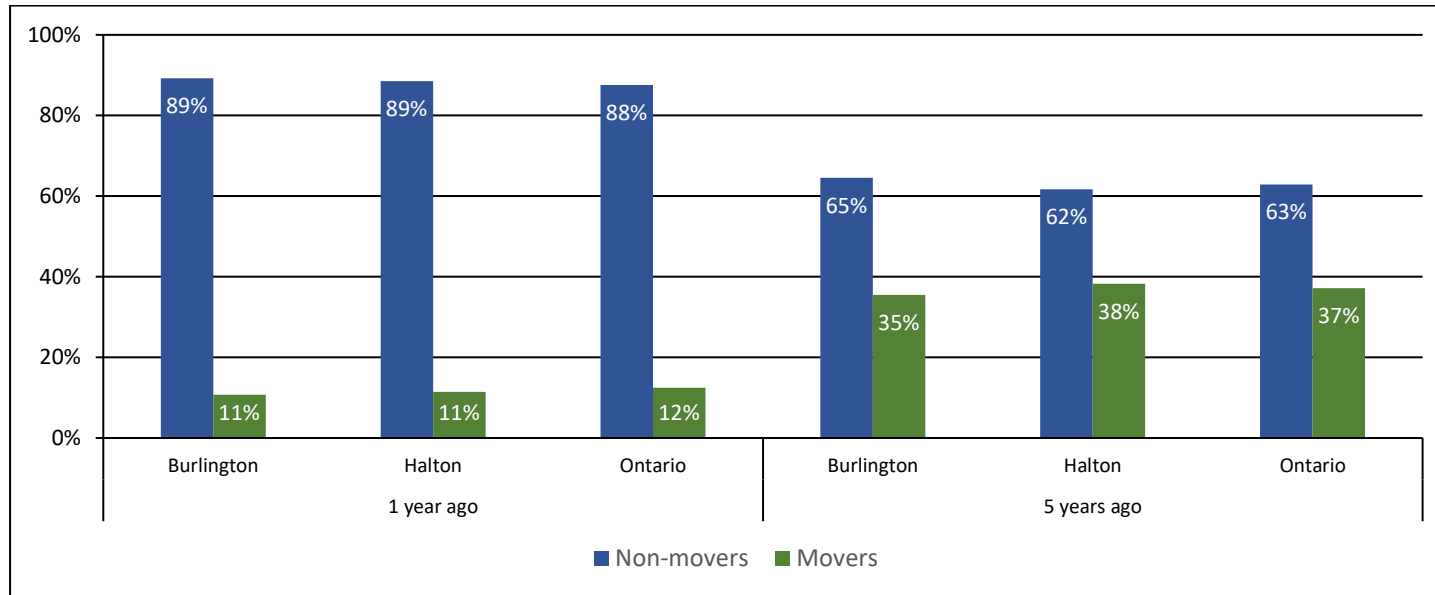
FIGURE 16: MOBILITY RATES IN BURLINGTON, 2016



Source: Statistics Canada, 2016 Census of Population

Note: Persons who have not moved are referred to as **non-movers** and persons who have moved from one residence to another are referred to as **movers**. **Movers** include non-migrants and migrants. **Intraprovincial migrants** are movers who, on Census Day, were living in a different census subdivision than the one at which they resided one year earlier, in the same province. **Interprovincial migrants** are movers who, on Census Day, were living in a different census subdivision than the one at which they resided one year earlier, in a different province. **External migrants** are movers who were living in Canada on Census Day, but who were living outside Canada one year earlier. **Non-migrants** are persons who did move but remained in the same city, town, township, village or Indian reserve. **Migrants** include internal migrants who moved to a different city, town, township, village or Indian reserve within Canada.

FIGURE 17: MOBILITY RATES IN BURLINGTON, HALTON, AND ONTARIO, 2016



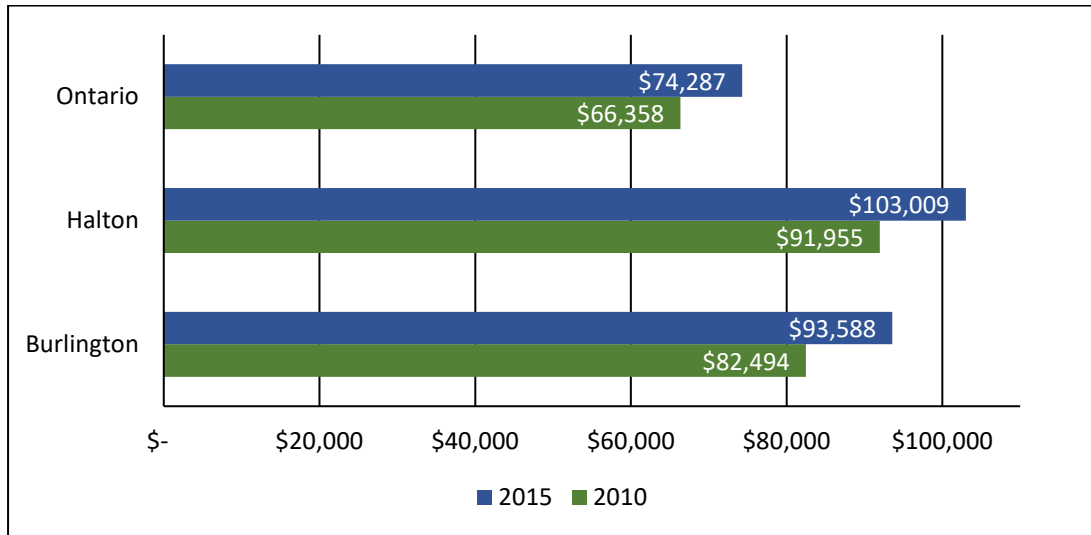
Source: Statistics Canada, 2016 Census of Population

1.1.4 Income

Household Income

The median household income in Burlington in 2015 was \$93,588, a growth of roughly 13% from 2010 levels (see Figure 18). The median income levels for Burlington in both 2010 and 2015 were below the overall levels for Halton (which saw growth of 12%) and above the levels in Ontario (which saw growth of 11.9%).

FIGURE 18: MEDIAN HOUSEHOLD INCOME OF PRIVATE HOUSEHOLDS

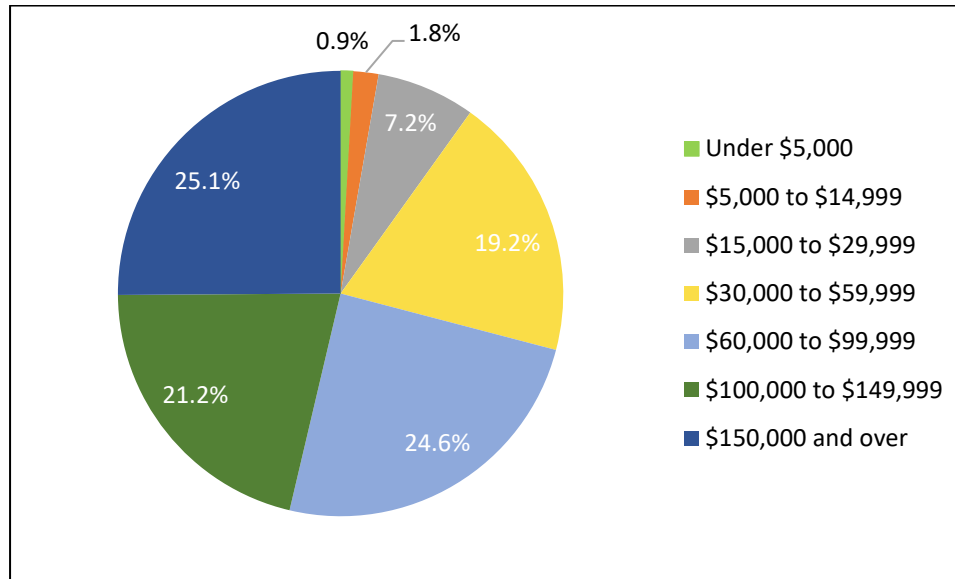


Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, 2016 Census of Population

Household Income Brackets

In terms of household income brackets, roughly 46.3% of households in Burlington in 2015 made over \$100,000 (see Figure 19 below). This is compared with the 29.1% of households in Burlington that made less than \$60,000. Roughly 51.6% of households in Halton and 34.9% in Ontario made over \$100,000, with 25.8% of households in Halton and 40.1% in Ontario making less than \$60,000. Taken together, these statistics highlight the relatively higher levels of wealth in Burlington compared with the province.

FIGURE 19: HOUSEHOLD INCOME BRACKETS, BURLINGTON, 2015



Source: Statistics Canada, 2016 Census of Population

1.1.5 Dwelling Characteristics

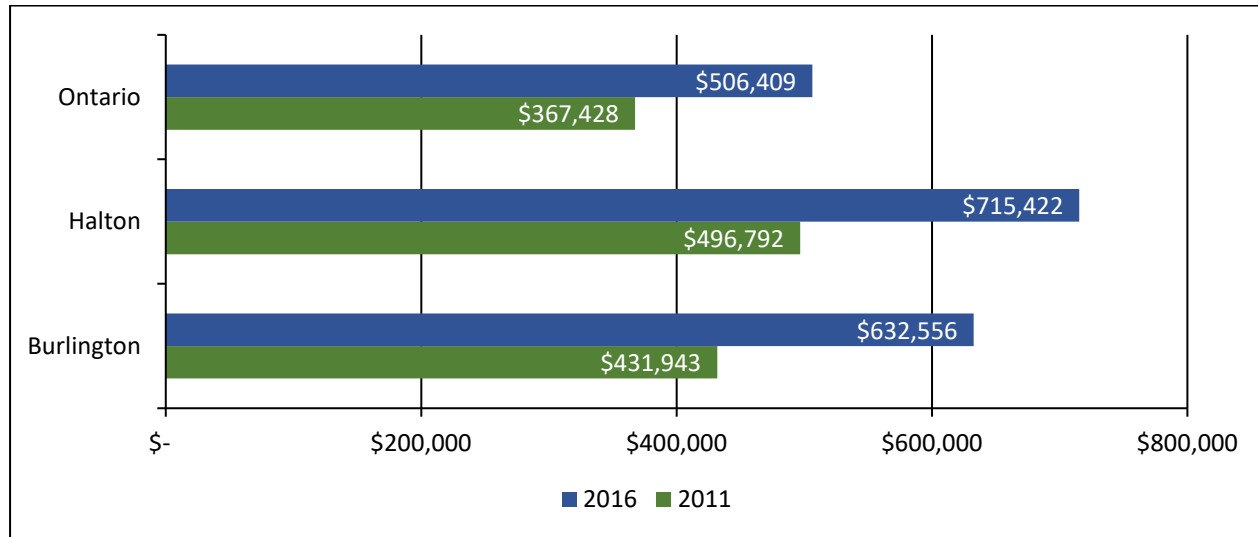
Household Size

The average number of people in private households in Burlington in 2016 was 2.5 (constant from 2011). This is slightly lower relative to Halton (2.6 in 2016, 2.8 in 2011) and Ontario (2.6 in 2016 and 2011).

Dwelling Values

As seen in Figure 20, the average value of owned dwellings in Burlington in 2016 was \$632,556 (an increase of 46.4% from 2011). This is below the average value of \$715,422 for dwellings in Halton (an increase of 44% from 2011), but substantially above the average dwelling value for Ontario at \$506,409 (an increase of 37.8% from 2011).

FIGURE 20: AVERAGE VALUE OF OWNED DWELLINGS



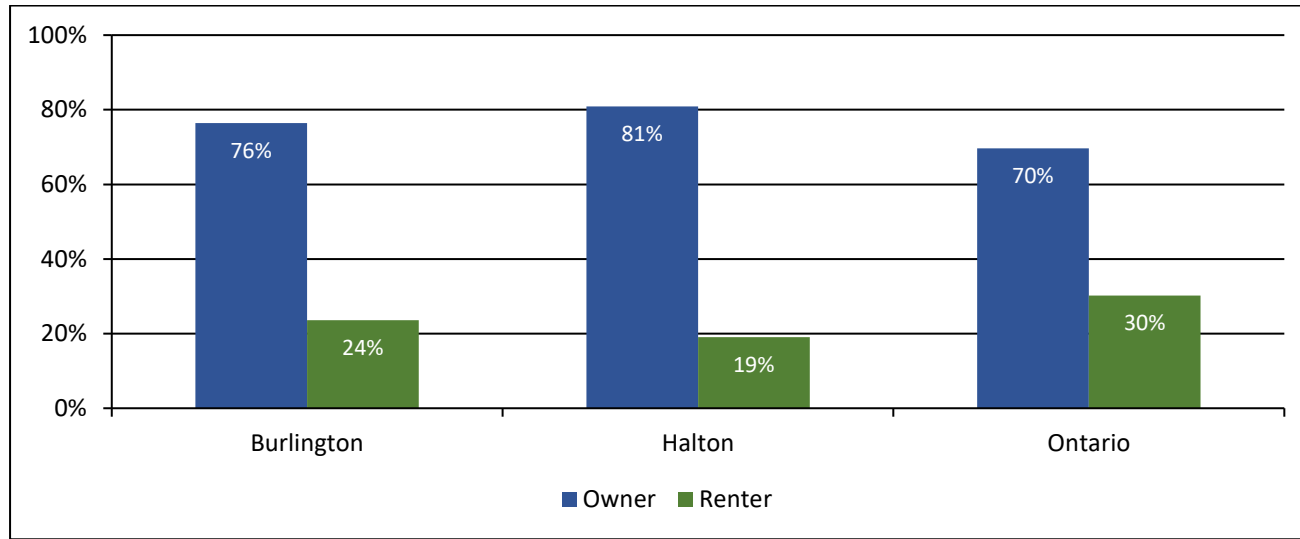
Source: Statistics Canada, 2016 Census of Population

Note: Value of dwelling - Refers to the dollar amount expected by the owner if the dwelling were to be sold.

Ownership Characteristics

Roughly 76% of private households in Burlington own their residence, with an additional 24% renting (see Figure 21) households. Compared with Halton there is slightly less household ownership and more renting in Burlington. Compared with Ontario, there is more household ownership and less renting in Burlington.

FIGURE 21: TOTAL PERCENTAGE OF PRIVATE HOUSEHOLDS BY TENURE, 2016

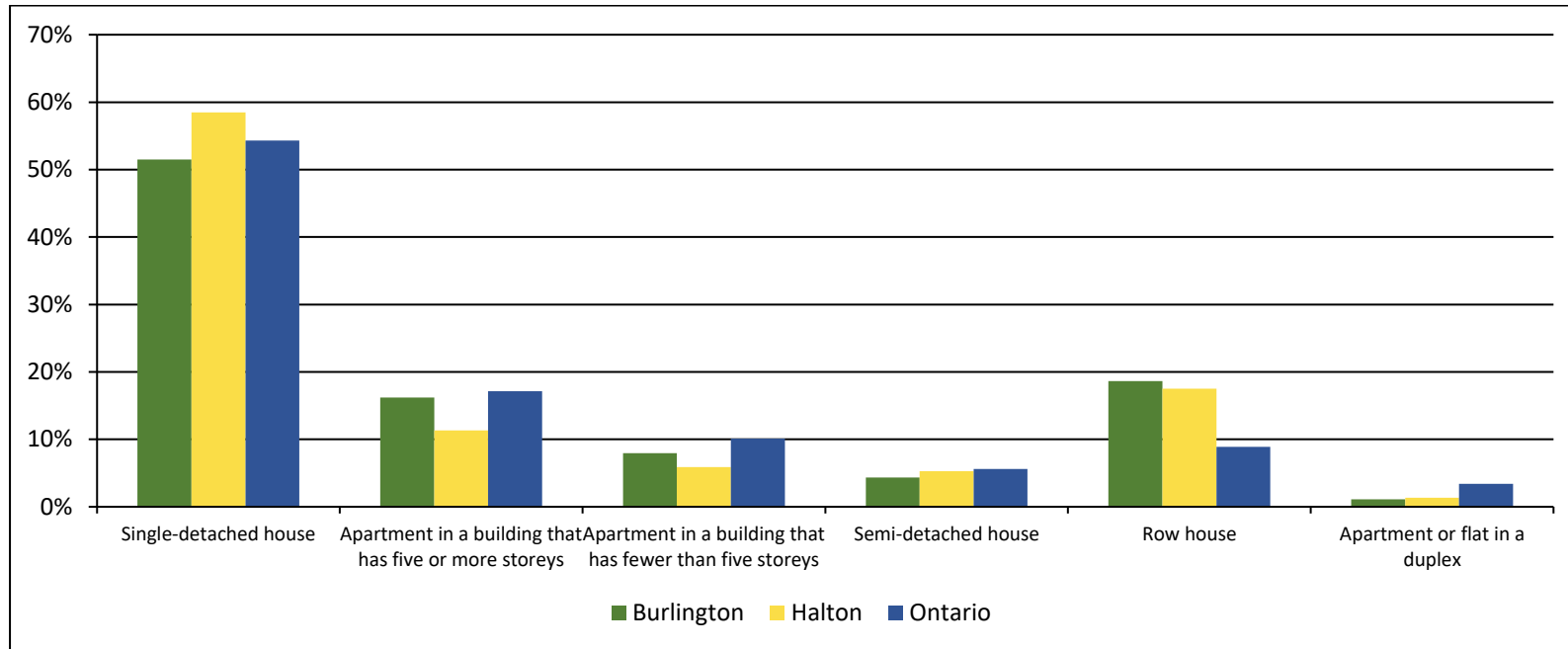


Source: Statistics Canada, 2016 Census of Population

Dwelling Types

As seen in Figure 22, roughly 52% of the dwelling types in Burlington are single-detached houses (slightly lower than both Halton at 59% and Ontario at 54%). Other dwelling types representing more than 10% of Burlington's housing stock include row houses (18.6%) and apartment buildings with five or more storeys (16.2%).

FIGURE 22: PROPORTION OF DWELLING TYPES, 2016



Source: Statistics Canada, 2016 Census of Population

Primary Rental Market

As seen in Figure 23, the vacancy rate in Burlington for rental apartments increased from 1.1% in October 2016 to 1.4% in October 2017. This increase also coincided with an increase in the availability rate for rental apartments in Burlington (3.1% to 4.0%) and an increase in the average and median rents for two bedroom apartments.

Similar trends for average and median rents are being experienced in Hamilton and Ontario as a whole. However, Hamilton and Ontario experienced decreasing rates of vacancy and availability.

FIGURE 23: PRIMARY RENTAL MARKET

| | Oct-17 | | | | Oct-16 | | | |
|-------------------------------|------------|----------|----------|---------|------------|----------|----------|---------|
| | Burlington | Oakville | Hamilton | Ontario | Burlington | Oakville | Hamilton | Ontario |
| Vacancy Rate (%) - Apt | 1.4 | 1.0 | 2.7 | 1.6 | 1.1 | 1.1 | 4.5 | 2.1 |
| Availability Rate (%) - Apt | 4.0 | 2.5 | 3.5 | 2.9 | 3.1 | 2.5 | 6.7 | 3.7 |
| Average Rent (\$) - 2-Bed Apt | \$1,366 | \$1,456 | \$1,027 | \$1,208 | \$1,294 | \$1,423 | \$965 | \$1,154 |
| Median Rent (\$) - 2-Bed Apt | \$1,300 | \$1,450 | \$975 | \$1,150 | \$1,250 | \$1,429 | \$925 | \$1,100 |

Source: Canada Mortgage and Housing Corporation (CMHC), Housing Market Information Portal

1.2 Occupational Profile

1.2.1 Labour Force Characteristics

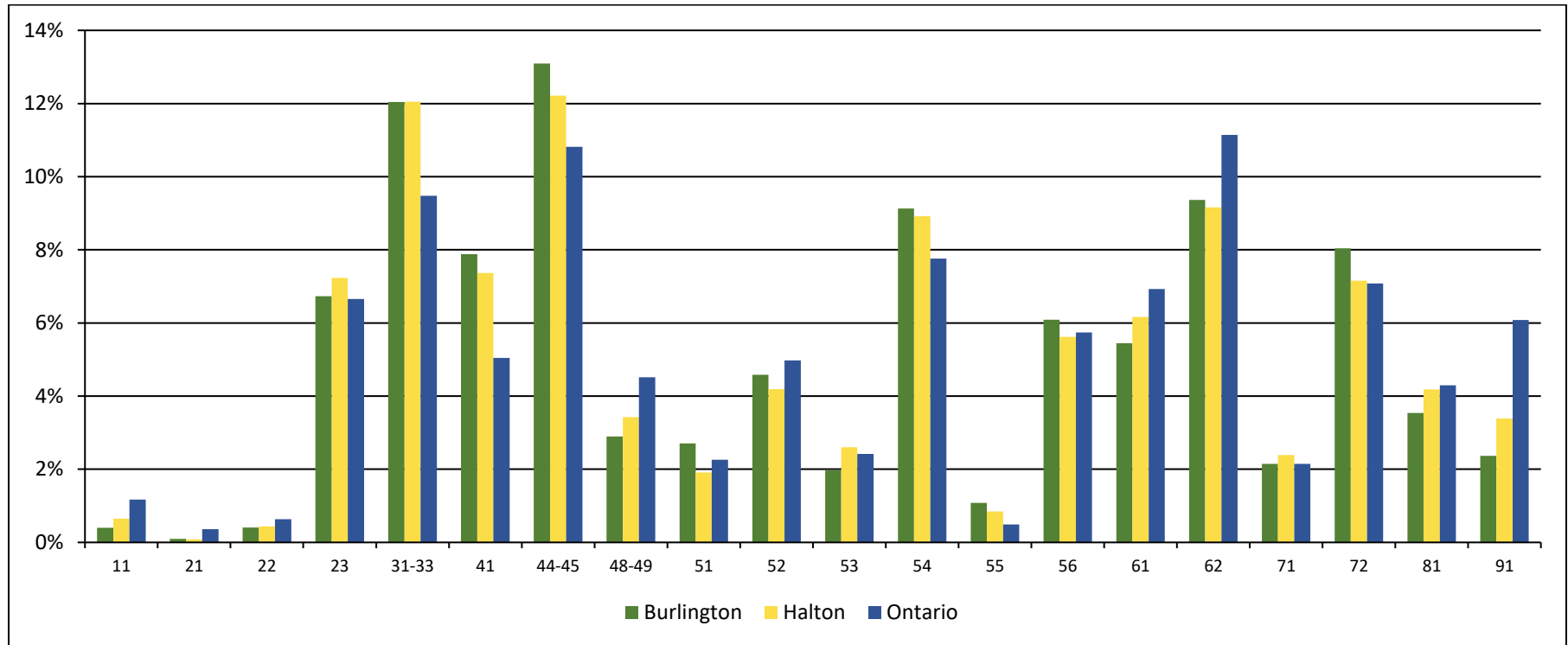
Regional Labour Force by Industry

In 2017, the top industries by labour force in Burlington were:

- Retail Trade (13.09%)
- Manufacturing (12.04%)
- Health Care and Social Assistance (9.36%)
- Professional, Scientific, and Technical Services (9.13%).

Figure 24 highlights all industries and their relative concentrations in the economy for Burlington, Halton, and Ontario.

FIGURE 24: SHARE OF TOTAL LABOUR FORCE POPULATION AGED 15 YEARS AND OVER BY INDUSTRY (NAICS), 2017



Source: Employees – EMSI 2018.1, adapted by BEDC

NAICS Categories:

11-Agriculture; forestry; fishing and hunting, 21-Mining; quarrying; and oil and gas extraction, 22-Utilities, 23-Construction, 31-33 Manufacturing, 41-Wholesale trade, 44-45 Retail trade, 48-49 Transportation and warehousing, 51-Information and cultural industries, 52-Finance and insurance, 53-Real estate and rental and leasing, 54-Professional; scientific and technical services, 55-Management of companies and enterprises, 56-Administrative and support; waste management and remediation services, 61-Educational services, 62-Health care and social assistance, 71-Arts; entertainment and recreation, 72-Accommodation and food services, 81-Other services (except public administration), 91-Public administration

Since 2012, the total labour force by industry in Burlington grew by 9.6% (see Figure 25).

The largest increases (in terms of absolute change) were seen in the following sectors:

- 72 Accommodation and food services (+2,002 employed)
- 62 Health care and social assistance (+1,961 employed)
- 44-45 Retail Trade (+1,211 employed)
- 56 Administrative and support; waste management and remediation services (+1,150 employed)
- Construction (+994 employed)

Significant decreases were seen in the Real estate and rental leasing sector with a loss of 419 employees.

Computer systems design and related services (3,160 people employed)

Figure 26 below illustrates the top industries by number of employed in Burlington in 2017.

The top three industries are:

- Full-service restaurants and limited-service eating places (7,813 people employed)
- Elementary and Secondary Schools (4,758 people employed)
- Computer systems design and related services (3,160 people employed)

FIGURE 25: SHARE OF TOTAL LABOUR FORCE POPULATION AGED 15 YEARS AND OVER BY INDUSTRY, BURLINGTON, 2012 & 2017

| Industry (NAICS) | Burlington | | |
|---|----------------|----------------|-------------|
| | 2012 | 2017 | % Change |
| 11 Agriculture; forestry; fishing and hunting | 488 | 446 | -9% |
| 21 Mining; quarrying; and oil and gas extraction | 58 | 106 | 83% |
| 22 Utilities | 336 | 453 | 35% |
| 23 Construction | 6,541 | 7,535 | 15% |
| 31-33 Manufacturing | 12,992 | 13,478 | 4% |
| 41 Wholesale trade | 9,227 | 8,818 | -4% |
| 44-45 Retail trade | 13,442 | 14,653 | 9% |
| 48-49 Transportation and warehousing | 3,066 | 3,236 | 6% |
| 51 Information and cultural industries | 2,845 | 3,031 | 7% |
| 52 Finance and insurance | 4,962 | 5,125 | 3% |
| 53 Real estate and rental and leasing | 2,630 | 2,211 | -16% |
| 54 Professional; scientific and technical services | 9,267 | 10,215 | 10% |
| 55 Management of companies and enterprises | 1,361 | 1,208 | -11% |
| 56 Administrative and support; waste management and remediation services | 5,661 | 6,811 | 20% |
| 61 Educational services | 5,381 | 6,095 | 13% |
| 62 Health care and social assistance | 8,514 | 10,475 | 23% |
| 71 Arts; entertainment and recreation | 1,586 | 2,406 | 52% |
| 72 Accommodation and food services | 6,997 | 8,999 | 29% |
| 81 Other services (except public administration) | 4,013 | 3,958 | -1% |
| 91 Public administration | 2,706 | 2,645 | -2% |
| Total | 102,072 | 111,905 | 9.6% |

Source: Employees – EMSI 2018.1, adapted by BEDC

FIGURE 26: TOP INDUSTRIES BY # OF EMPLOYED, BURLINGTON, 2017

| | # of Employed |
|--|---------------|
| Full-service restaurants and limited-service eating places | 7,813 |
| Elementary and secondary schools | 4,758 |
| Computer systems design and related services | 3,160 |
| Services to buildings and dwellings | 2,430 |
| Grocery stores | 2,171 |
| Building equipment contractors | 2,119 |
| Employment services | 2,089 |
| General medical and surgical hospitals | 1,924 |
| Unclassified | 1,912 |
| Clothing stores | 1,776 |
| Architectural, engineering and related services | 1,724 |
| Management, scientific and technical consulting services | 1,698 |
| Health and personal care stores | 1,626 |
| Local, municipal and regional public administration | 1,618 |
| Residential building construction | 1,559 |
| Other financial investment activities | 1,521 |
| Other amusement and recreation industries | 1,448 |
| Child day-care services | 1,360 |
| Other machinery, equipment and supplies merchant wholesalers | 1,342 |
| Depository credit intermediation | 1,208 |

Source: Employees – EMSI 2018.1, adapted by BEDC

Regional Labour Force by Industry Location Quotients

In order to determine the level and degree of industrial specialization that has developed in Burlington, **Location Quotients (LQs)** have been calculated to measure the relative concentration of labour force activity by major industry sector.

Location quotients are a commonly used tool in regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region(s) in which it resides. LQ's have been calculated to compare the City of Burlington to the broader trends in the economies of Halton Region and the province of Ontario. This LQ analysis will help highlight the industries in which Burlington has competitive advantages.

A location quotient greater than 1.25 for a given sector indicates a local concentration of economic activity as compared to the overarching region and may be an indication of competitive advantage with respect to the attraction of that industry sector.

Location quotients equal to 1.0 for a given sector suggest that the study area has the same concentration of economic activity as the overarching comparator (in this case, the Region of Halton, and the Province of Ontario).

Finally, a location quotient of less than 0.75 suggests that the place in question does not have a strong competitive advantage in that sector.

As seen in Figure 27, compared to Ontario, Burlington has a high degree of specialization in:

- Management of Companies and Enterprises (2.19)
- Wholesale Trade (1.56)
- Manufacturing (1.27)

Relative to Halton, Burlington has a low concentration of industries in Agriculture, Forestry, Fishing, and Hunting (0.61), and Public administration (0.70).

Relative to Ontario, Burlington has a low concentration of industries in Mining, Quarrying, Oil, and Gas Extraction (0.26), Agriculture, Forestry, Fishing, and Hunting (0.34), Public Administration (0.39), and Utilities (0.64).

FIGURE 27: TOTAL LABOUR FORCE POPULATION AGED 15 YEARS AND OVER BY INDUSTRY, LOCATION QUOTIENTS, 2017

| Industry (NAICS) LQ's | Burlington | |
|--|-------------|-------------|
| | vs. Halton | vs. Ontario |
| 11 Agriculture; forestry; fishing and hunting | 0.61 | 0.34 |
| 21 Mining; quarrying; and oil and gas extraction | 1.13 | 0.26 |
| 22 Utilities | 0.93 | 0.64 |
| 23 Construction | 0.93 | 1.01 |
| 31-33 Manufacturing | 1.00 | 1.27 |
| 41 Wholesale trade | 1.07 | 1.56 |
| 44-45 Retail trade | 1.07 | 1.21 |
| 48-49 Transportation and warehousing | 0.84 | 0.64 |
| 51 Information and cultural industries | 1.42 | 1.20 |
| 52 Finance and insurance | 1.09 | 0.92 |
| 53 Real estate and rental and leasing | 0.76 | 0.82 |
| 54 Professional; scientific and technical services | 1.02 | 1.18 |
| 55 Management of companies and enterprises | 1.27 | 2.19 |
| 56 Administrative and support; waste management and remediation services | 1.08 | 1.06 |
| 61 Educational services | 0.88 | 0.79 |
| 62 Health care and social assistance | 1.02 | 0.84 |
| 71 Arts; entertainment and recreation | 0.90 | 1.00 |
| 72 Accommodation and food services | 1.12 | 1.14 |
| 81 Other services (except public administration) | 0.85 | 0.82 |
| 91 Public administration | 0.70 | 0.39 |

Source: Employees – EMSI 2018.1, adapted by BEDC

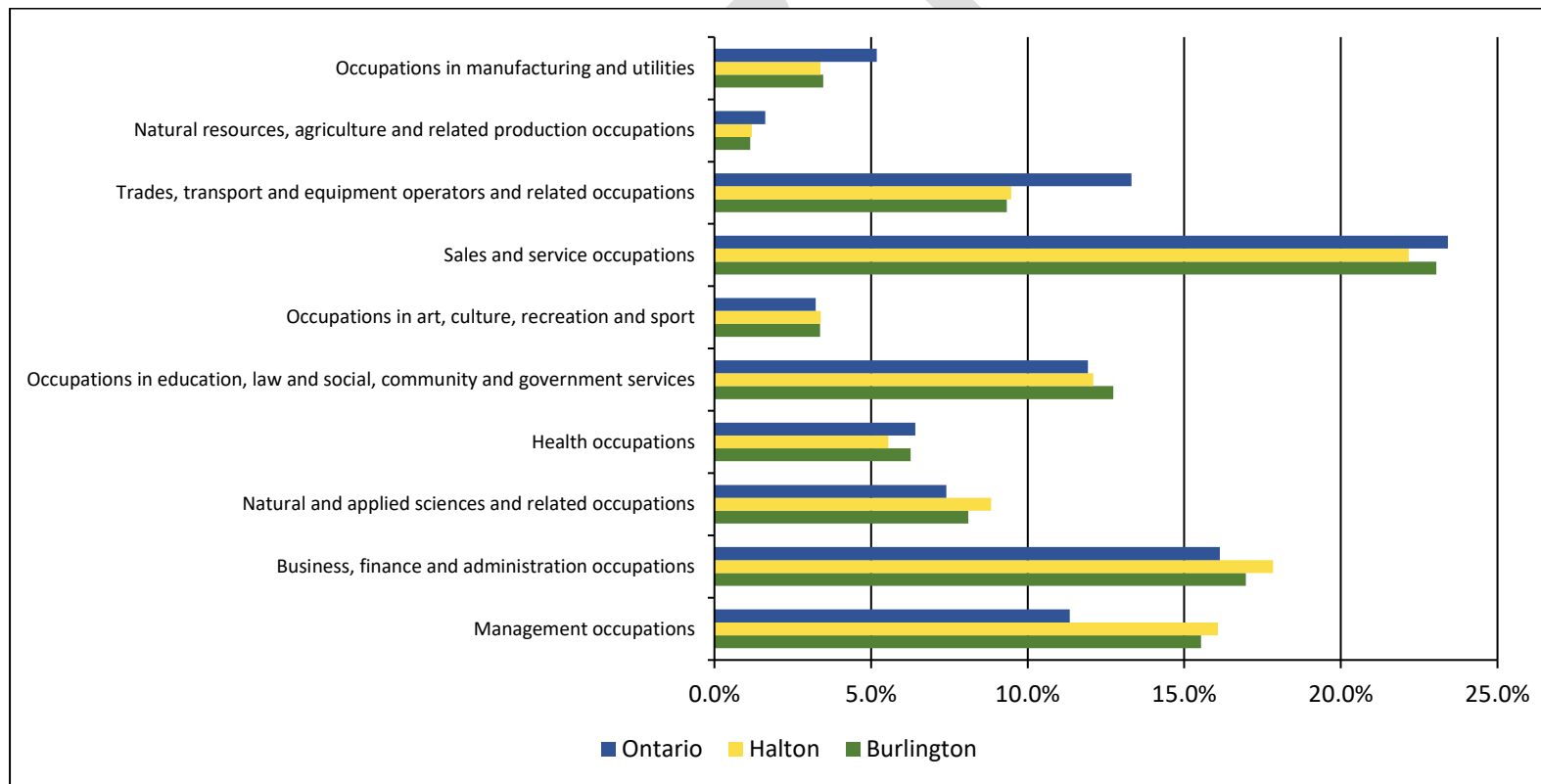
Labour Force by Occupation

As seen in Figure 28, the top three occupational industries in Burlington in 2016 were in Sales and Service (23.0%), Business Finance and Administration (17.0%), and Management (15.5%).

These concentrations are comparable to levels in Halton and Ontario, with the exception of the higher concentration of management occupations in Burlington and Halton relative to the province.

Between 2011 and 2016, Burlington experienced the greatest increases in Occupations in art, culture, recreation and sport (24.2% increase), Natural resources, agriculture, and related production occupations (15.6%), and Health Occupations (13.7%) (see Figure 29). These increases are on trend with increases seen in Halton.

FIGURE 28: TOTAL LABOUR FORCE POPULATION AGED 15 YEARS AND OVER BY OCCUPATION, 2016



Source: Statistics Canada, 2016 Census of Population

FIGURE 29: TOTAL LABOUR FORCE POPULATION AGED 15 YEARS AND OVER BY OCCUPATION, 2011 AND 2016

| Occupation Category | 2011 | | | 2016 | | | % Change | | |
|--|---------------|----------------|------------------|----------------|----------------|------------------|-------------|-------------|-------------|
| | Burlington | Halton | Ontario | Burlington | Halton | Ontario | Burlington | Halton | Ontario |
| 0 Management occupations | 14,965 | 46,455 | 770,580 | 15,565 | 47,855 | 790,880 | 4.0% | 3.0% | 2.6% |
| 1 Business; finance and administration occupations | 17,700 | 52,120 | 1,138,330 | 17,000 | 53,115 | 1,124,770 | -4.0% | 1.9% | -1.2% |
| 2 Natural and applied sciences and related occupations | 7,810 | 23,270 | 494,500 | 8,125 | 26,300 | 516,110 | 4.0% | 13.0% | 4.4% |
| 3 Health occupations | 5,520 | 13,745 | 392,695 | 6,275 | 16,535 | 447,045 | 13.7% | 20.3% | 13.8% |
| 4 Occupations in education; law and social; community and government services | 11,880 | 33,345 | 801,465 | 12,765 | 36,005 | 831,340 | 7.4% | 8.0% | 3.7% |
| 5 Occupations in art; culture; recreation and sport | 2,725 | 8,125 | 206,420 | 3,385 | 10,090 | 225,720 | 24.2% | 24.2% | 9.3% |
| 6 Sales and service occupations | 23,105 | 61,745 | 1,550,260 | 23,090 | 66,010 | 1,632,085 | -0.1% | 6.9% | 5.3% |
| 7 Trades; transport and equipment operators and related occupations | 9,280 | 26,055 | 868,515 | 9,350 | 28,210 | 927,820 | 0.8% | 8.3% | 6.8% |
| 8 Natural resources; agriculture and related production occupations | 995 | 3,115 | 106,810 | 1,150 | 3,560 | 113,405 | 15.6% | 14.3% | 6.2% |
| 9 Occupations in manufacturing and utilities | 3,125 | 8,560 | 350,685 | 3,480 | 10,085 | 361,455 | 11.4% | 17.8% | 3.1% |
| Total | 97,105 | 276,535 | 6,680,260 | 100,185 | 297,765 | 6,970,630 | 3.2% | 7.7% | 4.3% |

Source: Statistics Canada, 2016 Census of Population

Digging deeper into the statistics (see Figure 30), the top occupational categories by the number of employed in Burlington in 2017 were:

- Retail Salespersons (4,065 people employed)
- Sales and account representatives- wholesale trade, non-technical (2,986 people employed)
- Food counter attendants, kitchen helpers and related support occupations (2,622 people employed)

FIGURE 30: TOP OCCUPATIONS BY # OF EMPLOYED, BURLINGTON, 2017

| Occupation | # of Employed |
|--|---------------|
| Retail salespersons | 4,065 |
| Sales and account representatives - wholesale trade (non-technical) | 2,986 |
| Food counter attendants, kitchen helpers and related support occupations | 2,622 |
| Technical sales specialists - wholesale trade | 2,233 |
| Cashiers | 2,189 |
| Retail and wholesale trade managers | 2,080 |
| Unclassified | 1,912 |
| Early childhood educators and assistants | 1,758 |
| Transport truck drivers | 1,640 |
| Retail sales supervisors | 1,528 |
| Material handlers | 1,453 |
| Other customer and information services representatives | 1,416 |
| Other financial officers | 1,389 |
| Information systems analysts and consultants | 1,323 |
| Cooks | 1,318 |
| Store shelf stockers, clerks and order fillers | 1,290 |
| Nurse aides, orderlies and patient service associates | 1,258 |
| Registered nurses and registered psychiatric nurses | 1,255 |
| Elementary school and kindergarten teachers | 1,251 |
| Administrative officers | 1,196 |

Source: EMSI Analyst

Employment Statistics

The unemployment rate in Burlington in 2016 was 5.6%, down from 5.8% in 2011 (see Figure 31). This decrease in the unemployment rate was smaller than decreases in the unemployment rates for both Halton and Ontario during the same time period (Halton at 6.3% in 2011 and 6.0% in 2016, and Ontario at 8.3% in 2011 and 7.4% in 2016).

FIGURE 31: EMPLOYMENT STATISTICS

| | 2011 | | | 2016 | | |
|--------------------------------|------------|---------|-----------|------------|---------|-----------|
| | Burlington | Halton | Ontario | Burlington | Halton | Ontario |
| In the labour force | 98,785 | 281,625 | 6,864,990 | 101,650 | 302,950 | 7,141,675 |
| Employed | 93,030 | 263,850 | 6,297,005 | 95,975 | 284,770 | 6,612,150 |
| Unemployed | 5,755 | 17,770 | 567,985 | 5,680 | 18,180 | 529,525 |
| Not in the labour force | 44,725 | 114,925 | 3,608,685 | 47,845 | 130,895 | 3,896,765 |
| Participation rate | 68.8% | 71.0% | 65.5% | 68.0% | 69.8% | 64.7% |
| Employment rate | 64.8% | 66.5% | 60.1% | 64.2% | 65.6 % | 59.9% |
| Unemployment rate | 5.8% | 6.3% | 8.3% | 5.6% | 6.0% | 7.4% |

Source: Statistics Canada, 2016 Census of Population

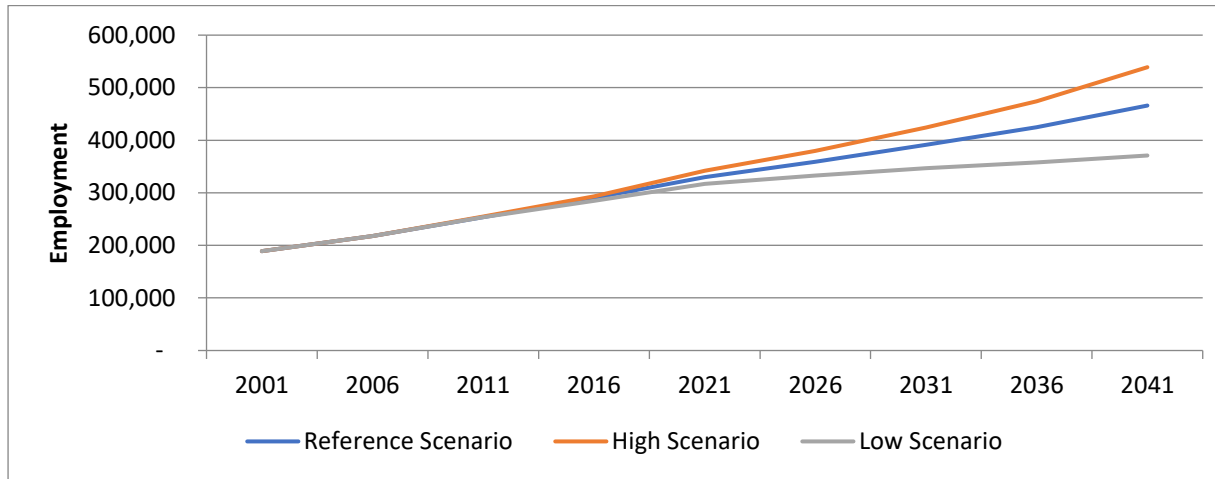
Employment Growth Projections

As outlined in an earlier section (see Population Projections), data released by the Government of Ontario for the GGH estimates that employment in Halton Region will increase by 96%-185% between 2001 and 2041 (see Figure 32), significantly above the projected increases for the GGH of 44%-85%.

As seen in Figure 33, this employment data has been broken down further to highlight the employment projections for each of the municipalities in Halton Region. These projections indicate a 20% increase in employment in Burlington, lower than the increases projected for Oakville (56%), Milton (320%), and Halton Hills (118%).⁴

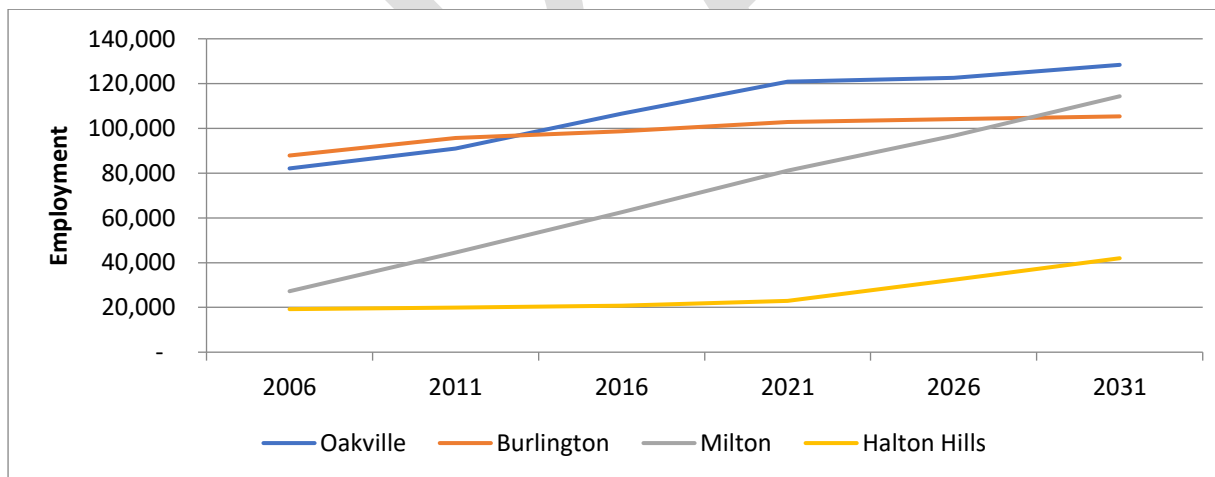
⁴ As with the population projections presented earlier, it is important to note that the data used in the Halton Region municipality projections has not been updated since 2011, whereas the GGH data was revised in 2013. As a result, Figure 32 and Figure 33 should not be compared directly to each other, but rather used as an indicator of general trends in the region.

FIGURE 32: EMPLOYMENT PROJECTIONS TO 2041, HALTON REGION



Source: Hemson Consulting for the Government of Ontario, "Greater Golden Horseshoe Growth Forecasts to 2041: Technical Report (November 2012) Addendum", June 2013

FIGURE 33: EMPLOYMENT PROJECTIONS TO 2031, MUNICIPALITIES OF HALTON REGION

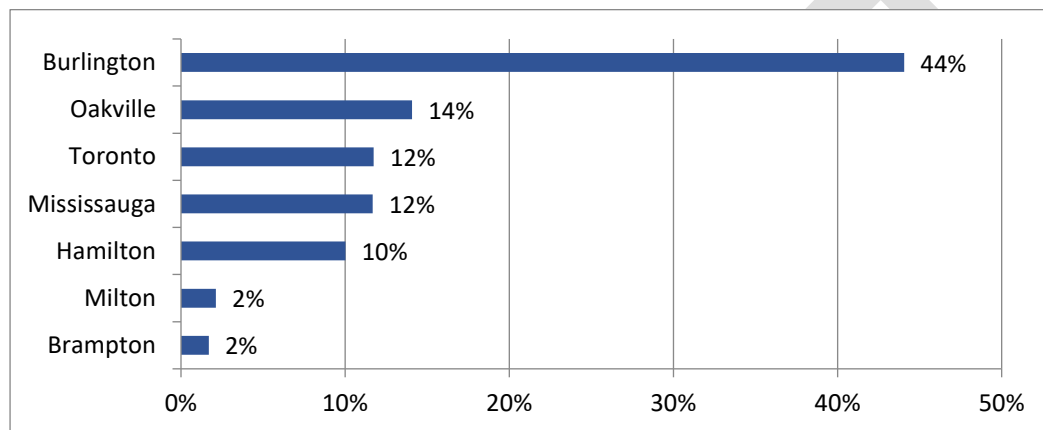


Source: Regional Municipality of Halton, "Best Planning Estimates of Population, Occupied Dwelling Units and Employment, 2011-2031", June 2011

Commuting Patterns

Roughly 44% of residents in Burlington worked in Burlington in 2011 (see Figure 34). Other top areas that residents of Burlington worked include Oakville (14%), Toronto (12%), Mississauga (12%), and Hamilton (10%).

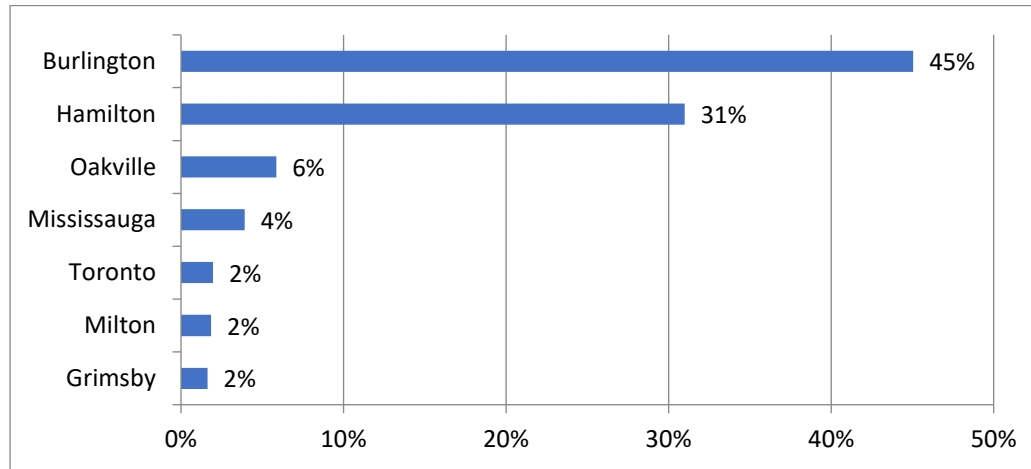
FIGURE 34: PLACE OF WORK FOR RESIDENTS OF BURLINGTON, 2011



Source: Statistics Canada; 2011 National Household Survey. Catalogue Number 99-012-X2011032

In terms of where workers in Burlington reside, roughly 45% of workers live within Burlington (see Figure 35). A significant number of workers that commute into Burlington for their employment also live in Hamilton (31%). Other important areas from which workers live and commute into Burlington include Oakville (6%) and Mississauga (4%), albeit, to a lesser extent.

FIGURE 35: PLACE OF RESIDENCE FOR WORKERS IN BURLINGTON, 2011



Source: Statistics Canada; 2011 National Household Survey. Catalogue Number 99-012-X2011032

1.3 Business Profile

1.3.1 Business Characteristics

Business Patterns Assessment

Statistics Canada's Canadian Business Patterns Data provides a record of business establishments in Canada by industry and size. Collected by the Canada Revenue Agency (CRA), business data collected includes all local businesses that meet at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to CRA; or
- Have a minimum of \$30,000 in annual sales revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The Canadian Business Patterns Data records business counts by "Total", "Indeterminate" and "Subtotal" categories. The establishments in the "Indeterminate" category include the self-employed (i.e. those who do not maintain an

employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). It should be noted that the Canadian Business Patterns Data uses the CRA as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than \$30,000 are not included. The population of these small, unincorporated businesses is thought to be in the range of 600,000 in all of Canada.

Business Patterns in Burlington – 2013 to 2017

A detailed review of the business counts from the Halton Employment Survey for the period between 2013 and 2017 for Burlington provides a snapshot of the growth or decline of businesses over a four-year period in the City. When combined with the broader industry analysis presented above, the business patterns information assists in understanding the key industry opportunities for Burlington to pursue, especially with regards to program development and delivery, and strategic planning.

As seen in Figure 36, the number of business establishments in Burlington fell by 0.7% between 2013 and 2017. Positive gains (in terms of absolute numbers) in the number of business establishments in Burlington were seen especially in:

- Real Estate and Rental and Leasing (+1,650 businesses)
- Finance and Insurance (+413 businesses)
- Health Care and Social Assistance (+364 businesses)
- Arts, Entertainment and Recreation (+47 businesses)

In terms of concentration, the following sectors exhibited the highest concentration of business establishments in Burlington as a percent of the total number of businesses in 2017:

- Real Estate and Rental and Leasing (2,764 businesses, 21.7% of total, increased by 148.1% from 2013)
- Professional, Scientific and Technical Services (2,475 businesses, 19.2% of total, decreased by 1.3% from 2013)
- Finance and Insurance (1,307 businesses, 10.3% of total, increased by 46.2% from 2013)
- Construction (1,170 businesses, 9.2% of total, decreased by 1.1% from 2013)

FIGURE 36: BUSINESS ESTABLISHMENTS BY INDUSTRY AND LOCATION QUOTIENTS, BURLINGTON, 2013 & 2017

| Industry (NAICS) | Burlington | | | LQ 2017 | | |
|--|---------------|---------------|--------------|--------------|-------------|-------------|
| | 2013 | 2017 | %Δ | 2017 % Total | vs. Halton | vs. Ontario |
| 11 Agriculture, Forestry, Fishing and Hunting | 93 | 77 | -17.2% | 0.6% | 0.60 | 0.14 |
| 21 Mining, Quarrying, and Oil and Gas Extraction | 6 | 9 | 50.0% | 0.1% | 0.73 | 0.61 |
| 22 Utilities | 10 | 11 | 10.0% | 0.1% | 0.60 | 0.32 |
| 23 Construction | 1,183 | 1170 | -1.1% | 9.2% | 1.02 | 0.94 |
| 31-33 Manufacturing | 588 | 253 | -57.0% | 2.0% | 1.03 | 1.09 |
| 41 Wholesale Trade | 913 | 337 | -63.1% | 2.6% | 1.02 | 1.25 |
| 44-45 Retail Trade | 1,223 | 548 | -55.2% | 4.3% | 0.94 | 0.95 |
| 48-49 Transportation and Warehousing | 448 | 428 | -4.5% | 3.4% | 0.74 | 0.58 |
| 51 Information and Cultural Industries | 183 | 223 | 21.9% | 1.8% | 1.15 | 1.09 |
| 52 Finance and Insurance | 894 | 1307 | 46.2% | 10.3% | 1.14 | 1.28 |
| 53 Real Estate and Rental and Leasing | 1,114 | 2764 | 148.1% | 21.7% | 0.93 | 0.82 |
| 54 Professional, Scientific and Technical Services | 2,475 | 2444 | -1.3% | 19.2% | 0.95 | 1.35 |
| 55 Management of Companies and Enterprises | 702 | 224 | -68.1% | 1.8% | 1.12 | 1.44 |
| 56 Administrative and Support, Waste Management and Remediation Services | 584 | 582 | -0.3% | 4.6% | 1.03 | 1.17 |
| 61 Educational Services | 176 | 175 | -0.6% | 1.4% | 0.96 | 1.21 |
| 62 Health Care and Social Assistance | 633 | 997 | 57.5% | 7.8% | 1.16 | 1.37 |
| 71 Arts, Entertainment and Recreation | 189 | 236 | 24.9% | 1.9% | 1.18 | 1.01 |
| 72 Accommodation and Food Services | 460 | 146 | -68.3% | 1.1% | 1.07 | 0.75 |
| 81 Other Services (except Public Administration) | 981 | 787 | -19.8% | 6.2% | 1.23 | 1.12 |
| 91 Public Administration | 4 | 1 | -75.0% | 0.0% | 0.63 | 0.62 |
| Total Economy | 12,809 | 12,719 | -0.7% | | | |

Source: Canadian Business Patterns, Statistics Canada, December 2013 and December 2017

Note: **Over 1.25** = High Concentration; **Under 0.75** = Low Concentration

Figure 36 also highlights that Burlington has a high degree of specialization (i.e. location quotient) relative to Ontario by number of business establishments in:

- Management of Companies (1.25)
- Health Care and Social Assistance (1.37)
- Professional, Scientific and Technical Services (1.28)

Relative to Halton, Burlington has a low concentration of businesses in Agriculture, Forestry, Fishing, and Hunting (0.60), Utilities (0.60), Public Administration (0.63), Mining, Quarrying, Oil, and Gas Extraction (0.73) and Information and Cultural Industries (0.74).

Relative to Ontario, Burlington has a low concentration of businesses in Agriculture, Forestry, Fishing, and Hunting (0.14), Utilities (0.32), Information and Cultural Industries (0.58), Mining, Quarrying, Oil, and Gas Extraction (0.61) and Public Administration (0.62).

Business Patterns in Burlington – 2017

As can be seen below in Figure 37, small companies and enterprises that employ less than 10 people play an important role in the business composition in Burlington. In 2017 (excluding self-employed businesses that make up the indeterminate category, which themselves are small enterprises), there were 3,228 businesses (51% of the subtotal) that employ 1-4 people. An additional 1,282 businesses (20% of the subtotal) employ 5-9 people.

While roughly 71% of the employers in Burlington employ nine or less people, roughly 23% of employers in the community employ between 10-49 employees and 6% of employers employ 50 or more employees.

The top industries of Burlington employers that employ nine or less employees are:

- Professional, Scientific, and Technical Services (823 businesses)
- Health Care and Social Assistance (592 businesses)
- Construction (453 businesses)
- Retail Trade (444 businesses)
- Other Services (Except Public Administration) (440 businesses)

The top Burlington industries with firms employing 10-49 employees are:

- Accommodation and Food Services (106 businesses)

- Retail Trade (95 businesses)
- Wholesale Trade (66 businesses)
- Manufacturing (57 businesses)
- Construction (52 businesses)

Of the Burlington firms employing 50 or more employees, the top industries are:

- Manufacturing (71 businesses)
- Retail Trade (67 businesses)
- Accommodation and Food Services (44 businesses)
- Wholesale Trade (31 businesses)
- Health Care and Social Assistance (27 businesses)

It is interesting to note that roughly 67% of business establishments in Burlington in 2017 were self-employed businesses (i.e. the indeterminate category in Figure 37).

The top industries for the self-employed in Burlington are:

- Real Estate and Rental and Leasing (2,764 businesses)
- Professional, Scientific, and Technical Services (2,444 businesses)
- Finance and Insurance (1,307 businesses)
- Construction (1,170 businesses)
- Health Care and Social Assistance (997 businesses)

Comparing industry concentrations between the 'self-employed' and 'employer' businesses in Burlington reveals some interesting findings. These are:

- The self-employed account for roughly 72% of all business establishments in the Professional, Scientific, and Technical Services industry. This represents more than double the 28% of business establishments that have employees in the same industry.
- The self-employed account for roughly 66% of all business establishments in the Construction industry. This is nearly double the 34% of business establishments that have employees in the same industry.

FIGURE 37: BUSINESS ESTABLISHMENT SIZE BY INDUSTRY, BURLINGTON, 2017

| Industry (NAICS) | Total | Indeterminate | Subtotal | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100+ |
|--|---------------|---------------|--------------|--------------|--------------|------------|------------|------------|------------|
| 11 Agriculture, Forestry, Fishing and Hunting | 99 | 77 | 22 | 13 | 5 | 2 | 0 | 2 | 0 |
| 21 Mining, Quarrying, and Oil and Gas Extraction | 14 | 9 | 5 | 3 | 1 | 0 | 0 | 1 | 0 |
| 22 Utilities | 18 | 11 | 7 | 1 | 1 | 2 | 1 | 2 | 0 |
| 23 Construction | 1,765 | 1,170 | 595 | 319 | 134 | 72 | 52 | 12 | 6 |
| 31-33 Manufacturing | 641 | 253 | 388 | 110 | 84 | 66 | 57 | 36 | 35 |
| 41 Wholesale Trade | 828 | 337 | 491 | 206 | 107 | 81 | 66 | 19 | 12 |
| 44-45 Retail Trade | 1,337 | 575 | 762 | 228 | 216 | 156 | 95 | 45 | 22 |
| 48-49 Transportation and Warehousing | 671 | 428 | 243 | 164 | 30 | 19 | 14 | 7 | 9 |
| 51 Information and Cultural Industries | 319 | 223 | 96 | 45 | 33 | 8 | 5 | 1 | 4 |
| 52 Finance and Insurance | 1,609 | 1307 | 302 | 167 | 52 | 43 | 22 | 7 | 11 |
| 53 Real Estate and Rental and Leasing | 3,029 | 2,764 | 265 | 181 | 33 | 29 | 14 | 6 | 2 |
| 54 Professional, Scientific and Technical Services | 3,402 | 2,444 | 958 | 698 | 125 | 65 | 49 | 13 | 8 |
| 55 Management of Companies and Enterprises | 283 | 224 | 59 | 14 | 4 | 10 | 18 | 4 | 9 |
| 56 Administrative and Support, Waste Management and Remediation Services | 916 | 582 | 334 | 164 | 72 | 47 | 29 | 6 | 16 |
| 61 Educational Services | 257 | 175 | 82 | 37 | 13 | 13 | 15 | 1 | 3 |
| 62 Health Care and Social Assistance | 1,733 | 997 | 736 | 440 | 152 | 82 | 35 | 11 | 16 |
| 71 Arts, Entertainment and Recreation | 323 | 236 | 87 | 38 | 18 | 10 | 16 | 1 | 4 |
| 72 Accommodation and Food Services | 541 | 145 | 396 | 90 | 72 | 84 | 106 | 35 | 9 |
| 81 Other Services (except Public Administration) | 1,328 | 787 | 541 | 310 | 130 | 61 | 22 | 11 | 7 |
| 91 Public Administration | 4 | 1 | 3 | 0 | 0 | 0 | 0 | 1 | 2 |
| Total Economy | 19,117 | 12,745 | 6,372 | 3,228 | 1,282 | 850 | 616 | 221 | 175 |

Source: Canadian Business Patterns, Statistics Canada, December 2017

1.3.2 Select Characteristics from the 2017 Halton Region Employment Survey

The Halton Region Employment Survey is an annual door-to-door business survey that captures employment and land-use information from all visible places of work in each of the municipalities of Halton.⁵ Data collection for the survey occurs through face-to-face interviews, telephone interviews, and questionnaire drop-offs and relies entirely on the willingness of businesses to participate in the survey.

A total of 13,413 businesses were surveyed as part of the 2017 Employment Survey.

Given the greater reliance on businesses to opt-in and participate, or answer all questions in the survey (which causes response rates to vary by topic), the findings from the Halton Employment Survey may not correlate to other business databases (such as the Canadian Business Patterns) due to methodological differences.

As a result, any findings from the Halton Employment Survey should not be directly compared to findings in earlier sections of the Burlington Economic Base Analysis. They are provided here to support the reader in developing a more nuanced understanding of the Burlington economy from a ground level perspective.

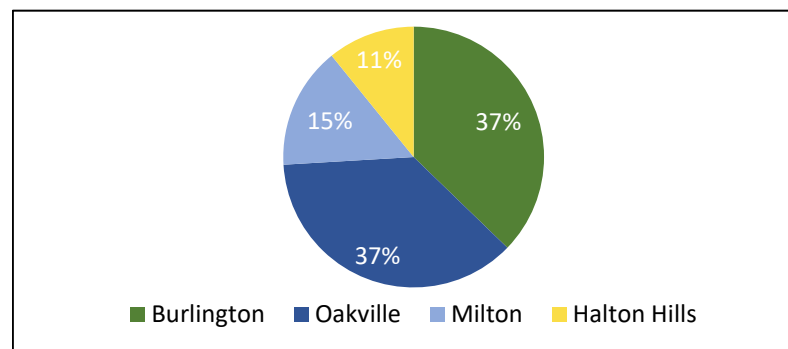
Select Business Characteristics in Burlington

Drawing from the results of the 2017 Halton Region Employment Survey, Figure 38 highlights that 37.2% of all businesses in Halton Region (that responded to the survey) are located in Burlington. This statistic showcases that the greatest proportion of business in the region are located in Burlington, with Oakville at 36.8%, Milton at 15.1%, and Halton Hills at 10.8%.

As seen in

Figure 39, Burlington and Oakville also account for the greatest proportion of full time equivalent jobs in Halton Region (38% for each municipality), further highlighting the importance of both communities for employment in the region.

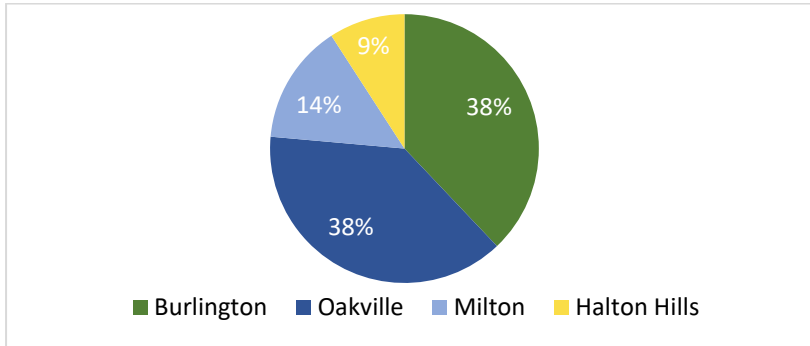
FIGURE 38: PROPORTION OF BUSINESSES BY MUNICIPALITY, HALTON REGION, 2017



Source: Halton Region, "2017 Employment Survey Results", based on responses from 12,970 businesses

⁵ Halton Region, "2017 Employment Survey Results"

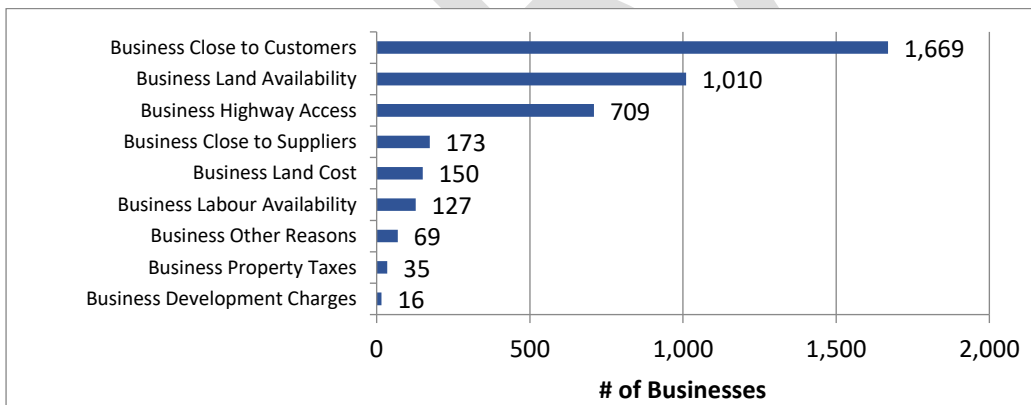
FIGURE 39: PROPORTION OF JOBS (FULL TIME EQUIVALENT) BY MUNICIPALITY, HALTON REGION, 2017



Source: Halton Region, "2017 Employment Survey Results", based on responses from 12,970 businesses

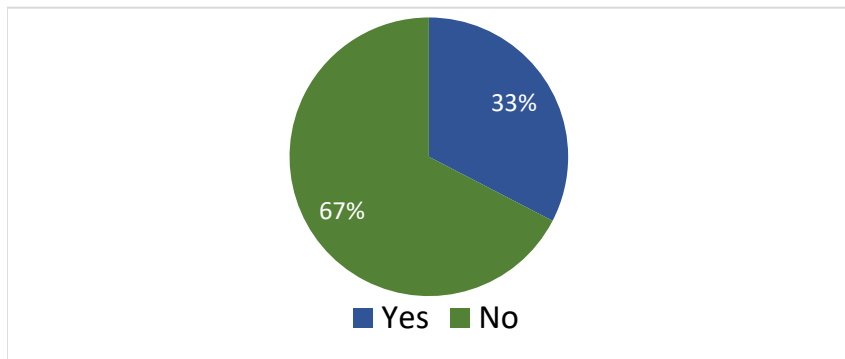
Using most recently available data, roughly 42% of respondents indicated that being close to customers was the greatest reason they choose to locate themselves in Burlington (see Figure 40). Other top reasons included business land availability (26%) and access to the highway (18%).

FIGURE 40: REASONS BUSINESSES CHOOSE TO LOCATE IN BURLINGTON, 2013



Source: Halton Region, "2013 Employment Survey Results", based on responses from 3,958 businesses

FIGURE 41: BUSINESSES OPERATING AS A HEAD OFFICE, BURLINGTON, 2017



Source: Halton Region, "2017 Employment Survey Results", based on responses from 4,033 businesses

Figure 41, highlights that roughly 33% of businesses responding to the survey indicated that they operate as a head office based out of Burlington.

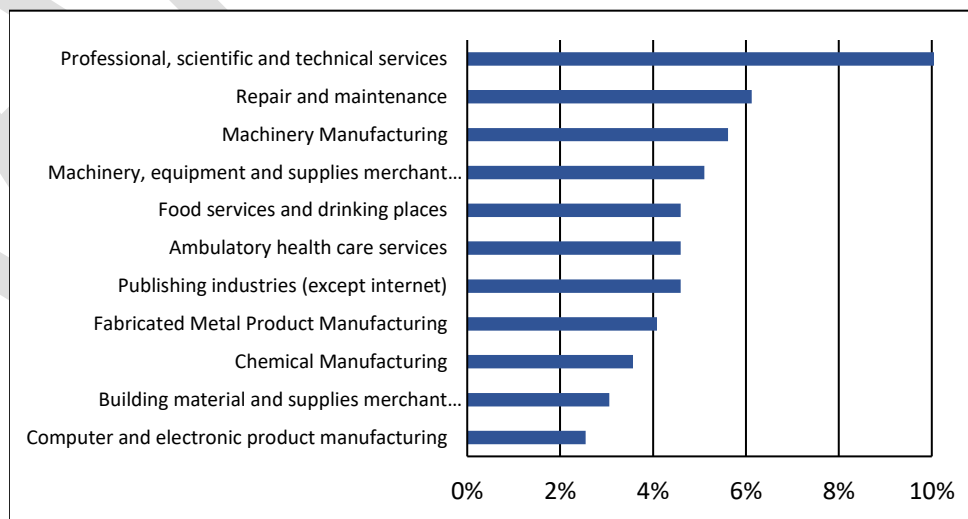
This is slightly higher than the roughly 29% of businesses indicating they operate as a head office out of Oakville (based on responses from 3,810 businesses for Oakville).

As seen in Figure 42, in 2017, a number of businesses based in Burlington exported their goods or services outside of the community.

Listed below are some of the top industries businesses exporting out of Burlington are found in:

- Machinery Manufacturing (9.6%)
- Machinery, Equipment, and Supplies Wholesale (8.8%)
- Fabricated Metal Product Manufacturing (8.09%)
- Building material and supplies merchant wholesalers (7.4%)
- Miscellaneous Manufacturing (5.1%)

FIGURE 42: NUMBER OF BUSINESSES EXPORTING IN BURLINGTON, 2017



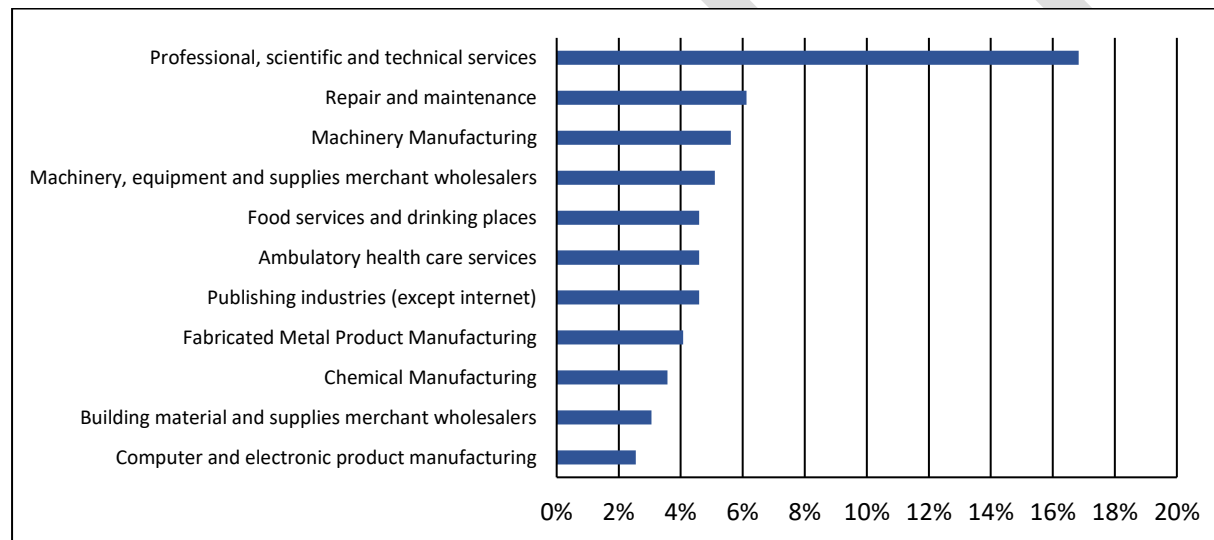
Source: Halton Region, "2017 Employment Survey Results", based on responses from 3,990 businesses (136 or 3.4% of those responded that they do export)

When considering Figure 43, the findings illustrate that out of the 196 Burlington businesses who indicated they were conducting research and development activities (of a total of 3,977 who responded), 16.8% were found in the Professional, Scientific, and Technical Services industry.

A further 6.1% in the Repair and Maintenance, and 5.6% in the Machinery Manufacturing sectors also indicated that they were conducting research and development activities in 2017.

These statistics highlight some of the important sectors in Burlington's economy that are helping to drive innovation in the region.

FIGURE 43: BUSINESSES CONDUCTING RESEARCH & DEVELOPMENT IN BURLINGTON, 2017



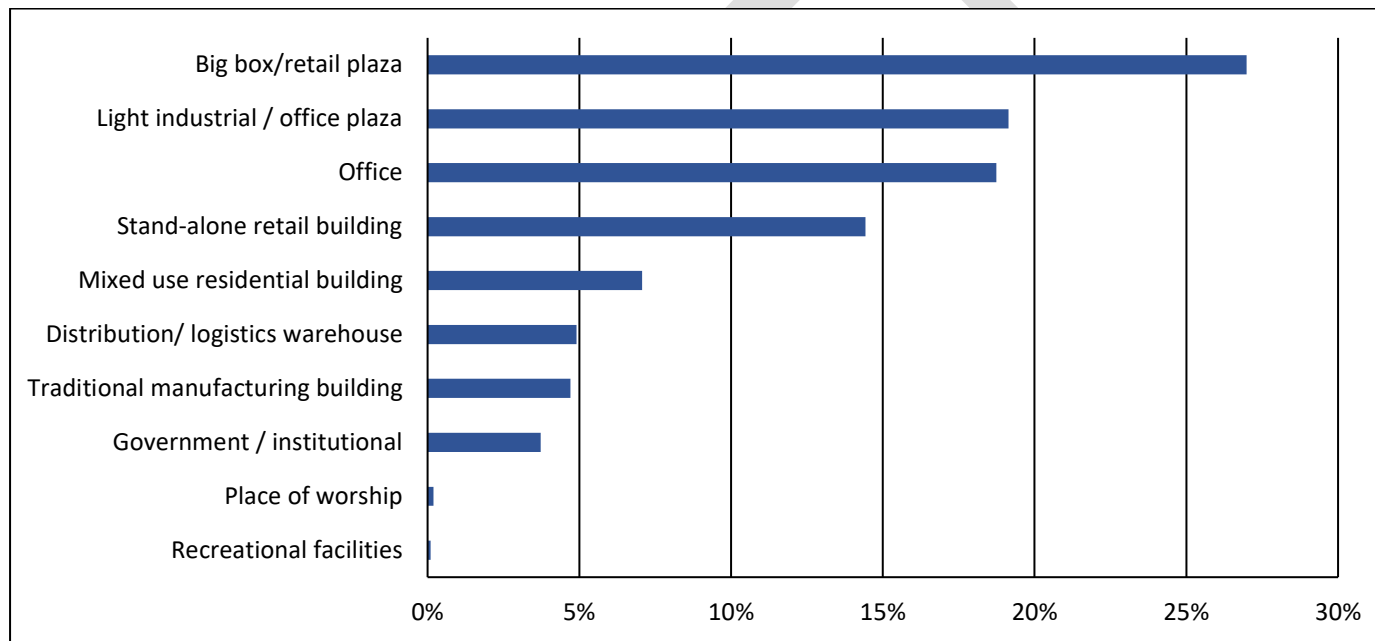
Source: Halton Region, "2017 Employment Survey Results", based on responses from 3,977 businesses (196 or 4.9% of those responded that they had conducted research and development from their location)

Roughly 27% of respondents indicated that they were located in a Big Box Store / Retail Plaza in 2013.

Other top building types include Light industrial office plaza (19%), Office (19%), and Stand Alone Retail Buildings (14%), highlighting the diversity in built form that businesses rely on in Burlington (Figure 44).

However, it also provides a window into the composition of the types of businesses that are responding to the survey, which should be taken into consideration when examining and inferring results from other findings in the survey itself.

FIGURE 44: BUSINESSES BY BUILT FORM, BURLINGTON, 2017



Source: Halton Region, "2017 Employment Survey Results", based on responses from 1,019 businesses