

# HALTON EMPLOYMENT SURVEY 2020

## BURLINGTON ANALYSIS

DRAFT December 2021



## Abstract

Each year Halton Region conducts an employment survey to provide updated information regarding businesses and employment characteristics in the Region. Results from the Halton Employment Survey provide varied information, such as the number of businesses and jobs in the region, business characteristics, such as business size, and business activities, such as international trade. This year, 4,947 businesses in Burlington and reported 83,974 jobs. Comparatively, Statistics Canada reported to the 95,975 jobs in 2016 and EMSI reported 101,882 jobs in Burlington in 2018.

## Introduction

This report is a statistical analysis of Burlington and Halton Region economic figures as presented in Halton Employment Surveys from 2016-2020. The goal of this report is to:

- Provide an understanding of the current composition of Burlington's economy in 2020,
- Highlight key changes and trends in Burlington's economy from 2016 to 2020,
- Benchmark Burlington by comparing its trends to Halton Region's.

In 2020, the business participation rate for employment survey was 40.3%. This is a significant drop from the 2019 participation rate of 84.8%, which is the standard for this survey. The 2020 rate is lower than previous years as a result of data collection process modifications introduced to comply with COVID-19 regulations. Since participation was so low in 2020, the data analysis methodology for the HES was altered for the first time, by using information collected from the participating businesses as a sample and applying trends within the sample to the rest of the businesses.

**Disclaimer:** This report uses data from the Halton Employment Survey (HES), which is a self-reported point-in-time survey based on voluntary participation as a result it includes some refusals. Moreover, the HES is mostly conducted in person, as a result only businesses readily identifiable and with a physical address are included. HES data indicates lower employment numbers than other data sources, including EMSI and Statistics Canada. Burlington Economic Development does not warrant the completeness or accuracy of the information contained in this report and does not accept liability arising from the use or misuse of all or portions of such information. Caution should be used in interpreting the information in the report and making any conclusions.

## Burlington Highlights

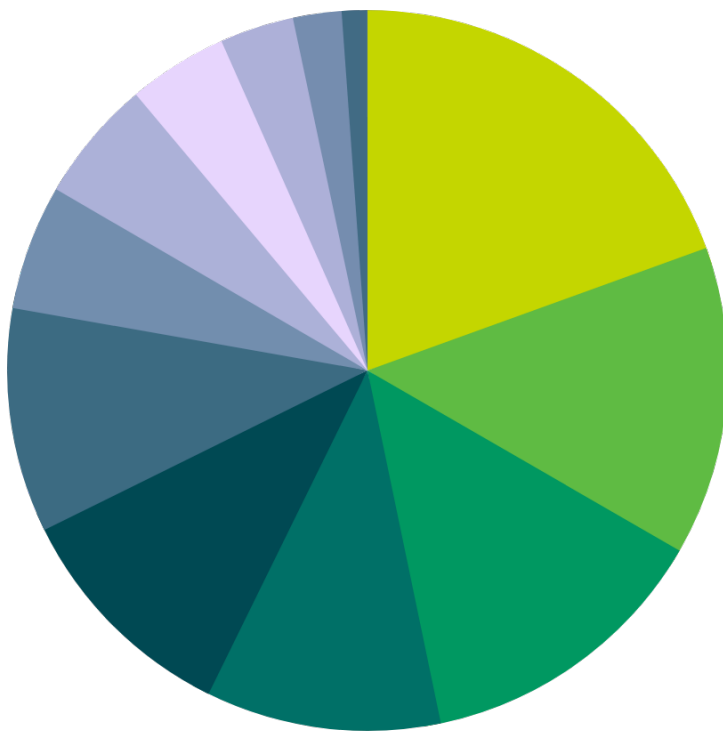
4,947 businesses	Top industries by number of employees:
Based on the survey, Burlington had a total of 4,947 reported businesses in 2020.	<ol style="list-style-type: none"><li>1. Retail Trade (13,780 employees)</li><li>2. Manufacturing (13,638 employees)</li><li>3. Healthcare &amp; Social Assistance (9,281 employees)</li></ol>

## 2020 Economic Snapshot

### Top Industries

In 2020, the top five industries with the most businesses in Burlington were Retail trade (840 businesses), Other services (except public administration) (597 businesses), Healthcare & social assistance (578 businesses), Manufacturing (454 businesses), and Accommodation & food services (451 businesses). Together, these industries consist of 59.1% (2,924) of the total 4,974 businesses in Burlington.

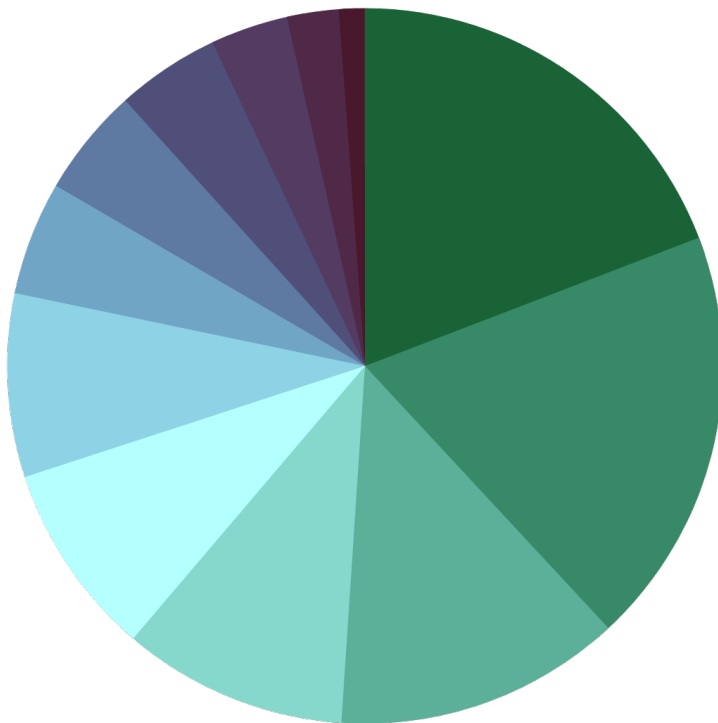
### Business Breakdown by Industry



17.00%	Retail trade
12.10%	Other services (except public administration)
11.70%	Healthcare and social assistance
9.20%	Manufacturing
9.10%	Accommodation & food services
8.80%	Professional, scientific & technical services
4.90%	Finance & insurance
4.80%	Wholesale trade
3.9% - 3.0%	Construction, Educational services Arts, entertainment & recreation
2.9% - 2.0%	Administrative & support, waste management & remediation services Real estate, rental & leasing
1.9% - 1.0%	Transportation & Warehousing Information & cultural industries Management of companies & enterprises Management of companies & enterprises
< 1.0%	Public administration Agriculture, forestry, fishing & hunting Utilities, Mining, quarrying, oil & gas extraction

In 2020, the top five industries employing the most people in Burlington are; Retail Trade (13,780 employees), Manufacturing (13,638 employees), Healthcare & social assistance (9,281 employees), Education services (7,301 employees), and Professional, scientific & technical services (6,260 employees). Together these industries account for 59.9% (50,300) of the total 83,974 employees in Burlington.

### Employee Breakdown by Industry

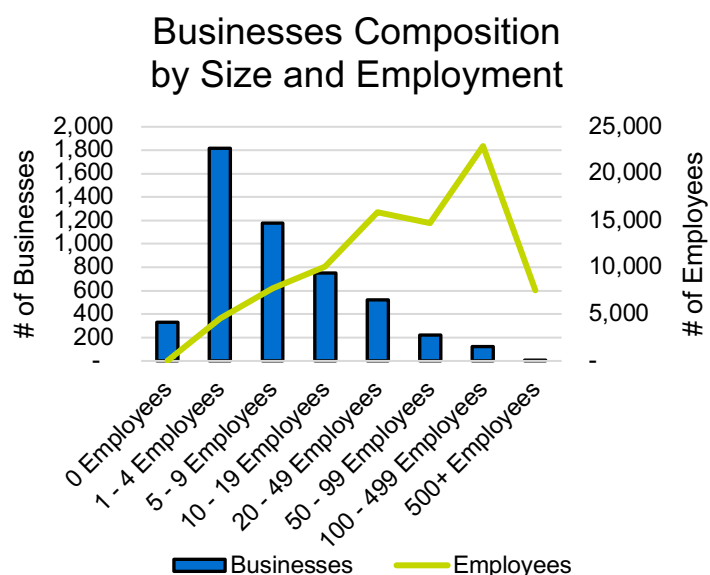


<b>16.40%</b>	<b>Retail trade</b>
<b>16.20%</b>	<b>Manufacturing</b>
<b>11.10%</b>	<b>Healthcare and social assistance</b>
<b>8.70%</b>	<b>Educational services</b>
<b>7.50%</b>	<b>Professional, scientific &amp; technical services</b>
<b>7.10%</b>	<b>Accommodation &amp; food services</b>
<b>4.40%</b>	<b>Other services (except public administration)</b>
<b>4.20%</b>	<b>Finance &amp; insurance</b>
<b>3.9% - 3.0%</b>	<b>Wholesale trade Construction Information &amp; cultural industries</b>
<b>2.9% - 2.0%</b>	<b>Transportation &amp; Warehousing Administrative &amp; support Waste management &amp; remediation services Public administration Arts, entertainment &amp; recreation</b>
<b>1.9% - 1.0%</b>	<b>Management of companies &amp; enterprises Real estate, rental &amp; leasing</b>
<b>&lt;1%</b>	<b>Utilities, Mining, quarrying, oil &amp; gas extraction Agriculture, forestry, fishing &amp; hunting</b>



## Business Size

In 2020, Small and Medium Enterprises (SMEs), with less than 100 employees, made up 97.4% of all businesses and employed 59.2% of all employees in Burlington. Most businesses had 1-4 employees (1,818 businesses), followed by those with 5-9 employees (1,179 businesses), and those with 10-19 employees (750 businesses). Businesses with 100+ employees only made up 2.6% of businesses in Burlington, however they made up 40.8% of all employment. In Halton Region, SMEs made up 97.3% of all businesses and similarly the biggest groups are those with 1-4, 5-9 and 10-19 employees respectively.



## Top Private Employers in 2020

BUSINESS NAME	INDUSTRY SUB-SECTOR
Sofina Foods	Food processing
Evertz Microsystems	Broadcasting equipment manufacturing
L-3 Communications Wescam	Defense equipment manufacturing
Verlas	Marketing services
Ikea	Retail services

## Top Public Employers in 2020

BUSINESS NAME	INDUSTRY SUB-SECTOR
J.W. Singleton Education Centre	Education
Joseph Brant Hospital	Healthcare
Burlington City Hall	Public Administration

## Types of Employment

In 2020, a large portion of employees in Burlington worked in full-time positions. They accounted for 72.8% of all filled positions or 60,756 positions, followed by part-time positions which accounts for 22.9% of all filled positions or 19,075 positions. Seasonal employment made up 4.3% of all filled positions in 2020 or 3,603 positions. The composition of positions in Burlington is very similar to the rest of Halton Region which was; 72.2% full-time, 23.6% part-time, and 4.2% seasonal.

## **Business Age**

In 2020, there were 4,195 respondents who provided the age of their business. The results show that 33.1% of businesses in Burlington were 10 – 24 years old, 29.4% were 5 – 9 years old, 18.5% were 25 – 49 years old, 14.5% were less than 5 years old and 4.9% were more than 50 years old. The same pattern can be seen in Halton Region with very slight variations.

## **Trends**

### **General**

Between 2019 and 2020, based on the reported data, Burlington saw a -2% change in the overall number of businesses within its boundaries (from 5,059 to 4,947), and the number of employees changed by -4% (from 87,595 to 83,974). The counts between 2016 and 2020 show similar trends. During this period the number of businesses changed by -2% (from 5,043 to 4,947) and the number of employees also changed by -2% (from 85,508 to 83,974).

### **Industries**

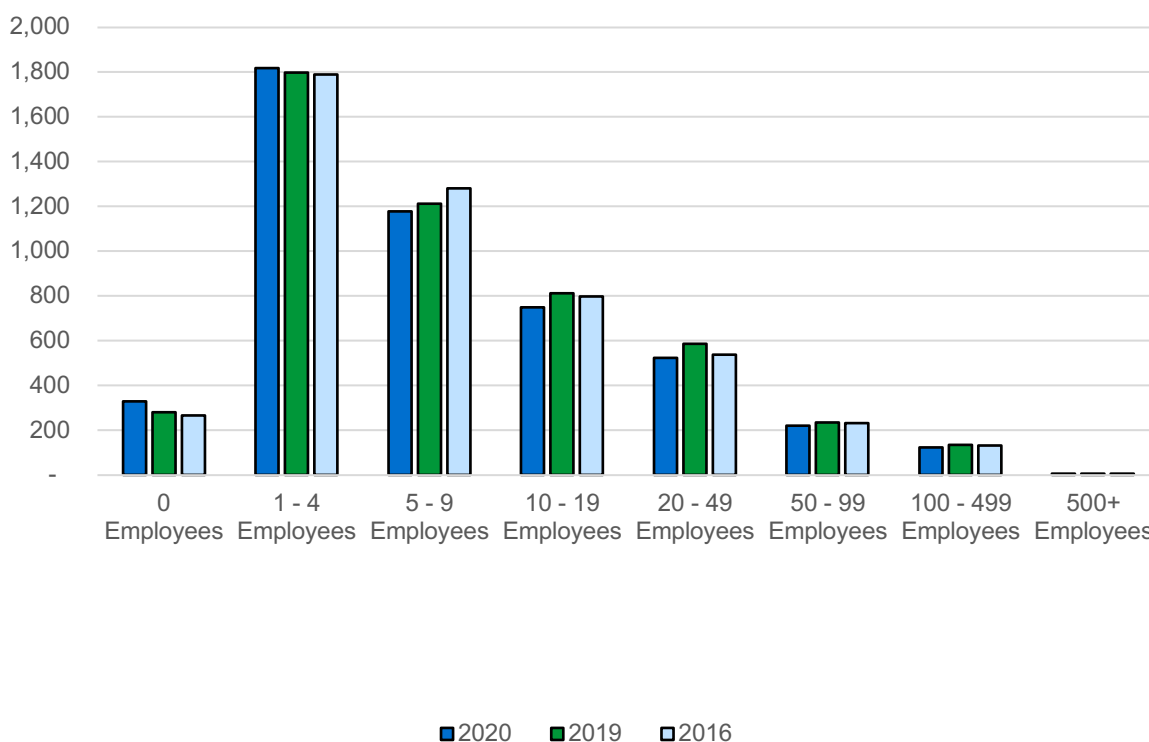
Between 2019 and 2020, based on the data reported, a small number of key industries saw an increase in overall business counts. Since 2019, The industries that saw an increase in number of businesses were Educational services (2%), and Public administration (2%). Some industries also saw a decrease in business counts, those that saw the largest percentage decrease in number of businesses are: Mining, quarrying, oil & gas extraction (-14%), Management of companies & enterprises (-13%), and Real estate, rental & leasing (-10%). Between 2016 and 2020, a significantly higher number of industries saw increases in business counts. The industries that saw the largest increase in business counts include Mining, quarrying, oil & gas extraction (100%), Agriculture, forestry, fishing & hunting (30%), and Arts, entertainment & recreation (15%). It is worth noting however, that the Mining, quarrying, oil & gas industry only had less than 10 business every year between 2016 and 2020 so any change reported for this industry will be overstated. The industries that saw the largest percentage decrease in overall business numbers are: Transportation & Warehousing (-21%), Real estate, rental & leasing (-14%), and Wholesale Trade (-12%). See Appendix #1 for more information.

Similarly, based on data reported, between 2019 and 2020, a small number of industries saw increases in overall employee numbers. Changes in employee counts were significantly larger than in business counts, however. The industries that saw the largest increases in number of employees are: Utilities (35%), Information & cultural (7%) and Retail trade (7%). A large part of the increase in the Retail industry can be attributed to supermarkets. In contrast, the industries that saw the largest percentage decrease in number of employees are: Mining, quarrying, oil & gas extraction (-57%), Management of companies & enterprises (-24%), and Accommodation & food services (-24%). Between 2016 and 2020, many industries experienced sizeable increase in employee counts, including the Mining, quarrying, oil & gas extraction, which saw the largest increase in employee counts (100%), followed by Agriculture, forestry, fishing & hunting (30%), and Arts, entertainment & recreation (15%). It is worth noting that the Mining, quarrying, oil & gas extraction industry employed less than 20 people every year between 2016 and 2020, so any relative change is overstated. The industries that saw the largest percentage decrease in overall employee numbers are: Mining, quarrying, oil & gas extraction (-33%), Real estate, rental & leasing (-14%), and Wholesale Trade (-12%). See appendix #2 for more information.

## Business Size

The 1-year and 5-year business size trends in Burlington show very similar changes. Between these periods, there was a significant increase in the number of very small businesses. The 0 employees business group saw a sizeable increase of 17.9% since 2019, and 23.6% since 2016. Businesses with 1-4 employees were the also saw an increase in business counts, 1.1% since 2019, and 1.5% since 2016. The number of all business with 5 to 499 employees decreased since 2016 and 2019, with the group with 20 – 49 employees experiencing the biggest decline (-10.8%) since 2019, and the group with 5 – 9 employees since 2016 (-8.0%). The number of businesses with 500+ employees has remained stable since 2016.

Business Counts by Size (2016, 2019, & 2020)





## Other Notable Trends

### Import and Export

Similar to previous years, Burlington continues to be a net importer, importing at more than double the rate of exports (316 exporters vs 765 importers). The largest number of exporting businesses are in Manufacturing, Wholesale Trade, and Professional, scientific and technical services. This is slightly different than in the rest of Halton, where Manufacturing, Wholesale Trade, and Retail trade were the industries that exported the most. In 2020, exporting businesses employed on average 41 people, in comparison, the average Burlington business employed around 17 people.

### Lease and Ownership

The percentage share of ownership vs leasing in Burlington has remained stable in the past 5 years. In 2020, 21% of businesses surveyed reported that they own their business space, while the remaining 79% of businesses lease their space. This is consistent with the trends seen across Halton Region.

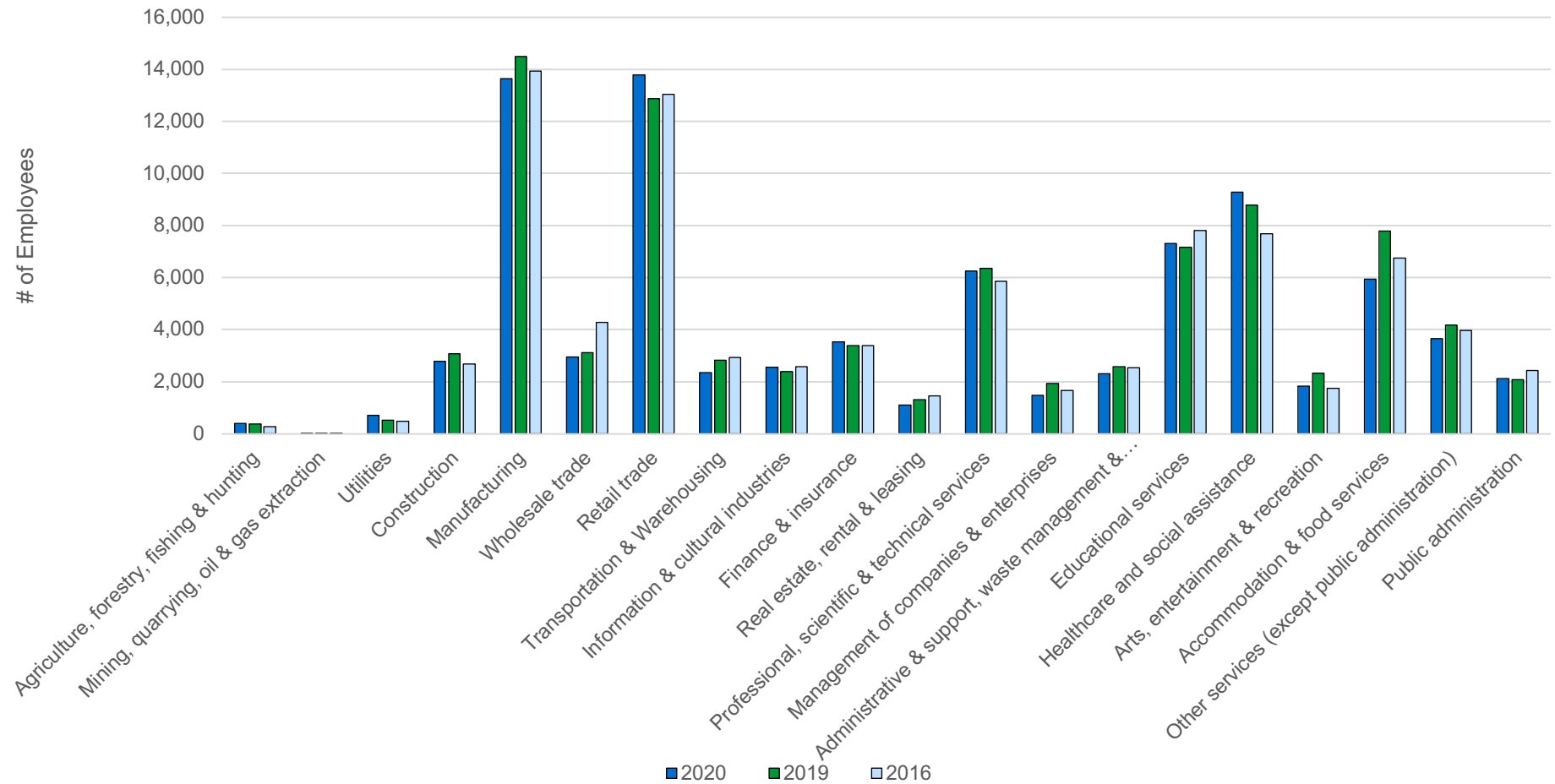
### Square Footage

Since 2016 the average business size has been increasing in Burlington. In 2016 the average business occupied a total of 15,544 sq. ft. this increased to 21,271 sq. ft in 2019 and 22,008 sq. ft. in 2020. Since 2016 this is equal to a 41.6% increase in average business size. This was largely spearheaded by businesses in the Professional, scientific, and technical services which saw a 118% increase in average business sizes since 2016.

### Work from Home

In the 2020 HES, a new question regarding work from home was added to the questionnaire. In total, 1,574 businesses responded to the question. 78.1% of the businesses that answered this question reported that their business did not have a work from home arrangement for their employees, while 21.9% said they did. In Halton Region as a whole, there were 4,636 respondents, of which 84.1% reported that they did not have work from home arrangements, and only 15.9% reported they did.

Employee Counts by Industry (2016, 2019, & 2020)



Business Counts by Industry (2016, 2019, & 2020)

