

HALTON EMPLOYMENT SURVEY ANALYSIS 2022

Burlington Economic Development



Burlington Highlights

5,111 businesses

Based on HES 2022, this was a decrease of 3% from 2019.

87,694 jobs

Based on HES 2022, this was a decrease of 9.5% from 2019.

Top 3 Sectors

- ✓ Retail Trade (13,729 jobs)
- ✓ Manufacturing (13,667 jobs)
- ✓ Healthcare and Social Assistance (9,036 jobs)

120 businesses

in Burlington employ more than 100 staff

Abstract

Each year Halton Region conducts an employment survey (HES) to provide updated information regarding businesses and employment characteristics in the Region. Based on self-reported data, 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 and remote work. This year 5,111 businesses in Burlington reported 87,694 jobs. Comparatively, Statistics Canada reported 7,415 businesses and Environics reported 109,020 jobs in 2022.

Introduction

This report analyzes the statistics for Burlington and Halton Region as presented in Halton Employment Surveys from 2019 to 2022. The goal of this report is to:

- Provide an understanding of the current composition of Burlington's economy in 2022,
- Highlights key changes and trends in Burlington's economy from 2019 to 2022, and
- Benchmark Burlington by comparing trends within the city to larger trends in Halton Region.

In this report, businesses and jobs were grouped by the North American Industry Classification System (NAICS) codes to highlight key economic trends effecting different industries.

Disclaimer: This report uses data from the Halton Employment Survey (HES), which is a self-reported point-in-time survey based on voluntary participation and 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.

Business Size and Growth

Highlights

- Majority of Burlington's jobs were in the Population-related category with 33,005. This category includes jobs in Retail Trade, Social Assistance, and Accommodation and Food Services.
- Burlington saw its largest increase in jobs from 2019-2022 in the Educational Services industry with 21%.
- With the drop seen in 2020 due to COVID-19, both businesses and jobs have picked up the pace in 2022 and a significant rise in jobs was seen in the knowledge-based and institutional-related industry (7.8%).

Business Size

Over the last four years from 2019 to 2022, business sizes in Burlington have remained relatively steady when measured by employee count. In 2022, over 90% of Burlington's businesses were small businesses (i.e., with less than 100 employees). Overall, over 1 in 3 businesses in Burlington have between 1-4 staff.

Burlington has seen steady numbers in business sizes both medium-sized businesses and large businesses (each with more than 100 employees). 97% of businesses in Burlington have under 100 employees. Small businesses are most prominent with 36% of business having 1-4 employees, 28% of businesses having 5-9 employees and 18% of businesses having 10-19 employees. It must be noted that the number of very large businesses (with 500 employees or more) has been continuously increasing with 60% growth over the past five years.

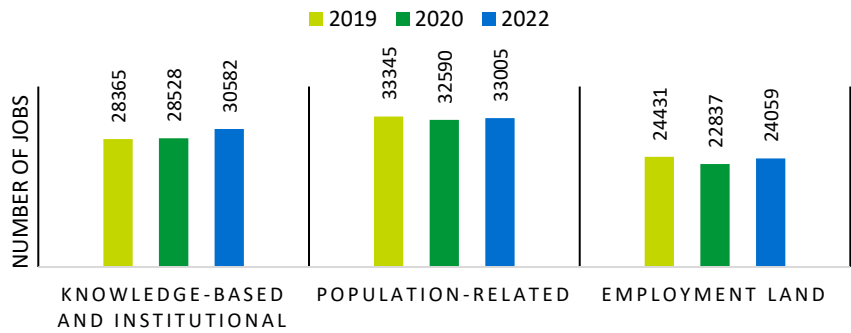
Growth by Industry Category

In this section, businesses and jobs were placed into one of three categories:

- The Employment Land category includes jobs and businesses related to primary industries, construction, utilities, and manufacturing. Typically, these businesses are land extensive and rely on truck transportation.
- The Knowledge-Based category and Institutional category includes jobs and businesses that require a post-secondary education and/or a professional certification. This category includes law firms, schools, long term care facilities, real estate companies and design firms. These businesses are typically located in office buildings (or in other spaces that have been renovated to accommodate offices).
- The Population-related category includes jobs and businesses that enhance daily life. This category includes stores, restaurants, and medical offices, as well as establishments that provide services such as dry cleaning and household repairs. These businesses are typically located in or near residential neighborhoods.

Over the last four years from 2019 to 2022, jobs in the Knowledge-based and Institutional industries rose, despite COVID-19 impacts. Jobs in the Population-related and Employment Land industries have remained relatively steady in Burlington, returning to near pre-pandemic numbers.

JOBS BASED ON INDUSTRY CATEGORY

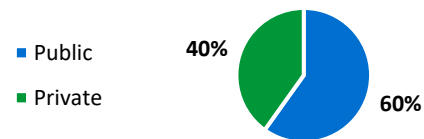


Source: HES Survey Data (2022) - Figure 1

Top Employers

Public sector companies are accountable for 60% of employees in Burlington. The table below depicts five top private and public companies concerning number of employees in Burlington in 2022.

TOTAL EMPLOYEE COUNT



Source: HES Survey Data (2022) - Figure 2

Top 5 Public Sector Employers	
Companies	No. of FT Employees
J.W. Singleton Education Centre	4260
Joseph Brant Hospital	1141
Burlington City Hall	908
New Street Education Centre	337
Burlington Transit, City of Burlington	181

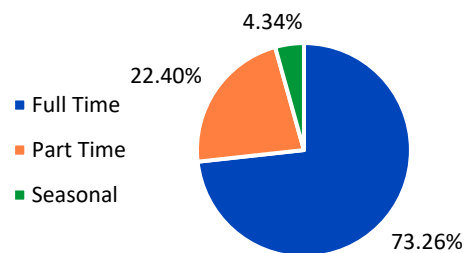
Top 5 Private Sector Employers	
Companies	No. of FT Employees
Sofina Foods Inc.	855
Evertz Microsystems Ltd.	779
Trans Union Canada	300
Cogeco Connexion Inc.	294
Boehringer Ingelheim (Canada) Ltd.	293

Types of Employment

In 2022, 87,694 jobs were reported in the HES. Nearly 75% of these were full time positions 22% were part time. Seasonal employment makes up 4% of all filled positions in 2022 or 3,806 positions. This composition of employment types has remained steady since 2019.

To illustrate further, the full-time category employee has slightly increased by 1.3%, whereas the part-time employees has seen a decrease of 4.1% and seasonal employees increased by 2.8%.

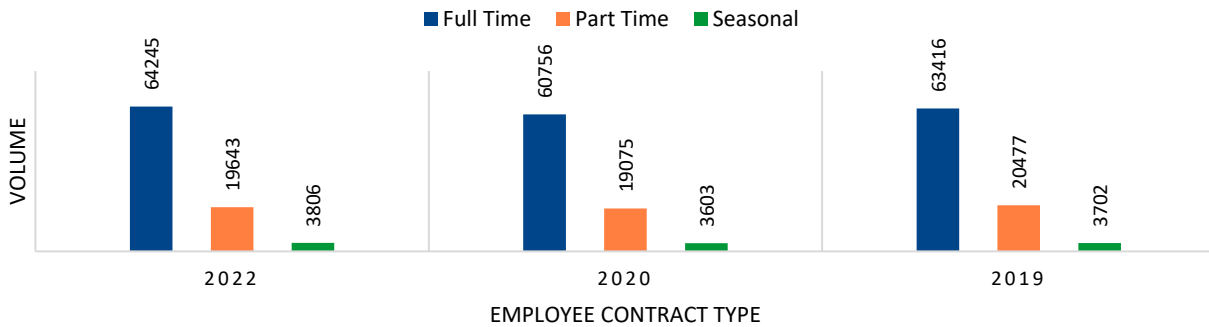
BURLINGTON EMPLOYEE CONTRACT TYPE



Source: HES Survey Data (2022) - Figure 3

Burlington's emphasis on maintaining a high quality of life has attracted both businesses and residents alike, it is very much evident in the increasing number of full-time, part-time, and seasonal employees since 2020 from below illustration. The full-time employees increased by 5.74%, whereas the part-time employees saw a spike of 2.98% and lastly the number of seasonal employees saw a growth of 5.63% from 2020.

COMPARISON STUDY OF EMPLOYEE CONTRACT TYPE VOLUME



Source: HES Survey Data (2022) - Figure 4

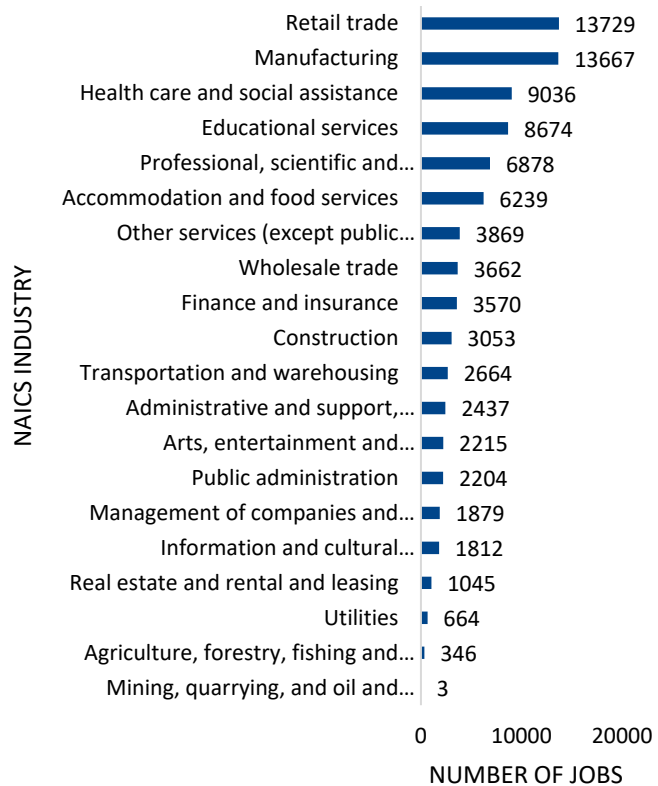
Top Industries by Job Count

In 2022, the top three industries employing the most people in Burlington are Retail Trade, Manufacturing, and Healthcare & Social Assistance. Together these industries account for 41.6% of all employment in Burlington.

Between 2019 and 2020 Burlington had a high growth percentage in the following industries: Retail Trade, Professional Scientific and Technical Services, and Accommodation and Food Services.

Conversely, Burlington had a notable decrease in reported jobs in the following industries: Manufacturing and Mining, quarrying, and oil and gas extraction.

BURLINGTON JOBS BY INDUSTRY (2022)



Source: HES Survey Data (2022) - Figure 5

Business Numbers and Growth

In 2022, the top three industries with the most businesses in Burlington were:

1. Retail trade: 871 businesses (17.1%)
2. Other services (except public administration): 604 businesses (11.9%)
3. Healthcare & social assistance: 589 businesses (11.6%)

Together, these industries consist of 59.3% of all businesses in Burlington.

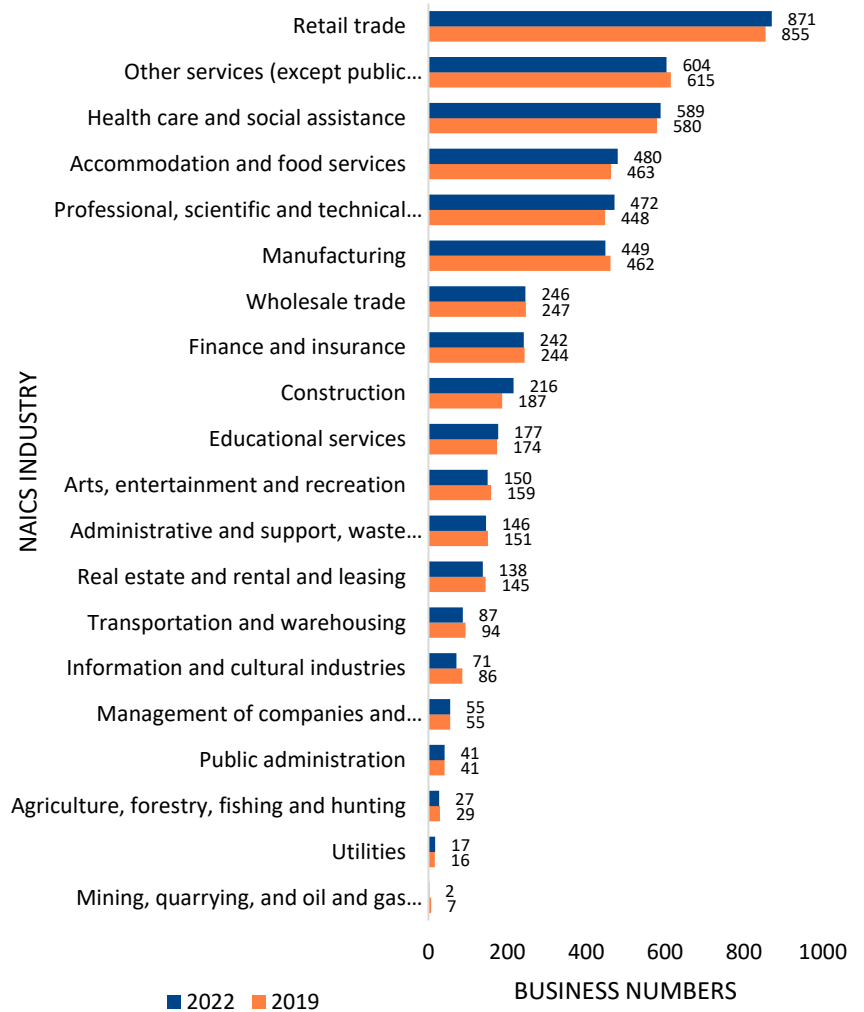
Since 2019, the top three industries with growing businesses in Burlington are:

1. Construction (15%)
2. Professional, scientific, and technical services (5.3%)
3. Accommodation and food services (3.6%)

Other industries saw a decrease in business counts, below are the three industries that saw the largest percentage decrease in number of businesses.

1. Mining, quarrying, oil & gas extraction (-71.4%)
2. Information and cultural industries (-17.4%)
3. Transportation and Warehousing (-8.04%)

BURLINGTON BUSINESS NUMBERS BY INDUSTRY (2022)



Source: HES Survey Data (2022) - Figure 6

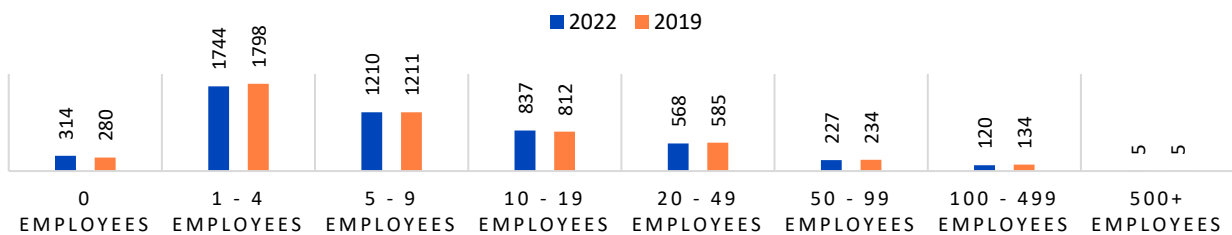
Business breakdown by industries - Burlington 2022

In 2022, Burlington saw steady numbers in both medium sized businesses and large businesses (each with more than 100 employees). 97.5% of businesses in Burlington have under 100 employees. Small businesses are most prominent with 34.7% of businesses having 1-4 employees, 24.08% of businesses having 5-9 employees and 16.7% of businesses having 10-19 employees. It must be noted that the number of very large businesses (with 500 employees or more) has been continuously increasing with 60% growth over the past five years.

Burlington's job market has seen a significant uptick, with unemployment rates dropping consistently over the past few years. In the comparison study of the types of employees different companies have in 2019 and 2022, it has been analyzed that there is growth in business counts that have 5-9 employees (growth rate of 2.63%), 10-19 employees (growth rate of 11.60%), 20- 49 employees (growth rate of 8.81%), 50-99 employees (growth rate of 3.65%). This growth has been a positive sign towards employment opportunities for its residents.

There is a very small reduction in the number of businesses with 1-4 employees and 100-499 employees. The number of businesses with 500+ employees has remained stable since 2019.

COMPARISON OF BUSINESS COUNTS BY EMPLOYEE VOLUME



Source: HES Survey Data (2022) - Figure 7

Other Notable Trends

Import and Export

Burlington continues to be a net importer, importing at more than seven times the rate of exports (65 exporters vs 473 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 account for the top exporters. In 2022, Burlington export businesses employed on average 50 people, in comparison, the overall average Burlington business employed 17 people.

Lease and Ownership

The percentage share of ownership vs leasing in Burlington has remained stable in the past 5 years. In 2022, 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

The amount of square footage used by businesses in Burlington has remained largely stable since 2016, where the average space occupied by a business was 15,544 sq. ft. This increased to 21,271 sq. ft in 2019, dipped slightly in 2020, and returned to 25,410 sq. ft in 2022. Since 2016 this is equal to a 41.6% increase in average business size.

Note: As it is a major outlier in terms of space needs, the Agriculture, forestry, fishing & hunting industry was removed from this analysis.

Work from Home (WFH)

In the 2020 HES, a new question regarding work from home was added to the questionnaire. In 2022 total, 2985 businesses responded to the question. 70.65 % of the total businesses that answered this question reported that their business did not have WFH arrangement for their employees, while 29.35% of the total business reported that they did. This percentage has reduced in both the categories from 2020, as it was 78% with No work from home arrangements, whereas 29.35% managed to provide WFH provision.