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2023 HALTON EMPLOYMENT SURVEY (HES) REPORT

BURLINGTON ECONOMIC DEVELOPMENT
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Burlington Highlights

5,080 businesses

Based on HES 2023, this was an increase of 30.83% from 2020.

87,391 jobs

Based on HES 2023, this was an increase of 4.74% from 2020.

Top 3 Sectors

- ✓ Retail Trade (13,859 jobs)
- ✓ Manufacturing (12,785 jobs)
- ✓ Healthcare and Social Assistance (9,319 jobs)

121 businesses

In Burlington employs more than 100 staff.

Abstract

Each year Halton Region conducts an employment survey (HES) to provide updated information regarding businesses and employment characteristics. Based on self-reported data, the Halton Employment Survey results provide varied information, such as the number of companies and jobs in the region, business characteristics, business size, and business activities, such as international trade and remote work. This year 5,080 businesses in Burlington reported 87,391 jobs. Comparatively, Statistics Canada reported 8,434 businesses and Environics reported 105,761 jobs in 2024.

Introduction

This report analyzes the statistics for Burlington and Halton Region as presented in Halton Employment Surveys from 2020 to 2023. The goal of this report is to:

- Provide an understanding of the current composition of Burlington’s economy in 2023,
- Highlights key changes and trends in Burlington’s economy from 2020 to 2023, and
- Benchmark Burlington by comparing trends within the city to larger trends in the Halton Region.

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

- Most jobs in Burlington were in the Knowledge-based and Institutional category with 30,463. This category includes jobs in Educational Services, Professional, Scientific, and Technical Services, Finance and Information and Cultural Industries.
- Burlington saw its largest increase in jobs from 2020-2023 in the Educational Services industry with 26.4%.
- With the drop seen in 2020 due to COVID-19, both businesses and jobs have picked up the pace in 2023 and a significant rise in jobs was seen in Population Population-related industries with employment in the Arts, entertainment, and recreation sectors increasing by 21.27%.

Business Size

Over the last four years from 2020 to 2023, business sizes in Burlington have remained steady when measured by employee volume. In 2023, over 95% 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.

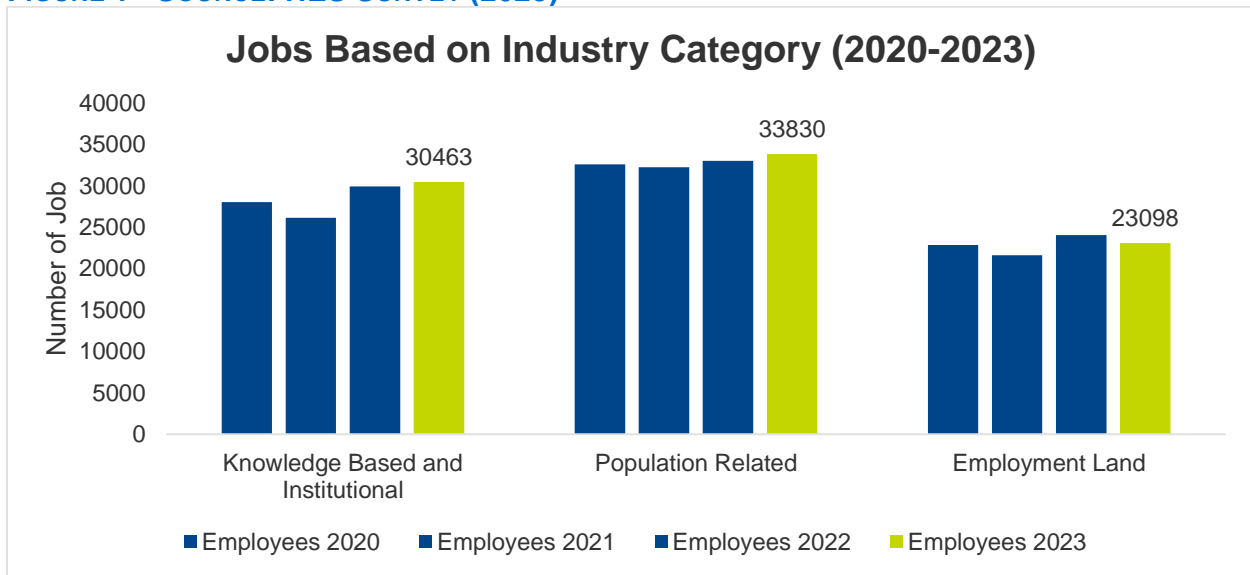
Burlington has seen similarly steady numbers in businesses of medium and large sizes (Medium-sized business has 100 to 250 employees and large-sized businesses have over 250 employees). 97% of businesses in Burlington have under 100 employees. Small businesses are most prominent with 33% of businesses having 1-4 employees, 23% having 5-9 employees, and 16% having 10-19 employees. It must be noted that the number of large businesses (with 500+ employees) has remained constant over the past four years.

Growth by Industry Category

In this section, businesses and jobs are categorized as follows:

- 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 and Institutional* categories include 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.

FIGURE 1 - SOURCE: HES SURVEY (2023)



Between 2020 and 2023, employment trends across key sectors reflected post-pandemic adjustments and varying recovery patterns. Knowledge-based and Institutional jobs initially declined from 28,017 in 2020 to 26,146 in 2021, likely due to disruptions in education, healthcare, and professional services, but recovered to 30,463 by 2023, signaling a gradual return to pre-pandemic levels. Population-related industries showed consistent growth, rising from 32,590 in 2020 to 33,005 in 2022 to leveling off at 33,830 in 2023, underscoring the sustained demand for retail, public services, and transportation sectors.

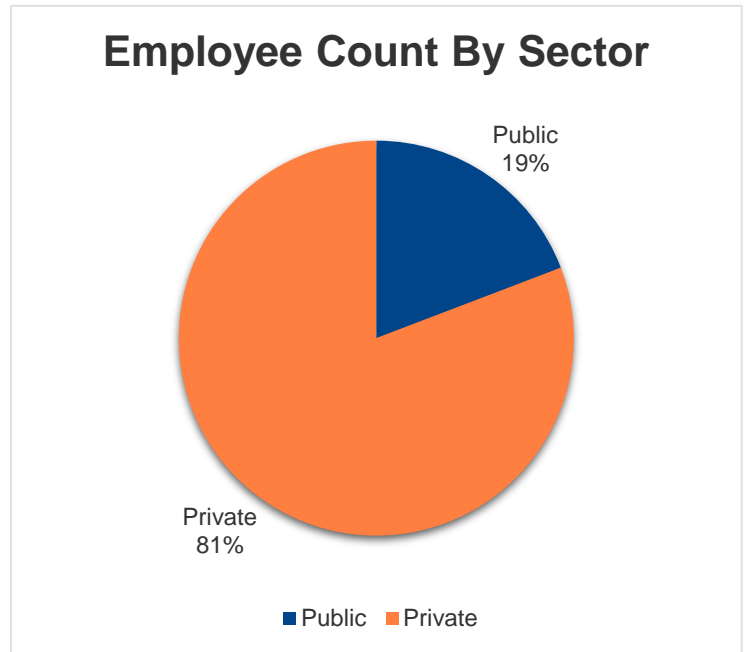
In contrast, Employment Land industries, including construction and manufacturing, saw employment rise from 22,837 in 2020 to 24,059 in 2022, before leveling off at 23,161 in 2023, indicating that initial recovery efforts have tapered as operational capacities stabilized. These trends highlight how population-facing industries-maintained momentum, while institutional sectors required more time to recover, and employment land industries reached equilibrium after a period of growth.

Top Employers

Private sector companies employ 81% of Burlington's workforce. This highlights the city's heavy reliance on business-driven employment. This concentration suggests that Burlington's economy is highly responsive to market trends, business investments, and consumer demand. A strong private sector presence contributes to economic agility, fostering job creation in industries like retail, professional services, and manufacturing. However, it also introduces potential risks, as economic downturns or disruptions in key industries could significantly affect employment levels.

The tables below highlight Burlington's top five private and public sector employers based on the largest number of employees in 2023.

FIGURE 2- SOURCE: HES SURVEY (2023)



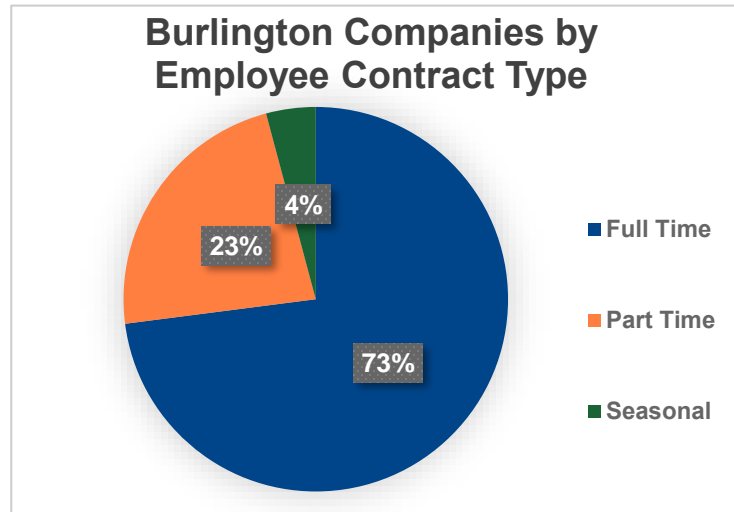
Top 5 Public Sector Employers	
Companies	No. of FT Employees
Joseph Brant Hospital	2038
Burlington City Hall	908
Royal Botanical Gardens	298
Home and Community Care Support Services HNHB	249
Cama Woodlands Nursing Home	217

Top 5 Private Sector Employers	
Companies	No. of FT Employees
Sofina Foods Inc.	855
Evertz Microsystems Ltd.	635
Cogeco Inc.	582
JFE Shoji Power Canada Inc.	412
Hunter Amenities International Ltd.	300

Types of Employment

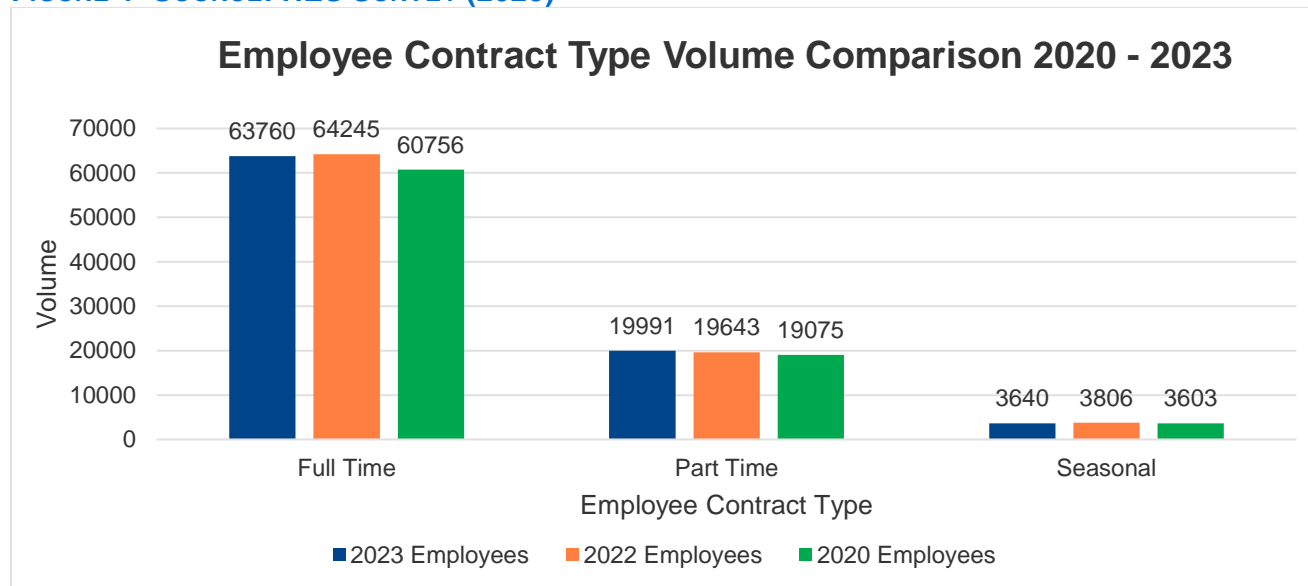
In 2023, 87,391 jobs were reported in the HES. Approximately 73% of these were full-time positions 23% were part-time. Seasonal employment makes up 4% of all filled positions in 2023 or 3,640 positions. The composition of employment types has shown slight variations since 2020. Full-time employment decreased by 0.8% between 2022 and 2023, while part-time employment grew by 1.8%. Seasonal employment, however, dropped by 4.4%. These changes suggest minor adjustments in the workforce rather than a consistent trend over time.

FIGURE 3- SOURCE: HES SURVEY (2023)



Burlington's emphasis on maintaining a high quality of life continues to attract businesses and residents alike, as reflected in employment trends. However, between 2020 and 2023, the number of full-time employees decreased by 0.8%. In contrast, part-time employees saw an increase of 1.8%, while seasonal employees experienced a decline of 4.4%. These shifts reveal subtle yet impactful changes in the workforce composition of Burlington.

FIGURE 4- SOURCE: HES SURVEY (2023)



Top Industries by Job Count

In 2023, the top two industries employing the most people in Burlington are Retail Trade, Manufacturing, and Healthcare & Social Assistance. Together these industries account for 29.3% of all employment in Burlington.

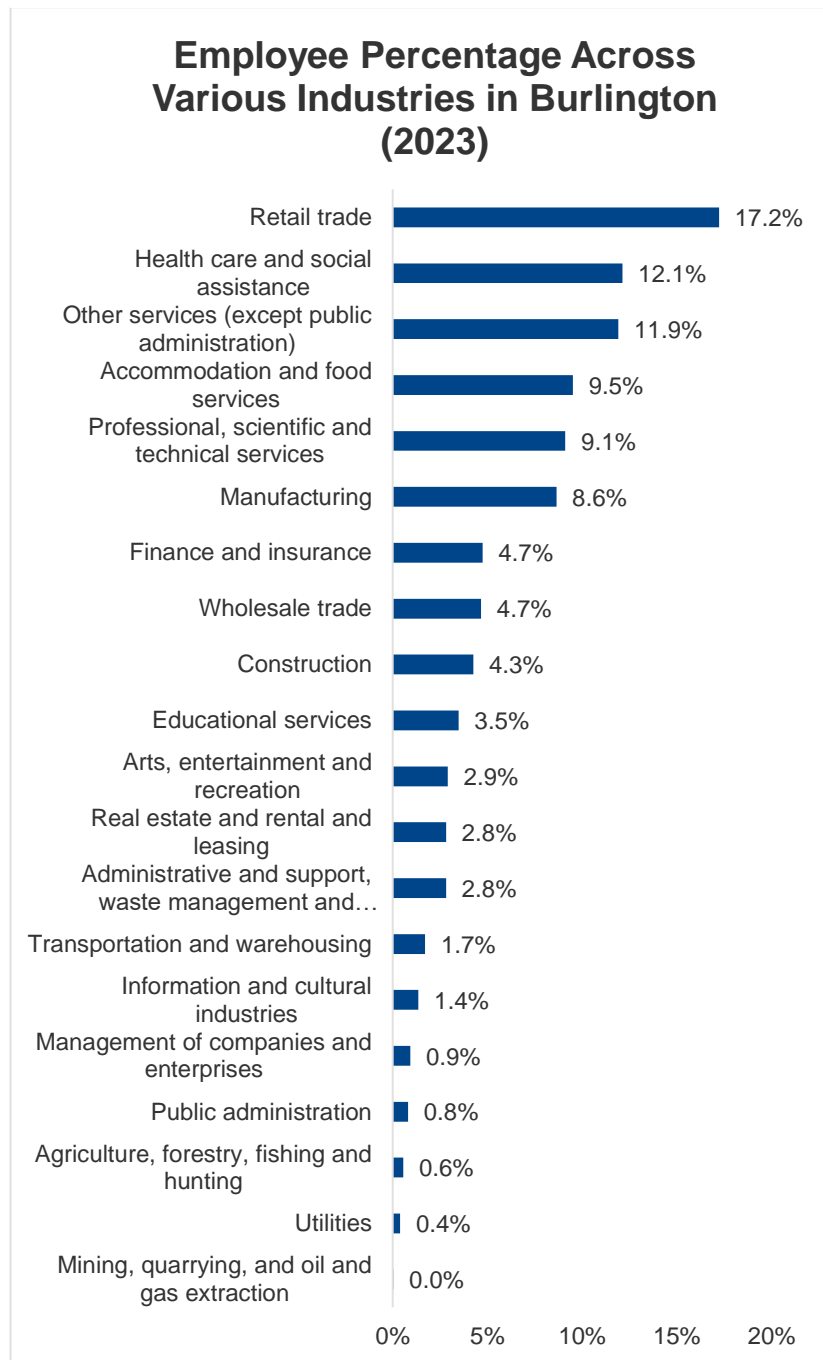
Between 2020 and 2023, Burlington saw high growth in the following industries:

- Wholesale Trade
- Educational Services
- Management of companies and enterprises

Conversely, Burlington had a notable decrease in reported jobs in the following industries:

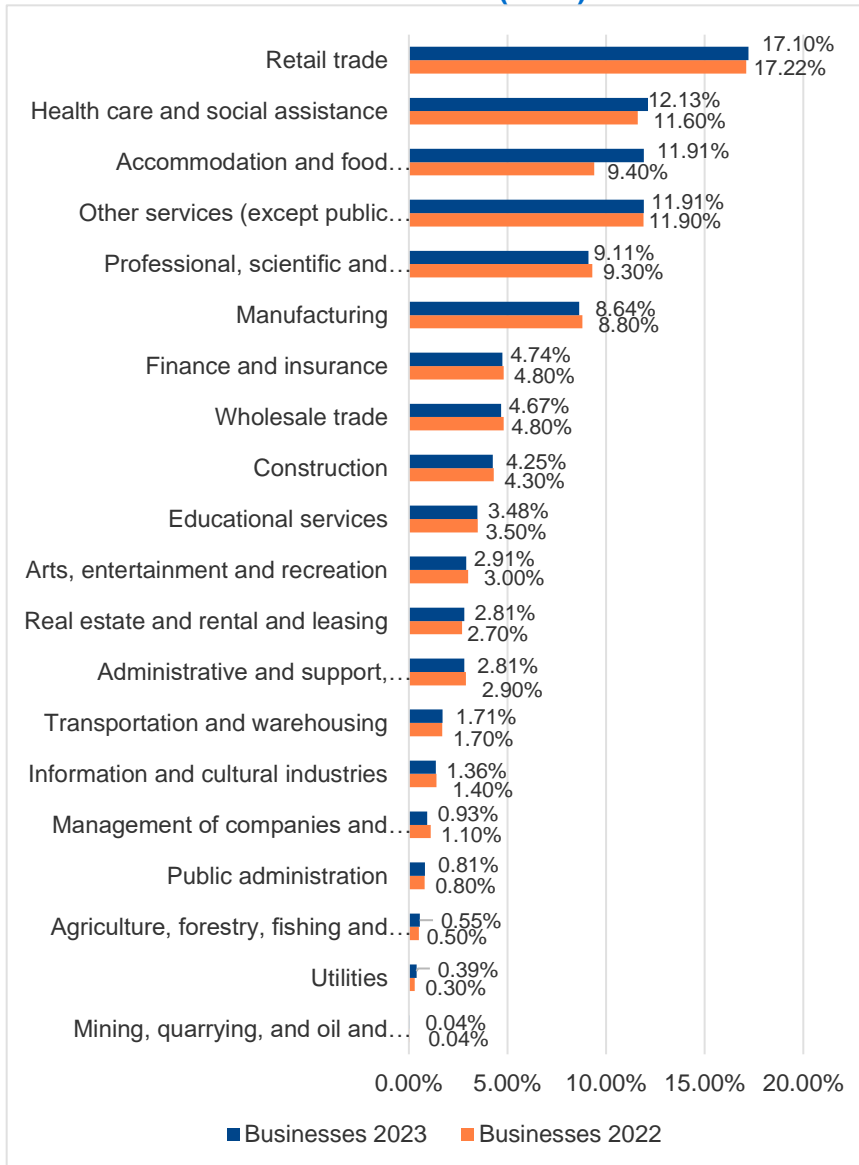
- Information and Cultural Industry
- Agriculture, forestry, fishing and hunting
- Mining, quarrying, and oil and gas extraction

FIGURE 5-SOURCE: HES SURVEY (2023)



Business Numbers and Growth

FIGURE 6- SOURCE: HES SURVEY (2023)



In 2023, the top three industries with the most businesses in Burlington were:

1. Retail trade: 875 businesses (17.2%)
2. Other services (except public administration): 605 businesses (11.9%)
3. Healthcare & social assistance: 616 businesses (12.1%)

Together, these industries consist of 41.3% of all businesses in Burlington.

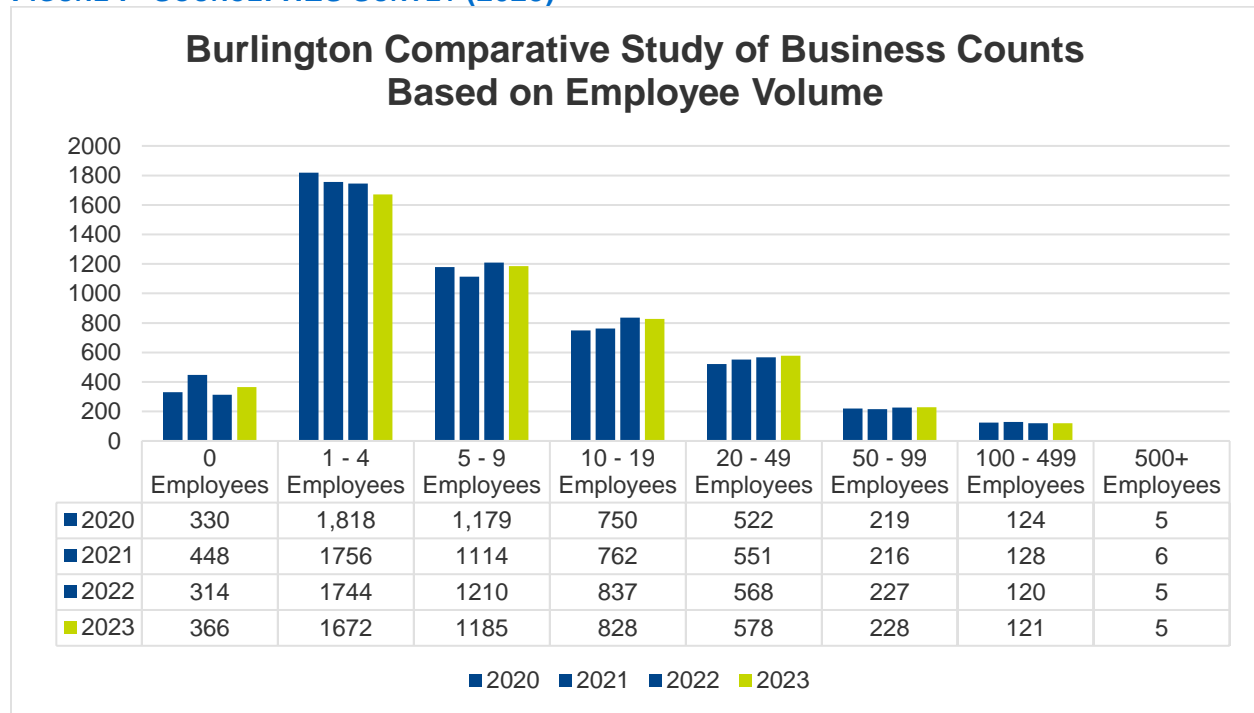
Since 2020, the top three industries with growing businesses in Burlington are:

1. Construction (19.34%)
2. Utilities (25%)
3. Real estate and rental and leasing (10%)

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

1. Information and cultural industries (-14.81%)
2. Arts, Entertainment and Recreation (-5.73%)
3. Public Administration (-2.38%)

FIGURE 7- SOURCE: HES SURVEY (2023)



Business Breakdown by Industries – Burlington 2023

In 2023, Burlington saw steady numbers in both medium-sized businesses and large businesses (each with more than 100 employees). 97.47% of businesses in Burlington have under 100 employees. Small businesses are most prominent with 33.55% of businesses having 1-4 employees, 23.78% of businesses having 5-9 employees, and 16.62% of businesses having 10-19 employees.

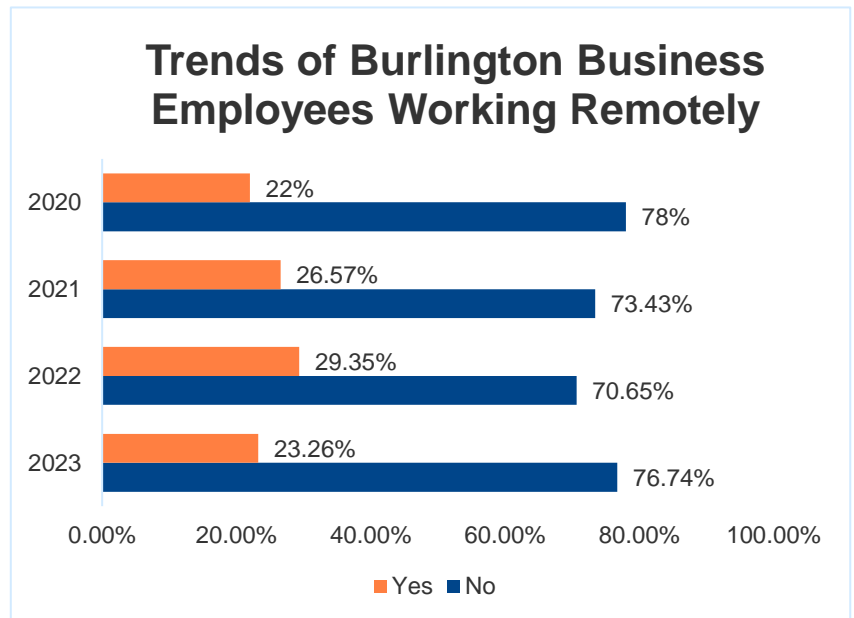
Burlington's job market has seen a significant uptick, with unemployment rates dropping consistently over the past few years. In the comparison study of the types of employees' different companies have in 2020 and 2022, it has been analyzed that there is growth in business counts that have 5-9 employees (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 2020.

Work From Home

The 2023 HES data indicates a decline in the proportion of businesses offering work-from-home (WFH) arrangements compared to the previous year. Of the 4,122 businesses surveyed, 77% reported they do not provide WFH options, up from 70.65% in 2022. Conversely, only 23% of businesses offer WFH, down from 29.35% the previous year. This trend suggests a shift toward more in-person work environments, with a growing number of employers reducing or discontinuing remote work arrangements.

FIGURE 8- SOURCE: HES RESULT DATA (2023)



Other Notable Trends

Import and Export

Burlington continues to be a net importer, importing at more than seven times the rate of exports (70 exporters vs 456 importers). The largest number of exporting businesses are in Manufacturing, Retail 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 2023, Burlington export businesses employed on average 46 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 2023, 22% of businesses surveyed reported that they own their business space, while the remaining 78% 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 2019, where the average space occupied by a business was 28,581.58 sq. ft. This decreased to 24,500 sq. ft in 2020, then has increased each subsequent year and is now 31,000 sq. ft by 2023. This indicates a 16.86% increase in the average business size since 2020.

Note: Due to its significant outlier status in terms of space requirements, the Agriculture, Forestry, Fishing & Hunting industry has been excluded from this analysis.

Business Location Status

The 2023 HES revealed that 29% of businesses in Burlington relocated, while 71% remained at their original locations. Among the sectors with the highest relocation rates, Professional, Scientific, and Technical Services experienced 164 businesses (35.4%) moving, followed by Manufacturing with 148 businesses (33.7%). The Retail Trade sector demonstrated the greatest stability, with 583 businesses (66.6%) remaining in place, reflecting lower mobility compared to other industries.