



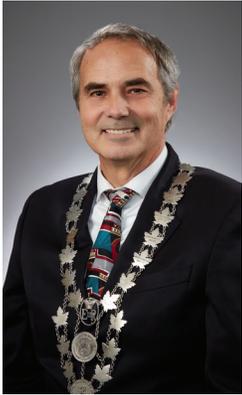
2018 Employment Survey Results



Contents

| | |
|---|----|
| Message from Halton Regional Chair Gary Carr | 3 |
| Introduction | 4 |
| 2018 ES Results Summary: Businesses | 5 |
| Summary of Businesses Identified in the 2018 Employment Survey | 5 |
| Distribution of Businesses Across Halton | 6 |
| Business Concentration in Halton's Employment Area | 7 |
| Summary of Jobs identified in the 2018 Employment Survey | 8 |
| Distribution of Total Jobs across Halton | 9 |
| Distribution of Jobs in Halton's Employment Area..... | 10 |
| Results: Halton's Businesses | 11 |
| Businesses by Size | 11 |
| Businesses by Ownership..... | 11 |
| Business Floor Area..... | 11 |
| Results: Halton's Jobs | 12 |
| Jobs by Employment Type..... | 12 |
| Jobs by Category | 12 |
| Businesses and Jobs by Sector | 13 |
| Businesses and Jobs Highlight by Sector | 13 |
| NAICS Sector..... | 14 |
| Manufacturing Sub-sectors..... | 15 |
| Professional Sub-Sectors | 16 |
| Retail Sub-Sectors | 17 |
| Other Service Sub-sectors..... | 17 |
| Methodological Notes for 2018 | 18 |
| About Halton's Employment Survey..... | 18 |
| Survey Response Rate | 18 |
| Data Collection | 18 |
| Data Notes | 19 |
| Glossary of Terms | 19 |

Message from Halton Regional Chair Gary Carr



On behalf of Halton Regional Council, I am pleased to present the results of the 2018 Employment Survey. Annual participation from local businesses supports our overall understanding of business characteristics and economic landscape in Halton. This survey is also an important planning tool that informs policy and decision-making at Halton Region, including infrastructure improvements that support regional economic growth.

Results of the 2018 Employment Survey show that the Region's Employment Areas have an important role in supporting Halton's economic competitiveness and accommodating employment growth. Some of the key findings from the 2018 survey include:

- Halton's Employment Areas represent about eight per cent of total lands.
- 43.2 per cent of businesses and 52.9 per cent of jobs were located within Employment Areas.
- 229,130 jobs and 13,296 businesses were located in Halton.
- 70.8 per cent of total jobs were full-time.
- Top three employment sectors: retail trade, manufacturing and education services.

I invite you to read the following report and learn why new and existing businesses continue to locate or expand in Halton Region. To find out more about employment in Halton, visit halton.ca.

If you have any questions or comments, feel free to contact us by calling 311 or by emailing me at gary.carr@halton.ca. You can also find me on Twitter @garycarrhalton, LinkedIn or Facebook.

Sincerely,

Gary Carr
Halton Regional Chair

Introduction

The 2018 Employment Survey was the ninth annual survey of businesses in Halton. Through the Employment Survey, the Region collects information on business and employment activity in Halton. This includes data on the number of employees, type of employment (full-time, part-time or seasonal), industry sector and floor space, among other things.

This report provides a summary of the results of the 2018 Employment Survey. In particular, the report:

- highlights the business and employment counts for 2018;
- presents information related to Halton's economic sectors; and
- examines the distribution of businesses and jobs across Halton, including within the Region's Employment Areas.

The 2018 Employment Survey Results Report is structured as follows:

2018 ES Results Summary

- summarizes key results from the 2018 Employment Survey related to business and job counts, including the spatial distribution of businesses and jobs

Results: Halton's Businesses

- provides highlights related to businesses in Halton

Results: Halton's Jobs

- provides highlights related to jobs in Halton

Businesses and Jobs by Sector

- identifies key information by economic sectors in Halton

Methodological Notes for 2018

- presents an overview of the Survey methodology, including information on data collection and response rate



2018 Survey Results Highlights

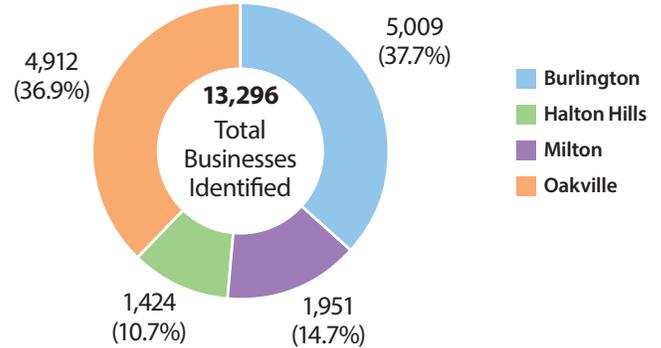
- 13,296 total businesses identified
- 229,130 total jobs identified
- 89.3 per cent of businesses surveyed in 2018 continue to operate since 2017
- Top three sectors by total jobs are:
 1. Retail Trade (14.9%)
 2. Manufacturing (14.3%)
 3. Educational Services (9.5%)
- 43.2 per cent of businesses and 52.9 per cent of jobs were located within the Employment Areas designated in Halton's Regional Official Plan
- 70.8 per cent of total jobs, and 75.5 per cent of new jobs reported in 2018 are full-time jobs

Note: A Glossary of Terms is available on page 19.

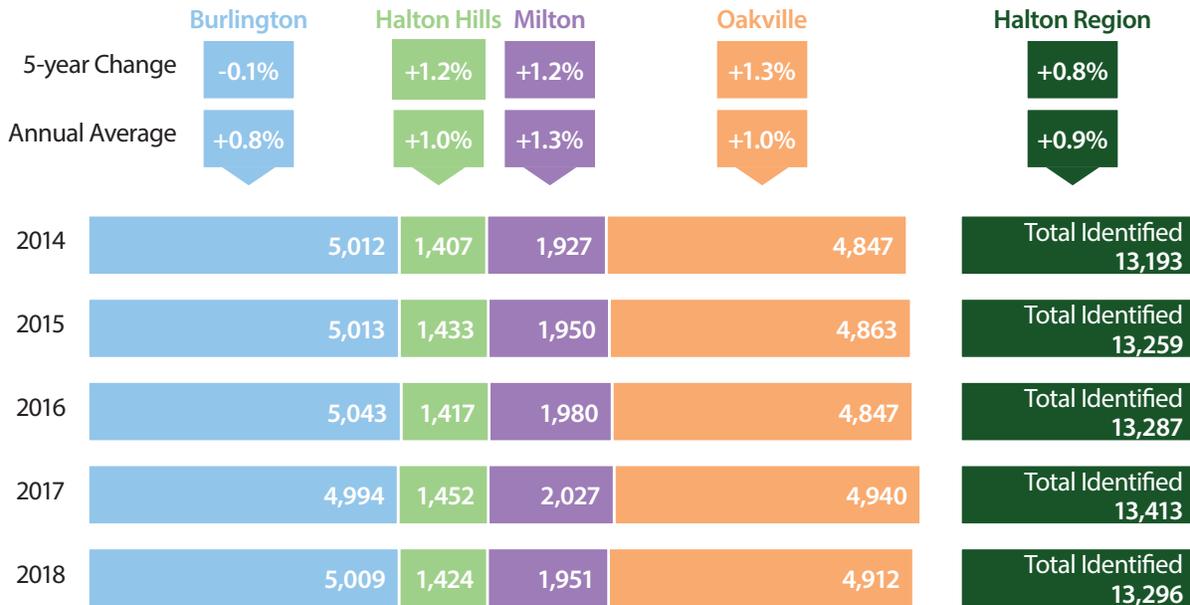
2018 ES Results Summary: Businesses

Summary of Businesses Identified in the 2018 Employment Survey

The 2018 Employment Survey identified a total of 13,296 businesses in Halton Region. Burlington had the highest share of identified businesses at 5,009 (37.7 per cent), followed by Oakville with the second highest share at 4,912 businesses (36.9 per cent). Milton and Halton Hills had 1,951 (14.7 per cent) and 1,424 (10.7 per cent) businesses identified, respectively.



Over the last five years, between 2014 and 2018, the Employment Survey results show an increase of 0.8% in the total number of businesses identified. By municipality on an annual basis, Milton had the highest average rate of increase in the number of businesses identified at 1.3% per year. Halton Hills and Oakville saw an average of 1.0% increase in businesses identified per year. On average, Burlington had an increase of 0.8% per year.



2018 ES Results Summary: Businesses

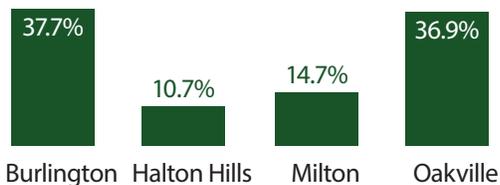
Distribution of Businesses Across Halton

The map shown on this page identifies the spatial distribution of businesses across Halton Region. To provide an overall picture of where businesses are located in Halton, each geographic area highlighted on the map is assigned a colour based on the number of businesses within that area. The darker the colour, the higher the number of businesses in the area.

Businesses are located throughout Halton's settlement areas (Urban Area & Hamlet) and rural areas. There are visible concentrations within Halton's settlement areas and particularly within the Employment Area identified in Halton's Regional Official Plan.

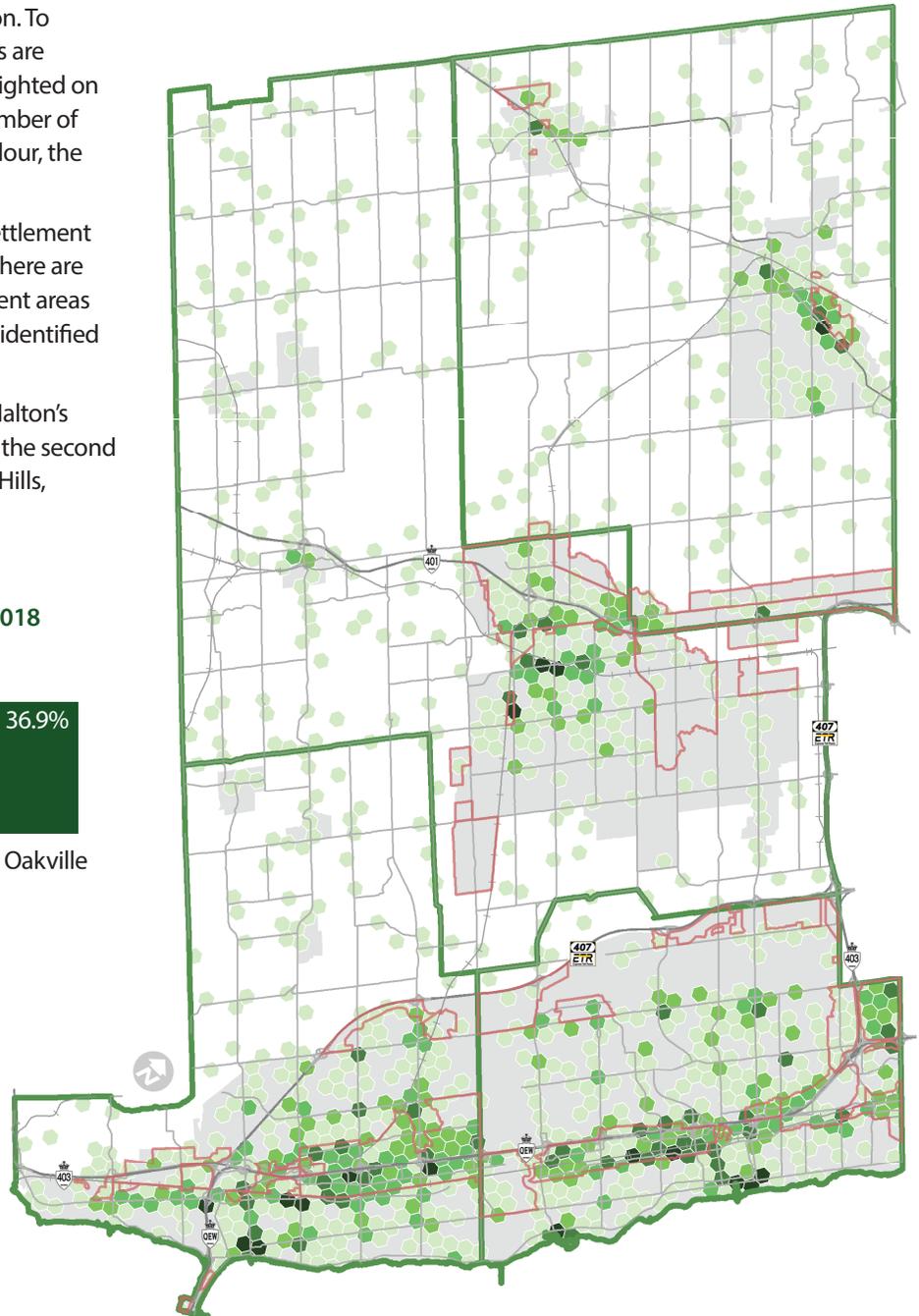
In 2018, Burlington had the highest share of Halton's total businesses at 37.7 per cent. Oakville had the second highest share, followed by Milton and Halton Hills, respectively.

Local Municipal Share of the Total Businesses Identified in 2018



Based on 12,366 total businesses

- 1 to 10 Businesses
- 11 to 25 Businesses
- 26 to 50 Businesses
- 51 to 100 Businesses
- 100 + Businesses
- Urban Area & Hamlet
- Employment Area



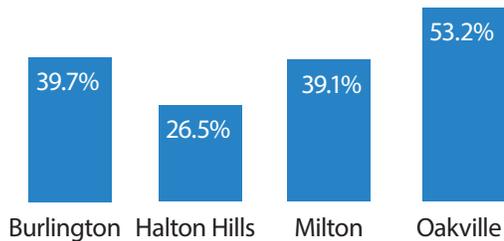
2018 ES Results Summary: Businesses in Employment Area

Business Concentration in Halton's Employment Area

The map shown on this page identifies the spatial distribution of businesses within Halton's Employment Area. To provide an overall picture of where businesses are located within the Employment Area, each geographic area highlighted on the map is assigned a colour based on the number of businesses within that area. The darker the colour, the higher the number of businesses in the area.

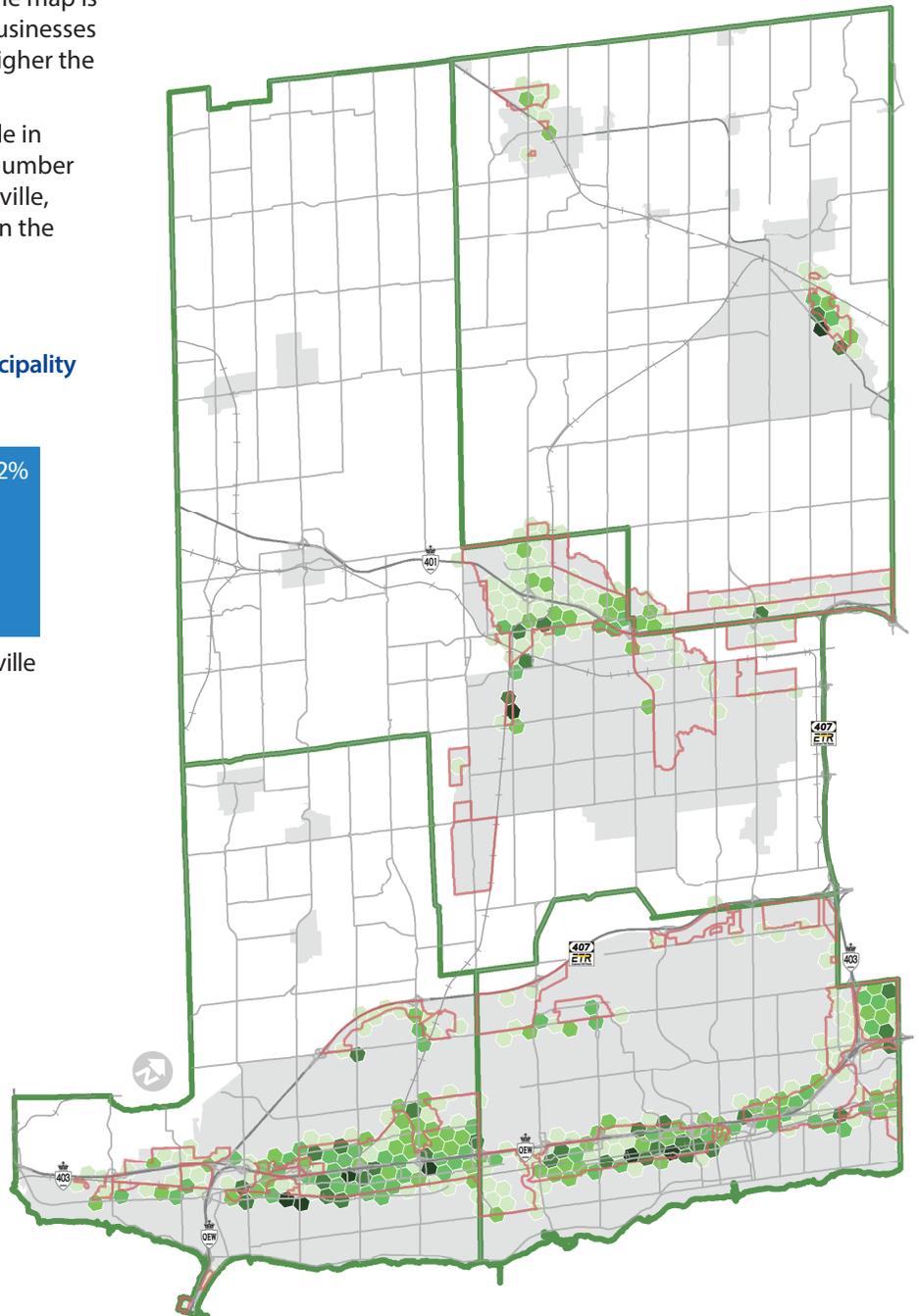
The Employment Area plays an important role in each Local Municipality where a significant number of businesses are located. Particularly, in Oakville, over half of all businesses were located within the Employment Area in 2018.

Percentage of Businesses Located within Halton's Employment Area by Municipality



Based on 5,742 businesses

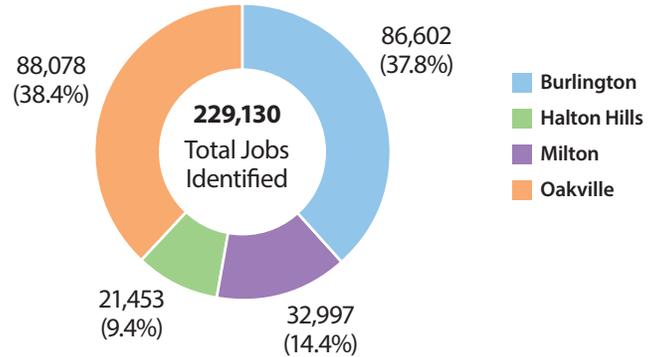
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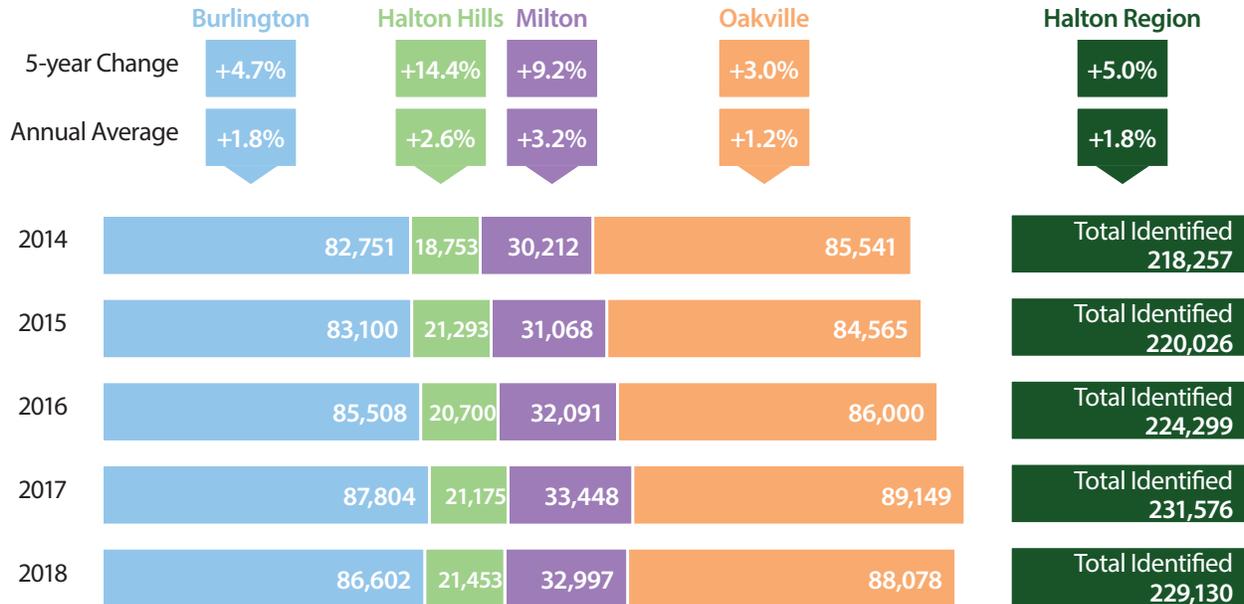
2018 ES Results Summary: Jobs

Summary of Jobs identified in the 2018 Employment Survey

The 2018 Employment Survey identified a total of 229,130 jobs in Halton Region. Oakville had the highest share of identified jobs at 88,078 (38.4 per cent), followed by Burlington with the second highest share at 86,602 jobs (37.8 per cent). Milton and Halton Hills had 32,997 (14.4 per cent) and 21,453 (9.4 per cent) businesses identified, respectively.



Over the last five years, between 2014 and 2018, the Employment Survey results show an increase of 5.0% in the total number of jobs identified. By municipality on an annual basis, Milton had the highest average rate of increase in the number of jobs identified at 3.2% per year, followed by Halton Hills at 2.6% per year. Burlington saw an average of 1.8% increase in jobs identified per year. On average, Oakville had an increase of 1.2% in per year.



2018 ES Results Summary: Jobs

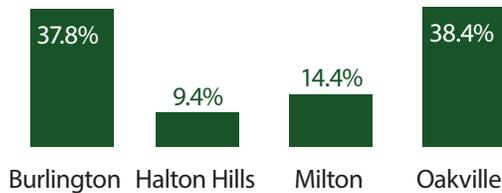
Distribution of Total Jobs across Halton

The map shown on this page identifies the spatial distribution of jobs across Halton Region. To provide an overall picture of where jobs are located in Halton, each geographic area highlighted on the map is assigned a colour based on the number of businesses within that area. The darker the colour, the higher the number of jobs in the area.

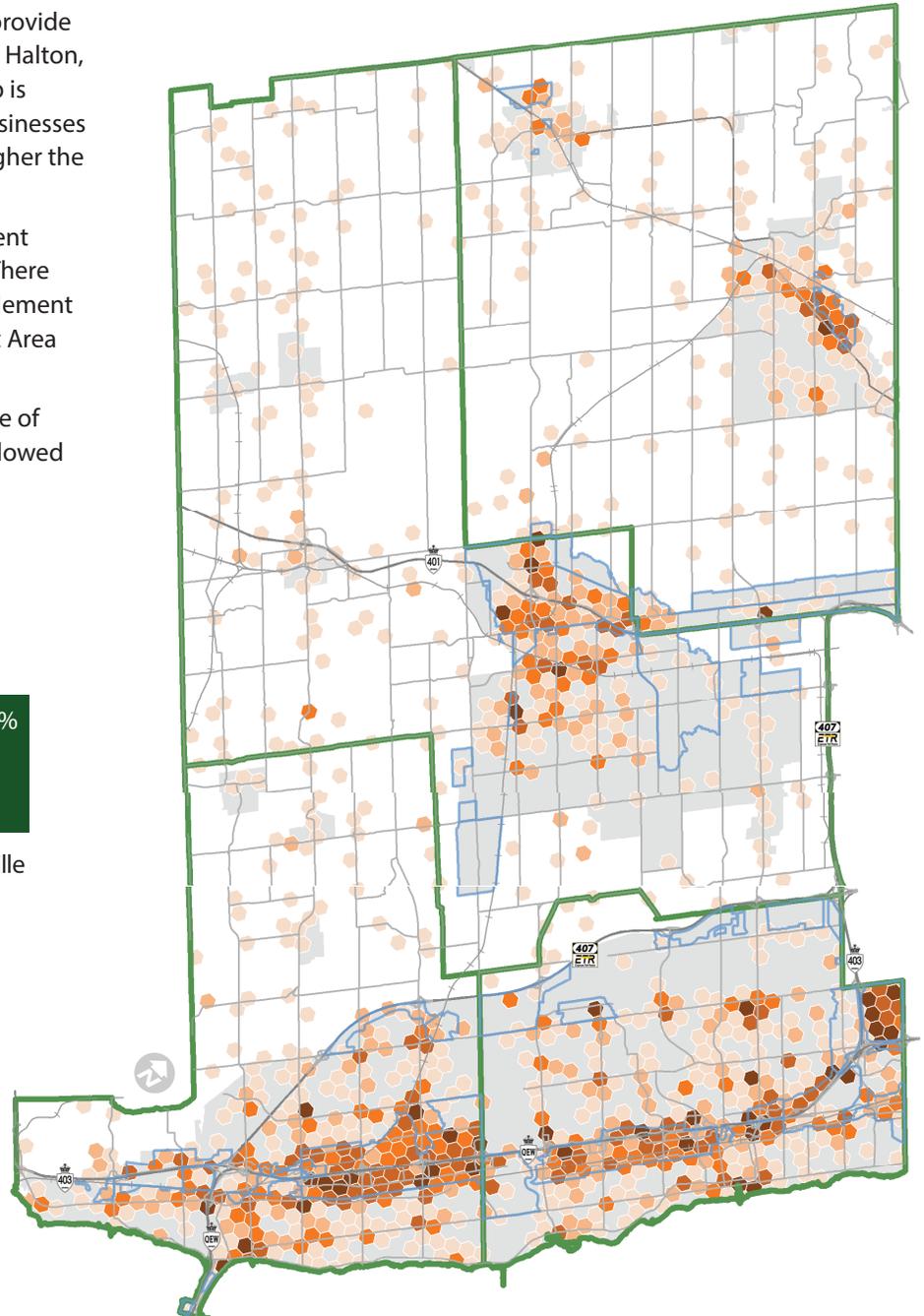
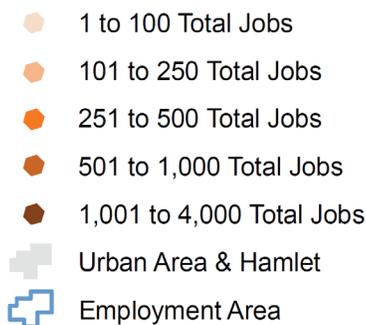
Jobs are located throughout Halton's settlement areas (Urban Area & Hamlet) and rural areas. There are visible concentrations within Halton's settlement areas and particularly within the Employment Area identified in Halton's Regional Official Plan.

By municipality, Oakville had the highest share of Halton's total jobs in 2018 at 38.4 per cent, followed by Burlington, Milton, then Halton Hills.

Local Municipal Share of the Total Jobs Identified in 2018



Based on 229,130 total jobs



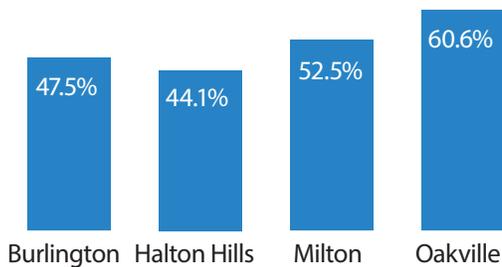
2018 ES Results Summary: Jobs in Employment Area

Distribution of Jobs in Halton's Employment Area

The map shown on this page identifies the spatial distribution of jobs within Halton's Employment Area. To provide an overall picture of where jobs are located within the Employment Area, each geographic area highlighted on the map is assigned a colour based on the number of jobs within that area. The darker the colour, the higher the number of jobs in the area.

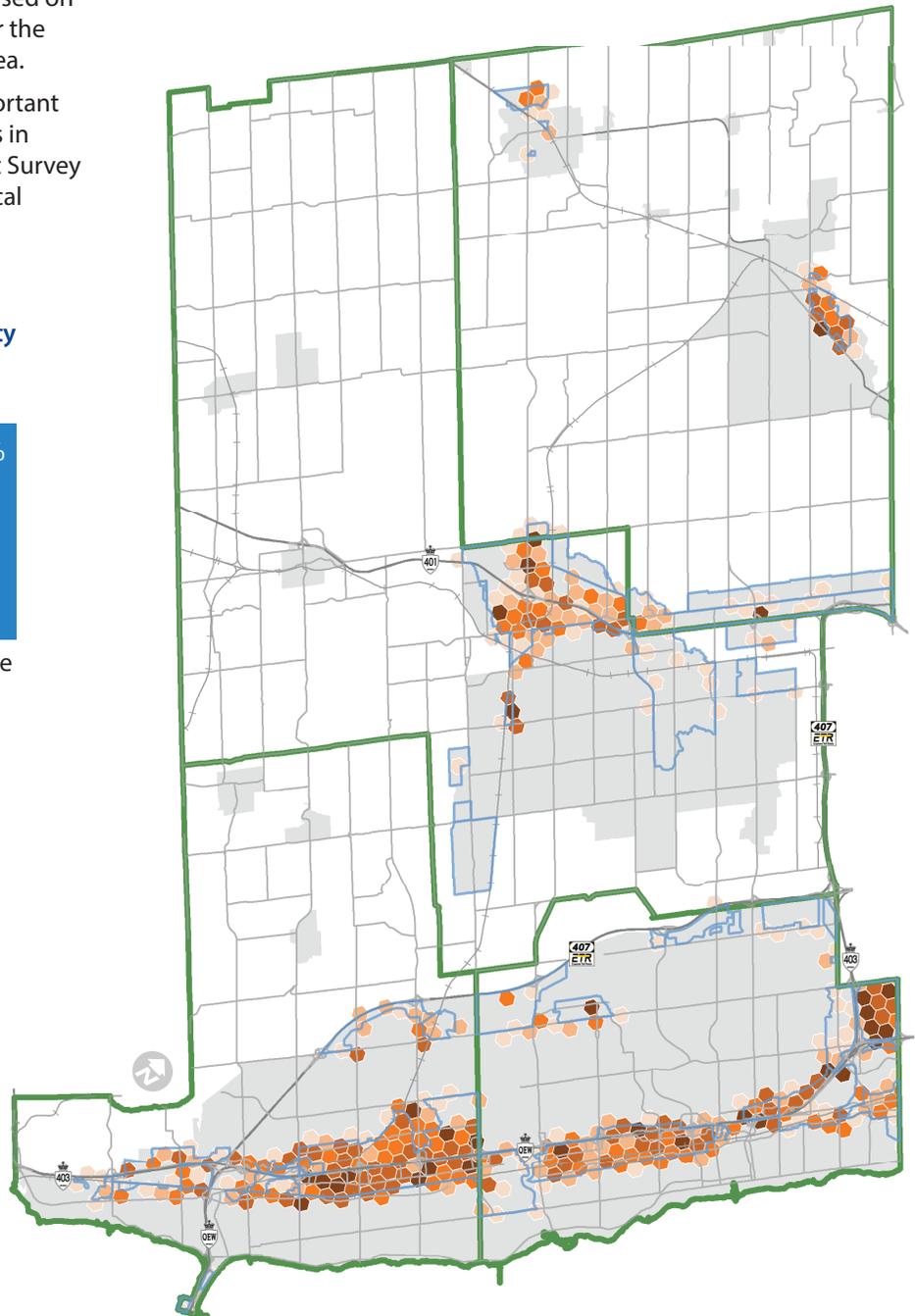
The Employment Area plays a particularly important role by supporting a significant number of jobs in each Local Municipality. The 2018 Employment Survey identified that nearly half of all jobs in each Local Municipality were in the Employment Area.

Percentage of Jobs within Halton's Employment Area by Municipality



Based on 121,323 jobs

- 1 to 100 Total Jobs
- 101 to 250 Total Jobs
- 251 to 500 Total Jobs
- 501 to 1,000 Total Jobs
- 1,001 to 4,000 Total Jobs
- Urban Area & Hamlet
- Employment Area

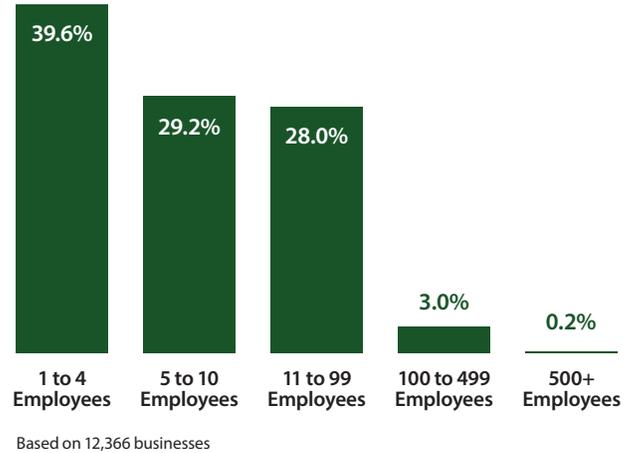


Results: Halton's Businesses

Businesses by Size

In 2018, 69 per cent of Halton's businesses were small businesses with 10 or fewer employees. 28 per cent of the all active businesses had more than 10 but less than 100 employees. The remaining 3 per cent of the businesses employed more than 100 employees.

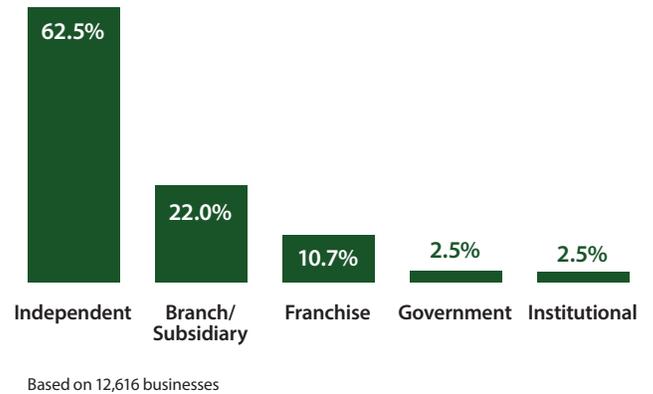
In 2018, businesses by the size of employees were as follows:



Businesses by Ownership

The majority of businesses in Halton were independently owned businesses, representing almost 63 per cent of the total businesses identified in 2018. The second highest ownership type was a branch/subsidiary business (22 per cent), followed by Franchise (10.7 per cent), Government (2.5 per cent), and Institutional (2.3 per cent).

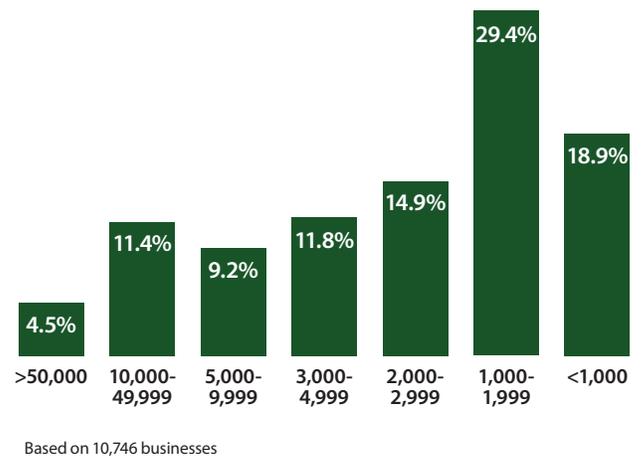
In 2018, businesses by ownership types were as follows:



Business Floor Area

84 per cent of the businesses identified in 2018 operated within the floor areas of 10,000 square feet (or less). The remaining 11 per cent operated within the floor areas of between 10,000 and 49,999 square feet, and 4.5 per cent operated within the floor areas of greater than 50,000 square feet.

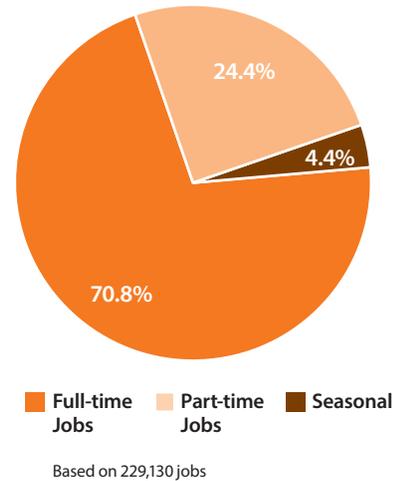
In 2018, businesses by the size of occupying floor space area were as follows:



Results: Halton's Jobs

Jobs by Employment Type

The majority of jobs identified in 2018 were full-time jobs, at approximately 71 per cent of the total jobs. About 25 per cent were part-time jobs and 4 per cent were seasonal jobs.

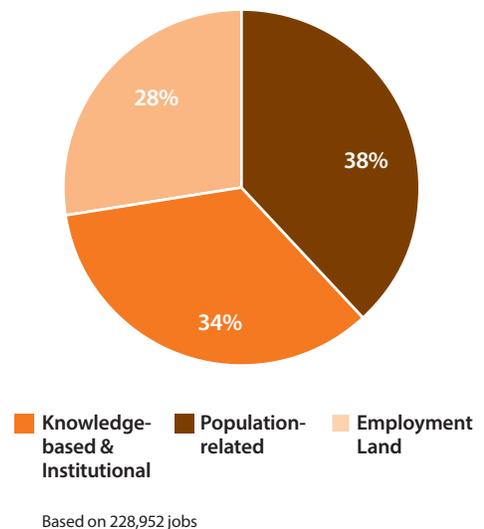


Jobs by Category

In 2018, jobs in Population-related Category represented the highest share of total jobs at 38 per cent. The Population-related Category contains jobs that enhance daily life, which include retail, medical offices, hotels, restaurants, or other service-related establishments (such as dry cleaners and repair shops).

Knowledge-based & Institutional Category had the second highest share at 34 per cent. This category includes jobs that require a post-secondary education and/or a professional certification such as law firms, schools, long-term care facilities, real estate companies, or design firms.

Employment Land Category had a 28 per cent share of the total jobs. These jobs are related to primary industries, construction, utilities, and manufacturing.



Businesses and Jobs by Sector

Businesses and Jobs Highlight by Sector

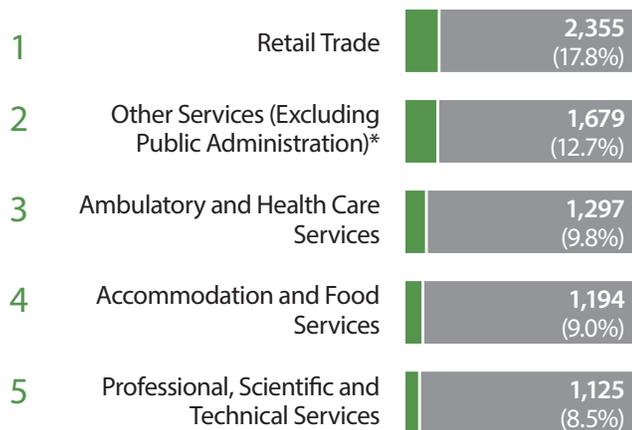
Halton is one of the fastest growing regions in Canada with diverse businesses operating across the region. In 2018, the top sector by total number of businesses was retail trade. Businesses in this sector are primarily engaged in retailing merchandise or provide services related to the sale of merchandise. Retail trade was also the top sector by total number of jobs.

The top 5 sectors, as defined in the North American Industrial Classification System (NAICS), by total number of businesses and by total number of jobs in 2018 were as follows:

Halton is one of the fastest growing regions in Canada with diverse businesses operating across the Region. In 2018, the top 5 sectors by business count were:

Top 5

Sectors by Total Businesses



Top 5

Sectors by Total Jobs



The top 5 sectors by job count were:

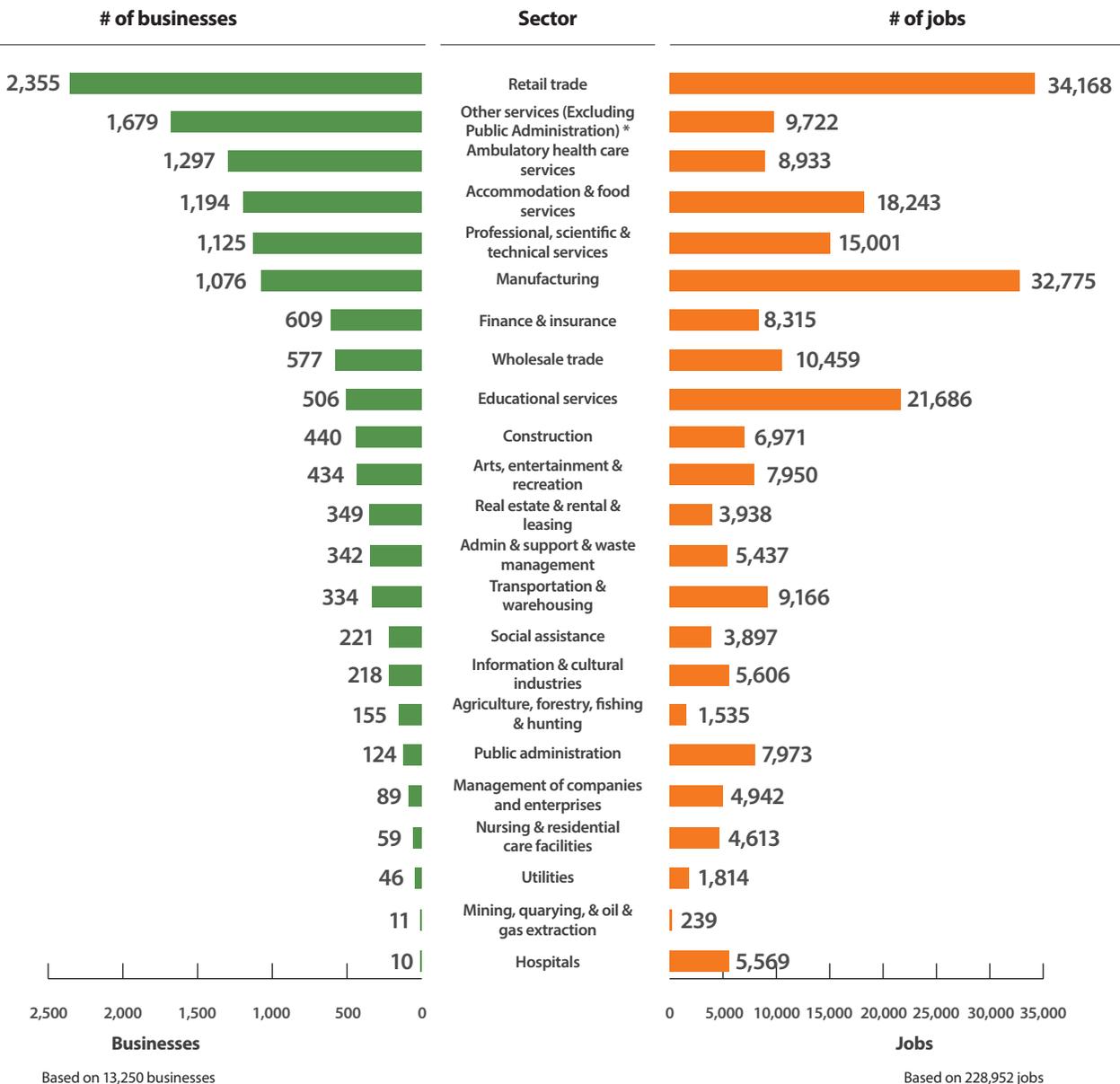
*** Other Services (Excluding Public Administration):**

Establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services; organizing and promoting religious activities; supporting various causes through grant-making, advocating (promoting) various social and political causes, and promoting and defending the interests of their members. Private households are also included.

Businesses and Jobs by Sector

Businesses and Jobs by NAICS Sectors

The graph below presents the results of the 2018 Employment Survey related to businesses and jobs by sectors as defined in the North American Industrial Classification System (NAICS).



*** Other Services (Excluding Public Administration):**

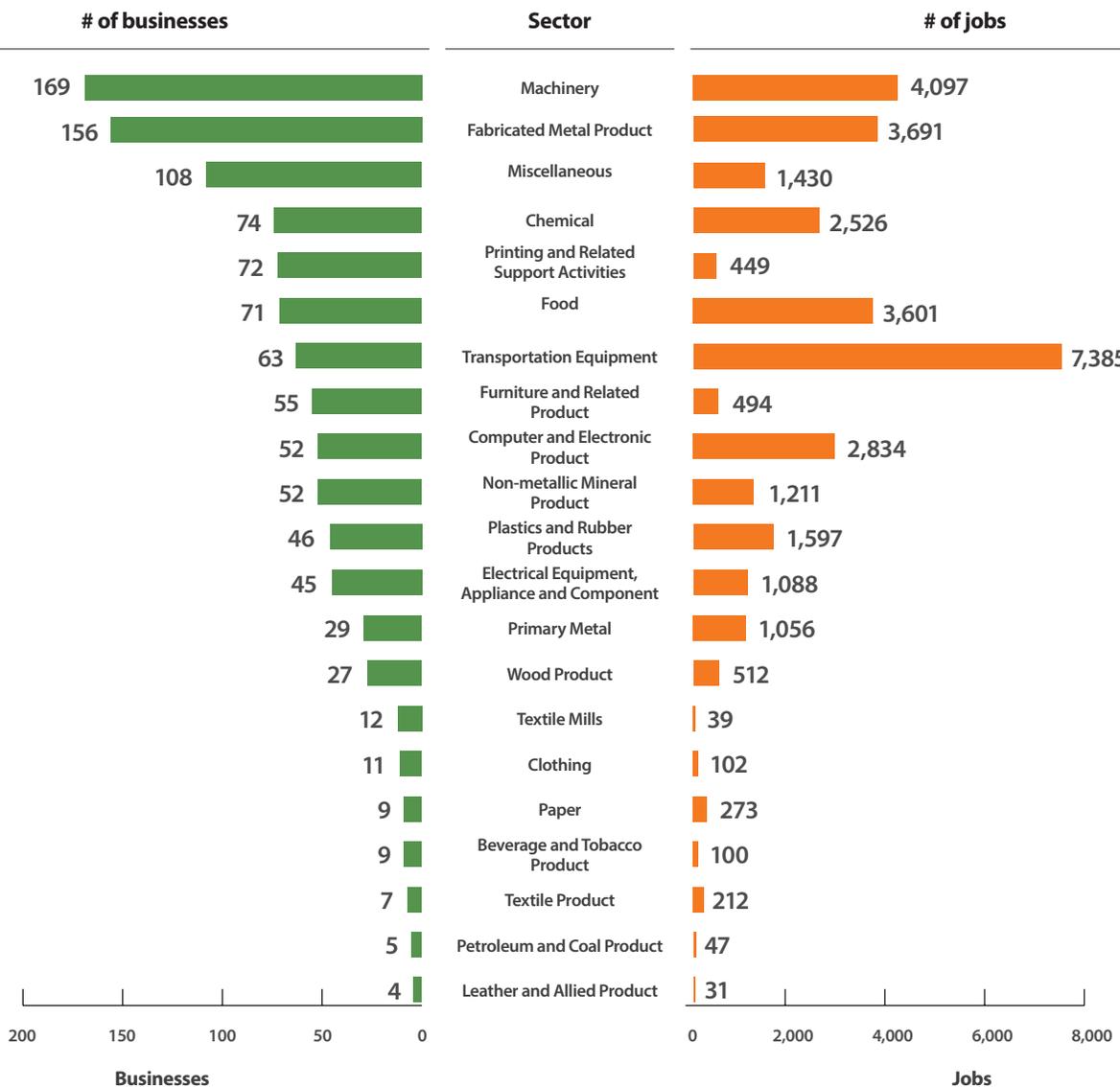
Establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services; organizing and promoting religious activities; supporting various causes through grant-making, advocating (promoting) various social and political causes, and promoting and defending the interests of their members. Private households are also included.

Businesses and Jobs by Sector

Manufacturing Sub-sectors

In 2018, the most common manufacturing sub-sector by total number of businesses was in machinery manufacturing. Businesses in this sub-sector are primarily engaged in manufacturing industrial and commercial machinery.

The most common manufacturing sub-sector by total number of jobs was in transportation equipment, which engages in manufacturing equipment for transporting people and goods. Halton's largest private employer in this sub-sector includes the Ford Motor Company in Oakville.



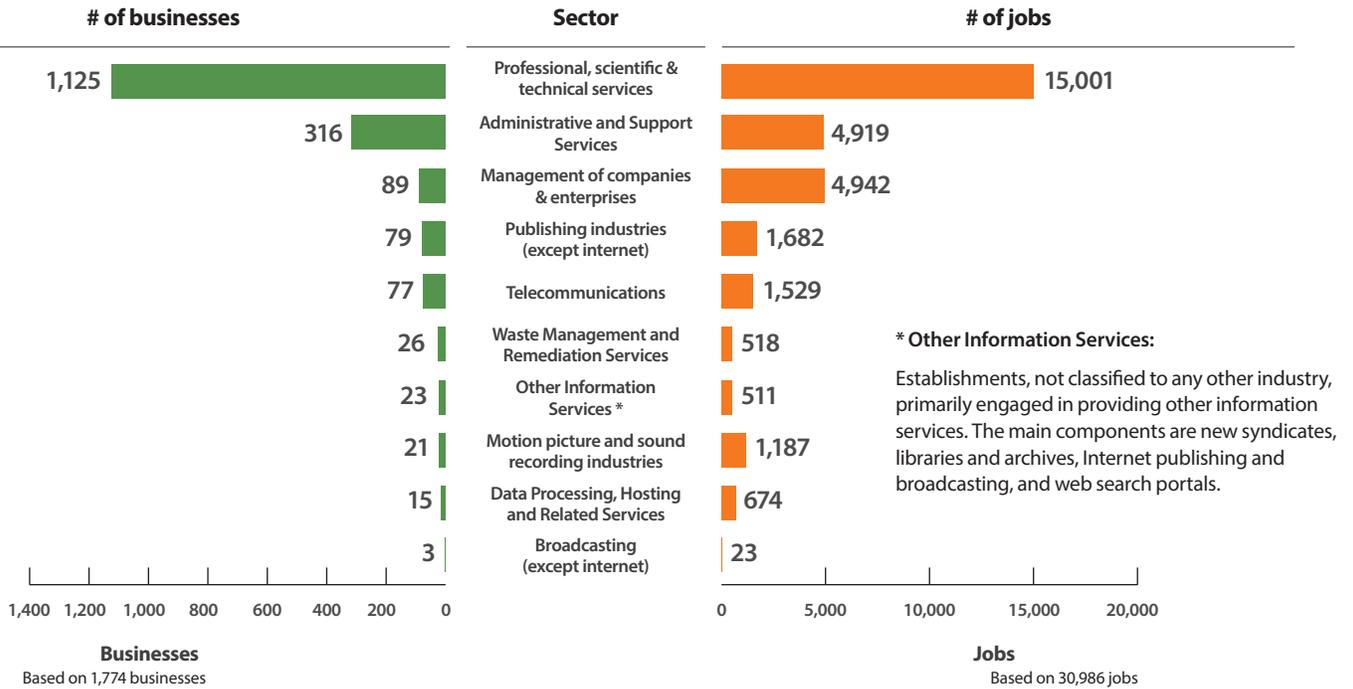
Based on 1,076 businesses

Based on 32,775 jobs

Businesses and Jobs by Sector

Professional Sub-Sectors

The 2018 Employment Survey identified 1,774 businesses operating in industries offering professional services, which accounted for 13.4 per cent of the total businesses identified in 2018. Additionally, the businesses in this sub-sector accounted for 13.5 per cent of the total jobs identified in 2018, or 30,986 jobs.



Finance Insurance Real Estate (FIRE) Services Sub-sectors

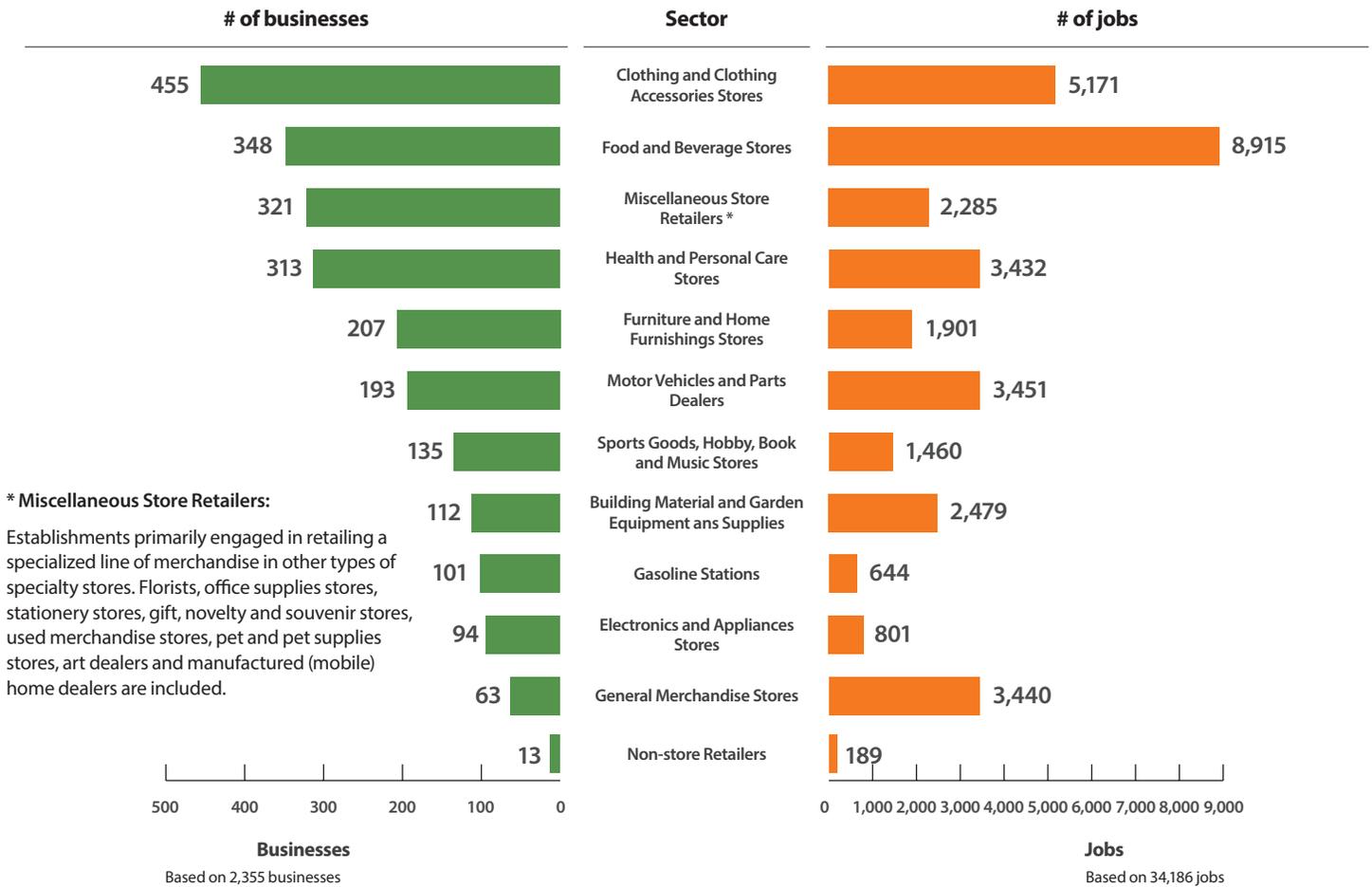
In 2018, 958 businesses were identified operating in the FIRE subsector, which accounted for 7.2 per cent of the total businesses in Halton Region. Businesses in this sub-sector employed 5.4 per cent of the total jobs identified in 2018, or 12,253 jobs.



Businesses and Jobs by Sector

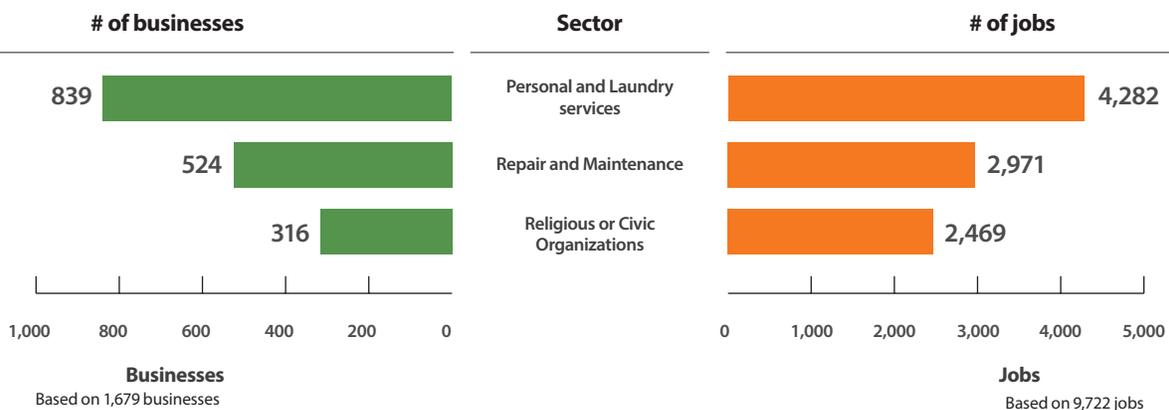
Retail Sub-Sectors

Of the 2,355 businesses identified in 2018 that operates in the retail sub-sector, businesses in food and beverage stores (stores that sell food and beverage merchandise from fixed point-of-sale locations) employed the most people at almost 9,000 jobs, or 3.9 per cent of the total jobs identified in 2018.



Other Service Sub-sectors

In 2018, there were 1,679 businesses (businesses that provide miscellaneous services) employing 9,722 people in this sub-sector. About 44 per cent of the businesses in this sub-sector were providing personal and laundry services, followed by businesses in repair and maintenance and businesses in religious or civic organizations, respectively.



Methodological Notes for 2018

About Halton's Employment Survey

Halton Region conducts an annual survey of all visible businesses across the Region, which include work that may be a for-profit establishment or a non-profit/government organization.

The survey gathers information on business types and employment activities to help the Region to:

- monitor economic and land use trends across the Region;
- plan for future regional infrastructure and services; and
- assist in policy development and decision-making.

Participation in the survey is voluntary and the results presented in this report are based on the respondents' input.

Survey Response Rate

The 2018 Employment Survey identified a total of 13,296 active businesses. Of these, 1,394 were businesses identified for the first time in 2018 and 11,902 were previously identified businesses in 2017 that continue to operate.

The response rate for the 2018 Employment Survey were as follows:

- **83.1%** of the total businesses identified provided updated or new information;
- **12.5%** were unavailable to provide updated or new information (where the businesses were previously surveyed, the information from the previous survey was carried over); and
- **4.4%** declined to participate in the survey in 2018.

Data Collection

Halton's Employment Survey is a survey of all visible businesses across Halton Region, including rural, farm-based, and advertised home-based businesses. Between the months of May and September, a group of Employment Surveyors are deployed to visit every business across the Region. Prior to the deployment, the Surveyors are provided with a comprehensive training on the survey methodology, process, and protocols.

The Survey incorporates a number of different methods to collect data from businesses using a custom developed tablet-based survey application or a printed survey form. Surveyors are trained to use the most appropriate option.

The primary method of collecting data is through in-person interviews with follow-up interviews via telephone, e-mail, or facsimile, as necessary. Businesses also have the option to respond by submitting an electronic form available on Halton Region's website. A description of each method is summarized below.

1. In-person interviews with the businesses

Between months of May and September of each year, Employment Surveyors are deployed to visit every business in person across Halton Region. Surveyors use a custom developed survey application installed on secure electronic tablets to survey businesses and record the responses.

In cases where businesses are unavailable for survey at the time of the in-person visit, the Surveyors are trained to exercise the option to arrange an alternate time to revisit the business or provide alternate options to respond, which are described below.

Methodological Notes for 2018

2. Follow-up interviews via telephone, including responses received via regular mail, e-mail, or facsimile

Where businesses are unavailable to be surveyed in-person, the Surveyors are trained to ask for the business contact information for a follow-up email via telephone. Subsequently, Surveyors follow-up with the businesses during regular office hours, or at a pre-arranged time.

Where appropriate, Surveyors may leave a printed survey form with options for businesses to respond via regular mail, e-mail, or facsimile.

3. Electronic submissions via Halton Region's website

Businesses also have the option of submitting electronic responses via Halton Region's website at halton.ca.

Where businesses are unavailable for participation in the survey, information relating to that business from the previous survey years are carried over.

Data Notes

The Employment Survey is a point-in-time survey based on voluntary participation. Accordingly, the data may not reflect the most current circumstances, particularly in certain industries experiencing rapid and frequent changes.

Halton Region 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.

Regional staff work to continually improve the quality of Employment Survey methodology. Please contact Planning Services, Halton Region, with any questions or suggestions.

Glossary of Terms

Business

Single location of work that may be a for-profit establishment or a non-profit/government organization

FIRE

Industry categorization of financial, insurance, real estate, rental, and leasing services.

Full-time Employment

Over 30 work hours per five-day week through the year.

North American Industrial Classification System (NAICS)

2012 version of an industry classification system used throughout Canada, the United States, and Mexico. For more information on NAICS, visit: www.statcan.gc.ca/

Part-time Employment

Under 30 hours, five days a week, throughout the year.

Seasonal Employment

Temporary workers employed over a specific contract period, in either a full-time or part-time capacity.

