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Burlington, Ontario Economic Profile

September 28, 2009

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BURLINGTON, ONTARIO, ECONOMIC PROFILE: EXECUTIVE SUMMARY

The following report presents a detailed analysis into the profile of The City of Burlington's workforce, economic composition, and industry trends developed as an aid in supporting The Burlington Economic Development Corporation's (BEDC) economic development strategy. The components of this report include:

1. A census based profile and evaluation of the current and future Burlington economy and workforce characteristics cross compared against Halton and Ontario from 1996 to 2006, with focus on the various sectors and sub-sectors which comprise the Burlington economy, and what trends should be expected towards the future.
2. The development of a comprehensive manufacturing and business services workforce profile, highlighting specific areas such as: key metrics and trends in each industry, facets affecting each industry, and the identification of sub-sectors and/or specializations. The primary industries evaluated in this profile include the following 5 industries:
 - i. Business Services
 - ii. Information Technology
 - iii. Scientific, Technical and Professional Services
 - iv. Financial Services
 - v. Manufacturing

Population and Labour Force Demographic Profile – Key Findings

Burlington, Ontario when compared to both Halton and Ontario as a whole has the highest percentage of population with some postsecondary education. Likewise, from 1996 to 2006, the percentage of persons living in Burlington with some form of postsecondary education increased, thus indicating the presence of a population which is becoming increasingly more educated. From an industry perspective, as of 2006, industries employing the most persons from Burlington were found to be in manufacturing/construction, wholesale and retail trade, health and education, and business services, while manufacturing showed a notable decrease over the years 2001 to 2006. According to the Toronto Region Research Alliance (TRRA), the largest sector of Burlington's labour force by occupation as of 2009 has been found in sales and service, business/finance/administration, and management. Moreover, the TRRA has projected Burlington's labour force to increase substantially over the next 5 years. When evaluating Burlington's catchment area (CMA), roughly half of those living in Burlington work outside of the city, predominately in Hamilton, Oakville, Mississauga, and Toronto. Alternatively, a roughly equal number of individuals commute into the city for work purposes, primarily from Hamilton, Oakville, Mississauga, and Toronto.

Macro-Sector Analysis – Key Findings

A cross comparison the 5 key industry sectors within Burlington uncovered the following results:

Majority of Firms: Operate in Business Service and Scientific, Technical, and Professional Services

Majority of Employees: Work in Manufacturing and Business Services

Majority of Revenues: Generated from Manufacturing firms

Employee & Firm Productivity: Highest among Financial Services and Manufacturing firms

Micro-Sector Analysis – Key Findings

An individual analysis of the 5 key industry sectors within Burlington uncovered the following results:

Business Services:

Majority of Firms	Small single locations
Majority of Employees	Small single locations
Majority of Revenues	Small single locations
Breakdown of Predominant Sub-Sectors	<p>Scientific, Technical, and Professional Services:</p> <ul style="list-style-type: none"> • Administrative and General Management Consulting Services • Miscellaneous Consulting Services • Offices of Lawyers <p>Admin. and Support, Waste Mgmt and Remediation:</p> <ul style="list-style-type: none"> • Janitorial Services • Landscaping Services
Key Trends	<p>-Outsourcing of business services such as call centres and human resource functions</p> <p>-Capitalization on restructurings, tax and advisory, management and strategic consulting opportunities, and legal consultation</p>

Information Technology:

Majority of Firms	Small Single Locations
Majority of Employees	Large Single Locations (51 to 100 employees)
Majority of Revenues	Large Single Locations (51 to 100 employees)
Breakdown of Predominant Sub-Sectors	<p>Scientific, Technical, and Professional Services:</p> <ul style="list-style-type: none"> • Computer Systems Design Services • Custom Computer Programming <p>Information Technology:</p> <ul style="list-style-type: none"> • Software Publishers • Data Processing, Hosting, and Related Services • Landscaping Services
Key Trends	<p>-Compound annual growth of 4% through 2010</p> <p>-Virtualization technology development</p> <p>-Nanotechnology development</p> <p>-Increasing usage of digital protection and security products</p> <p>-Green IT</p> <p>-Changes in hardware and software development</p>

Scientific, Technical, and Professional Services:

Majority of Firms	Equally dispersed among single location firms of varying sizes
Majority of Employees	Small single locations
Majority of Revenues	Small single locations
Breakdown of Predominant Sub-Sectors	<ul style="list-style-type: none">• Management, Scientific and Technical Consulting Services• Other Management Consulting Services• Offices of Lawyers• R&D in Physical, Engineering, and Life Sciences
Key Trends	<ul style="list-style-type: none">-Advanced Electronics-Biotech-Information Technology & Communications-Food Processing & Packaging-Automation, Robotics & Engineering Design-Advanced Manufacturing Companies-Logistics

Financial Services:

Majority of Firms	Small single locations
Majority of Employees	Small single locations
Majority of Revenues	Large single locations (>100 employees)
Breakdown of Predominant Sub-Sectors	Finance & Insurance: <ul style="list-style-type: none">• Insurance Agencies• Brokerages• Commercial Banking• Open-End Investment Funds• Sales Financing
Key Trends	Banking: <ul style="list-style-type: none">• Changing role of the branch• Increasing demand for retirement services• Development of service oriented architectures Insurance: <ul style="list-style-type: none">• Emerging retirement market• Development of advanced analytics

Manufacturing:

Majority of Firms	Small single locations
Majority of Employees	Large single locations (>100 employees)
Majority of Revenues	Large single locations (>100 employees)
Breakdown of Predominant Sub-Sectors	<ul style="list-style-type: none">• Primary & Fabricated Metal Manufacturing• Machinery Manufacturing• Computer & Electronic Product Manufacturing• Chemical & Chemical Product Manufacturing• Paper Manufacturing & Printing and Related Support Activities
Key Trends	<ul style="list-style-type: none">-Increasing focus on production efficiency-Improvements in energy usage-Increasing use of wireless-Improved security-Implementation of green manufacturing

MACRO INDUSTRY PROFILE

Summary

For the purpose of this report, the macro industry profile has been divided into two sections:

1. Population and Labour Force Demographic Profile of Burlington, Ontario
2. Macro-Sector Analysis.

The Population and Labour Force Demographic Profile is a secondary analysis of a selected set of primary data points based on information from Statistics Canada (Statscan) and the Toronto Region Research Alliance (TRRA). Data points from Statscan have been derived from Statscan's last three Census' of Population, while the data points from the TRRA are a combination of primary and secondary information from reports published by the TRRA. This report analyzes key trends and developments in areas including education, employment by industry and occupation, and commuting flows. The City of Burlington has been compared to the Region of Halton and the Province of Ontario on a relative basis to determine Burlington's comparative strengths and weaknesses, in addition to the City's absolute trends and statistics.

The Macro-Sector Analysis is a secondary analysis of primary data points based on information obtained from the Dun & Bradstreet Corporation's Hoover's Database. This section cross compares five of Burlington, Ontario's selected industries including Business Services, Information Technology, Scientific, Technological, and Professional Services, Financial Services, and Manufacturing. Categories of particular interest in this report include: total number of firms, total number of employees, total revenue, average revenue per firm, and average productivity per employee.

Key Findings

1. The Population and Labour Force Demographic Profile

Education

From 1996 to 2006, the percentage of persons with some form of postsecondary education increased in Burlington, Halton, and Ontario. Of the three, Burlington had the highest percentage of population with some postsecondary education at 57.2% as of 2006. Overall, there was not any large difference between the education levels of the three groups, although certain groups had higher attainments in certain categories. As of 2006:

- 15.7% of Burlington's population did not have a high school certificate,
- 27.0% had only a high school certificate,
- 4.5% had a university diploma or certificate below the bachelor level,
- 29.0% were educated in trades or had a non-university certificate or diploma,
- 23.7% had completed university.

Labour Force by Industry

As at 2006, the industries employing most persons from Burlington were manufacturing/construction, wholesale and retail trade, health and education, business services, and other services. Each of these areas employed between 16.2% to 20.0% of persons from Burlington. Only manufacturing showed a notable decrease (-2.6%) since 2001.

Burlington's labour force breakdown by industry as of 2006 was similar to Halton and Ontario, with notable differences being higher percentages of wholesale and retail trade (+3.3%), and finance and real estate (+2.1%) in Ontario, but manufacturing and construction (-2.3%) being lower in Ontario.

Labour Force by Demographic

Toronto Region Research Alliance (TRRA) data indicates that as at 2009, the largest sector of Burlington's labour force by occupation is sales and service (25.1%), followed by business/finance/administration (19.9%), and management (14.9%). The TRRA's projected increase for Burlington's labour force as a whole is +15.6% over the next five years.

Commuting Flows

As at 2006, approximately half the people who worked in Burlington lived in Burlington. As well, approximately half the residents of Burlington worked in Burlington.

The most popular outside cities for people from Burlington to work in were; Hamilton (13.9% of Burlingtonians), Oakville (11.9%), Mississauga (11.7%) and Toronto (11.0%). The most popular origins of persons working in Burlington who did not reside in Burlington were similarly; Hamilton (33.5%), Oakville (5.4%), Mississauga (3.5%), and Toronto (1.8%).

TRRA studies indicate that as at 2009, 79.9% of Burlington's labour force commuted to work by car (as driver). No other type of transportation (including in car as passenger) was used by over 10% of Burlington's labour force. TRRA forecasts for 2014 suggest that very little will change within this dynamic.

2. Macro-Sector Analysis

Following comparative analysis between the city's five key industry sectors, it was evident that Business Services contributed to the largest number of firms in Burlington, with a 43% share. This is primarily due to the substantially large number of Business Services firms with 0 to 5 employees. The next largest sector within Burlington is the Scientific, Technical, and Professional Services sectors, representing 29% of all firms. When delving into the number of employees in Burlington, Manufacturing stood out as the leader with 43% of all employees. This was primarily a result of the substantially large number of manufacturing firms with greater than 100 employees. The second largest sector in this respect was Business Services with a 23% share of total employees in Burlington. Manufacturing also had the largest total share of revenue in Burlington at 55%. Most of these revenues were obtained from firms with 21 to 50 employees, and firms with greater than 100 employees within the Manufacturing sector. Productivity per employee was highest within the Financial Services sector, with average revenue per employee of \$413K, followed by the Manufacturing sector with average revenue per employee of \$262K. Similar observations were noted for productivity per firm, with Financial Services leading the way at \$122M, followed by Manufacturing at \$103M.

For a description on framework explanation and data collection methodology, please see Appendices A and B.

DEMOGRAPHIC PROFILE

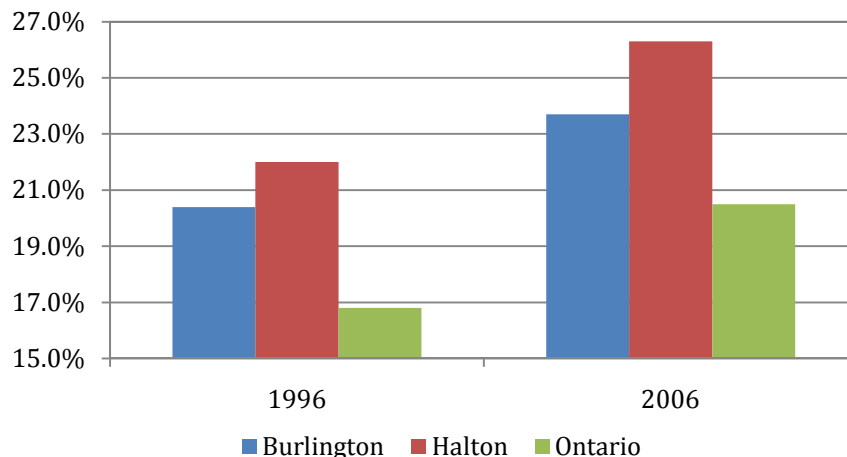
1. Education¹

	Burlington (1996)	Burlington (2006)	Halton (1996)	Halton (2006)	Ontario (1996)	Ontario (2006)
Education - Total - All persons age 15 and over	109,040		132,695	265,530		347,505
Persons without a high school certificate	26,825	20,930	65,635	54,415	2,786,945	2,183,625
Persons with a high school certificate	15,560	35,845	37,150	90,945	1,229,275	2,628,575
Some postsecondary education	13,185		32,395		943,795	
University certificate or diploma below bachelor level		5,930		16,450		405,270
Persons with trades or non-university certificate or diploma	31,220	38,505	71,945	94,375	2,048,950	2,589,890
Persons who have completed university	22,260	31,480	58,400	91,320	1,420,240	2,012,060

1.1 Percentage of persons who have completed university²

The percentage of persons who have completed university has risen in Burlington, Halton and Ontario by a similar amount (~3%) from 1996 to 2006. As at 2006, 2.6% more of Halton's population has completed university as compared to Burlington, while 3.2% less of Ontario's population has completed university as compared to Burlington.

Percentage of Persons who have Completed University



1.2 Percentage of persons with trades or non-university certificate or diploma³

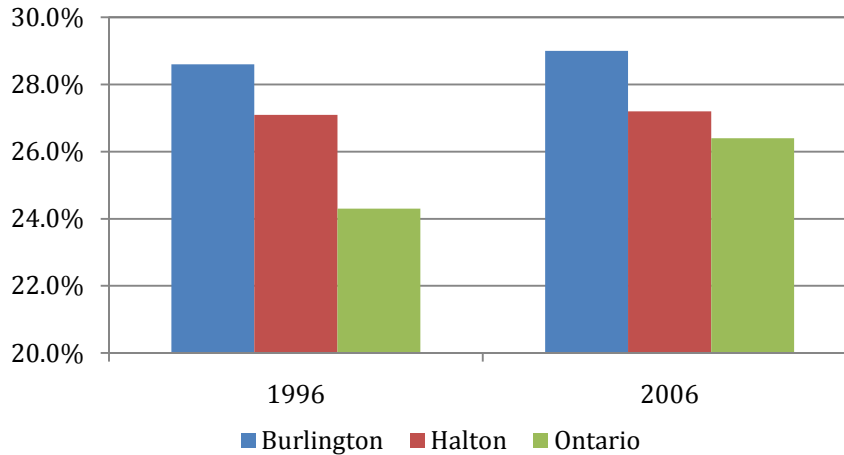
Between 1996 and 2006, Burlington and Halton had a relatively constant percentage of population with trades or non-university certificate or diploma, while Ontario's percentage of population grew by 2.1%. Burlington's percentage of population with trades or non-university certificate or diploma was 1.8% higher than Halton and 2.6% higher than Ontario as at 2006.

¹ Statistics Canada Census Data for Burlington, Halton, and Ontario (1996, 2006), accessed from [www.statcan.com]

² Statistics Canada Census Data for Burlington, Halton, and Ontario (1996, 2006), accessed from [www.statcan.com]

³ Statistics Canada Census Data for Burlington, Halton, and Ontario (1996, 2006), accessed from [www.statcan.com]

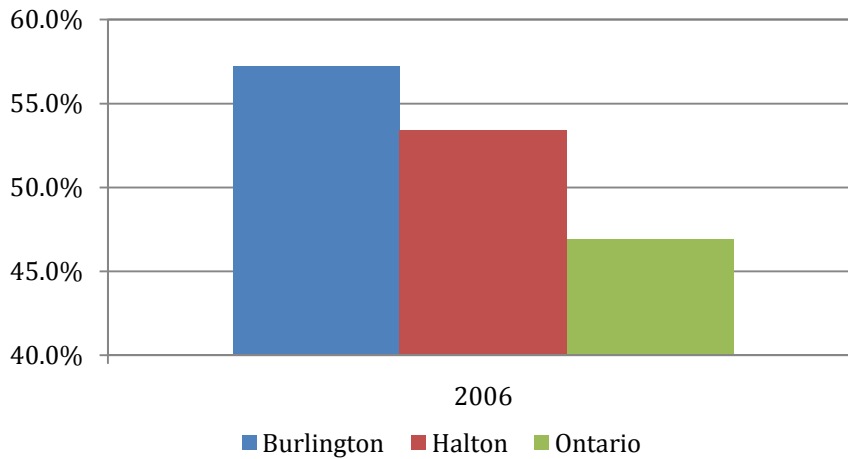
Percentage of Persons with Trades or Non-University Certificate/Diploma



1.3 Percentage of persons who have completed some level of post secondary education⁴

As at 2006, Burlington’s percentage of persons who have completed some level of post secondary education was 57.2%, 3.8% higher than Halton and 10.3% higher than Ontario (including persons with a university certificate or diploma below the bachelor level, persons with trades or non-university certificate or diploma, and persons who have completed university).

Percentage of Persons with Some Post-Secondary Education



Key Findings

- From 2000-2006, the number of individuals who have a high school degree has increased substantially within Burlington, Halton, and Ontario by 1.3, 1.4, and 1.1 fold, respectfully.
- Furthermore, individuals possessing a university degree in these locations are also on the rise, with a 23% increase in Burlington, 56% increase in Halton, and a 42% increase in Ontario.

⁴ Statistics Canada Census Data for Burlington, Halton, and Ontario (2006), accessed from [www.statcan.com]

2. Workforce by Industry⁵

	Burlington 2001	Burlington 2006	Halton 2001	Halton 2006	Ontario 2001	Ontario 2006
Total - Experienced labour force	84,930	91,730	211,465	247,200	5,992,765	6,473,730
Agriculture and other resource-based industries	1,180	1,215	3,935	4,180	191,020	190,000
Manufacturing and construction industries	17,105	16,115	41,540	43,695	1,316,580	1,284,445
Wholesale and retail trade	16,255	17,595	38,440	46,160	950,730	1,027,700
Finance and real estate	7,390	8,225	19,550	23,030	401,445	442,610
Health and education	12,905	14,835	29,935	36,595	902,990	1,045,225
Business services	16,180	18,350	45,120	53,975	1,145,910	1,274,345
Other services	13,915	15,390	32,935	39,565	1,084,090	1,209,390

2.1 Percentage of experienced labour force in given industries – Burlington⁶

Burlington's labour force composition shifted between 2001 and 2006. While the percentage of the labour force in agriculture /resource-based industries and wholesale and retail trade stayed relatively constant, the amount of persons employed in manufacturing / construction industries shrank by 2.6%. Health and education, and business services, both saw moderate increases of 1.0%, while finance and real estate, and other services, saw small increases of 0.3% and 0.4%, respectively.

Percentage of experienced labour force in given industries	Burlington 2001	Burlington 2006	Change 2001-2006
Agriculture / resource-based industries	1.40%	1.30%	-0.10%
Manufacturing / construction industries	20.10%	17.60%	-2.60%
Wholesale and retail trade	19.10%	19.20%	0.00%
Finance and real estate	8.70%	9.00%	0.30%
Health and education	15.20%	16.20%	1.00%
Business services	19.10%	20.00%	1.00%
Other services	16.40%	16.80%	0.40%

The industries employing the largest percentage of Burlington's labour force continued to be wholesale and retail trade, manufacturing / construction, health and education, and business services, which employed the largest percentage of persons by a small margin in 2006.

⁵ Statistics Canada Census Data for Burlington, Halton, and Ontario (2001, 2006), accessed from [www.statcan.com]

⁶ Statistics Canada Census Data for Burlington (2001, 2006), accessed from [www.statcan.com]

2.2 Percentage of experienced labour force in given industries – Halton⁷

The Region of Halton saw similar shifts to the City of Burlington in terms of percentage of labour force in given industries. Halton saw a smaller decrease in manufacturing /construction industries and larger increases in wholesale and retail trade.

Percentage of experienced labour force in given industries	Halton 2001	Halton 2006	Change 2001-2006
Agriculture / resource-based industries	1.90%	1.70%	-0.20%
Manufacturing / construction industries	19.60%	17.70%	-2.00%
Wholesale and retail trade	18.20%	18.70%	0.50%
Finance and real estate	9.20%	9.30%	0.10%
Health and education	14.20%	14.80%	0.60%
Business services	21.30%	21.80%	0.50%
Other services	15.60%	16.00%	0.40%

As at 2006, the Region of Halton's percentage of experienced labour force in given industries was very similar to the City of Burlington, with a less than 2% deviation in any category.

Experienced labour force in given industries	Burlington 2006	Halton 2006	Difference
Agriculture / resource-based industries	1.30%	1.70%	-0.40%
Manufacturing / construction industries	17.60%	17.70%	-0.10%
Wholesale and retail trade	19.20%	18.70%	0.50%
Finance and real estate	9.00%	9.30%	-0.30%
Health and education	16.20%	14.80%	1.40%
Business services	20.00%	21.80%	-1.80%
Other services	16.80%	16.00%	0.80%

2.3 Percentage of experienced labour force in given industries – Ontario⁸

Changes in the percentage of experienced labour force in given industries in Ontario between 2001 and 2006 were very similar to the City of Burlington. Ontario saw slightly less losses in manufacturing / construction industries.

Percentage of experienced labour force in given industries	Ontario 2001	Ontario 2006	Change 2001-2006
Agriculture / resource-based industries	3.20%	2.90%	-0.30%
Manufacturing / construction industries	22.00%	19.80%	-2.10%
Wholesale and retail trade	15.90%	15.90%	0.00%
Finance and real estate	6.70%	6.80%	0.10%
Health and education	15.10%	16.10%	1.10%
Business services	19.10%	19.70%	0.60%
Other services	18.10%	18.70%	0.60%

As at 2006, the composition of Ontario's experienced labour force was comparable to the City of Burlington. Differences between Burlington's and Ontario's labour force are illustrated in the table below:

⁷ Statistics Canada Census Data for Burlington, and Halton Region (2001, 2006), accessed from [www.statcan.com]

⁸ Statistics Canada Census Data for Burlington, and Ontario (2001, 2006), accessed from [www.statcan.com]

Experienced labour force in given industries	Burlington 2006	Ontario 2006	Difference
Agriculture / resource-based industries	1.30%	2.90%	-1.60%
Manufacturing / construction industries	17.60%	19.80%	-2.30%
Wholesale and retail trade	19.20%	15.90%	3.30%
Finance and real estate	9.00%	6.80%	2.10%
Health and education	16.20%	16.10%	0.00%
Business services	20.00%	19.70%	0.30%
Other services	16.80%	18.70%	-1.90%

Key Findings

- In Burlington from 2000 to 2006, there was a relatively constant experienced labour force in agriculture /resource-based industries and wholesale and retail trade, while manufacturing/construction industries shrank by 2.6%,
- The experienced labour force for Burlington within health and education, and business services, both saw moderate increases of 1.0%, while finance and real estate, and other services, saw small increases of 0.3% and 0.4%, respectively.
- The largest substantial change in the Halton region was noted for experienced labour in manufacturing/construction, which declined by 2.0%
- Within Ontario as whole, once again, manufacturing/construction declined by the largest margin (2.1%), while health and education was on the rise (1.1%).
- Following a comparison between Burlington, and Ontario, it was evident that the largest differences were between wholesale and retail trade (Ontario greater by 3.3%), and Manufacturing (Burlington greater by 2.3%).

3. Labour Force by Occupation

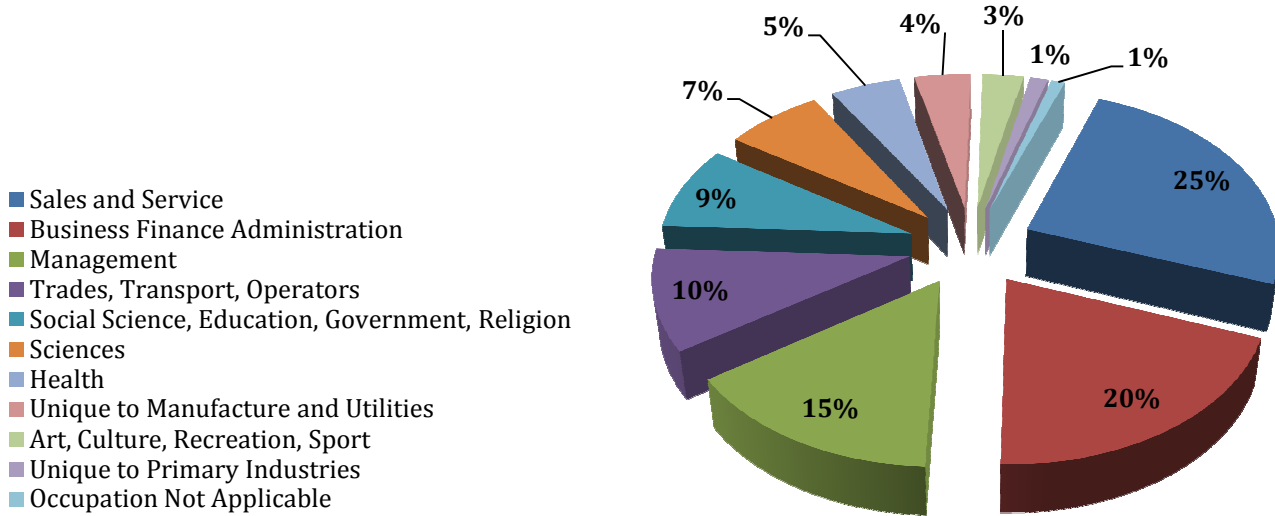
3.1 Percentage of experienced labour force in given occupations – Burlington 2009⁹

As at 2009, Toronto Region Research Alliance data indicates that the largest sector of Burlington's labour force, by occupation, is sales and service, followed business/finance/administration, and management. Their projected increase for Burlington's labour force as a whole is 15.6% over the next five years. Of this growth, the largest changes are expected to come in the areas of management (18.4%), and sciences (18.4%). The least growth is expected to come from the areas of trades, transport, operators (13.3%), and sales and service (13.7%).

Labour Force by Occupation - Burlington	2009	% of Total	% Change (2004-2009)	2014 Forecast	% Change (2009-2014)
Sales and Service	26,645	25.10%	14.30%	30,287	13.70%
Business Finance Administration	21,206	19.90%	16.90%	24,551	15.80%
Management	15,884	14.90%	20.50%	18,805	18.40%
Trades, Transport, Operators	10,943	10.30%	13.20%	12,399	13.30%
Social Science, Education, Government, Religion	9,053	8.50%	16.90%	10,581	16.90%
Sciences	7,484	7.00%	19.90%	8,861	18.40%
Health	5,325	5.00%	15.60%	6,086	14.30%
Unique to Manufacture and Utilities	4,311	4.10%	15.70%	4,971	15.30%
Art, Culture, Recreation, Sport	3,110	2.90%	15.20%	3,608	16.00%
Unique to Primary Industries	1,344	1.30%	14.60%	1,537	14.40%
Occupation Not Applicable	1,009	0.90%	14.00%	1,162	15.20%
Total	106,314	100.00%	16.40%	122,848	15.60%

⁹ Toronto Region Research Alliance Report (2009) Burlington Labour Force Data, accessed from [www.trra.ca]

Labour Force by Occupation in Burlington, Ontario



Key Findings

- Largest labour force in 2009 was Sales and Service at 25.10%.
- Largest % change from 2004-2009 occurred in Management (20.50%).
- Largest growth predicted between 2009-2014 is the Management sector at 18.4%.

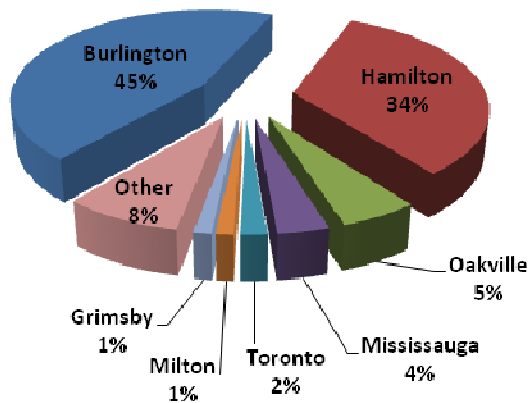
4. Commuting Flows

4.1 Persons who work in Burlington¹⁰

As at 2006, approximately half of the persons who work in the City of Burlington also lived in Burlington, with Hamilton in second by a large margin over the third largest incoming constituency, Oakville.

Origins of Persons Who Work in Burlington	
Burlington	32,665
Hamilton	24,270
Oakville	3,920
Mississauga	2,555
Toronto	1,345
Milton	885
Grimsby	870
Other	5,960
Total	72,470

Origins of Persons Working In Burlington

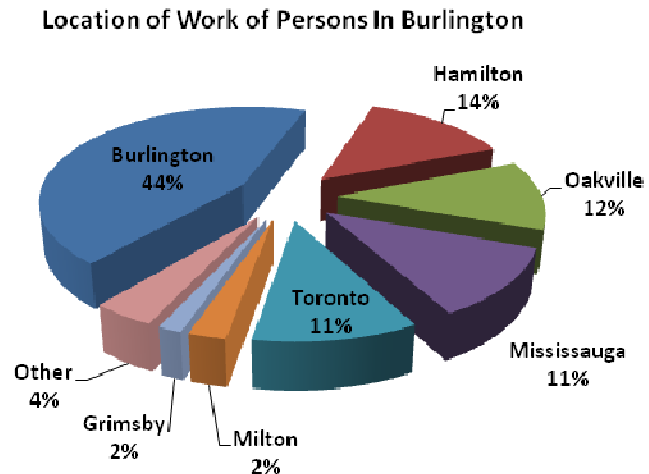


¹⁰ Statistics Canada (2009) Commuting Flows Census for Burlington, Ontario, accessed from [www.statcan.com]

4.2 Location of work of persons who reside in Burlington¹¹

As at 2006, almost half of persons from Burlington worked in the City of Burlington. The other popular locations of employment for residents of Burlington were Oakville, Mississauga, Toronto, and Hamilton.

Location of Work of Persons from Burlington	
Burlington	32,665
Hamilton	10,105
Oakville	8,605
Mississauga	8,475
Toronto	8,000
Milton	1,835
Grimsby	1,175
Other	3,105
Total	73,965



4.3 Forecasts of methods of labour force commuting¹²

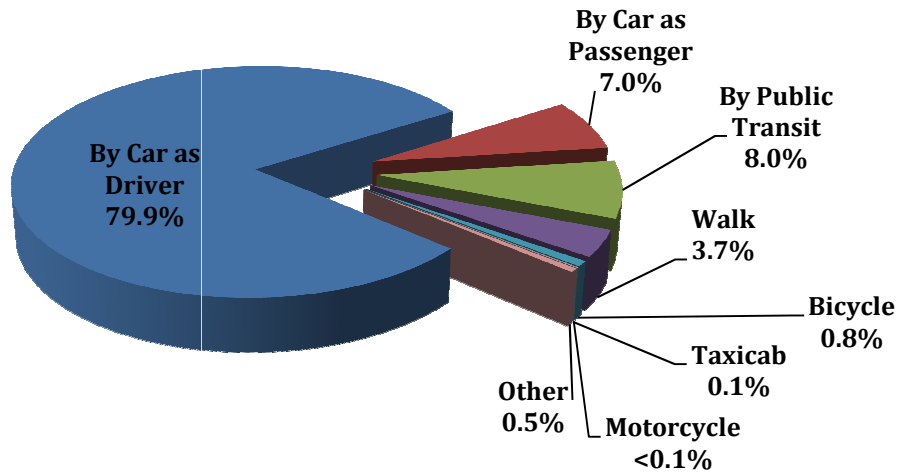
TRRA studies indicate that as at 2009, 79.9% of Burlington's labour force commuted to work by car (as driver). No other type of transportation (including in car as passenger) represented over 10% of Burlington's labour force. Their forecasts for 2014 suggest very that little will change within this dynamic.

Labour Force by Method of Travel to Work	2009	% of Total	% Change (2004-2009)	2014	% of Total	% Change (2009-2014)
By Car as Driver	74,273	79.9%	17.4%	86,395	80.2%	16.3%
By Car as Passenger	6,513	7.0%	11.5%	7,287	6.8%	11.9%
By Public Transit	7,398	8.0%	18.2%	8,660	8.0%	17.1%
Walk	3,474	3.7%	10.3%	3,857	3.6%	11.0%
Bicycle	716	0.8%	10.8%	797	0.7%	11.3%
Motorcycle	41	0.0%	13.9%	50	0.0%	22.0%
Taxicab	71	0.1%	14.5%	78	0.1%	9.9%
Other	497	0.5%	14.8%	563	0.5%	13.3%
Total	92,983	100.0%	16.6%	107,687	100.0%	15.8%

¹¹ Statistics Canada (2009) Commuting Flows Census for Burlington, Ontario, accessed from [www.statcan.com]

¹² Statistics Canada (2009) Commuting Flows Census for Burlington, Ontario, accessed from [www.statcan.com]

Labour Force by Method of Travel to Work



Key Findings

- 79% of people working in Burlington reside in either Burlington, or Hamilton, Ontario:
 - 45% from Burlington, Ontario
 - 34% from Hamilton, Ontario
- 58% of people who reside in Burlington work in either Burlington, or Hamilton, Ontario:
 - 44% from Burlington, Ontario
 - 14% from Hamilton, Ontario
- Largest number of commuters is via car as drivers (79.9%).
- Largest change in commute preference from 2004-2009 was observed by public transit (18.2%).
- Largest predicted growth in commute preference by 2014 is for motorcycle (22%), and public transit (17.1%).

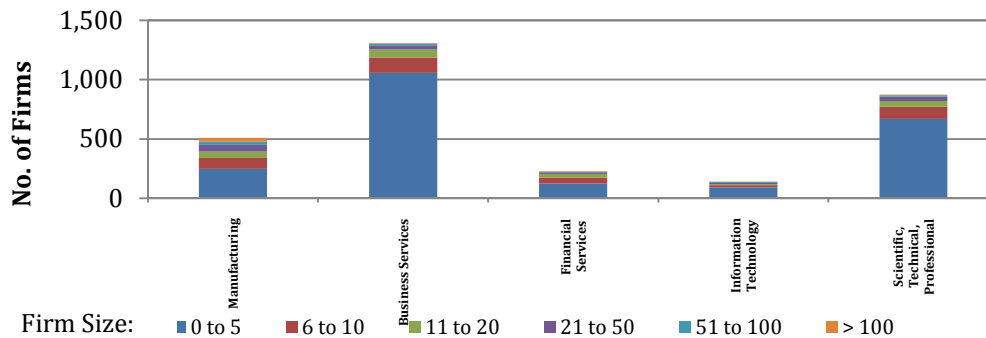
MACRO-SECTOR ANALYSIS

Profile by Firm Size¹³:

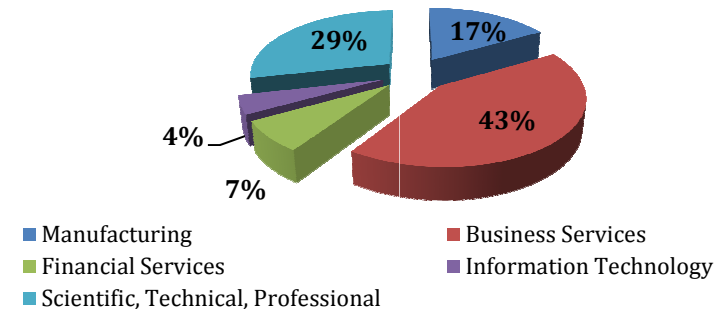
Based on the sample set data generated by the Hoover's database, it is evident that Business Services represents the largest number of firms in Burlington with a 43% share. With regards to firm size, the Manufacturing Sector consists of the most firms with a labour force greater than 21 employees, while Business Services has the largest concentrations of firms with 10 or less employees. As a whole, the largest number of firms was concentrated with companies comprised of 0 to 5 employees. This contributed to 72% of all firms in Burlington, over 5.5 times greater than the next closest firm size category.

Firm size (No. of Burlington Employees)	Number of Firms by Industry Sector					TOTAL	
	Manufacturing	Business Services	Financial Services	Information Technology	Scientific, Technical, Professional		
0 to 5	248	1,058	126	93	670	2,195	72%
6 to 10	93	130	51	19	101	394	13%
11 to 20	53	66	28	8	49	204	7%
21 to 50	57	35	13	10	37	152	5%
51 to 100	26	13	6	8	13	66	2%
> 100	33	5	5	1	5	49	2%
Total	510	1,307	229	139	875	3,060	100%

Number of Firms by Industry Sector in Burlington, Ontario



Number of Firms by Industry Sector in Burlington, Ontario



Key Findings:

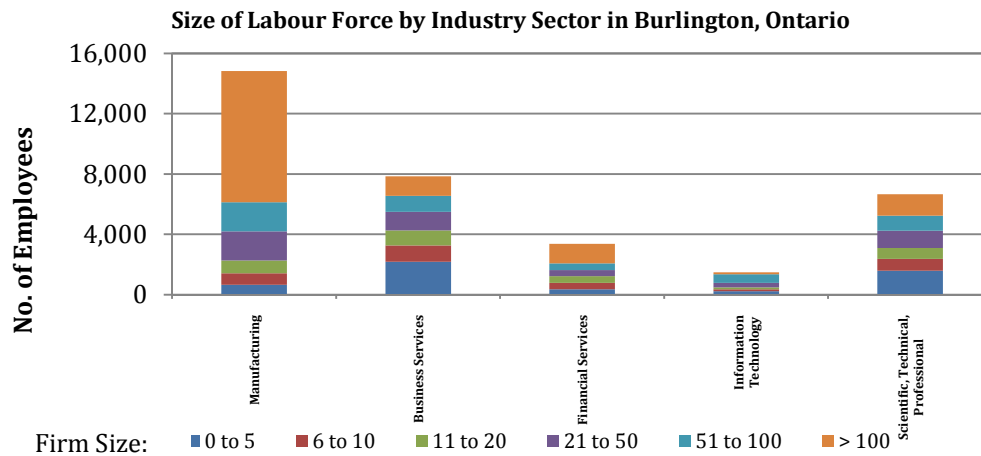
- Largest number of firms in Business Services (43%).
- Most firms with a labour force greater than 21 employees observed for Manufacturing.
- Most firms with a labour force of 10 or less employees observed for Business Services.
- Largest number of firms concentrated in companies of 0 - 5 employees.

¹³ Dun & Bradstreet Corporation (2009) Industry Data. Accessed from [www.hoovers.com]

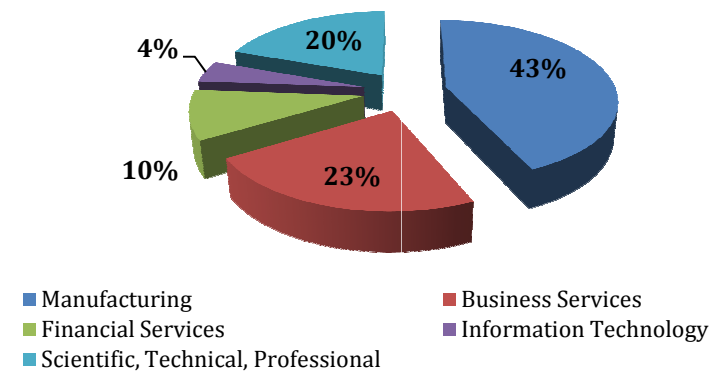
Profile by Number of Employees¹⁴:

In Burlington, the industry with the largest concentration of employees is the Manufacturing Sector, with a share of 43%. As seen with the number of firms, the Information Technology sector had the smallest share of employees at 4% of the labour force. When delving into the category of firm size, it was illustrated that firms with greater than 100 employees contribute to the largest portion of employees in the labour force with a 38% share. Variation between other firm size categories was very similar with regards to their share of the labour force.

Firm size (No. of Burlington Employees)	Total Number of Employees by Industry Sector					TOTAL	
	Manufacturing	Business Services	Financial Services	Information Technology	Scientific, Technical, Professional		
0 to 5	659	2,185	354	220	1,581	4,999	15%
6 to 10	767	1,074	424	146	793	3,204	9%
11 to 20	844	997	443	121	729	3,134	9%
21 to 50	1,917	1,230	403	284	1,143	4,977	15%
51 to 100	1,942	1,063	457	588	992	5,042	15%
> 100	8,702	1,300	1,280	119	1,429	12,830	38%
Total	14,831	7,849	3,361	1,478	6,667	34,186	100%



Number of Employees by Industry Sector in Burlington, Ontario



Key Findings:

- Largest number of employees in Manufacturing (43%).
- Smallest share of employees in Information Technology (4%).
- Firms with greater than 100 employees contribute to the largest portion of employees (38%).

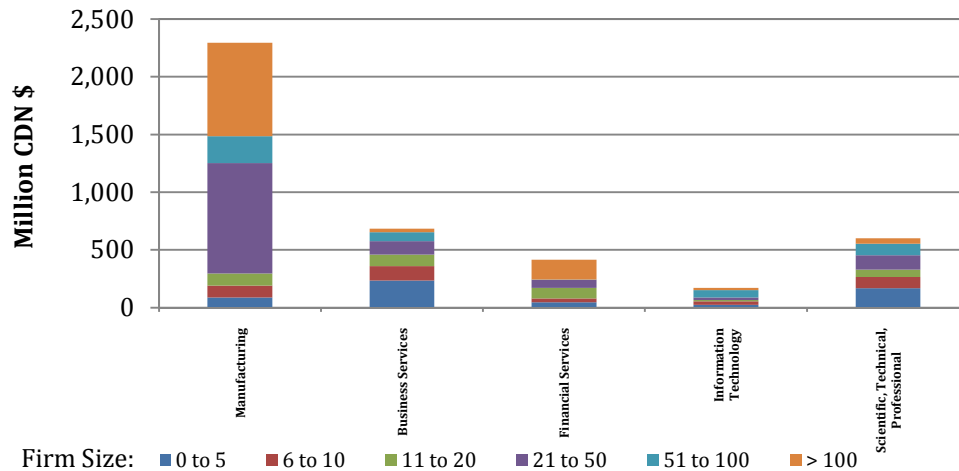
¹⁴ Dun & Bradstreet Corporation (2009) Industry Data. Accessed from [www.hoovers.com]

Profile by Total Revenue¹⁵:

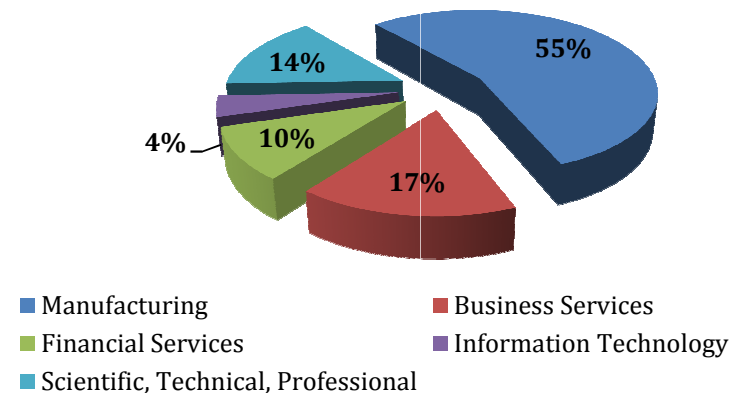
An industry analysis of total revenues illustrated that Manufacturing Sector had the largest total share of revenues at 55%, followed by Business Services at 16%, Scientific, Technical, and Professional services at 14%, Financial Services at 10%, and Information Technology at 4%. According to firm size, it is evident that firms with 21 to 50 employees generate the largest sum of revenue, with a 31% share of the market, followed by firms with greater than 100 employees with a 26% share. The remaining firm size categories show a similar share of total revenues, between 9% & 13%.

Firm size (No. of Burlington Employees)	Total Revenue by Industry Sector (Million CDN \$)					TOTAL	
	Manufacturing	Business Services	Financial Services	Information Technology	Scientific, Technical, Professional		
0 to 5	86.7	234.1	46.2	24.9	169.1	561	13%
6 to 10	102.2	125.8	32.2	28.9	95.4	384	9%
11 to 20	106.0	99.6	92.9	11.0	64.9	374	9%
21 to 50	956.3	115.2	67.3	21.7	125.1	1,286	31%
51 to 100	234.4	78.6	5.4	64.7	97.5	481	12%
> 100	807.8	31.4	169.9	18.0	49.4	1,077	26%
Total	2,293	684.7	413.9	169.2	601	4,163	100%

Total Revenue by Industry Sector in Burlington, Ontario



Total Revenue per Employee by Industry Sector in Burlington, Ontario



Key Findings:

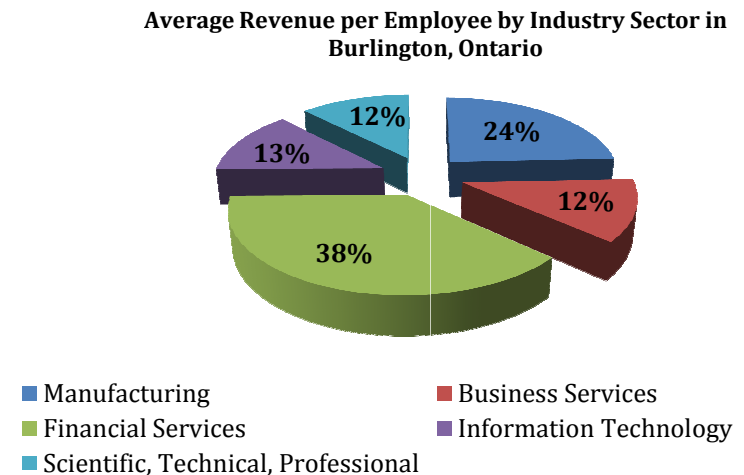
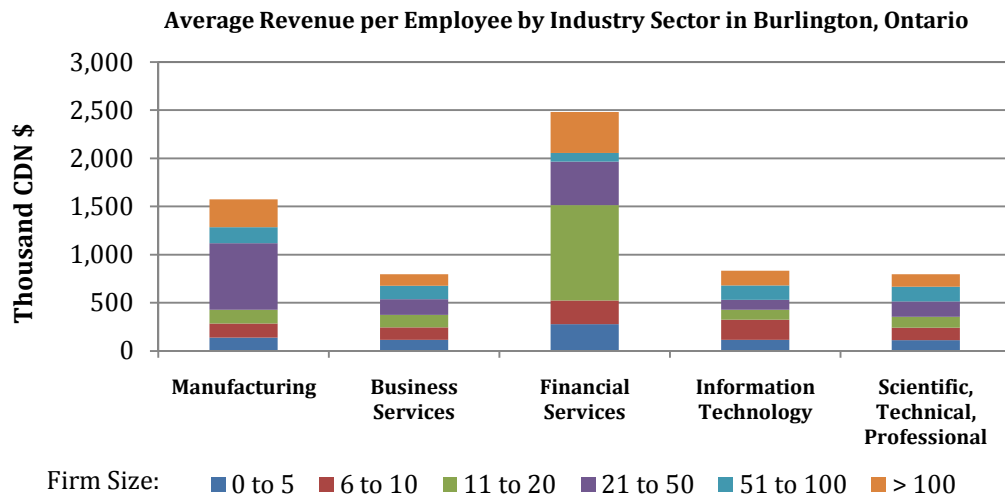
- Greatest total revenues observed for Manufacturing Sector (55%), followed by Business Services (16%), S, T, and P (14%), Financial Services (10%), and Information Technology (4%).
- Firms with 21 to 50 employees generate the largest share of total revenue (31%), followed by firms with greater than 100 employees (26%).

¹⁵ Dun & Bradstreet Corporation (2009) Industry Data. Accessed from [www.hoovers.com]

Average Productivity per Employee¹⁶:

Following analysis of average revenue generated by each employee, it is evident that employees in the Financial Services sector have the largest employee productivity, with 38% share of the market, followed by employees in the Manufacturing sector at 24%. The remaining industries showed similar employee productivity with 12-13% share of the market. After reviewing productivity by labour force size, it was illustrated that employees in firms with 11 to 20, and 21 to 50 workers have the largest average productivity with 23% and 24%, respectively.

Firm size (No. of Burlington Employees)	Average Revenue per Employee by Industry Sector (Thousand CDN \$)				
	Manufacturing	Business Services	Financial Services	Information Technology	Scientific, Technical, Professional
0 to 5	138.7	113.1	276.6	113.2	110.2
6 to 10	144.8	132.0	247.7	209.4	131.2
11 to 20	144.2	127.4	988.3	103.8	112.7
21 to 50	690.0	164.8	451.7	102.8	160.4
51 to 100	165.3	137.7	90.0	150.8	151.9
> 100	289.7	120.8	424.8	151.3	130.3
Total	262.1	132.6	413.2	138.5	132.8



Key Findings:

- Largest productivity of employees within Financial Services (38%), followed by Manufacturing (24%).
- Employees in firms with 11 to 21, and 21 to 50 workers have the largest average productivity (23% and 24%, respectively).

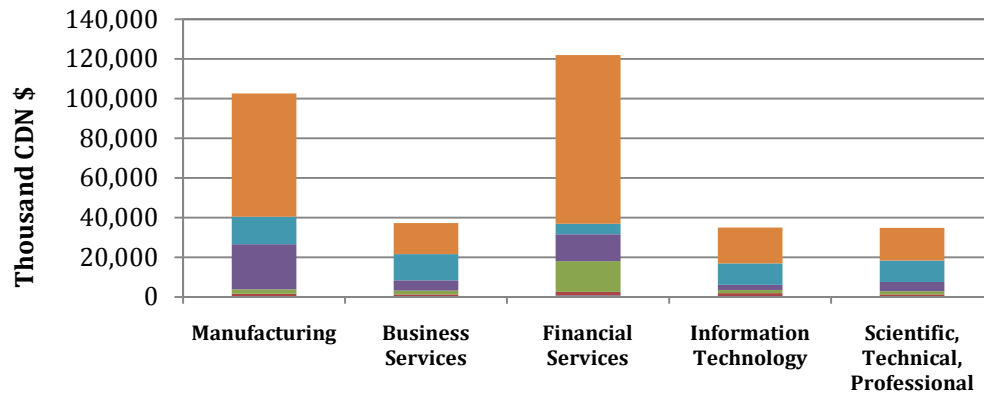
¹⁶ Dun & Bradstreet Corporation (2009) Industry Data. Accessed from [www.hoovers.com]

Average Revenue per Firm¹⁷:

As illustrated below, firms in Financial Services generated the largest average revenues, at \$122K per firm. Behind Financial Services was Manufacturing, at \$103K per firm. At the other end, with significantly lower average revenues are Business Services, Information Technology, and Scientific, Technical, and Professional services at \$37K, \$35K, and \$35K, respectively. Firms with greater than 100 employees generated the largest average revenue, with 60% share of average revenue totals. A consistent trend was illustrated with a direct correlation between firm size and average revenue generated per firm, as to be expected.

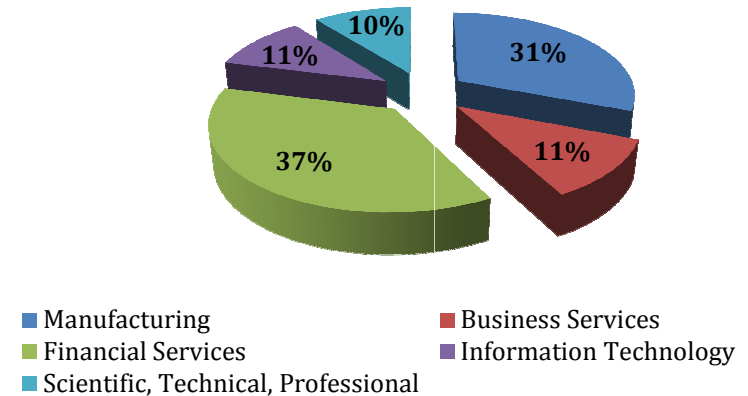
Firm size (No. of Burlington Employees)	Average Revenue per Firm by Industry Sector (Thousand CDN \$)					TOTAL	
	Manufacturing	Business Services	Financial Services	Information Technology	Scientific, Technical, Professional		
0 to 5	375.3	233.6	710.8	267.7	260.2	1,848	1%
6 to 10	1,202.4	1,084.5	1,894.1	1,605.6	1,025.8	6,812	2%
11 to 20	2,304.3	1,879.2	15,483.3	1,571.4	1,622.5	22,861	7%
21 to 50	22,769.0	5,236.4	13,460.0	2,712.5	4,633.3	48,811	15%
51 to 100	13,788.2	13,100.0	5,400.0	10,783.3	10,833.3	53,905	16%
> 100	62,138.5	15,700.0	84,950.0	18,000.0	16,466.7	197,255	60%
Total	102,577.8	37,233.7	121,898.2	34,940.6	34,841.8	331,492	100%

Average Revenue per Firm by Industry Sector in Burlington, Ontario



Firm Size: ■ 0 to 5 ■ 6 to 10 ■ 11 to 20 ■ 21 to 50 ■ 51 to 100 ■ > 100

Average Revenue per Firm by Industry Sector in Burlington, Ontario



Key Findings:

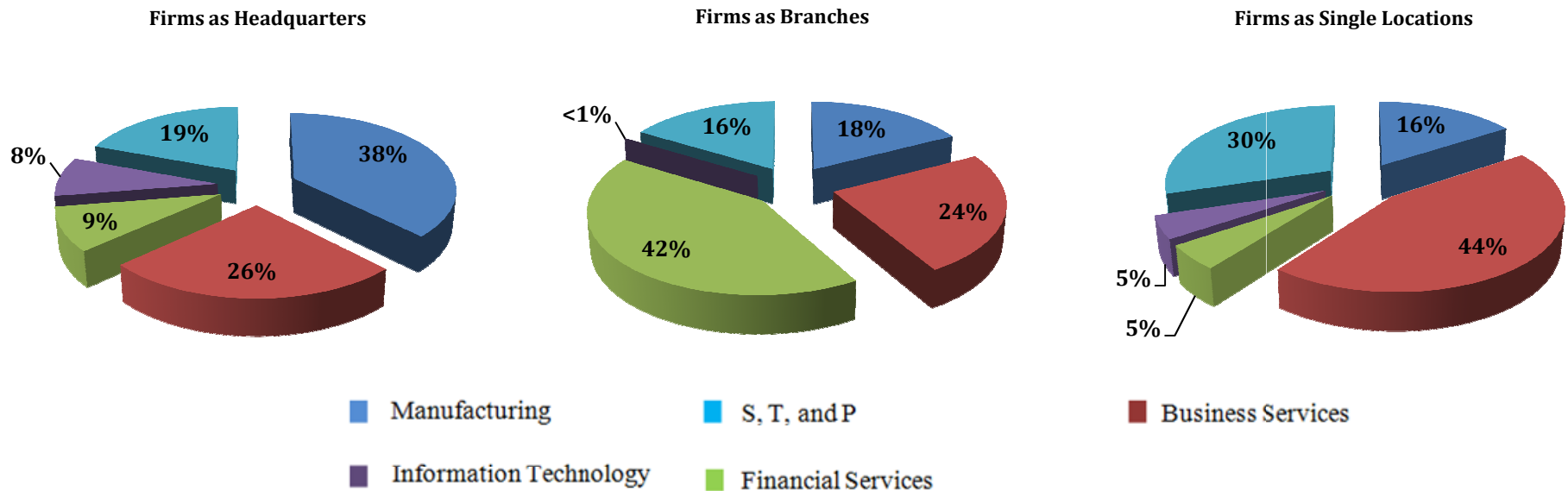
- Largest average revenue per firm observed for Financial Services (\$122K/firm), followed by Manufacturing (\$103K/firm).
- Firms with greater than 100 employees generated the largest average revenue.
- Positive trend between firm size and average firm revenue.

¹⁷ Dun & Bradstreet Corporation (2009) Industry Data. Accessed from [www.hoovers.com]

Profile by Firm Location¹⁸:

Following an analysis based on firm’s location type, it is illustrated that firms as a single location dominate the city of Burlington, with 90% share of total firms. Individual location analysis illustrates that Business Services had the greatest number of firms as both headquarters and as single locations with 26% and 45% share, respectively, while Financial Services had the largest share of firms as branches at 42%.

Firm Type Location	Location Type by Industry Sector					TOTAL	
	Manufacturing	Business Services	Financial Services	Information Technology	Scientific, Technical, Professional		
Headquarters	41	28	10	9	21	109	4%
Branches	33	46	80	0	31	190	6%
Single Location	436	1,233	139	130	823	2,761	90%
Total	510	1,307	229	139	875	3,060	100%



Key Findings:

- Firms as a single location dominate Burlington, Ontario with 90% share of all firms.
- Greatest number of firms as both headquarters and as single locations observed for Business Services.
- Greatest number of branches observed for Financial Services.

¹⁸ Dun & Bradstreet Corporation (2009) Industry Data. Accessed from [www.hoovers.com]

MICRO INDUSTRY PROFILE

Summary

In the development of The City of Burlington's Economic Profile a comprehensive analysis of five of the city's major industries was conducted. These industries include:

- a. Business Services
- b. Information Technology
- c. Scientific, Technical and Professional Services
- d. Financial Services
- e. Manufacturing
- f.

The first part of this section illustrates the methodology utilized with regards to information gathering. The second and third part of this section is a summary and analysis of the information collected and analyzed to provide an accurate "snap-shot" of Burlington, Ontario's industry composition.

Following the analysis of Burlington's five primary sectors (as listed above), significant trends and findings were identified, illustrating both strategic advantages and industry competitiveness within the city.

Business Services: The Business Services sector in Burlington, Ontario is dominated by smaller firms, with 81% of all firms with 5 employees or less, and 91% of all firms with 10 employees or less. Similarly, 42% of all employees within Business Services come from firms with 10 or less employees. With regards to location type, 94% of Business Service firms are a single location. Total revenues within the sector are also dominated by smaller firms, with 52% of Business Service revenues coming from firms with 10 or less employees. Within Business Services are two large subsectors, Scientific, Technical, and Professional (S, T, and P) Services, and Administration and Support, Waste Management and Remediation, contributing to 84% of all total firms, 69% of all employees, and 74% of total revenues in Burlington. Within the S, T, and P subsector of Business Services at the 6-digit NAICS level are 3 large industries that account for 57% of the total firms, 50% of total employees, and 45% of total revenues within the respective subsector. These industries are Administrative and General Management Consulting Services, Miscellaneous Consulting Services, and Offices of Lawyers. One industry that did not have a significant share of firms or employees, but did account for a 10% share of total revenues within S, T, and P was Landscape Architectural Services. The highest productivity per employee (average revenue generated per employee) was identified in the "Other Services Related to Advertising" and Landscape Architectural Services, while the highest average revenue per firm was identified in the Media Representatives, Engineering Services, and Landscape Architectural Services. Next, the Administrative Support, Waste Management and Remediation subsector of Business Services at the 6-digit NAICS level is primarily dominated by the "All Other Business Support Services" with 76% of firms, 63% of employees, and 58% of total revenues within its respective subsector. Other notable industries within this subsector included Janitorial Services and Landscaping Services, contributing to a combined 13% of all firms, 26% of all employees, and 24% of total revenues within its respective subsector. The highest productivity per employee was illustrated within Employment Placement Agencies and Packaging and Labeling Services, while the highest average revenue per firm was illustrated within Court Reporting and Stenotype Services, and Credit Bureaus.

Information Technology: Similar to the Business Services sector, the Information Technology (IT) sector is dominated by smaller firms, with 67% of all firms with 5 employees or less, and 80% of all firms with 10 employees or less. However, 40% of all employees within IT come from firms with 51 to 100 employees. With regards to location type, 94% of Business Service firms are single location. Total revenues within the sector are also dominated by firms with 51 to 100 employees, with a share of 38%. Within IT are two large

subsectors, Scientific, Technical, and Professional (S, T, and P) Services, and Information Technology, contributing to 90% of all total firms, 94% of all employees, and 91% of total revenues in Burlington. Within the S, T, and P subsector of Business Services at the 6-digit NAICS level are 2 large industries that account for 98% of the total firms, 92% of total employees, and 86% of total revenues within the respective subsector. These industries include Computer Systems Design Services, and Custom Computer Programming. The greatest productivity per employee (average revenue generated per employee) as well as the greatest average revenue per firm was identified in Management, Scientific, and Technical Consulting Services. Next, the Information subsector of IT at the 6-digit NAICS level is primarily dominated by Software Publishers and Data Processing, Hosting, and Related Services with 73% of all firms, 92% of employees, and 91% of total revenues within its respective subsector. The highest productivity per employee as well as per firm was illustrated within Software Publishing.

Scientific, Technical & Professional (S, T and P): Within this sector, there is a rather equal distribution of firms of all sizes, with 64% of firms with 0 to 50 employees, and the remaining 36% of firms with greater than 50 employees. However, with regards to labour force size, 77% of employees within the sector come from firms with 0 to 5 employees. With regards to location type, 94% of firms are single location, staying consistent with both IT and Business Services. Total contribution of revenues within S, T and P is concentrated within firms of 0 to 5 employees, accounting for 28%. The second largest contribution came from firms with 21 to 50 employees, accounting for 21%. Within S, T and P is one large subsector, Scientific, Technical and Professional Services, contributing to 97% of all firms, 88% of total employees, and 93% of total revenues for Burlington. Breaking down S, T and P Services to a 6-digit NAICS level identified a substantially large mix of industries, illustrating Burlington's depth of experienced professionals. The largest industry within this subsector included Management, Scientific and Technical Consulting Services with 18% of the total firms, 13% of all employees, and 17% of total revenues for the respective subsector. The second and third largest industries within this service subsector are Other Management Consulting Services and Offices of Lawyers, accounting for a combined 20% of all firms, 12% of all employees, and 22% of total revenues for the respective subsector. One industry that had a substantial share of total employees within this subsector was R&D in Physical, Engineering, and Life Sciences at 14%. Lastly, the highest productivity per employee and also per firm was illustrated for Landscape Architectural Services and Title Abstract and Settlement Offices.

Financial Services: Similar to both Business Services and the IT sector, Financial Services is dominated by smaller firms, with 89% of firms having 0 to 20 employees. Less than 1% of firms had more than 100 employees. On the other hand, 38% of all employees within Financial Services came from organizations with more than 100 employees, and only 23% coming from firms with 10 or less employees. With regards to location type, only 61% of firms were a single location, with 35% listed as branches. Total contribution of revenues within Financial Services is dominated by firms with greater than 100 employees, with a 41% share. The largest subsector within Financial Services is Finance and Insurance, accounting for a 97% share of total firms, 99% of employees, and greater than 99% of revenues. Delving further into this subsector by 6-digit NAICS, many industries emerged that varied substantially between each categorical assessment. Insurance Agencies and Brokerages accounted for the largest share of firms at 26%. This industry also had a share of 17% of all employees, and 16% of total revenues within the respective subsector. Commercial banking had the second largest share of firms in Burlington's Financial Services accounting for 17%. This industry also had 16% of all employees, and did not report total revenues. With the largest number of total employees (19%) and total share of revenues (35%) was Open-end Investment Funds, but interestingly this industry accounted for less than 1% of all firms. Lastly, Sales Financing also had a large share of total revenue contributing to 18% of the respective subsector. This industry did not have a large share of firms or total employees. When looking at total productivity by employee, Commercial Banking was the highest by a substantial margin. It also had the second highest productivity per firm, behind the Open-End Investment Funds and Insurance Agencies and Brokerages.