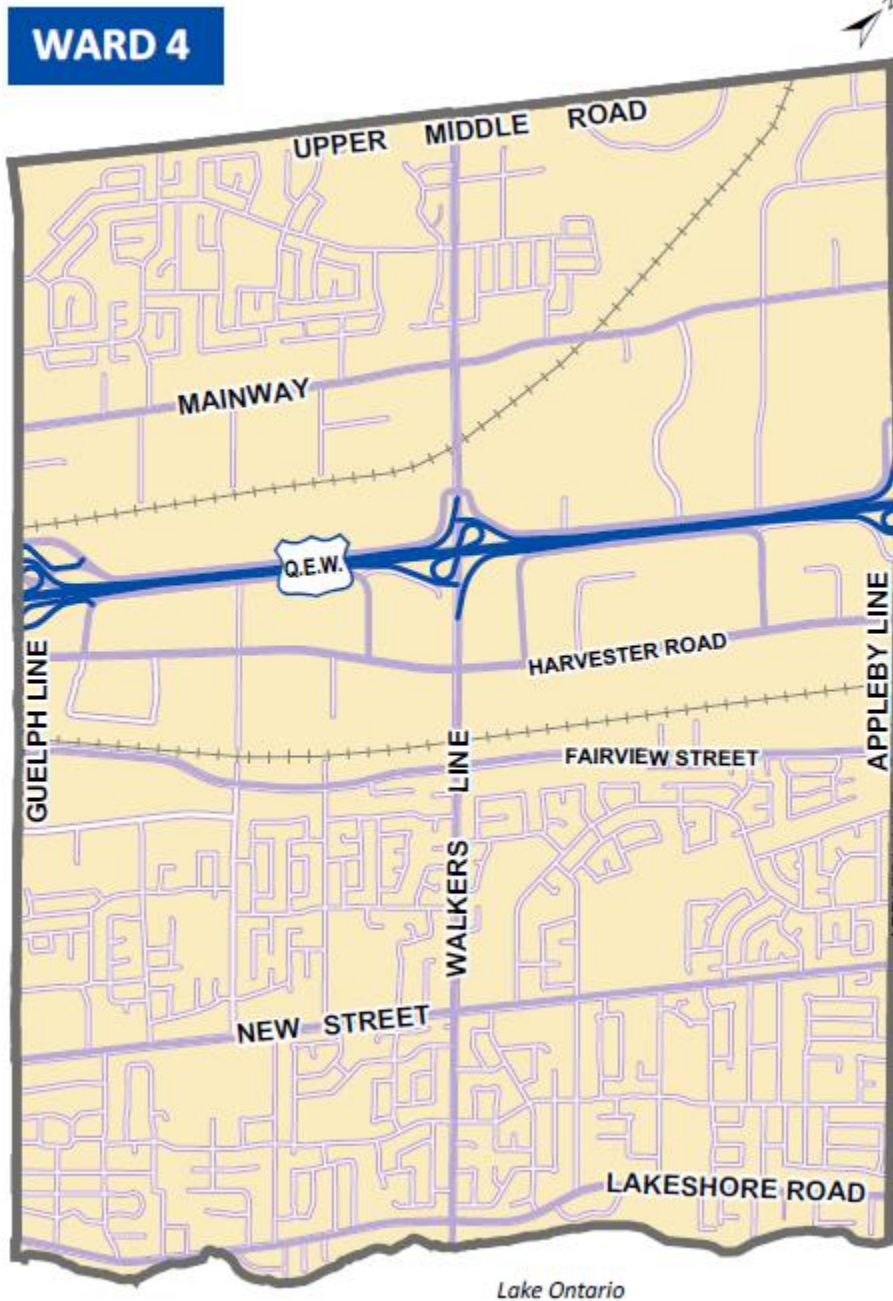


BEDC Data Outreach Report

Ward 4

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Executive Summary

Site Selector tool: <http://bedc.ca/burlington-sites/>

This report is designed to provide a snap shot of the data available from the Burlington Economic Development Corporation's (BEDC) new Site Selector tool, known as BurlingtonSites. Using this tool, one can obtain addition insight into the economic activity and demographic makeup within a given geography. The data provided by BurlingtonSites is sourced from Environics Analytics. In addition, the tool provides users with the ability to add map layers to provide additional details.

Using BurlingtonSites, BEDC is able to gather data for any specific location in Burlington. Sites can be set by using radius distance or driving time from a specific address, or by using a hard boundary (such as an individual Ward). The four primary data categories include: business composition data, labour force data, consumer spending data and broad demographic data. Some relevant data for Burlington has been included in this report, as well as the outputs from BurlingtonSites.

Data for Burlington is available from multiple sources. There may be discrepancies in some numbers. BurlingtonSites and this report use data ONLY from the following sources:

1. Demographic and economic data provided by **Environics Analytics**.
2. Property data provided by the **Realtors Association of Hamilton-Burlington (RAHB)**.

It is worth noting that the average household income reported by Environics Analytics is approximately \$15,000 lower than some other data sources.

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What is BurlingtonSites

BurlingtonSites is BEDC's new site selector tool. It adds value for our customers and attracts new opportunity to Burlington. BurlingtonSites possesses numerous functions that set it apart from more traditional economic development site selector tools.

One of the most important of these functions is the ability to use the tool to source data. This data (sourced from Environics Analytics), is both demographic and economic in its nature, and is quintessential to attracting new businesses to operate in Burlington; whether the data be consumer spending data for a retail shop, or business composition data for a manufacturer hoping to capture pre-existing supply chain efficiencies.

Additionally, BurlingtonSites contains Burlington specific layers, such as local zoning by-laws and Burlington's vacant land and parcel layers. This allows BEDC to provide insight on specific parcels of land to the development community.

Finally, BurlingtonSites, has a building (or site) search tool enabling an individual to locate buildings and parcels that may be of interest to them. Properties are sourced from the Realtors Association of Hamilton-Burlington (RAHB). Customers can specifically look for buildings that are for lease or at sites that are for sale. This allows individuals to consider available sites when looking at expanding in or locating to Burlington.

Business Composition Data

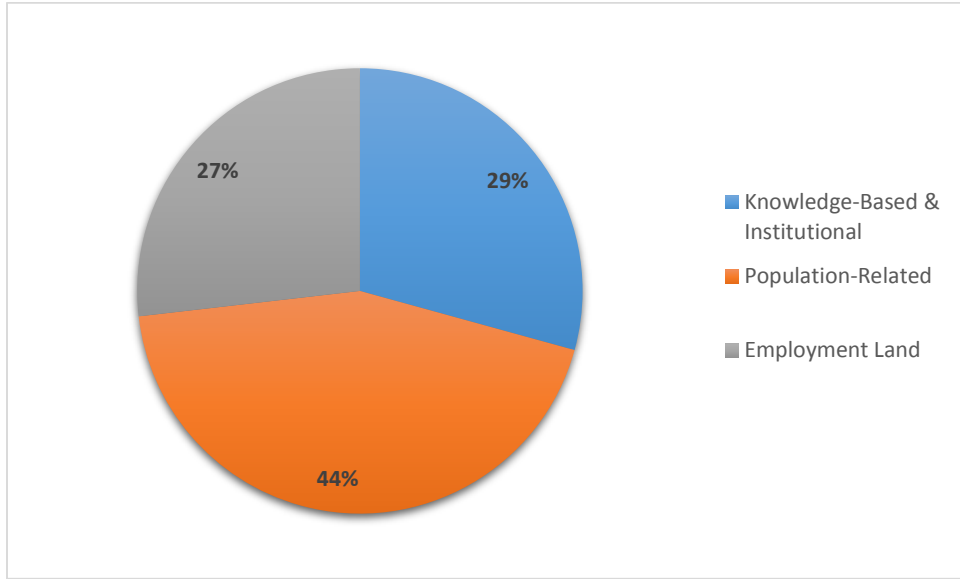
Knowing the make-up of businesses within an area is essential to understanding the area's economy. Business composition is an effective way to evaluate the demand for specific goods and services in the area, as well as a location's economic diversity. Below is the makeup of businesses by industry within Ward 4, organized by the industry with the most businesses to the fewest.

Table 1 – Business Composition in Ward 4

Business Classification	Total Number of Businesses	Percentage
Retail: Home, Food, Automobiles, Personal Care	283	12.75%
Professional, Scientific, and Technical Services	259	11.67%
Other Services - Repair, Personal Care, Laundry, Religious, etc.	210	9.46%
Health Care and Social Services	203	9.14%
Wholesalers	189	8.51%
Construction	157	7.07%
Manufacturing - Electronics, Furniture, Machinery, Metal, Transportation, Misc.	148	6.67%
Accommodation and Food Services	141	6.35%
Banking, Finance and Insurance	125	5.63%
Retail: Hobby, Media, General Merchandise	87	3.92%
Administrative and Support and Waste Management and Remediation Services	85	3.83%
Real Estate and Rentals	80	3.60%
Education	61	2.75%
Manufacturing - Chemical, Fuel, Paper, Plastic, Wood	40	1.80%
Arts, Sports, Entertainment, and Recreation	40	1.80%
Transportation and Warehousing: Private and Public Transportation, Oil and Gas Pipelines, Sightseeing	38	1.71%
Information	27	1.22%
Unclassified	24	1.08%
Transportation and Warehousing: Couriers and Messengers, Warehousing and Storage	8	0.36%
Manufacturing - Processed Food, Textiles, Clothing	6	0.27%
Public Administration	5	0.23%
Utility Services: Power, Gas, Steam, Water, and Sewage	3	0.14%
Holding Companies and Managing Offices	1	0.05%
Total	2,220	100%

Source: Environics Analytics, 2015

Chart 1 – Business Composition in Ward 4



Source: Environics Analytics, 2015

The business composition chart above displays the classification of businesses within Ward 4, which have been aggregated into more succinct categories from Table 1:

- **Knowledge-Based & Institutional:** Banking and financial fields, law, real estate, professional, scientific, and technical services, government, and education.
- **Population-Related:** Retail, healthcare and social services, food and accommodation services, arts and entertainment, and other service related establishment; repair, personal care, laundry, etc.
- **Employment Land:** Wholesale, manufacturing, construction, transportation and warehousing, and resource related; agriculture, oil, utilities, etc.

The chart indicates that the makeup of Ward 4’s business community is highly population-related based, with 44% of 2,220 businesses falling into the category with high retail and service presence. Knowledge-based and institutional, and employment land categories contribute nearly equal amounts with 643 and 589 businesses being present. Table 1 above, provides a more detailed business composition view by breaking down the categories into more specific classifications. Retail (home, food, automobile, and personal care) which falls into population-related occupations is the largest single classification, making up 12.75% of all businesses with 283. The highest knowledge-based and second largest classification is professional, scientific, and technical services with 259 businesses. The top 5 classifications make up 51.53% of all businesses in Ward 4, of which 3 are service related.

Labour Force Data

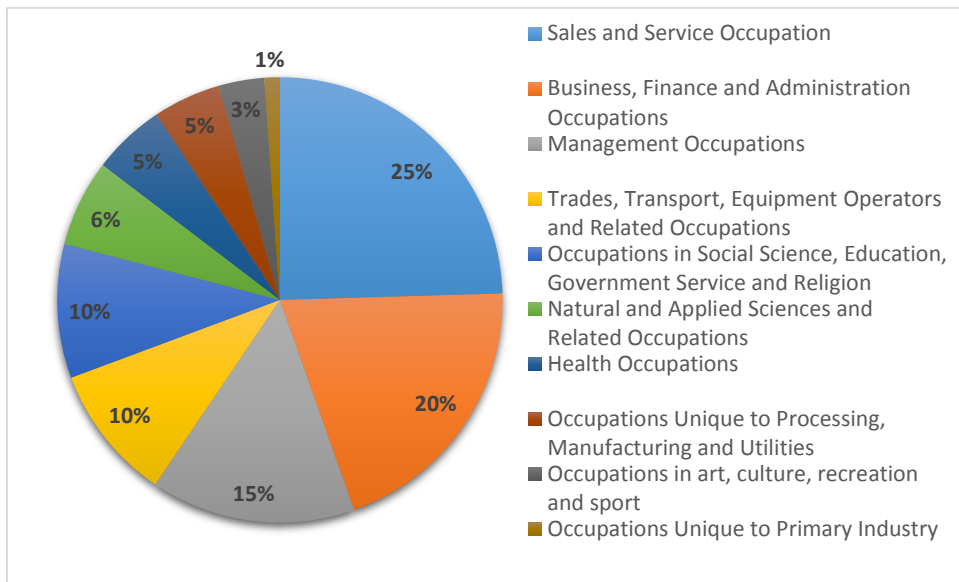
Labour Force Data is important to augment understanding of economic activity in Ward 4, in addition to the aforementioned business composition. **This is based on the people that live in the area and may work inside or outside of it.** The following data displays labour force employment by occupation.

Table 2 – Labour Force Employment of Ward 4 Residents

Occupations	Number of Employees	Percentage
Sales and Service Occupation	4,930	24.54%
Business, Finance and Administration Occupations	4,030	20.06%
Management Occupations	2,986	14.86%
Trades, Transport, Equipment Operators and Related Occupations	1,982	9.86%
Occupations in Social Science, Education, Government Service and Religion	1,954	9.73%
Natural and Applied Sciences and Related Occupations	1,270	6.32%
Health Occupations	1,061	5.28%
Occupations Unique to Processing, Manufacturing and Utilities	989	4.92%
Occupations in art, culture, recreation and sport	663	3.30%
Occupations Unique to Primary Industry	227	1.13%
Total	20,092	100%

Source: Environics Analytics, 2015

Chart 2 – Labour Force Data for Ward 4



Source: Environics Analytics, 2015

The labour force data shows that Ward 4 has a high number of sales and service employees, with a quarter of employment in this category. The second and third largest categories: business, finance, administrative, and management occupations make up 35% of employment and are knowledge-based.

Burlington has a strong manufacturing job base, but on the labour side residents employed in manufacturing make up only 4.25% of total labour force, with Ward 4 comprising 4.92%. This indicates that the people employed in this sector are coming from outside the city, and further confirms that the labour force is highly service based.

Consumer Spending Data

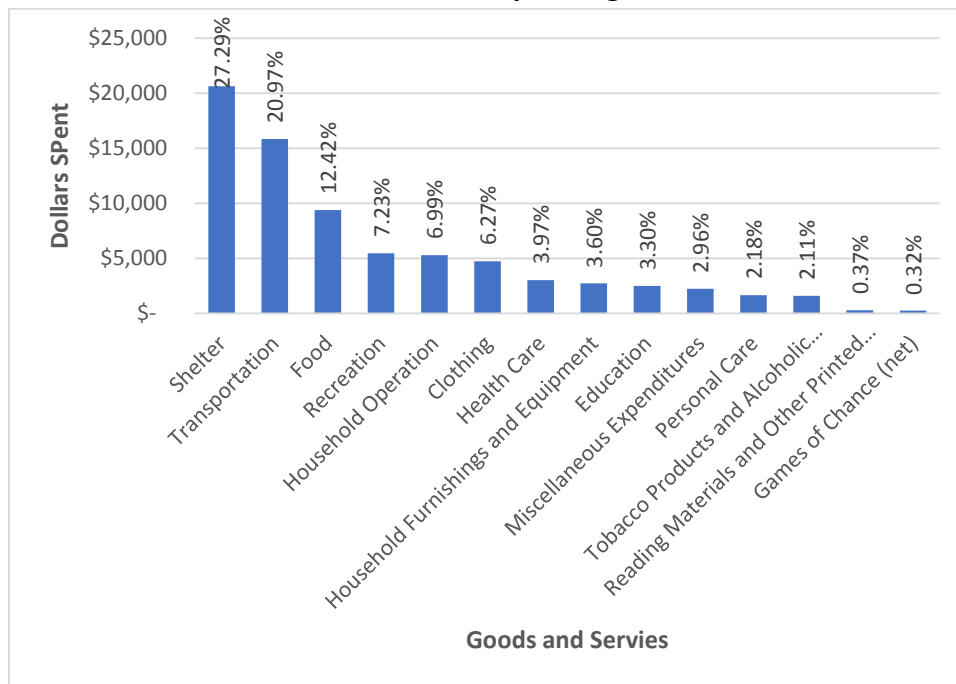
BEDC also has available consumer spending data. This is yet another way to analyse Ward 4's economy. Below is a chart, and a graphical representation of this data.

Table 3 – Household Spending in Ward 4

Consumption	Spending per Household	Percentage
Shelter	\$ 20,616	27.29%
Transportation	\$ 15,842	20.97%
Food	\$ 9,384	12.42%
Recreation	\$ 5,461	7.23%
Household Operation	\$ 5,282	6.99%
Clothing	\$ 4,739	6.27%
Health Care	\$ 2,999	3.97%
Household Furnishings and Equipment	\$ 2,723	3.60%
Education	\$ 2,493	3.30%
Miscellaneous Expenditures	\$ 2,236	2.96%
Personal Care	\$ 1,648	2.18%
Tobacco Products and Alcoholic Beverages	\$ 1,593	2.11%
Reading Materials and Other Printed Matter	\$ 280	0.37%
Games of Chance (net)	\$ 240	0.32%
Total	\$ 75,536	100%

Source: Environics Analytics, 2015

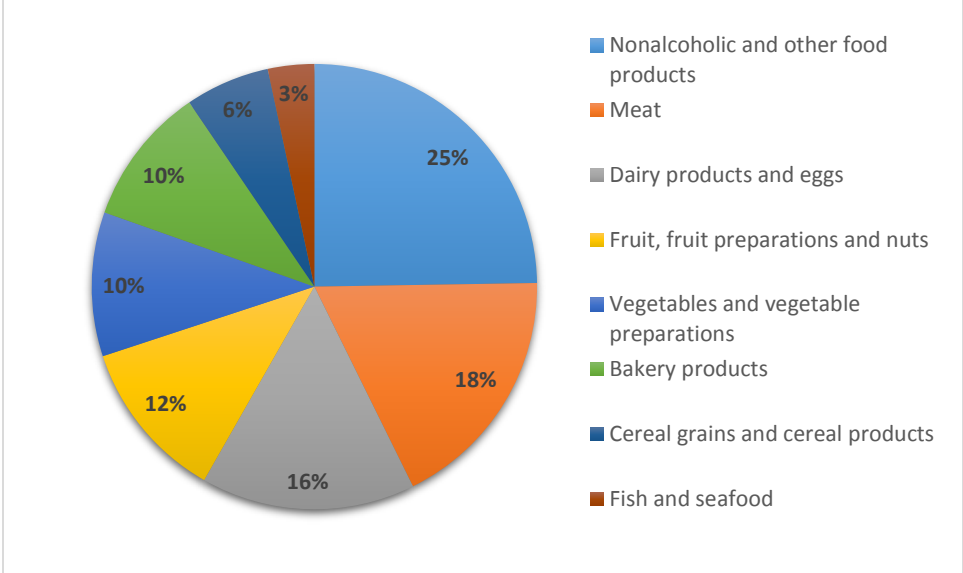
Chart 3 – Household Spending in Ward 4



Source: Environics Analytics, 2015

This data indicates where consumers are spending their disposable income. Important and high impact industries can be further broken down into more detailed data. For example, we have provided additional detail on food spending below.

Chart 4 – Detailed Consumption Spending in Ward 4



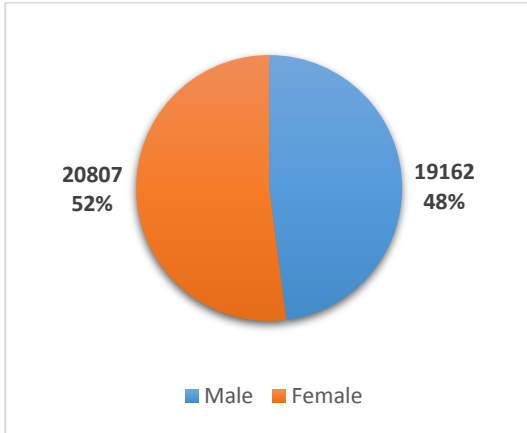
Source: Environics Analytics, 2015

This detailed breakdown of household consumption is available for all of the categories in Table 3. This data provides insight into the spending patterns of households within Ward 4, and can be used to provide insight into the needs of constituents, according to their purchasing patterns. It is also important for businesses and developers, giving them access to key data which assists in their decision making process for development and expansion assessments.

Demographic Data

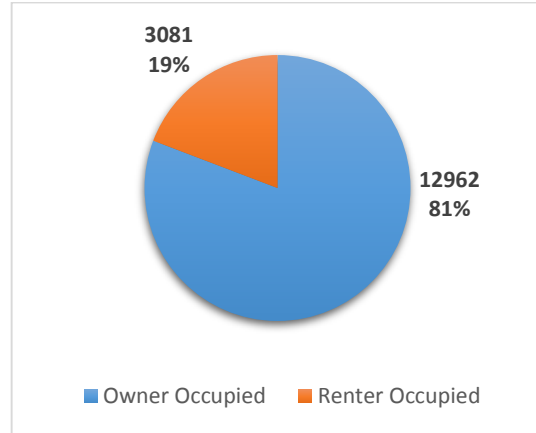
BurlingtonSites also can provide detailed Demographic Data. Below is a sample of some of the data that the BEDC has deemed to be relevant. Ward 4 has a population of 39,969 people, making up 16,043 households which are majority owner-occupied.

Chart 5 - Residents by Gender:



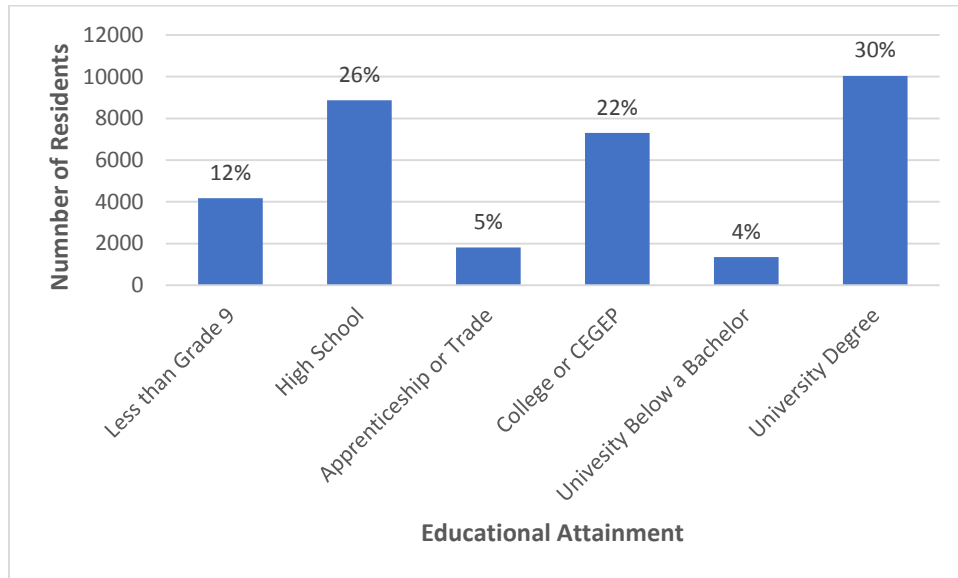
Source: Environics Analytics, 2015

Chart 6 - Residents by Home Ownership:



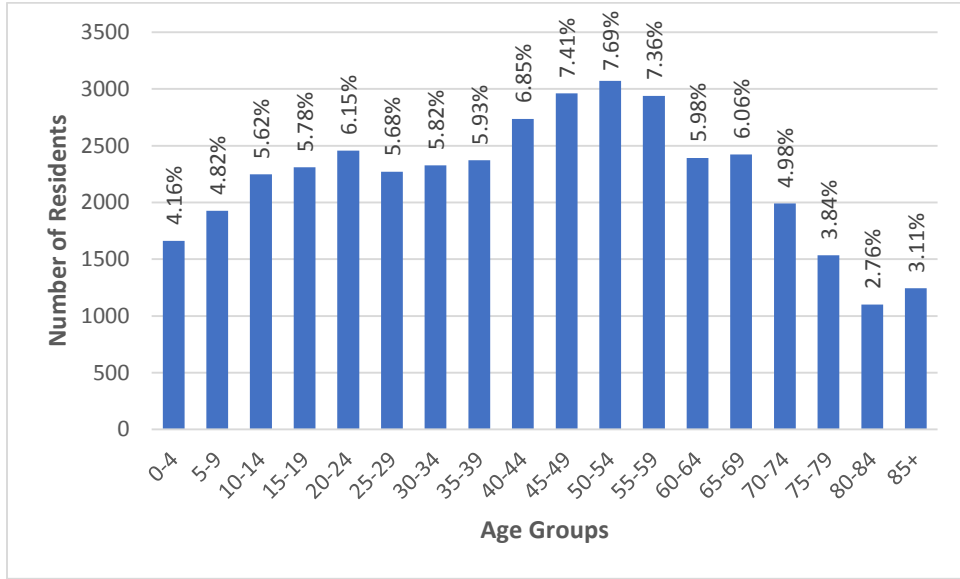
Source: Environics Analytics, 2015

Chart 7 – Highest Level of Educational Achievement in Ward 4



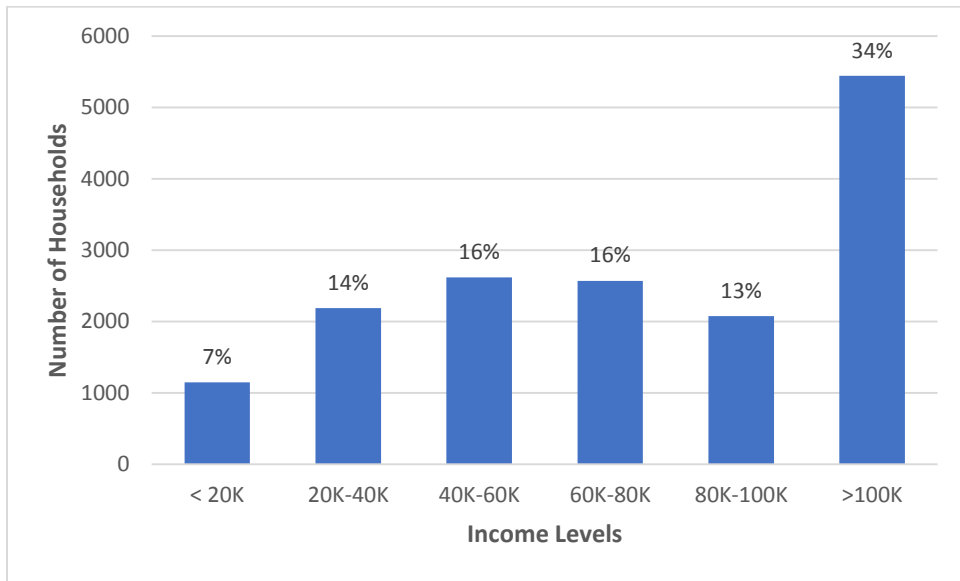
Source: Environics Analytics, 2015

Chart 8 - Age Demographic: Distribution in Ward 4



Source: Environics Analytics, 2015

Chart 9 - Household Income Distribution in Ward 4



Source: Environics Analytics, 2015

The above charts are a sample of the demographic data applicable to Ward 4. BEDC has access to traditional demographic information, such as gender and age. This traditional information is supplemented with more in-depth information, such as income distribution and educational achievement in order to provide a comprehensive understanding of your constituent’s demographics.

Conclusion

The data included in this report details the current state of Ward 4, an economy based heavily in services. Over 40% of employment is in knowledge-based and institutional industries, and is supplemented by a diverse array of economic activities (Table 1). Ward 4 is populated by well educated, and fiscally prosperous residents with 30% having attained a university degree and 34% of households earning over \$100,000 annually, with an average household income of \$103,471.

BEDC hopes that you have found this report useful and informative, in terms of both the data that has been included about Ward 4, as well as the additional knowledge available through use of the BurlingtonSites. BEDC is happy to provide additional analysis upon request. We encourage you to use the site selector tool to discover further insights into the community. It can be reached by clicking the following link:

<http://bedc.ca/locate/site-selection-bedc/burlington-sites-zoomprospector/>

Additionally, a report on Burlington as a whole is attached, enabling you to compare and contrast your Ward's findings with Burlington as a whole.