



2019

Employment Survey Results





Contents

<p>04 Message from Halton Regional Chair Gary Carr</p> <p>05 Introduction</p> <ul style="list-style-type: none"> 10th annual survey Report content Survey methodological notes 2019 Employment Survey results highlights <p>06 Businesses: Survey results</p> <ul style="list-style-type: none"> Total businesses identified Business ownership types Changes between 2018 and 2019 <p>07 Businesses: Five-year trend</p> <ul style="list-style-type: none"> Five-year business trend (2015-2019) Five-year business trend by municipality (2015-2019) <p>08 Businesses: Geographic distribution</p> <ul style="list-style-type: none"> By local municipality Geographic distribution of businesses <p>09 Jobs: Survey results</p> <ul style="list-style-type: none"> Total jobs identified Changes within businesses operating since 2018 Jobs identified between 2018 and 2019 <p>10 Jobs: Five-year trend</p> <ul style="list-style-type: none"> Five-year job trend (2015-2019) Five-year job trend by municipality (2015-2019) <p>11 Jobs: Geographic distribution</p> <ul style="list-style-type: none"> Jobs identified by local municipality Geographic distribution of jobs 	<p>12 Top sectors by business and job counts</p> <ul style="list-style-type: none"> Top-5 economic sectors by business and job counts <p>13 NAICS sectors by business and job counts</p> <ul style="list-style-type: none"> NAICS economic sectors <p>14 Retail trade subsectors by business and job counts</p> <ul style="list-style-type: none"> Retail trade (top sector by business count) subsectors <p>15 Manufacturing sub-sector by business and job counts</p> <ul style="list-style-type: none"> Manufacturing (top sector by job count) subsectors <p>16 Employment Area: Survey results</p> <ul style="list-style-type: none"> Employment Area by geography Employment Area by the numbers Businesses identified in Employment Areas Jobs identified in Employment Areas <p>17 Employment Area: Top sectors by business and job counts</p> <ul style="list-style-type: none"> Top-5 economic sectors by business and job counts <p>18 Methodological notes</p> <ul style="list-style-type: none"> Annual survey 2019 survey response rate Survey data collection methodology Data notes <p>19 Additional Information</p>
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Message from Halton Regional Chair Gary Carr

On behalf of Regional Council, I am pleased to present the results of the 2019 Employment Survey. Local businesses respond to our survey each year, allowing Halton Region to gather valuable information about employment in the area. The results also help us plan for the future by informing policy and decision-making, such as planning for infrastructure and service improvements to support our growing community.

The results of the 2019 Employment Survey show that over the past several years, the number of jobs in the region has increased and more businesses are choosing to call Halton home. Halton's Employment Areas support many of these jobs and businesses, and continue to play an important role in maintaining the economic competitiveness of our community.

Here are some more findings from the 2019 survey:

- More than 25 per cent of businesses had an increase in the number of jobs at their location.
- Over 46 per cent of local businesses and more than 50 per cent of jobs were located within Employment Areas identified in the Regional Official Plan.
- Over 60 per cent of companies were independently owned and operated.
- There was a 2.1 per cent annual increase in the number of jobs in Halton between 2015 and 2019—representing an additional 4,600 jobs each year.
- There was a 0.7 per cent annual growth in the number of businesses in Halton between 2015 and 2019—representing 91 more businesses each year.

I encourage you to read this report and learn why local and international employers continue to choose Halton as the place to succeed. To find out more about employment in Halton, visit halton.ca.

Thank you to the local businesses that participated in the 2019 Employment Survey. Your input and feedback allows the Region to effectively plan for growth and ensure Halton remains a great place to live, work, raise a family and retire.

Sincerely,

Gary Carr
Halton Regional Chair

Introduction

10th annual survey

In 2019, the Region conducted its 10th annual Employment Survey of businesses in Halton. Through the survey, the Region collects and updates information on business and employment across Halton. This includes data such as the number of employees, type of employment (full-time, part-time or temporary), industry sector and business space.

The results of this survey represent voluntary responses and input from businesses. These businesses have a physical location within Halton and are visible to the general public with business signage.

Report content

This report provides a summary of the 2019 Employment Survey results. In particular, the report:

- highlights the total number of businesses and jobs identified in 2019 as compared to the five-year trend from 2015 to 2019;
- presents additional information on businesses and jobs based on survey responses; and
- examines the geographic distribution of businesses and jobs across Halton, including within the Employment Areas identified in Halton's Regional Official Plan.

The 2019 Employment Survey Results report is organized as follows:

	Businesses Summarizes key results related to businesses in Halton.
	Jobs Provides highlights related to jobs in Halton.
	Businesses and Jobs by Sector Identifies key information related to economic sectors in Halton.
	Employment Area Provides a summary of results related to businesses and jobs within Halton's Employment Areas.

2019 Employment Survey Results highlights

Businessess

13,650

total number of businesses identified in Halton

11.5%

of total number of businesses were newly identified businesses

+0.7%

average annual increase over the last 5 years

46%

of businesses were located in Halton's Employment Areas



Retail trade

Top sector by business count



Jobs

241,423

total jobs identified in 2019

71.3%

of total jobs were full time positions

+2.1%

average annual increase over the last 5 years

53.8%

of jobs were located in Halton's Employment Areas



Manufacturing

Top sector by job count



Survey methodological notes

For information on the survey methodology, please see page 18.



Businesses: Survey results

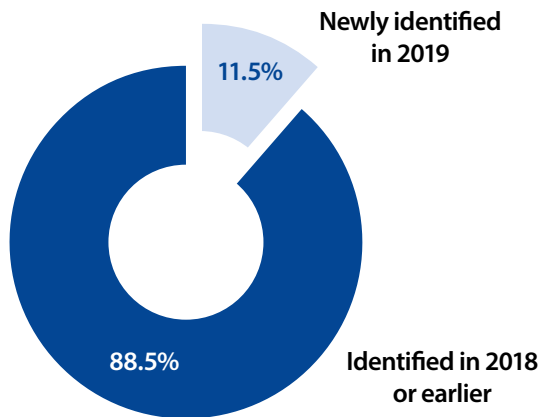
13,650 Total number of businesses identified in Halton

1,564 Number of newly identified businesses in 2019

Total businesses identified

The 2019 Employment Survey identified a total of 13,650 businesses in Halton Region. Of the businesses identified, 88.5 per cent (12,086 businesses) were businesses identified in 2018 or earlier. In other words, these businesses have been operating in Halton since 2018 or earlier.

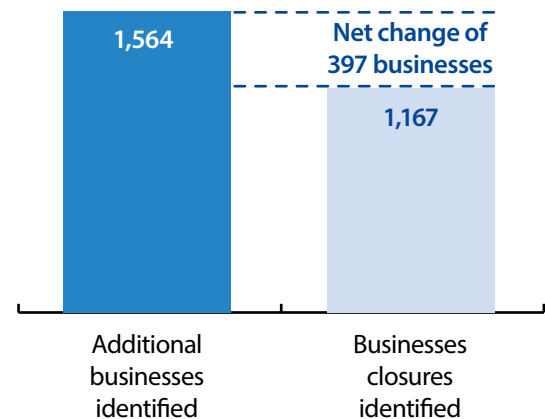
The other 11.5 per cent (1,564 businesses) were newly identified businesses in 2019. These represent businesses that were not identified during previous survey years.



Based on 13,650 businesses identified

Changes between 2018 and 2019

In 2019, 1,167 businesses previously identified by the survey had closed since 2018. With the addition of 1,564 newly identified businesses in 2019, this resulted in a net increase of 397 more businesses between 2018 and 2019 in Halton.



Based on 13,650 businesses identified

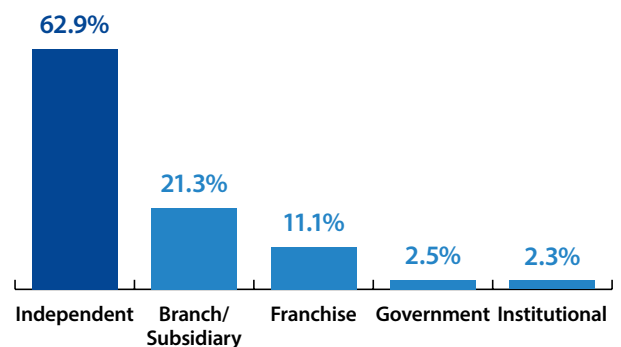
Business ownership types

The majority of businesses in Halton were independently owned and operated¹, representing 62.9 per cent (8,075 businesses) of the total businesses identified in 2019.

Branch or subsidiary businesses² were the second most common, representing 21.3 per cent (2,734 businesses) of businesses identified in 2019.

Franchises³ represent 11.1 per cent (1,428 businesses) of businesses in Halton.

The remaining 4.8 per cent (607 businesses) of businesses in Halton were government or institutional organizations.



Based on 12,844 responses

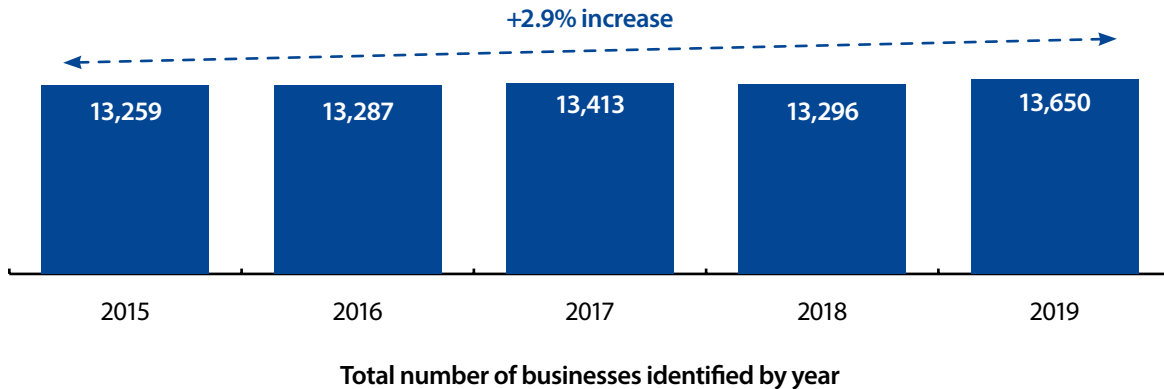
1. Independently owned and operated businesses are privately-owned establishments that are usually owned and run by one person.
 2. Branch or subsidiary businesses are owned by a parent company, but may operate under a business function that is different from the parent company.
 3. Franchises are owned and operated independently selling goods or services from another organization under a license agreement..



Businesses: Five-year trend

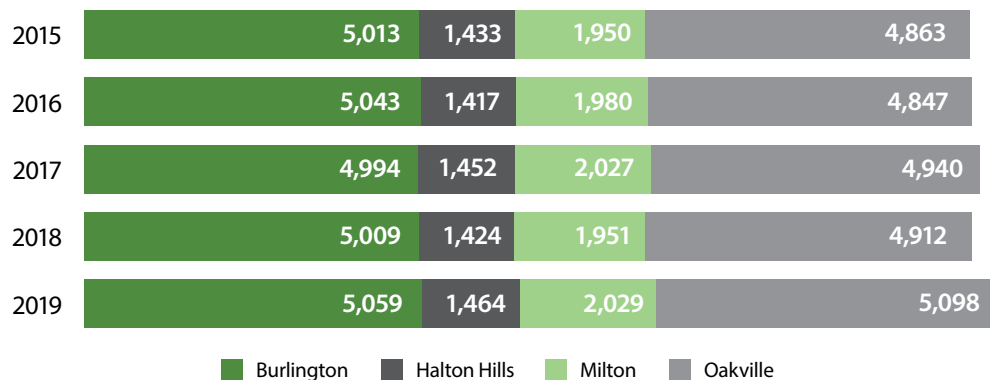
Five-year business trend (2015–2019)

Between 2015 and 2019, the Employment Survey results show an overall increase of 2.9 per cent (391 businesses) in the total number of businesses identified over this five-year period. The results show an average annual increase of 0.7 per cent, or 91 additional businesses identified, each year over the last five years.



Five-year business trend by municipality (2015–2019)

By municipality, Milton had the highest annual rate of growth in the number of businesses identified, with an average increase of 1.1 per cent, followed by Oakville at one per cent. Halton Hills and Burlington saw an average increase of 0.8 per cent and 0.2 per cent each year, respectively.



	Burlington	Halton Hills	Milton	Oakville	Halton Region
Five-year change (2015–2019)	0.9%	2.2%	4.1%	4.8%	2.9%
Annual average (2015–2019)	0.2%	0.8%	1.1%	1%	0.7%

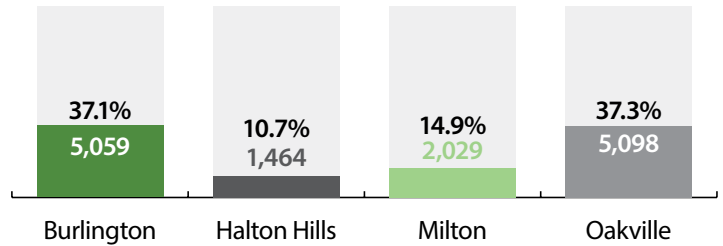


Businesses: Geographic distribution

By Local Municipality

By municipality, Oakville had the highest share of the total identified businesses at 37.3 per cent (5,098 businesses), followed by Burlington with a share of 37.1 per cent (5,059 businesses). Together, Oakville and Burlington were home to about 75 per cent of Halton's total businesses identified in 2019.

Milton and Halton Hills had shares of 14.9 per cent (2,029 businesses) and 10.7 per cent (1,464 businesses), respectively.



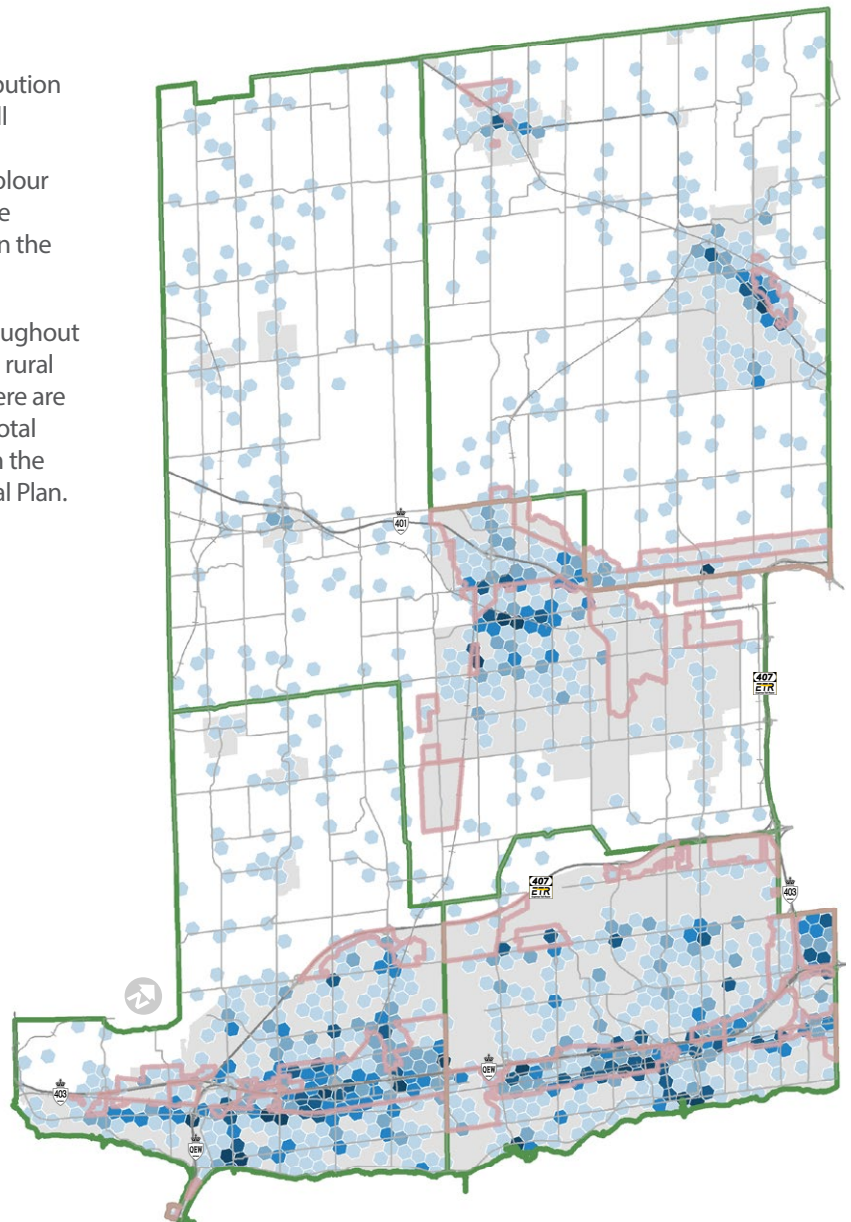
Based on 13,650 businesses identified

Geographic distribution of k

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.

The 13,650 businesses identified in 2019 are located throughout Halton's settlement areas (urban areas and hamlets) and rural agricultural areas. As illustrated by the darker shades, there are visible concentrations of businesses (46 per cent of the total businesses identified, or 5,913 businesses) located within the Employment Areas identified in Halton's Regional Official Plan.

- 1 to 10 businesses
- 11 to 25 businesses
- 26 to 50 businesses
- 51 to 100 businesses
- 100+ businesses
- Urban area & hamlet
- Employment Area





Jobs: Survey results

241,423

Total number of jobs identified in 2019

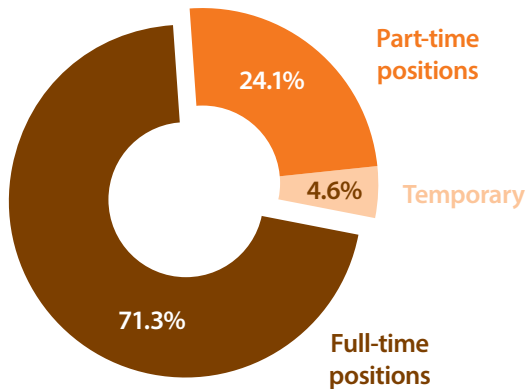
12,228

Number of newly identified jobs in 2019

Total jobs identified

The 2019 Employment Survey identified a total of 241,423 jobs in Halton Region. The majority of jobs identified in 2019 were full-time positions,¹ representing 71.3 per cent (172,247 jobs) of total jobs. 24.1 per cent (58,087 jobs) of the jobs were part-time positions.²

The remaining 4.6 per cent (11,089 jobs) were identified as temporary positions.³

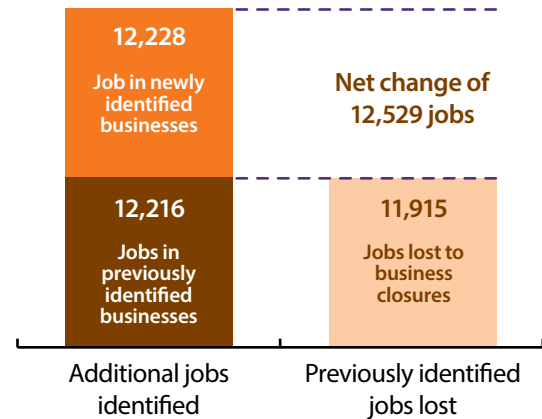


Based on 241,423 jobs identified

Jobs identified between 2018 and 2019

Within businesses that have operated since 2018 or earlier, an additional 12,216 jobs were identified in 2019. Within the businesses that were newly identified in 2019, 12,228 jobs were identified. Together, a total of 24,444 new jobs were identified in 2019.

Due to businesses closures between 2018 and 2019, 11,915 jobs were lost. When accounting for both job losses and new jobs, the 2019 Employment Survey results show a net increase of 12,529 jobs identified in Halton since 2018.

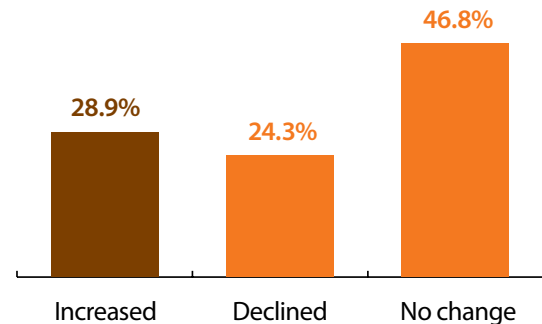


Based on 241,423 jobs identified

Changes within businesses operating since 2018

Within businesses that have operated since 2018 or earlier, 28.9 per cent (3,264 businesses) reported an increase in the number of jobs at their location. 24.3 per cent (2,744 businesses) of the businesses reported a lower number of jobs at the location.

The remaining 46.8 per cent (5,291 businesses) indicated no change in the number of jobs at the location.



Based on 11,299 responses

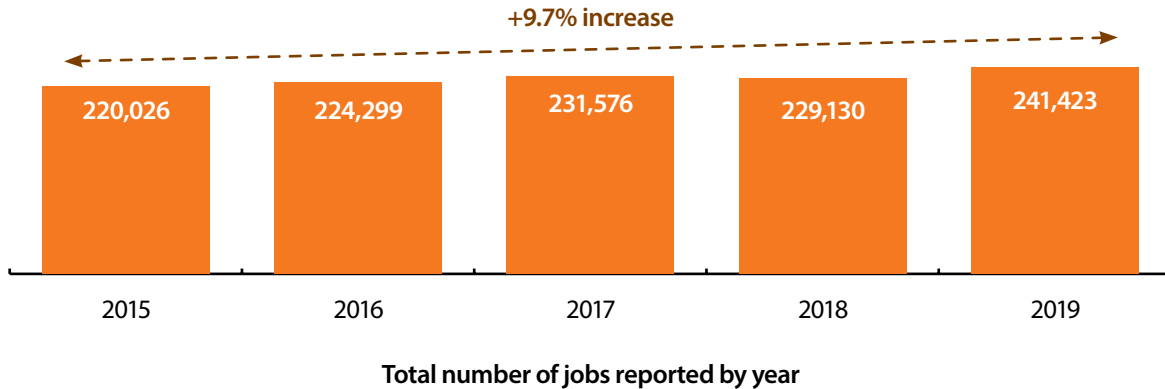
1. Full-time positions are based on jobs that consist of 30 hours or more per week.
 2. Part-time positions are based on jobs that consist of 30 hours or less per week.
 3. Temporary positions are based on jobs that are under a contract for a specific, limited amount of time, such as seasonal or holidays.



Jobs: Five-year trend

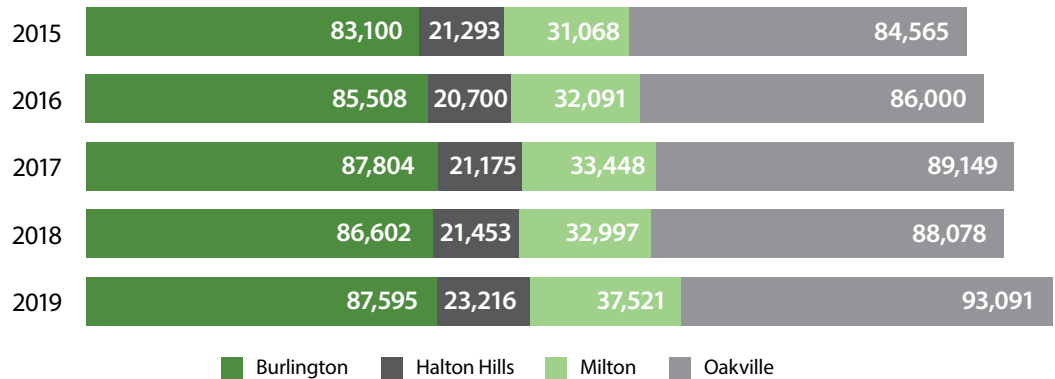
Five-year job trend (2015–2019)

Between 2015 and 2019, the survey results show an overall increase of 9.7 per cent (21,397 jobs) in the total number of jobs identified over this five-year period. The survey results show an average annual increase of 2.1 per cent, or about 4,600 additional jobs identified, each year over the last five years.



Five-year job trend by municipality (2015–2019)

By municipality, Halton Hills and Milton had the highest annual rate of growth in the number of jobs identified, with an average increase of 4.5 per cent each year. Oakville and Burlington saw an average increase of 1.7 per cent and 1.2 per cent in additional jobs identified each year, respectively.



	Burlington	Halton Hills	Milton	Oakville	Halton Region
Five-year change (2015–2019)	5.4%	9%	20.8%	10.1%	9.7%
Annual average (2015–2019)	1.2%	4.5%	4.5%	1.7%	2.1%

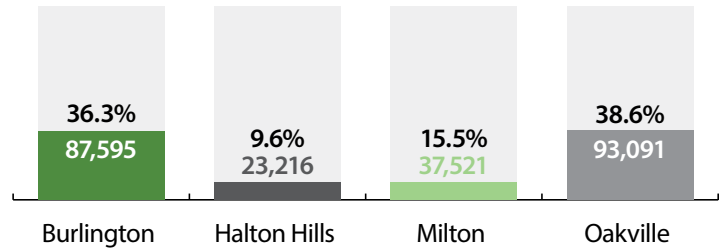


Jobs: Geographic distribution

Jobs identified by Local Municipality

By municipality, Oakville had the highest share of the total identified jobs at 38.6 per cent (93,091 jobs), followed by Burlington with a 36.5 per cent share (88,195 jobs).

Milton and Halton Hills had shares of 36.3 per cent (87,595 jobs) and 9.6 per cent (23,216 jobs), respectively.



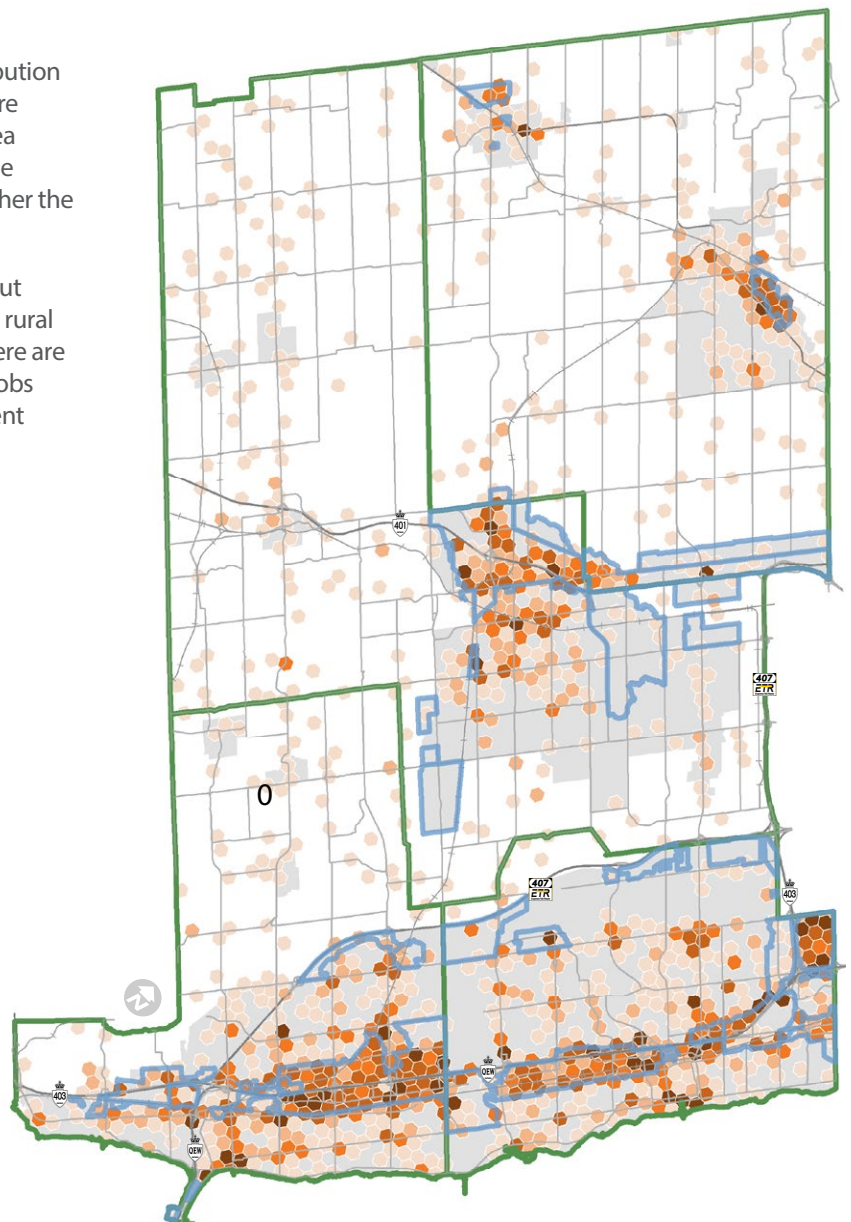
Based on 241,423 jobs identified

Geographic distribution of jobs

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 jobs in an area. The darker the colour, the higher the number of jobs in the area.

The 241,423 jobs identified in 2019 are located throughout Halton's settlement areas (urban areas and hamlets) and rural agricultural areas. As illustrated by the darker shades, there are visible concentrations of jobs (53.8 per cent of the total jobs identified, or 129,969 jobs) located within the Employment Areas identified in Halton's Regional Official Plan.

- 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





Top sectors by business and job counts

Top-5 economic sectors by business and job counts

By business count

1	Retail trade	2,428	17.8%
2	Other services (excluding public administration)	1,742	12.8%
3	Health care and social assistance	1,662	12.2%
4	Accommodation and food services	1,235	9%
5	Professional, scientific and technical services	1,179	8.6%

The top sector by total business count in 2019 is the retail trade sector, representing 17.8 per cent of the total businesses identified in Halton.

NAICS descriptions for the top-five sectors listed are provided below.



Retail trade

Retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.



Other services (except public administration)

Not classified in any other sector. Repairing motor vehicles, machinery, or equipment; 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.



Health care and social assistance

Providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.



Accommodation and food services

Providing short-term lodging and complementary services to travelers, vacationers and others.



Professional, scientific and technical services

Engaging in activities in which human capital is the major input.

By job count

1	Manufacturing	36,690	15.2%
2	Retail trade	34,286	14.2%
3	Health care and social assistance	25,154	10.4%
4	Educational services	21,342	8.8%
5	Accommodation and food services	18,911	7.8%

The top sector by total job count in 2019 is the manufacturing sector, representing 15.2 per cent of the total jobs identified in Halton.

NAICS descriptions for the top-five sectors listed are provided below.



Manufacturing

Chemical, mechanical or physical transformation of materials or substances into new products.



Retail trade

Retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.



Health care and social assistance

Providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.



Educational services

Providing instruction and training in a wide variety of subjects.



Accommodation and food services

Providing short-term lodging and complementary services to travelers, vacationers and others.

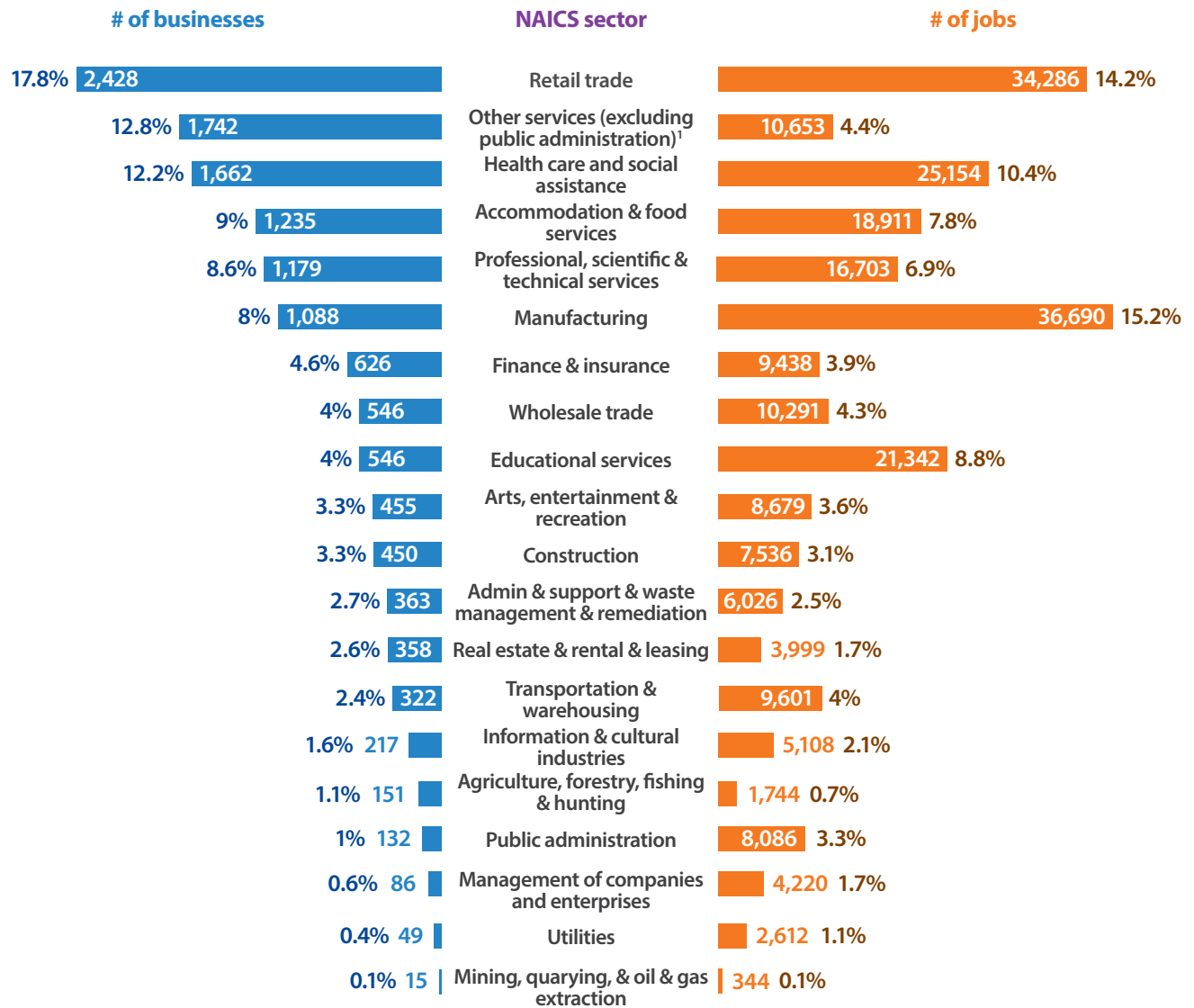
Source: North American Industry Classification System (NAICS) Canada, NAICS 2017 Version 3.0



NAICS sectors by business and job counts

NAICS economic sectors

The graph below represents business and jobs identified in the 2019 Employment Survey results by the sectors as defined in the North American Industrial Classification System (NAICS). For a full description of the sectors, see page 19 of this report.



Based on 13,650 responses

1. Other Services (Except Public Administration) include businesses that are not classified in any other sector, such as repairing motor vehicles, machinery, or equipment; 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. As defined in the North American Industrial Classification System (NAICS).

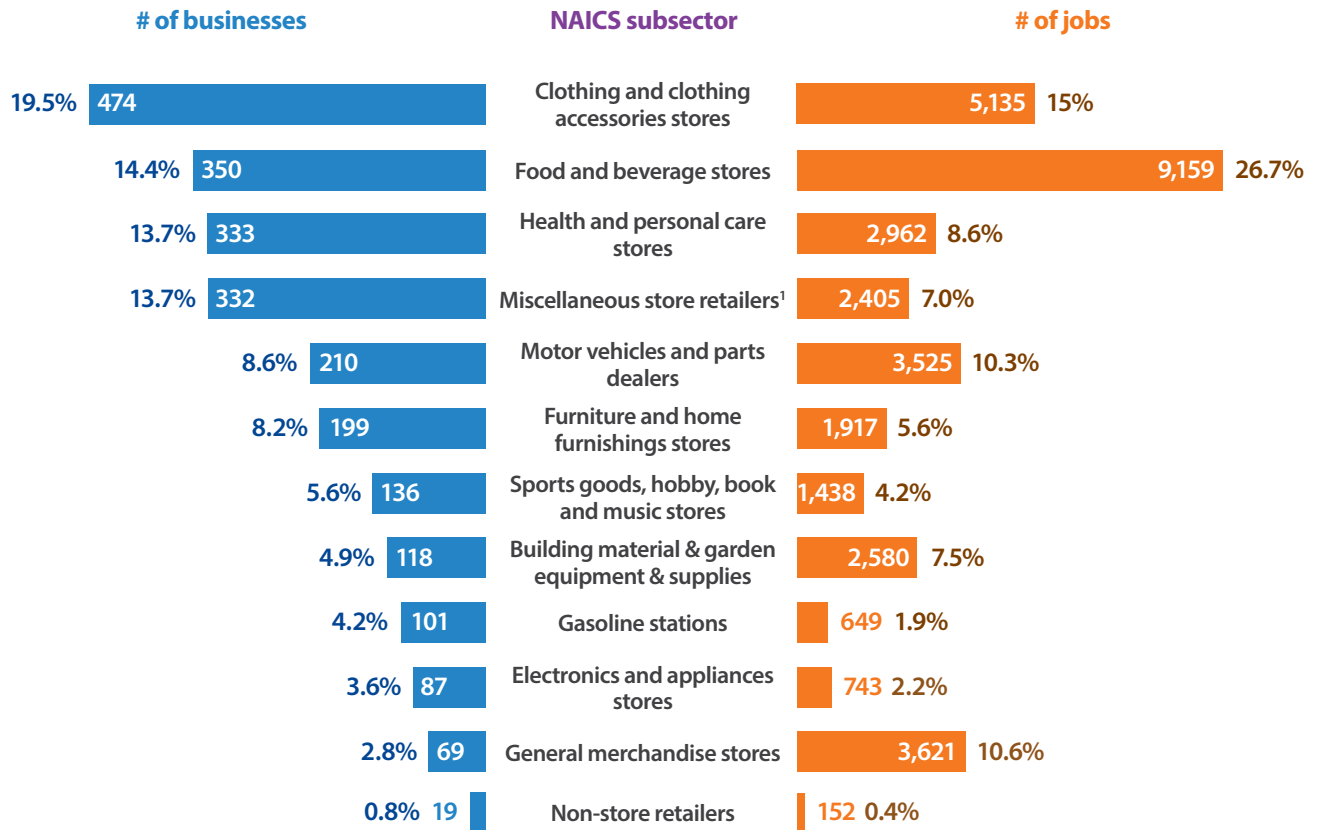


Retail trade subsectors by business and job counts

Retail trade (top sector by business count) subsectors

In Halton Region, the retail trade is the top sector by business count in 2019. Businesses in this sector, as defined by the North American Industrial Classification System (NAICS), are primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.

The graph below provides a breakdown of the retail trade sector by subsectors as defined in the NAICS:



Based on 2,428 responses

1. Miscellaneous Store Retailers include businesses with unique characteristics like florists, used merchandise stores, and pet and pet supply stores as well as other store retailers. As defined in the North American Industrial Classification System (NAICS).

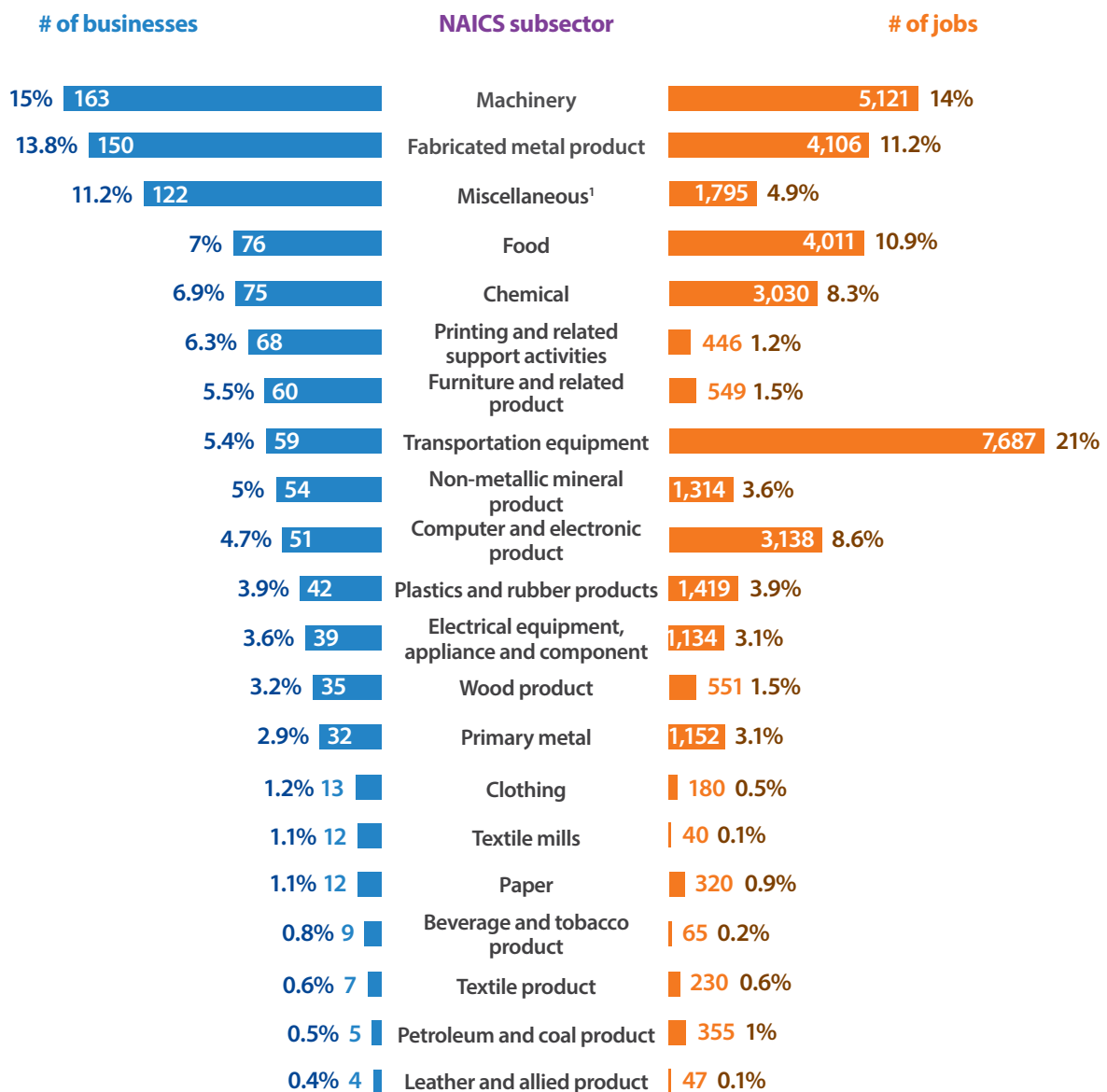


Manufacturing sub-sector by business and job

Manufacturing (top sector by job count) subsectors

In Halton Region, the manufacturing sector is the top sector by job count in 2019. Businesses in this sector, as defined by the North American Industrial Classification System (NAICS), are primarily engaged in the chemical, mechanical or physical transformation of materials or substances into new products. These products may be finished, in the sense that they are ready to be used or consumed, or semi-finished, in the sense of becoming a raw material for an establishment to use in further manufacturing.

The graph below provides a breakdown of the manufacturing sector by subsectors as defined in the NAICS:



Based on 1,088 responses

1. Miscellaneous Manufacturing include businesses that are not classified to any other subsector, primarily engaged in manufacturing activities. These establishments manufacture a diverse range of products, such as medical equipment and supplies, jewellery, sporting goods, toys and office supplies. As defined in the North American Industry Classification System (NAICS).



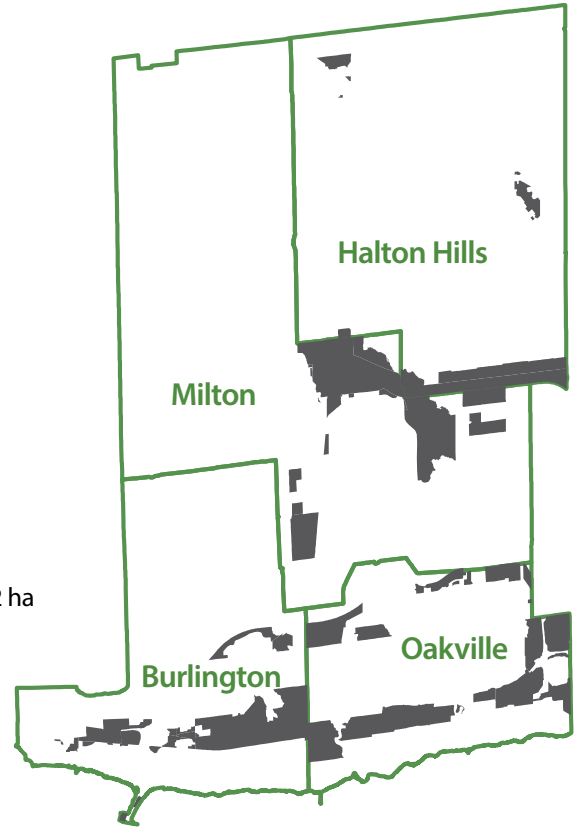
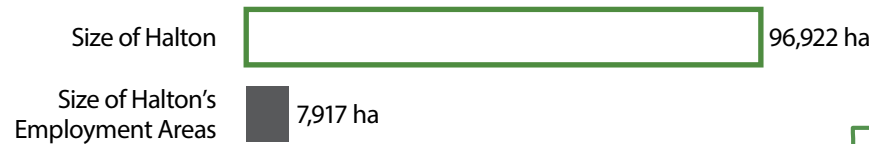
Employment area: Survey results

Employment Area by geography

Under the Growth Plan for the Greater Golden Horseshoe (2019), the Province requires municipalities to designate Employment Areas within their official plans to protect and plan for employment uses over the long term.

Through the Regional Official Plan, Halton Region has identified Employment Areas to ensure sufficient lands are available to accommodate forecasted employment growth. These lands are also strategically identified and located based on their close proximity and access to existing major highway interchanges and rail yards.

Halton's Employment Areas represent about eight per cent of the Region's total land size.



Employment Areas by the numbers

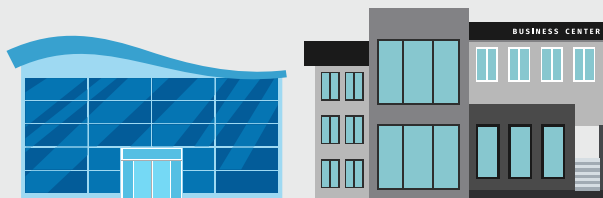
Due to their strategic location, as well as Regional policies that protect and support economic activities, Halton's Employment Areas are home to a significant portion of the Region's economic activities.

Businesses identified in Employment Areas

The 2019 Employment Survey identified 5,913 businesses located within Halton's Employment Areas, representing 46 per cent of businesses in Halton Region.

5,913
Number of businesses identified in 2019 in Employment Areas

46%
Percentage of total businesses located in Employment Areas



Jobs identified in Employment Areas

The survey identified 129,969 jobs within Halton's Employment Areas, representing more than half (53.8 per cent) of jobs in Halton Region.

129,969
Number of jobs identified in 2019 in Employment Areas

53.8%
Percentage of total jobs located in Employment Areas

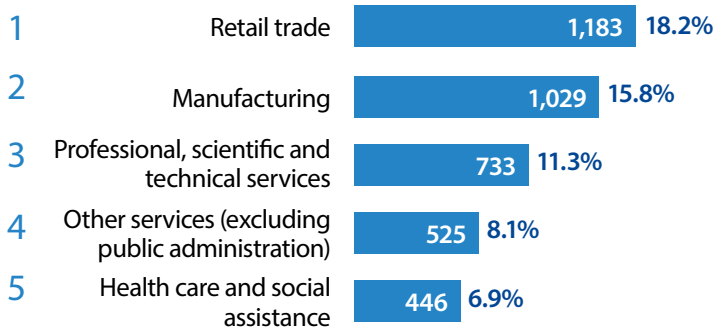




Employment Areas: Top sectors by business and job

Top-5 economic sectors by business and job counts

By business count



Within Halton's Employment Areas, the top sector by total business count in 2019 is the retail trade sector, representing 18.2 per cent of the total businesses identified in Halton's Employment Areas.

NAICS descriptions for the top-five sectors listed are provided below.



Retail trade

Retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.



Manufacturing

Chemical, mechanical or physical transformation of materials or substances into new products.



Professional, scientific and technical services

Engaging in activities in which human capital is the major input.



Other services (except public administration)

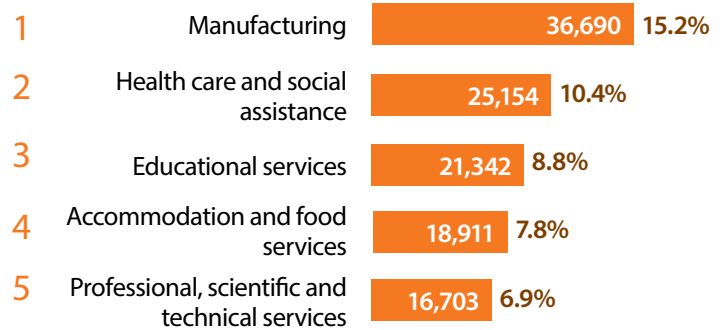
Not classified in any other sector. Repairing motor vehicles, machinery, or equipment; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services; organizing and promoting religious activities; supporting various causes through grant-making, advocating (promoting) various social and political causes, and promoting and defending the interests of their members.



Health care and social assistance

Providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.

By job count



Within Halton's Employment Areas, the top sector by total job count in 2019 is the manufacturing sector, representing 15.2 per cent of the total jobs identified in Halton's Employment Areas.

NAICS descriptions for the top-five sectors listed are provided below.



Manufacturing

Chemical, mechanical or physical transformation of materials or substances into new products.



Health care and social assistance

Providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.



Educational services

Providing instruction and training in a wide variety of subjects.



Accommodation and food services

Providing short-term lodging and complementary services to travelers, vacationers and others.



Professional, scientific and technical services

Engaging in activities in which human capital is the major input.

Source: North American Industry Classification System (NAICS) Canada, NAICS 2017 Version 3.0

Methodological notes

Annual survey

Halton Region conducts an annual employment survey of businesses across the region, which include for-profit establishments or non-profit/government organizations. These are businesses with a physical location within Halton and are visible to the general public with business signage.

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

- 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 input of respondents.

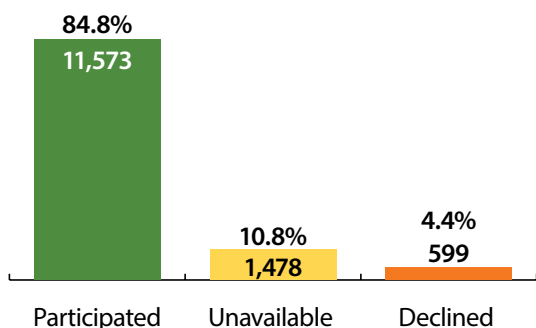
2019 survey response rate

The 2019 Employment Survey identified a total of 13,650 businesses in Halton Region.

The response rate for the 2019 Employment Survey was as follows:

- 11,573 (84.8 per cent) businesses participated in 2019 and provided an up-to-date information;
- 1,478 (10.8 per cent) businesses were unavailable to participate (i.e. business was not open during the day, survey contact was not available, etc.);
- 599 (4.4 per cent) businesses declined to participate in 2019.

In cases where businesses were not available or declined to participate, information from the previous survey responses were used where applicable.



2019 Survey Data Collection Methodology

Between the months of May and September, a group of employment surveyors were deployed to visit all visible businesses across the Region. Prior to the deployment, the surveyors were provided with a comprehensive training on the survey methodology, process and protocols.

The survey incorporated a number of different methods to collect information from businesses using a custom developed tablet-based application or a printed survey questionnaire form. Surveyors were trained to use the most appropriate option.

The primary method of collecting data was through in-person interviews with follow-up interviews via telephone, email, or facsimile, as necessary. Businesses also had the option to respond by submitting an online survey form available on **halton.ca**. A description of each method is summarized below.

1. In-person interviews with the business

Surveyors visited and surveyed all visible businesses across Halton by primarily using a custom developed survey application installed on a secure electronic tablets. Information and responses received through the survey were electronically recorded on the secured tablets.

In cases where businesses were unavailable for survey at the time of the visit, the surveyors were trained to exercise options to potentially arrange an alternate time to revisit the business or provide alternate participation options, such as follow-up interviews via telephone, email or an online survey form available on **halton.ca**.

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

In some cases, surveyors were trained to ask for the business contact information for a follow-up email via telephone or email during regular office hours or at a pre-arranged time.

Where appropriate, surveyors may have also left a printed survey questionnaire form with options for businesses to respond via regular mail, email or facsimile.

3. Online survey form via Halton Region's website

Businesses had the option of submitting a response through an online survey form available on **halton.ca** between May and September.

Data notes

The Employment Survey is a point-in-time survey based on voluntary participation. Accordingly, the data and results 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 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 at Halton Region with any questions or feedback.

Additional Information

North American Industry Classification System (NAICS) Sectors and Description

NAICS Sector	Description
Agriculture, Forestry, Fishing and Hunting	Growing crops, raising animals, harvesting timber, harvesting fish and other animals from their natural habitats and providing related support activities.
Mining, quarrying, and oil and gas extraction	Extracting naturally occurring minerals. Establishments performing similar activities, on a contract or fee basis, are also included.
Utilities	Operating electric, gas and water utilities.
Construction	Constructing, repairing and renovating buildings and engineering works, and in subdividing and developing land.
Manufacturing	Chemical, mechanical or physical transformation of materials or substances into new products.
Wholesale Trade	Wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.
Retail Trade	Retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.
Transportation and Warehousing	Transporting passengers and goods, warehousing and storing goods, and providing services to these establishments.
Information and Cultural Industries	Producing and distributing (except by wholesale and retail methods) information and cultural products.
Finance and Insurance	Engaging in financial transactions or in facilitating financial transactions (involving the creation, liquidation, or change in ownership of financial assets).
Real Estate and Rental and Leasing	Renting, leasing, or otherwise allowing the use of tangible or intangible assets.
Professional, Scientific and Technical Services	Engaging in activities in which human capital is the major input.
Management of Companies and Enterprises	Managing companies and enterprises and/or holding the securities or financial assets of companies and enterprises, for the purpose of owning a controlling interest in them and/or influencing their management decisions.
Administrative and Support, Waste Management and Remediation Services	Engaging in activities that support the day-to-day operations of other organizations or waste management activities.
Educational Services	Providing instruction and training in a wide variety of subjects.
Health Care and Social Assistance	Providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.
Arts, Entertainment and Recreation	Operating facilities or providing services to meet cultural, entertainment and recreational interests of their patrons.
Accommodation and Food Services	Providing short-term lodging and complementary services to travelers, vacationers and others.
Other Services (Except Public Administration)	Not classified in any other sector. Repairing motor vehicles, machinery, or equipment; 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.
Public Administration	Engaging in activities of a governmental nature.

