

Retail Trade

(NAICS 44-45)

Top Trends

Industry Information

- Retail trade is made up of 12 sub-industries. Food and beverage stores are the largest sub-industry making up 26% of the Retail Trade industry, with 6,560 people employed. This is followed by General merchandise stores with 3,630 people employed
- Seven out of twelve sub-industries in Retail trade grew from 2006 to 2016. Building material and garden equipment and supplies dealers grew the most with 810 workers
- The sub-industries that showed a decline in employment were Furniture and home furnishings stores, down 23% from 2006 to 2016, and Gasoline stations down 16.1% from 2006 to 2016
- There is a range of incomes in Retail trade but the median income is \$37,005.00 a year which is well below the average across all industries at \$53,880
- Locally Retail trade saw incomes increase from 2011 to 2016 by 9% on par with the growth seen across all industries (10%)

Employment Trends

- From 2006 to 2016 employment in Retail trade increased in Hamilton by 1,765 people. All the increase was from the last five years increasing by 7.7%, above the average seen across Ontario at 5.2%
- The unemployment rate in Retail trade has decreased over the last 10 years. In 2016, the unemployment rate was 3.8%, the lowest it's been in the last 10 years
- Employment in Retail trade is expected to continue seeing strong growth. From 2018 to 2023 it is forecast to increase by 3.1% in Hamilton

Workforce Characteristics

- The industry has a younger than average workforce as 30% of workers are between the ages of 15 to 24
- Fifty-nine percent of workers in Retail trade have a high school education or no certificate, much higher than the share seen across all industries at 36%
- The largest share of jobs are at skill level C at 38%. These jobs typically require a secondary school diploma

Businesses Information

- There are 3,208 Retail trade businesses in Hamilton, the majority of them are businesses with employees
- Food and beverage stores have the most number of businesses with employees, 348
- 84% of Retail Trade businesses have under 20 employees similar to the share seen across all industries

Occupational Information

- Retail salesperson, 6,880 workers, and Retail and wholesale trade managers, 4,250 workers, are the top two most employed occupations in Retail trade
- The occupations that grew the most in employment over the last five years were Retail and wholesale trade managers
- Other customer and information services representatives is the fastest growing entry-level job
- The top declining occupation is also an entry-level job: Retail salesperson. This occupation declined by 580 jobs

Job Postings

- Retail salesperson is still one of the most posted jobs locally despite the fact that employment declined over the past five years. There is a high degree of turnover for this occupation
- In 2017 Retail trade saw an increase in job postings, increasing by 784 year over year. There were 2,114 job postings in 2017

Table of Contents

Section 1: Industry Information	pg 3
Section 2: Employment Trends.....	pg 6
Long-term Trends in Employment.....	pg 6
Future Trends.....	pg 7
Section 3: Workforce Characteristics	pg 8
Age	pg 8
Education	pg 8
Skill Level.....	pg 9
Gender	pg 9
Section 4: Business Information.....	pg 10
Section 5: Occupational Information.....	pg 12
Section 6: Job Postings.....	pg 16

Section 1: Industry Information

TABLE 1. Employed by Sub-Industry Retail Trade (3-Digit NAICS), 2016, Place-of-Work, Hamilton (Census Division)

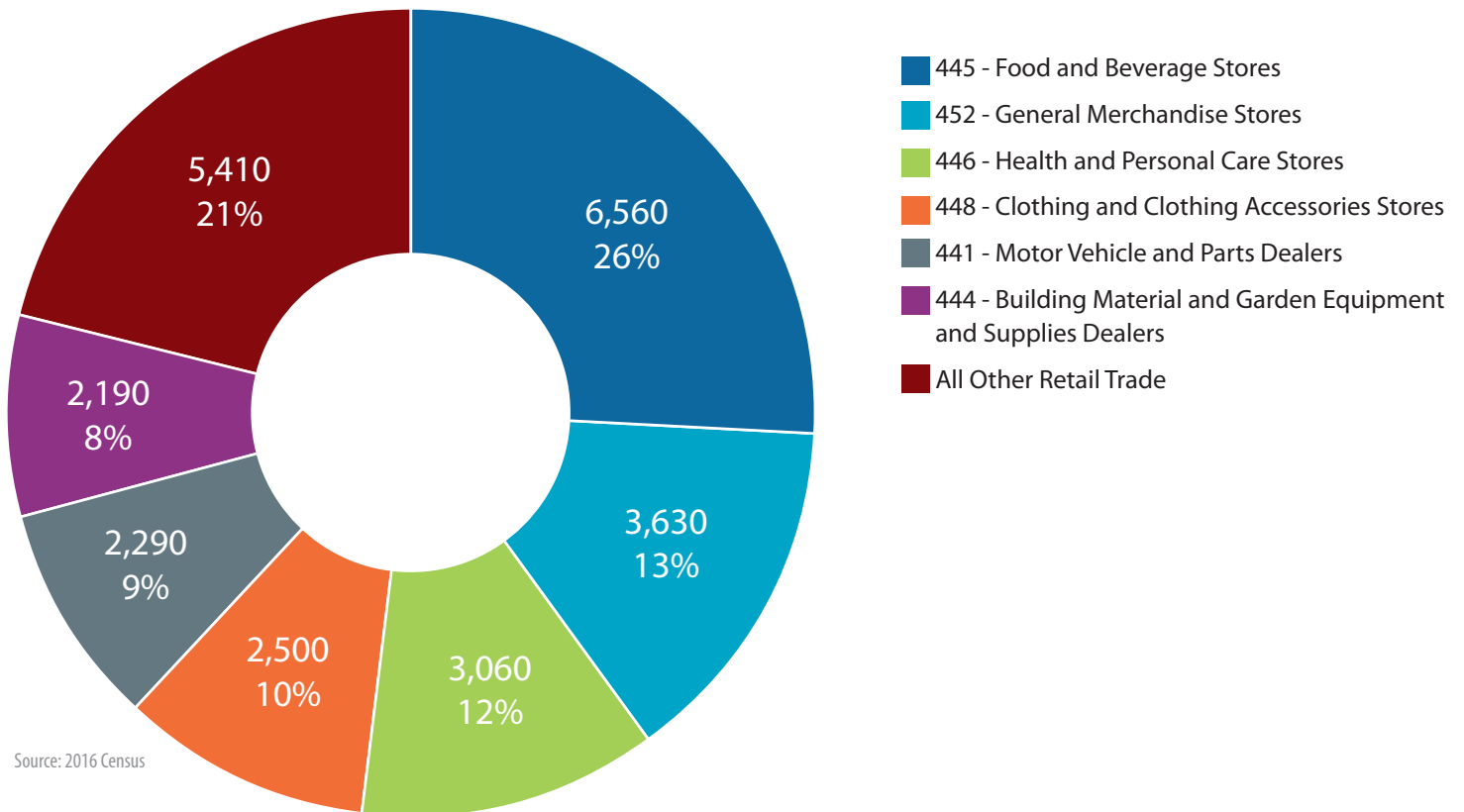


TABLE 2. Top 10 Employment by Retail Trade Sub Industry (4-Digit NAICS), 2016, Hamilton (Census Division)

	Number of People Employed
4451 Grocery stores	5,610
4461 Health and personal care stores	3,060
4521 Department stores	1,940
4441 Building material and supplies dealers	1,910
4481 Clothing stores	1,860
4529 Other general merchandise stores	1,690
4411 Automobile dealers	1,590
4511 Sporting goods, hobby and musical instrument stores	860
4431 Electronics and appliance stores	840
4539 Other miscellaneous store retailers	700

Source: 2006 Census; 2011 National Household Survey; 2016 Census

TABLE 3. Change in Employment by Retail Trade Sub-Industry (3-digit NAICS), 2016, Place-of-Work, Hamilton (Census Division)

	2006	2011	2016	06 to 16 Total Change	06 to 16 % Change	11 to 16 Total Change	11 to 16 % Change
441 Motor vehicle and parts dealers	2,065	1,820	2,290	225	11%	470	26%
442 Furniture and home furnishings stores	1,065	820	810	-255	-24%	-10	-1%
443 Electronics and appliance stores	855	1,150	830	-25	-3%	-320	-28%
444 Building material and garden equipment and supplies dealers	1,380	1,515	2,190	810	59%	675	45%
445 Food and beverage stores	6,035	6,190	6,560	525	9%	370	6%
446 Health and personal care stores	2,480	2,475	3,060	580	23%	585	24%
447 Gasoline stations	620	450	520	-100	-16%	70	16%
448 Clothing and clothing accessories stores	2,305	2,270	2,500	195	8%	230	10%
451 Sporting goods, hobby, book and music stores	1,050	1,045	1,020	-30	-3%	-25	-2%
452 General merchandise stores	4,010	4,175	3,630	-380	-9%	-545	-13%
453 Miscellaneous store retailers	1,585	1,485	1,660	75	5%	175	12%
454 Non-store retailers	445	410	570	125	28%	160	39%

Source: 2006 Census; 2011 National Household Survey; 2016 Census
 Note: Green indicates increases and red indicates decreases in employment.

TABLE 4. Income by Retail Trade Sub-Industry (3-digit NAICS), 2011 to 2016, Hamilton (Census Division)

	2011	2016	Change	% Change
All Industries	\$ 49,103	\$ 53,880	\$ 4,777	10%
44-45 Retail trade	\$ 33,955	\$ 37,005	\$ 3,050	9%
442 Furniture and home furnishings stores	\$ 29,316	\$ 41,477	\$ 12,161	41%
441 Motor vehicle and part dealers	\$ 41,545	\$ 51,695	\$ 10,150	24%
454 Non-store retailers	\$ 38,081	\$ 44,923	\$ 6,842	18%
453 Miscellaneous store retailers	\$ 26,069	\$ 32,362	\$ 6,293	24%
447 Gasoline stations	\$ 21,155	\$ 27,129	\$ 5,974	28%
452 General merchandise stores	\$ 26,554	\$ 29,567	\$ 3,013	11%
443 Electronics and appliances stores	\$ 35,251	\$ 38,138	\$ 2,887	8%
448 Clothing and clothing accessories stores	\$ 28,225	\$ 30,933	\$ 2,708	10%
444 Building material and garden equipment and supplies dealers	\$ 35,738	\$ 38,019	\$ 2,281	6%
451 Sporting goods, hobby, book and music stores	\$ 32,652	\$ 31,496	-\$ 1,156	-4%
445 Food and beverage stores	\$ 40,031	\$ 38,066	-\$ 1,965	-5%
446 Health and personal care stores	\$ 40,169	\$ 34,908	-\$ 5,261	-13%

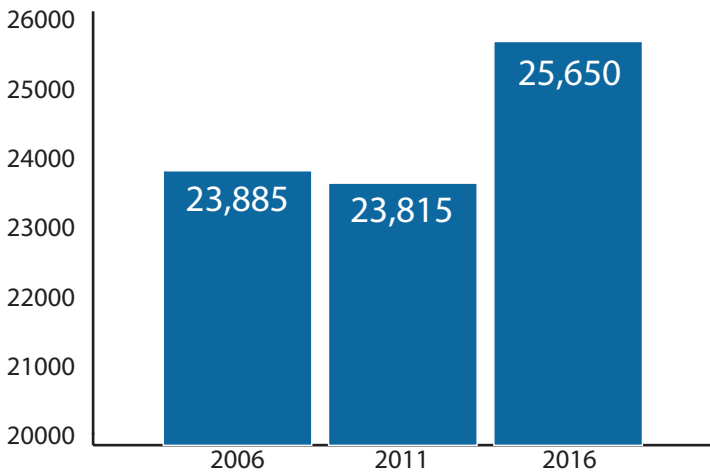
Source: 2011 National Household Survey; 2016 Census
 Note: Green indicates increases, and red indicates decreases in income.

Summary

- Food and beverage stores are the largest sub-industry making up 26% of the Retail trade industry, with 6,560 people employed. This is followed by General merchandise stores accounting for 14% of workers in the Retail trade industry
- Seven out of twelve sub-industries in Retail trade grew between 2006 to 2016. Building material and garden equipment and supplies dealers grew the most with 810 workers or by 58.7%
- The sub-industries that showed a decline in employment were Furniture and home furnishings stores, down 23% from 2006, Gasoline stations down 16.1% from 20
- On average, people in Retail trade earn \$37,005 a year which is well below the average across all industries at \$53,880
- There is a range of incomes in Retail trade with the highest paid sub-sector being Motor vehicle and parts dealers, with a yearly income of \$51,695
- Locally Retail trade as a whole saw incomes increase from 2011 to 2016 by 9% on par with the growth seen across industries (10%)
- Furniture and home furnishings stores saw income grow the most by 41%, leading to a new average at \$41,477

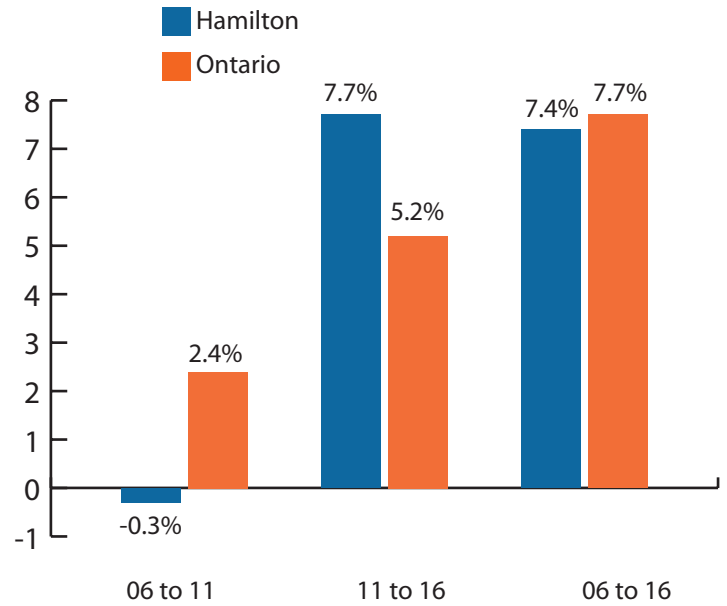
Section 2: Employment Trends

TABLE 5. Total Employment, Retail Trade 2006-2016, Place-of-Work, Hamilton (Census Division)



Source: 2006 Census; 2011 National Household Survey; 2016 Census

TABLE 6. Percentage Change in Retail Trade, 2006 to 2016, Place-of-Work, Ontario vs Hamilton (Census Division)

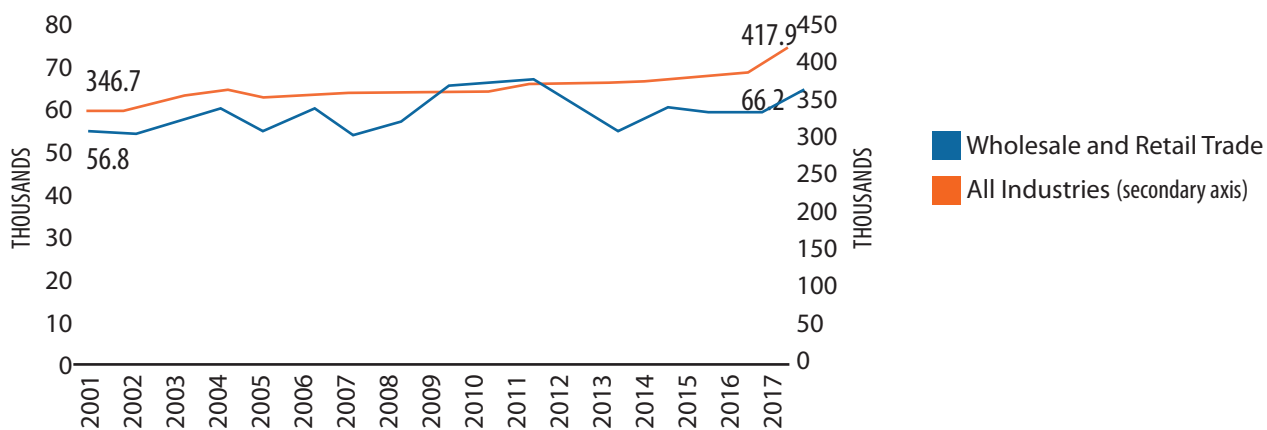


Source: 2006 Census; 2011 National Household Survey; 2016 Census

Long-Term Trends in Employment

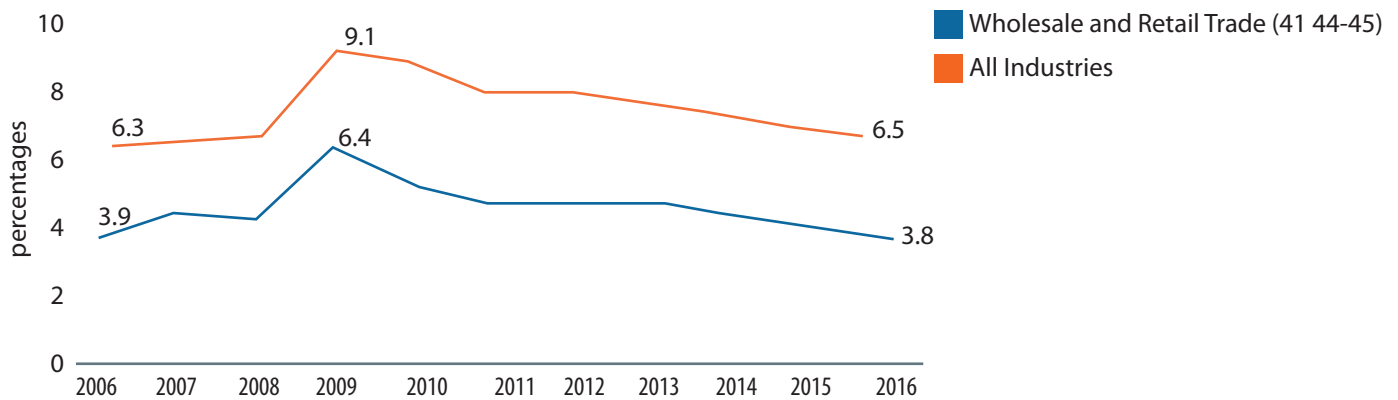
The following two tables use Labour Force Survey (LFS) data. Using LFS we can see long term trends and identify any annual fluctuations. Combining data sources gives a more complete picture. It should be noted that LFS uses Hamilton Census Metropolitan Area as the geography which includes Burlington and Grimsby. The Census uses Hamilton Census Division which excludes these two cities. This means employment numbers will be slightly higher using LFS data.

TABLE 7. Total Employment, Wholesale and Retail Trade, 2001 to 2016, Hamilton (Census Metropolitan Area)



Source: Labour Force Survey

TABLE 8. Unemployment Rate in Wholesale and Retail Trade, 2006 to 2016, Ontario



Source: Labour Force Survey

Note: This data was only available for Ontario. The industrial make-up of Ontario and Hamilton is similar. So this still gives useful information to understand the trends in the industry.

Note: This data is from Labour Force Survey (LFS) rather than the Censuses in other tables. In this table the Retail trade numbers are grouped together with the Wholesale industry. This is the way the LFS categorizes the industry. The numbers can still be used to identify trends in Retail Trade.

Future Trends

The following tables use EMSI Analyst data. This is used to provide a forecast for the sector. It uses Hamilton Census Division data, similar to the Census data.

TABLE 9. Future Employment in Retail Trade, 2018 to 2023, Place-of-Work, Hamilton (Census Division)

Region	2018 Jobs	2023 Jobs	Change	% Change
Hamilton	28,472	29,363	891	3.1%
Ontario	808,887	836,822	27,935	3.5%
Canada	2,175,909	2,242,134	66,225	3.0%

Source: EMSI Analyst

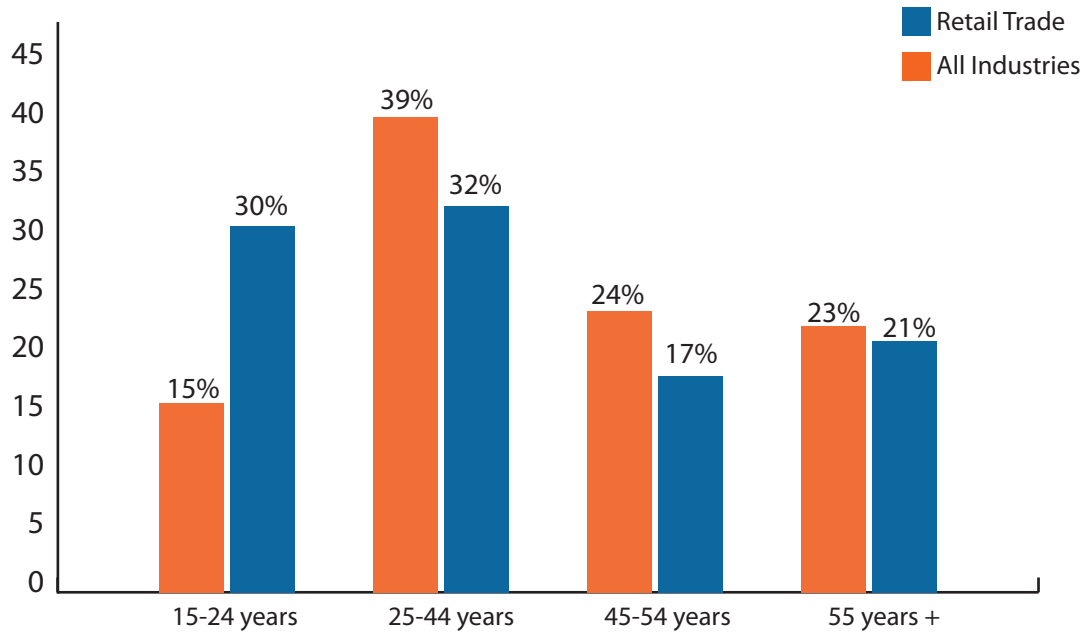
Summary

- Employment in Retail trade has seen consistent growth in employment from since the beginning of the last decade
- From 2006 to 2016 employment in Retail trade increased in Hamilton by 1,765 people. All the increase was from the last five years increasing by 7.7%, above the average seen across Ontario at 5.2%
- The unemployment rate in Retail trade has decreased over the last 10 years. At the height of the 2008/2009 recession, the unemployment rate for this industry was at 6.4%. In 2016, the unemployment rate was 3.8%, the lowest it's been in the last 10 years
- Employment in Retail trade from 2018 to 2023 is forecast to increase by 3.1% in Hamilton. This is on par with the growth expected across Ontario, at 3.5%

Section 3: Workforce Characteristics

Age

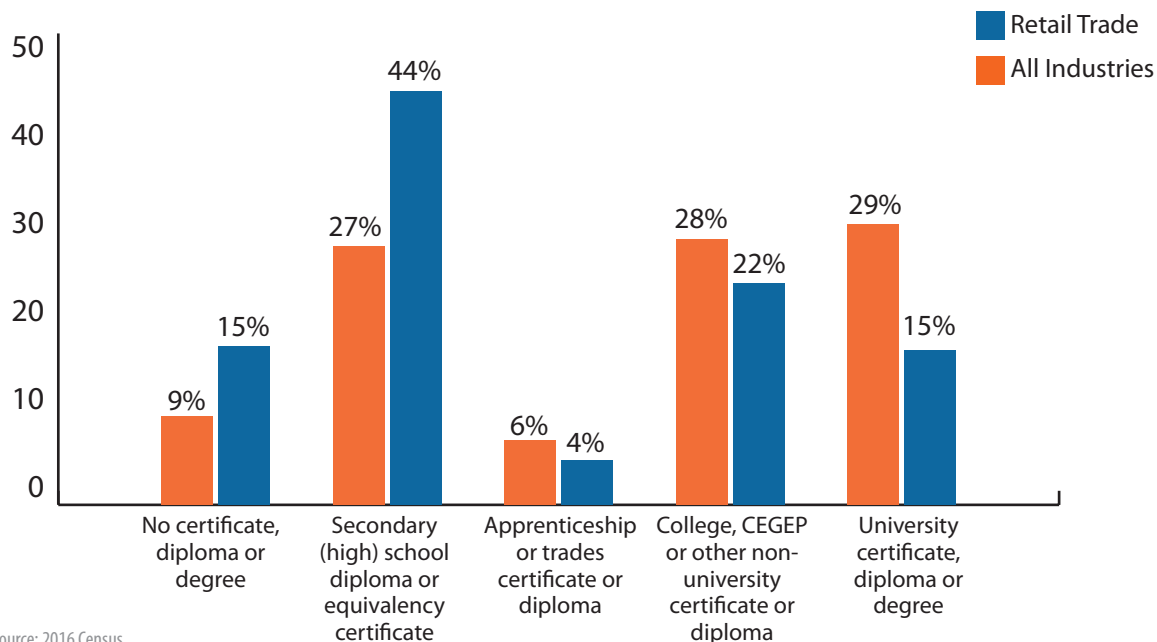
TABLE 10. Age Breakdown, Retail Trade vs All Industries, 2016, Place-of-Work, Hamilton (Census Division)



Source: 2016 Census

Education

TABLE 11. Educational breakdown, Retail Trade vs All Industries, 2016, Place-of-Work, Hamilton (Census Division)



Source: 2016 Census

Skill Level

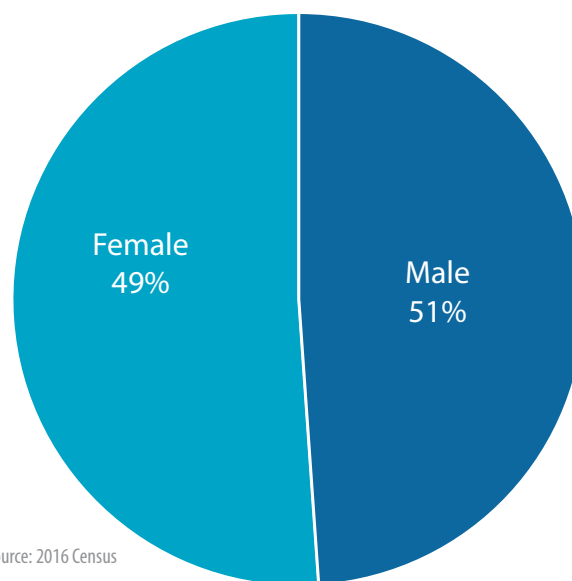
TABLE 12. Occupations by Skill Level, 2006 to 2016, Place-of-Work, Hamilton (Census Division)

Skill Level	Retail Trade			All Industries (2016)
	2006	2011	2016	
A – Occupations usually require university education	17%	18%	21%	30%
B – Occupations usually require college education or apprenticeship training	12%	14%	14%	30%
C – Occupations usually require secondary school and/or occupation-specific training	45%	42%	38%	27%
D – On-the-job training is usually provided for occupations	26%	26%	27%	13%

Source: 2006 Census; 2011 National Household Survey; 2016 Census

Gender

TABLE 13. Employment by Gender in Retail Trade, 2016, Hamilton (Census Division)



Source: 2016 Census

Summary

- The industry has a younger than average workforce as 30% of workers are between the ages of 15 to 24. This is double the share seen across industries
- The largest share of workers in Retail trade have a Secondary school diploma at 44%. In fact, 59% have high school or less, much higher than the share seen across all industries at 36%. Some of this is related to the young workers that have not finished their education
- The largest share of jobs are skill level C at 38%. These jobs typically require a secondary school diploma
- There have been changes to the skill level composition of the industry. Skill levels A and B increased slightly from a combined 29% to 35% from 2006 to 2016. Skill level C declined by 7% from 45% to 38%
- Within retail trade, the gender breakdown is split quite evenly between males and females

Section 4: Business Information

TABLE 14. Numbers of Employers by Employee Size Range, Retail Trade vs All Industries, 2017 December, Hamilton (Census Division)

	All Industries	Retail Trade
Total Businesses	47,819	3,208
Without employees	32,645	1,436
Total with employees	15,174	1,772

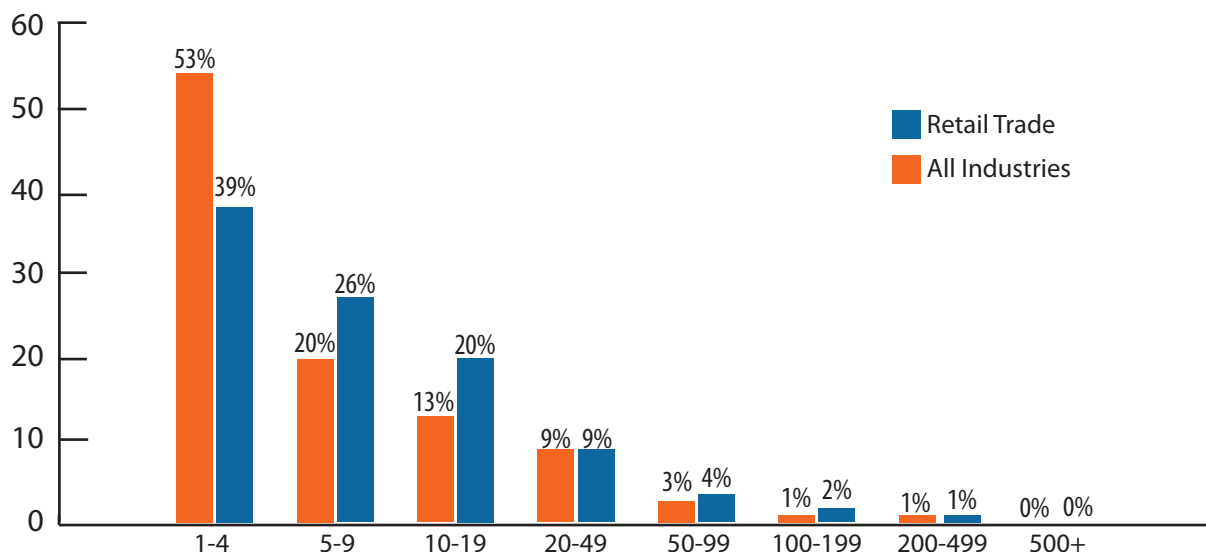
Source: Canadian Business Counts Data

TABLE 15. Number of Employers with Employees by Sub-Industry, Retail Trade, 2017 December, Hamilton Census Division

Industries	Total With employees
44-45 Retail Trade	1,772
445 - Food and beverage stores	348
446 - Health and personal care stores	272
448 - Clothing and clothing accessories stores	261
453 - Miscellaneous store retailers	174
441 - Motor vehicle and parts dealers	147
444 - Building material and garden equipment and supplies dealers	107
451 - Sporting goods, hobby, book and music stores	107
452 - General merchandise stores	95
447 - Gasoline stations	81
442 - Furniture and home furnishings stores	79
443 - Electronics and appliance stores	57
454 - Non-store retailers	44

Source: Canadian Business Counts Data

TABLE 16. Share of Employers by Employee Size Range, Retail Trade vs. All Industries, 2017 December, Hamilton (Census Division)



Source: Canadian Business Counts Data

Summary

- There are 3,208 Retail trade businesses in Hamilton, the majority of these are businesses with employees
- Food and beverage stores have the most number of businesses with employees, 348
- Eighty-four percent of Retail trade businesses have under 20 employees, similar to the shares seen across all industries

Section 5: Occupational Information

TABLE 17. Top 20 Occupations in Retail Trade, 2016, Place-of-Work, Hamilton (Census Division)

Occupations	# of People Employed	Change from 2011 to 2016	% Change from 2011 to 2016	Unemployment Rate (%)	Income (\$)
6421 Retail salespersons	6,880	-580	-8%	6.4	33,117
0621 Retail and wholesale trade managers	4,250	900	27%	2.6	47,892
6611 Cashiers	3,520	205	6%	9.3	23,259
6622 Store shelf stockers, clerks and order fillers	2,260	285	14%	9.4	28,399
6211 Retail sales supervisors	720	145	25%	1.8	31,677
3219 Other medical technologists and technicians (except dental health)	560	-35	-6%	3.6	36,902
6552 Other customer and information services representatives	540	315	1.4	8.8	43,348
3131 Pharmacists	420	95	29%	0	101,581
7321 Automotive service technicians, truck and bus mechanics and mechanical repairers	370	65	21%	1.2	53,439
6711 Food counter attendants, kitchen helpers and related support occupations	300	-15	-5%	9.8	22,628
6332 Bakers	280	160	133%	5.5	30,892
7452 Material handlers	260	30	13%	7.7	44,785
1521 Shippers and receivers	250	-140	-36%	4.7	39,971
7514 Delivery and courier service drivers	220	-20	-8%	6.2	35,113
6222 Retail and wholesale buyers	210	20	11%	4.1	44,301
6623 Other sales related occupations	180	-5	-3%	15.3	25,139
7511 Transport truck drivers	180	125	227%	3.9	48,850
1522 Storekeepers and partspersons	170	-10	-6%	3.8	47,091
1411 General office support workers	160	-30	-16%	3.2	45,916
1431 Accounting and related clerks	140	60	75%	2.6	44,494

Source: 2011 National Household Survey; 2016 Census

Note1: The unemployment rate in Hamilton during 2016 was **7.0%** if you include all workers including persons aged 15 years and over who never worked for pay or self-employment or last worked for pay or self-employment prior to 2015. It is **4.8%** if these workers are not included.

Note2: **Green** indicates increases, and **red** indicates decreases in employment.

TABLE 18. Top 20 Growing Occupations, 2011 to 2016, Place-of-Work, Hamilton (Census Division)

Occupations	2011	2016	Difference	% Change
0621 Retail and wholesale trade managers	3,350	4,250	900	27%
6552 Other customer and information services representatives	225	540	315	140%
6622 Store shelf stockers, clerks and order fillers	1,975	2,260	285	14%
6611 Cashiers	3,315	3,520	205	6%
6332 Bakers	120	280	160	133%
6211 Retail sales supervisors	575	720	145	25%
7511 Transport truck drivers	55	180	125	227%
3131 Pharmacists	325	420	95	29%
7321 Automotive service technicians, truck and bus mechanics and mechanical repairers	305	370	65	21%
1431 Accounting and related clerks	80	140	60	75%
0015 Senior managers - trade, broadcasting and other services, n.e.c.	65	110	45	69%
6562 Estheticians, electrologists and related occupations	75	120	45	60%
6731 Light duty cleaners	55	100	45	82%
6733 Janitors, caretakers and building superintendents	65	110	45	69%
0122 Banking, credit and other investment managers	0	40	40	N/A
1123 Professional occupations in advertising, marketing and public relations	0	40	40	N/A
3414 Other assisting occupations in support of health services	30	70	40	133%
6221 Technical sales specialists - wholesale trade	0	40	40	N/A
6344 Jewellers, jewellery and watch repairers and related occupations	20	60	40	200%

Source: 2011 National Household Survey; 2016 Census | Note: Green indicates increases in employment.

TABLE 19. Top 10 Declining Occupations, 2011 to 2016, Place-of-Work, Hamilton (Census Division)

Occupations	2011	2016	Difference	% Change
6421 Retail salespersons	7460	6880	-580	-8%
1521 Shippers and receivers	390	250	-140	-36%
1311 Accounting technicians and bookkeepers	195	90	-105	-54%
2242 Electronic service technicians (household and business equipment)	135	60	-75	-56%
3231 Opticians	125	70	-55	-44%
0631 Restaurant and food service managers	50	0	-50	-100%
5242 Interior designers and interior decorators	80	40	-40	-50%
9474 Photographic and film processors	40	0	-40	-100%
0114 Other administrative services managers	55	20	-35	-64%
1432 Payroll administrators	55	20	-35	-64%
1452 Correspondence, publication and regulatory clerks	35	0	-35	-100%
3219 Other medical technologists and technicians (except dental health)	595	560	-35	-6%
1221 Administrative officers	120	90	-30	-25%
1411 General office support workers	190	160	-30	-16%
6322 Cooks	110	80	-30	-27%
6342 Tailors, dressmakers, furriers and milliners	50	20	-30	-60%

Source: 2011 National Household Survey; 2016 Census

Note: Red indicates decreases in employment.

TABLE 20. Top 10 Entry Level Jobs (Skill Level C), 2016, Place-of-Work, Hamilton (Census Division)

Occupation	Number of People	Difference	% Change
6421 Retail salespersons	6,880	-580	-8%
6552 Other customer and information services representatives	540	315	140%
7452 Material handlers	260	30	13%
1521 Shippers and receivers	250	-140	-36%
7514 Delivery and courier service drivers	220	-20	-8%
7511 Transport truck drivers	180	125	227%
1522 Storekeepers and partpersons	170	-10	-6%
1411 General office support workers	160	-30	-16%
1431 Accounting and related clerks	140	60	75%
6562 Estheticians, electrologists and related occupations	120	45	60%

Source: 2011 National Household Survey; 2016 Census

Note: Green indicates increases, and red indicates decreases in employment.

TABLE 21. Top 10 Growing Entry Level Jobs (Skill Level C), 2016, Place-of-Work, Hamilton (Census Division)

Occupations	2011	2016	Change	% Change
6552 Other customer and information services representatives	225	540	315	140%
7511 Transport truck drivers	55	180	125	227%
1431 Accounting and related clerks	80	140	60	75%
6562 Estheticians, electrologists and related occupations	75	120	45	60%
3414 Other assisting occupations in support of health services	30	70	40	133%
7452 Material handlers	230	260	30	13%
7441 Residential and commercial installers and servicers	0	30	30	N/A
6411 Sales and account representatives - wholesale trade (non-technical)	45	70	25	56%
6563 Pet groomers and animal care workers	35	60	25	71%
7513 Taxi and limousine drivers and chauffeurs	35	60	25	71%

Source: 2011 National Household Survey; 2016 Census

Note: Green indicates increases in employment.

TABLE 22. Top 3 Declining Entry Level Jobs (Skill Level C), 2016, Place-of-Work, Hamilton (Census Division)

Occupations	2011	2016	Change	% Change
6421 Retail salespersons	7460	6880	-580	-8%
1521 Shippers and receivers	390	250	-140	-36%
9474 Photographic and film processors	40	0	-40	-100%
1432 Payroll clerks	55	20	-35	-64%
1452 Correspondence, publication and regulatory clerks	35	0	-35	-100%
1411 General office support workers	190	160	-30	-16%
7514 Delivery and courier service drivers	240	220	-20	-8%
6513 Food and beverage servers	30	10	-20	-67%
9522 Motor vehicle assemblers, inspectors and testers	30	10	-20	-67%
1414 Receptionists	125	110	-15	-12%
1422 Data entry clerks	35	20	-15	-43%

Source: 2011 National Household Survey; 2016 Census

Note: Red indicates decreases in employment.

Summary

- Table 18 shows the top 20 occupations by people employed in Retail trade. Retail salesperson, 6,880 workers , and Retail and wholesale trade managers, 4,250 workers, are the top two
- Among the top 20 there is a mix of growing and declining occupations
- Table 19 and 20 show the top growing and declining occupations. The occupations that grew the most employment over the last five years were Retail and wholesale trade managers
- Tables 21 to 22 relate to entry level positions. They show the top 10 in employment and the top growing and declining occupations. Other customer and information services representatives grew the most from 2011 to 2016
- The top declining occupation is also an entry-level job: Retail salesperson. This occupation declined by 580 jobs

Section 6: Job Postings

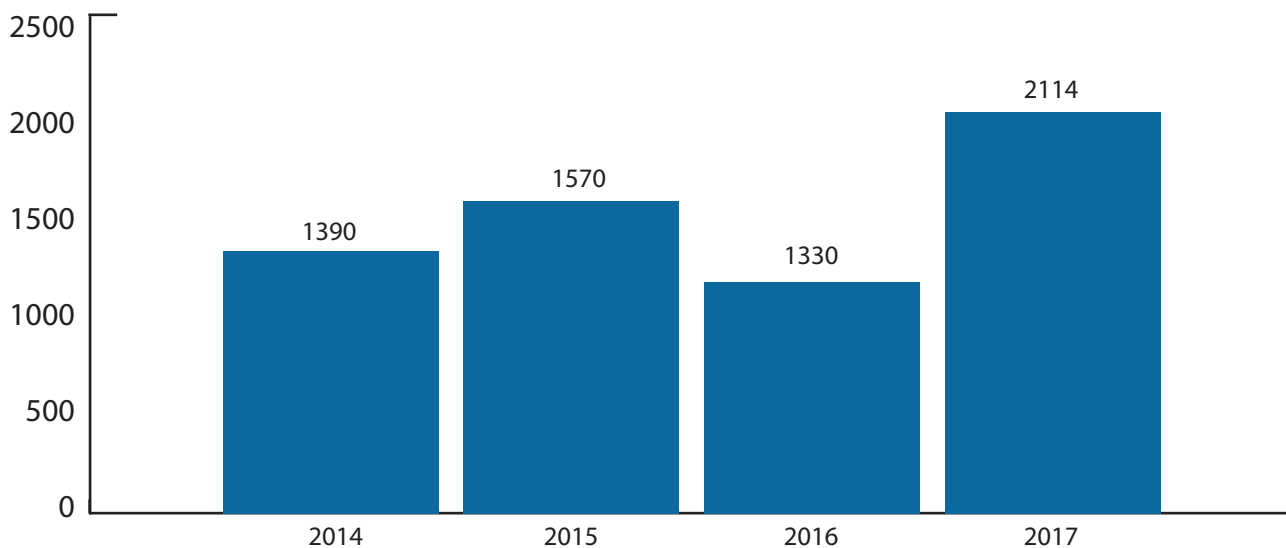
TABLE 23. Top 15 Job Postings, 2017, Hamilton (Census Division)

Occupations	Job Postings
6623 - Other sales related occupations	431
6421 - Retail salespersons	414
6000 - Sales and service (unidentified sub-category)	267
0621 - Retail and wholesale trade managers	224
6611 - Cashiers	124
3414 - Other assisting occupations in support of health services	82
6222 - Retail and wholesale buyers	61
6211 - Retail sales supervisors	57
0000 - Management (unidentified sub-category)	55
3131 - Pharmacists	38

Source: Vicinity Data

Note: The following list does not include all job postings available in Retail Trade. Many postings do not list the industry therefore the program (Vicinity Data) is not able to account for these postings.

TABLE 24. Job Postings in Retail Trade, Talent Neuron Vs Vicinity Jobs



Source: Talent Neuron, Vicinity Jobs

Summary

- Retail salesperson is still one of the most posted jobs even though it declined the most the last five years. This shows this job has a lot of turnover
- Retail trade has seen a consistent amount of job postings hovering around 1,300. In 2017 it increased to 2,114 job postings