



# Community Labour Market Report

By Amandine Martel & José-Karl Noiseux

# CITY OF THUNDER BAY

The *Community Labour Market Report series* provides local labour market indicators to assist community leaders and organizations in the decision-making process. The goal of this report is to provide community actors with a better understanding of what is happening in their community. It does not attempt to explain the reasons behind the trends, spikes or troughs in the provided data. This information is intended as a starting point for an evidence-based conversation by the community about why certain changes are occurring. This report is a first step. It is now up to you, the reader, and your fellow community members to explore and address the challenges and opportunities your community is experiencing. This report examines current labour demand and supply data from Thunder Bay, Ontario, and analyzes how each data set aligns with the other.

In the report, 'Thunder Bay' refers to the City of Thunder Bay; 'Thunder Bay District' or 'district' refers to the Census Division as defined by Statistics Canada; and 'Thunder Bay CMA' refers to Statistics Canada's Census Metropolitan Agglomeration (CMA) of Thunder Bay, which is comprised of the City of Thunder Bay and the neighbouring communities of Neening, Gillies, O'Connor, Conmee, Oliver Paipoonge, Fort William First Nation and Shuniah.

## DEMAND



### 01. Employers

Central to local labour market planning is an understanding of the characteristics of area employers, such as their number, size, and the industries they represent. Changes in any of these factors over time affect employment levels and employment opportunities within a local labour market.

Thunder Bay's employers are predominately small businesses. Indeed, 76.2 percent of businesses in the community have fewer than five employees (Table 2). By comparison, however, in June 2016, 87 percent of Ontario businesses had fewer than five employees. The city has several large employers (i.e., those with 100 or more employees), such as the hospital, the school boards, and those in the mining sector. In Thunder Bay, the number of small and medium-size enterprises (i.e., those with 0 to 99 employees) did increase by 1.3 percent between 2015 and 2016.<sup>1</sup> The number of large enterprises declined between 2015 and 2016, possibly due to downsizing.

In June 2016, the real estate, the professional, scientific and technical services, and the ambulatory health care services sectors had the highest number of employers (Table 1). Yet the majority of enterprises in the real estate industry are relatively small, with fewer than five employees. Therefore, these businesses do not represent a large proportion of total employment in the community. The professional, scientific and technical services and the ambulatory health care services sectors were also dominated by small businesses, but each sector did have a few larger employers.

Thunder Bay differs from the rest of the district as it has a smaller share of total employment in the truck transportation sector and a larger share in services, such as real estate and ambulatory health care.

<sup>1</sup> Businesses with zero employees are self-employed entrepreneurs who do not have any employee on their payroll.

**TABLE 1**

TOP 20 EMPLOYERS BY INDUSTRY, AND AS A PERCENTAGE OF TOTAL NUMBER OF EMPLOYERS, JUNE 2016	Total	Thunder Bay (% of Total Number of Employers)	Thunder Bay District (% of Total Number of Employers)	Ontario (% of Total Number of Employers)
531 - Real estate	1,479	17.9	15.4	15.5
541 - Professional, scientific & technical services	692	8.4	7.7	12.6
621 - Ambulatory health care services	662	8.0	7.3	4.9
238 - Specialty trade contractors	448	5.4	5.6	5.3
523 - Securities, commodity contracts & other financial investment & related activities	281	3.4	3.3	3.2
722 - Food services & drinking places	262	3.2	3.1	2.5
561 - Administrative & support services	253	3.1	2.8	3.6
813 - Religious, grant-making, civic & professional & similar organizations	221	2.7	2.5	1.8
236 - Construction of buildings	219	2.7	2.8	2.9
811 - Repair & maintenance	205	2.5	2.7	1.8
812 - Personal & laundry services	205	2.5	2.3	1.8
551 - Management of companies & enterprises	177	2.1	2.1	2.1
484 - Truck transportation	114	1.4	1.9	3.2
624 - Social assistance	107	1.3	1.2	0.9
237 - Heavy & civil engineering construction	103	1.2	1.2	0.8
445 - Food & beverage stores	102	1.2	1.5	1.0
448 - Clothing & clothing accessories stores	87	1.1	0.9	0.8
611 - Educational services	87	1.1	1.1	1.0
113 - Forestry & logging	80	1.0	1.8	0.1
524 - Insurance carriers & related activities	80	1.0	0.8	0.9
<b>Total Number of Employers</b>	<b>8,260</b>	-	-	-

Source: Statistics Canada, Canadian Business Counts, and author's calculations based on Statistics Canada, Business Counts

TABLE 2

CHANGE IN NUMBER OF EMPLOYERS BY NUMBER OF EMPLOYEES IN THUNDER BAY	June 2015	June 2016	2015-2016 Change (#)	2015-2016 Change (%)	Ontario Change (%)
0	4,685	4,848	163	2.0	2.7
1-4	1,533	1,522	-11	-0.1	1.7
5-9	766	718	-48	-0.6	0.7
10-19	588	589	1	0.0	-0.3
20-49	383	369	-14	-0.2	-2.5
50-99	118	135	17	0.2	18.4
100-199	56	51	-5	-0.1	-1.7
200-499	20	17	-3	0.0	0.2
500+	11	11	0	0.0	1.1
<b>Total Number of Employers</b>	<b>8,160</b>	<b>8,260</b>	<b>100</b>	<b>1.2</b>	<b>2.2</b>

<sup>2</sup> At the community level, the Business Counts data can be inconsistent due to concordance issues in geographical boundaries. Business data is collected according to postal codes, however, the data is aggregated and displayed according to CSD boundaries. The postal code and CSD boundaries do not perfectly match and this can cause misreporting of data. Especially when two communities are small, rural and close to one another. Where Northern Policy Institute becomes aware of such issues, we make every effort to correct them at the earliest opportunity by working directly with Statistics Canada and locally affected communities.

Source: Statistics Canada, Canadian Business Counts, and author's calculations based on Statistics Canada, Business Counts<sup>2</sup>



Business creation per **1,000** persons,  
June 2015-June 2016

Source: Author's calculations based on Statistics Canada, Canadian Business Counts;  
Statistics Canada estimates of population

## 02. Employment by Industry

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Employment by industry data<sup>3</sup> describe the type of business conducted by a person's employer. The industrial structure of an area—and, more specifically, shifts in industrial structure—can have significant consequences for the local labour market, such as the types of jobs available, their respective salaries, and the type of education and skills these jobs require.

In 2016, the health care and social assistance sector was the largest source of employment (19.1 percent of total employment – Table 3) in Thunder Bay CMA.

<sup>3</sup> Data from Statistics Canada, such as the census, or the National Household Survey (NHS), are used throughout this report. This data source has limitations, namely, to ensure confidentiality of individual respondent identity and characteristics, Statistics Canada National Household Survey (NHS) data are subject to non-disclosure rules. All estimates in NHS tabulations are subjected to a process called random rounding. Random rounding transforms all raw estimates to random rounded estimates. This reduces the possibility of identifying

The same year, wholesale and retail trade represented 15.5 percent of total employment—the second-largest source of employment for the community (Table 3). Therefore, any changes in these industries will have a significant impact on Thunder Bay CMA's employment. Between 2014 and 2016, employment in health care and social assistance in Thunder Bay CMA increased by 0.9 percent (Table 4)

individuals within the tabulations. All estimates greater than 10 are rounded to base 5, estimates less than 10 are rounded to base 10. The total value of summed or grouped data may not match the individual values. Similarly, percentages, which Statistics Canada calculates on rounded data, may not necessarily add up to 100 percent. Statistics Canada adjusts figures retroactively. Author's calculations are based on data available at the time of publication and are therefore subject to change.

In 2016, the health care and social assistance sector was the **largest source of employment** in Thunder Bay CMA...

**TABLE 3**

EMPLOYMENT BY INDUSTRY, AND AS A PERCENTAGE OF TOTAL, 2016		Thunder Bay CMA (#)	Thunder Bay CMA (% of Total)	Northwestern Ontario Excluding Thunder Bay CMA (% of Total)	Ontario (% of Total)
62	Health care & social assistance	11,500	19.1	18.1	12.0
41,44-45	Wholesale & retail trade	9,300	15.5	14.1	14.8
61	Educational services	5,200	8.7	9.8	7.2
72	Accommodation & food services	5,000	8.3	8.3	6.5
23	Construction	4,300	7.2	9.5	7.2
91	Public administration	3,900	6.5	6.0	5.0
54	Professional, scientific & technical services	3,300	5.5	2.3	8.5
48-49	Transportation & warehousing	3,200	5.3	5.0	4.7
31-33	Manufacturing	2,600	4.3	7.3	10.7
81	Other services (except public administration)	2,600	4.3	4.0	3.9
52-53	Finance, insurance, real estate, rental & leasing	2,600	4.3	3.3	7.9
51,71	Information, culture & recreation	2,400	4.0	1.8	4.5
21,113, 114,115	Forestry, fishing, mining, quarrying, oil & gas	1,600	2.7	6.0	0.5
55-56	Business, building & other support services	1,500	2.5	2.0	4.7
11	Agriculture	X	X	X	1.1
22	Utilities	X	X	X	0.7
<b>All Industries</b>		<b>60,100</b>	<b>-</b>	<b>-</b>	<b>-</b>

Sources: Statistics Canada, Labour Force Survey, CANSIM Tables: 282-0125 and 282-0131, author's calculations

An 'X' indicates that the data were suppressed for confidentiality reasons. The Labour Force Survey suppresses data when an estimate is below 1,500 for Ontario, its Economic Regions, or Census Metropolitan Areas.

TABLE 4

EMPLOYMENT BY INDUSTRY IN THE THUNDER BAY CMA AND ONTARIO	Thunder Bay CMA				Ontario
	2012	2014	2016	2014-2016 Change (%)	2014-2016 Change (%)
<b>Employment by Industry</b>					
<b>Goods-producing Sector</b>	<b>10,400</b>	<b>8,900</b>	<b>9,700</b>	<b>9.0</b>	<b>2.6</b>
Agriculture	X	X	X	X	-5.0
Forestry, fishing, mining, oil & gas	1,600	<1,500	1,600	>6.7	7.8
Utilities	X	X	X	X	-3.1
Construction	4,200	4,200	4,300	2.4	7.8
Manufacturing	3,400	2,300	2,600	13.0	0.4
<b>Services-producing Sector</b>	<b>51,400</b>	<b>52,700</b>	<b>50,400</b>	<b>-4.4</b>	<b>1.6</b>
Wholesale & retail trade	8,900	9,800	9,300	-5.1	-1.3
Transportation & warehousing	2,900	3,300	3,200	-3.0	-0.5
Finance, insurance, real estate & leasing	2,800	2,700	2,600	-3.7	8.4
Professional, scientific & technical services	3,100	3,100	3,300	6.5	6.2
Business, building & other support services	2,500	2,700	1,500	-44.4	-2.6
Educational services	6,200	4,800	5,200	8.3	1.7
Health care & social assistance	11,100	11,400	11,500	0.9	5.0
Information, culture & recreation	2,600	2,400	2,400	0.0	0.5
Accommodation & food services	5,000	5,100	5,000	-2.0	1.4
Other services (except public administration)	2,500	2,800	2,600	-7.1	-3.7
Public administration	4,000	4,500	3,900	-13.3	-3.8
<b>Total Employed</b>	<b>61,800</b>	<b>61,500</b>	<b>60,100</b>	<b>-2.3</b>	<b>1.8</b>

Sources: Statistics Canada, Labour Force Survey, CANSIM Tables: 282-0125 and 282-0131, author's calculations

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### 03. Employment by Occupation

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Employment by occupation data describe the type of work an employee does on the job. While growing industries need additional workers, the demand for specific occupations is a function of the work that needs to be done. Both the changing marketplace and the advance of technology alter the demand for occupations, with some growing strongly and others in decline. These changes have an impact on the types of jobs offered, their respective salaries, and the type of education and skills required. Indeed, an increase in entry-level occupations may have a different impact on the community than growth in senior-level occupations.

In 2016, sales and services occupations (NOCS category 6) represented the largest share of total employment in the Thunder Bay CMA (more than 26 percent of total employment). Between 2014 and 2016, employment in sales and services

occupations decreased by 6.6 percent (Table 6) in the Thunder Bay CMA—a higher reduction than Ontario's 1.7 percent decrease.

Trades, transport and equipment operators and related occupations (NOCS category 7) represented 15.3 percent of total employment. Between 2014 and 2016, trades, transport and equipment operators and related occupations remained stable in the Thunder Bay CMA, whereas occupations in this sector increased by 1.4 percent overall in Ontario.

Occupations in education, law and social, community and government services represented 14.5 percent of employment in Thunder Bay CMA in 2016. These occupations have grown by 3.6 percent since 2014 compared to a 9.5 percent growth rate for Ontario during the same time period.

...in 2016, **sales and service occupations** represented the **largest** share of total employment...

**TABLE 5**

EMPLOYMENT BY OCCUPATION, AND AS A PERCENTAGE OF TOTAL, 2016		Thunder Bay CMA (#)	Thunder Bay CMA (% of total)	Northwestern Ontario Excluding Thunder Bay CMA (% of total)	Ontario (% of total)
6	Sales & service occupations	15,600	26.0	24.4	24.2
7	Trades, transport & equipment operators & related occupations	9,200	15.3	18.6	13.0
4	Occupations in education, law & social, community & government services	8,700	14.5	16.3	11.9
1	Business, finance & administration occupations	8,400	14.0	9.8	16.6
3	Health occupations	6,300	10.5	8.5	6.8
2	Natural & applied sciences & related occupations	4,100	6.8	3.5	8.2
0	Management occupations	3,800	6.3	9.5	9.1
5	Occupations in art, culture, recreation & sport	1,500	2.5	0.8	3.3
8	Natural resources, agriculture & related production occupations	X	X	X	1.4
9	Occupations in manufacturing & utilities	X	X	X	5.5
<b>All occupations</b>		<b>60,100</b>	<b>-</b>	<b>-</b>	<b>-</b>

Sources: Statistics Canada, Labour Force Survey, CANSIM Tables: 282-0157 and 282-0159, author's calculations

An 'X' indicates that the data were suppressed for confidentiality reasons. The Labour Force Survey suppresses data when an estimate is below 1,500 for Ontario, its Economic Regions, or Census Metropolitan Areas.



**TABLE 6**

EMPLOYMENT BY OCCUPATION IN THUNDER BAY CMA AND ONTARIO		Thunder Bay CMA				Ontario
		2012	2014	2016	2014-2016 Change (%)	2014-2016 Change (%)
0	Management occupations	5,000	4,100	3,800	-7.3	-0.3
1	Business, finance & administration occupations	9,200	10,600	8,400	-20.8	0.7
2	Natural & applied sciences & related occupations	4,400	3,400	4,100	20.6	3.5
3	Health occupations	6,200	5,400	6,300	16.7	4.5
4	Occupations in education, law & social, community & government services	8,000	8,400	8,700	3.6	9.5
5	Occupations in art, culture, recreation & sport	X	X	X	X	7.7
6	Sales & service occupations	15,900	16,700	15,600	-6.6	-1.7
7	Trades, transport & equipment operators & related occupations	9,200	9,200	9,200	0.0	1.4
8	Natural resources, agriculture & related production occupations	X	X	X	X	-0.9
9	Occupations in manufacturing & utilities	1,600	1,500	<1,500	<0.1	0.8
<b>All occupations</b>		<b>61,800</b>	<b>61,500</b>	<b>60,100</b>	<b>-2.3</b>	<b>1.8</b>

Sources: Statistics Canada, Labour Force Survey, CANSIM Tables: 282-0157 and 282-0159, author's calculations

An 'X' indicates that the data was suppressed for confidentiality reasons. The Labour Force Survey suppresses data when an estimate is below 1,500 for Ontario, its Economic Regions or Census Metropolitan Areas.

## 04. Local Knowledge

This section features a summary of all jobs posted online in Thunder Bay.<sup>4</sup> Although this source of data has its limitations, it does provide a general idea of the vacancies and job opportunities in the community at a given time to complement the employment data presented previously.

<sup>4</sup> Vicinityjobs.ca gathers and tallies job ads posted on diverse websites, such as jobbank.ca, indeed.ca, and monster.ca. The system then strives to remove duplicates, and to classify job ads into occupational categories.



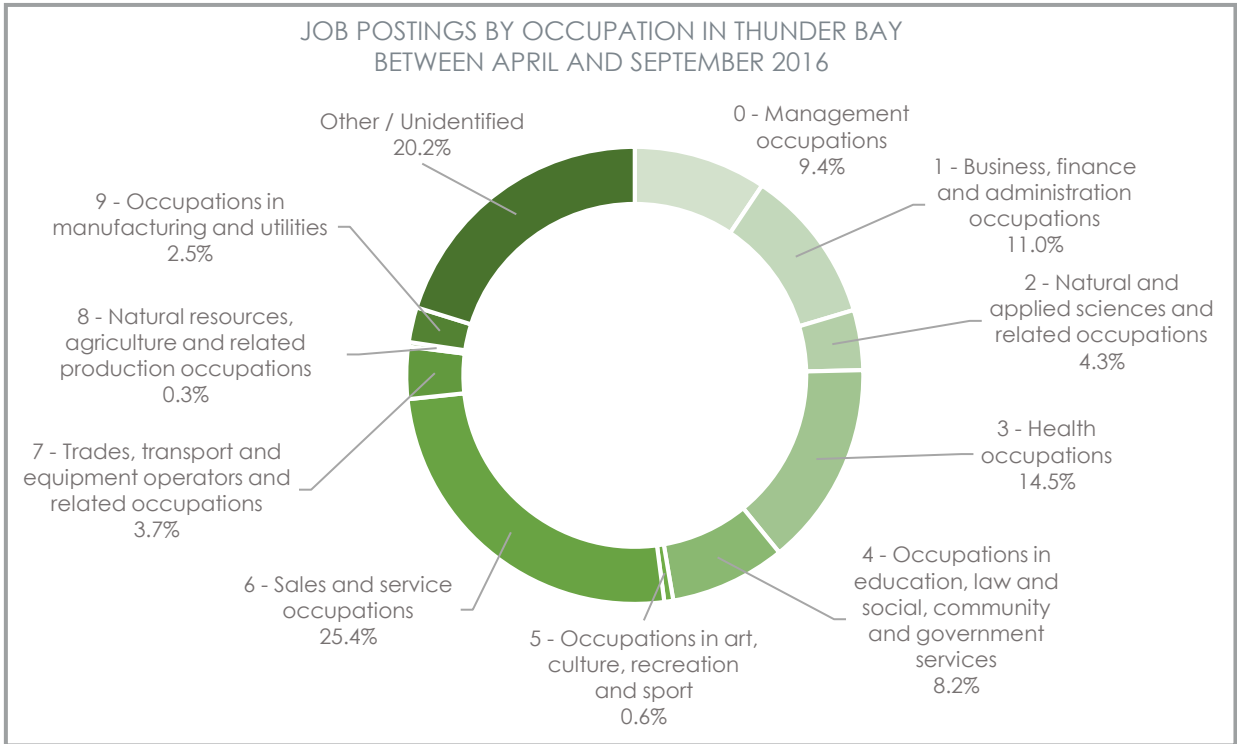
1,575

**jobs posted**

between April and September 2016

Source: Vicinityjobs.ca

FIGURE 1



Sources: Vicinityjobs.ca and on-the-ground research on local job boards



TABLE 7

MOST DEMANDED POSITIONS IN THUNDER BAY BETWEEN APRIL AND SEPTEMBER 2016		
Most-demanded Positions	Number of Postings	% of Total
Sales and service occupations	400	25.4
Health occupations	228	14.5
Business, finance and administration occupations	173	11.0
Management occupations	148	9.4
Occupations in education, law and social, community and government services	129	8.2

Sources: Vicinityjobs.ca and on-the-ground research on local job boards

TABLE 8

NUMBER OF POSTINGS BY TYPE IN THUNDER BAY BETWEEN APRIL AND SEPTEMBER 2016		
Type	Number of Postings	% of Total
Full time	416	26.4
Part time	30	1.9
Contract, casual	264	16.8
Unknown	865	54.9

Sources: Vicinityjobs.ca and on-the-ground research on local job boards

TABLE 9

NUMBER OF POSTINGS BY EDUCATION REQUIRED IN THUNDER BAY BETWEEN APRIL AND SEPTEMBER 2016		
Job Posted by Education and Skills Required	Number of Postings	% of Total
University Education	399	25.3
College or Vocational Education or Apprenticeship Training	301	19.1
Secondary School and/or Occupation-Specific Training	379	24.1
On-the-job Training or No Formal Education Required	168	10.7
Unknown	328	20.8

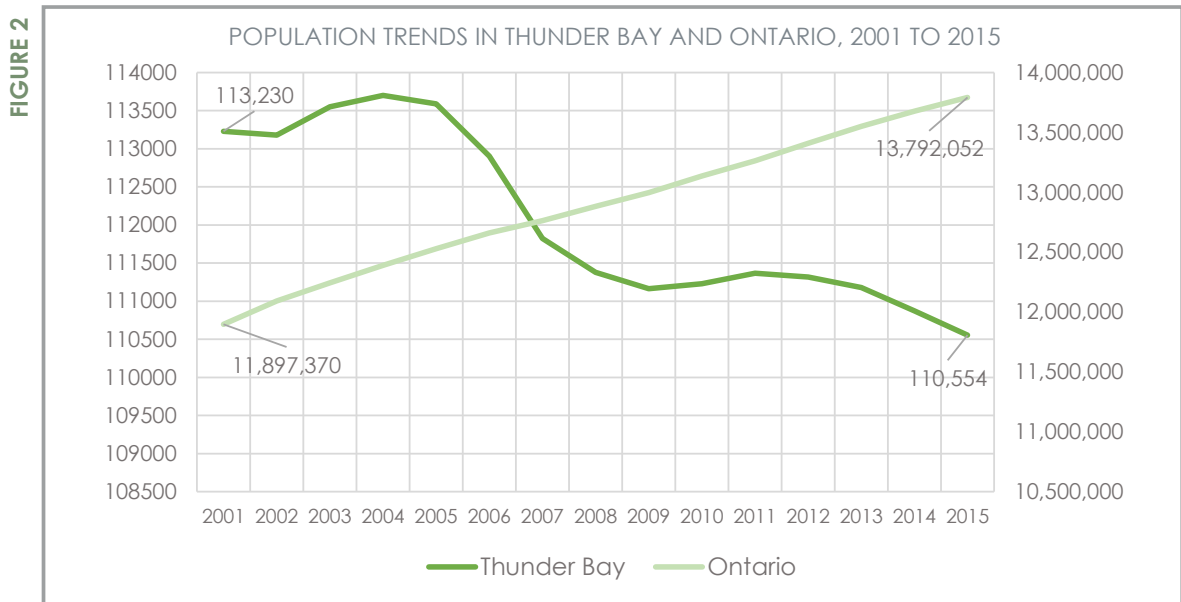
Sources: Vicinityjobs.ca, and on-the-ground research on local job boards

# SUPPLY

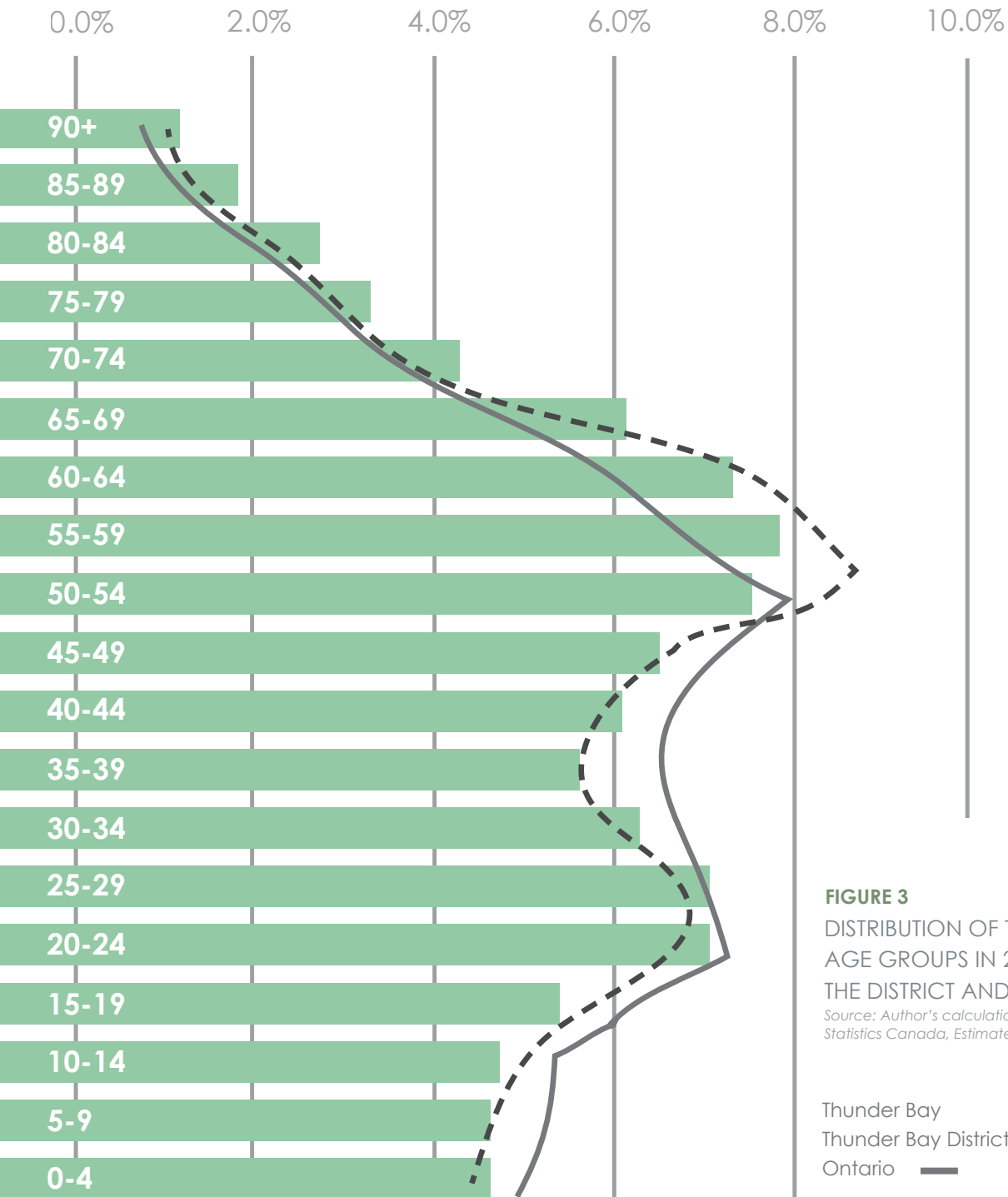
## 05. Population & Demographics

Population growth and composition are important drivers of labour market supply—the potential workers. They are also key components of the demand for some categories of workers (e.g., education or health care).

Thunder Bay's population has declined by 3.4 percent in the past 15 years. During that time, Ontario's population increased by 15.9 percent (Figure 2). The decline experienced in Thunder Bay is the result of a decreasing fertility rate and emigration—individuals leaving the community (Cuddy and Moazzami, 2016). This situation is exacerbated by the fact that Thunder Bay's population is aging faster than that of Ontario (Figure 3). These trends will have implications for the community's labour market outcomes and the demand for health care in the coming years.



Source: Statistics Canada, Estimates of population



**FIGURE 3**

DISTRIBUTION OF THE POPULATION BY AGE GROUPS IN 2015 FOR THUNDER BAY, THE DISTRICT AND FOR ONTARIO

Source: Author's calculations based on Statistics Canada, Estimates of population

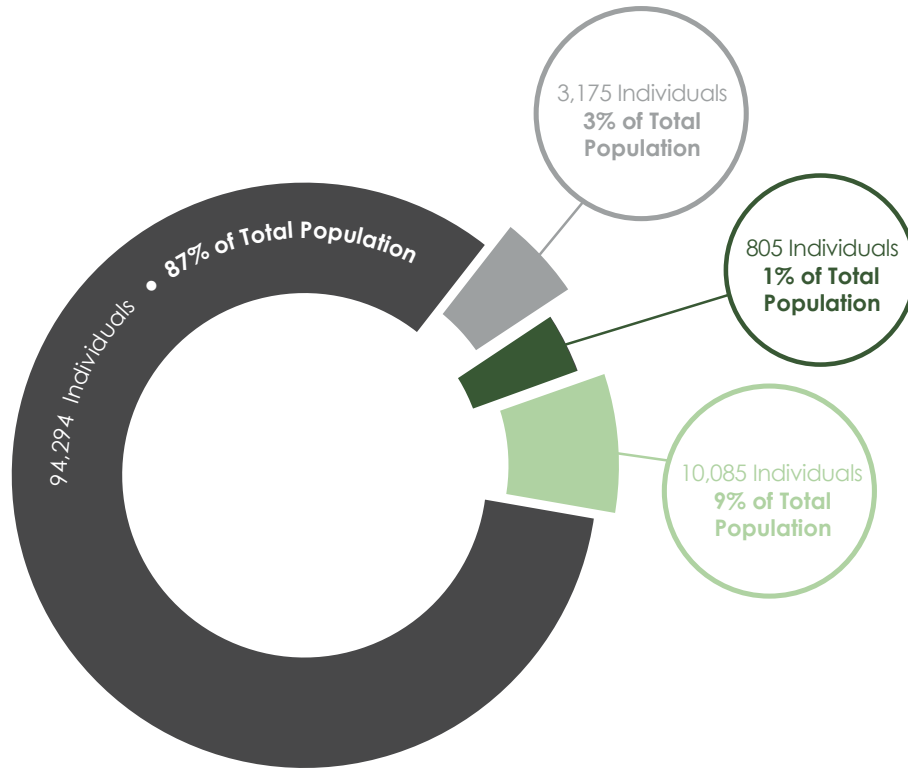
Thunder Bay █  
 Thunder Bay District - - -  
 Ontario —

# 107,909

## Thunder Bay Total population in 2016

Source: Statistics Canada, Census, 2016

The proportion of individuals ages 50 to 64, and those ages 65 and older, is higher in Thunder Bay than in the province, but slightly lower than in the rest of the District (Figure 3). Similarly, the proportion of individuals in the 20 to 34 age demographic is lower in Thunder Bay than in Ontario, but higher than in the rest of the District. Therefore, Thunder Bay's population is slightly younger than the population in the District and older than that of Ontario as a whole.



**FIGURE 4**

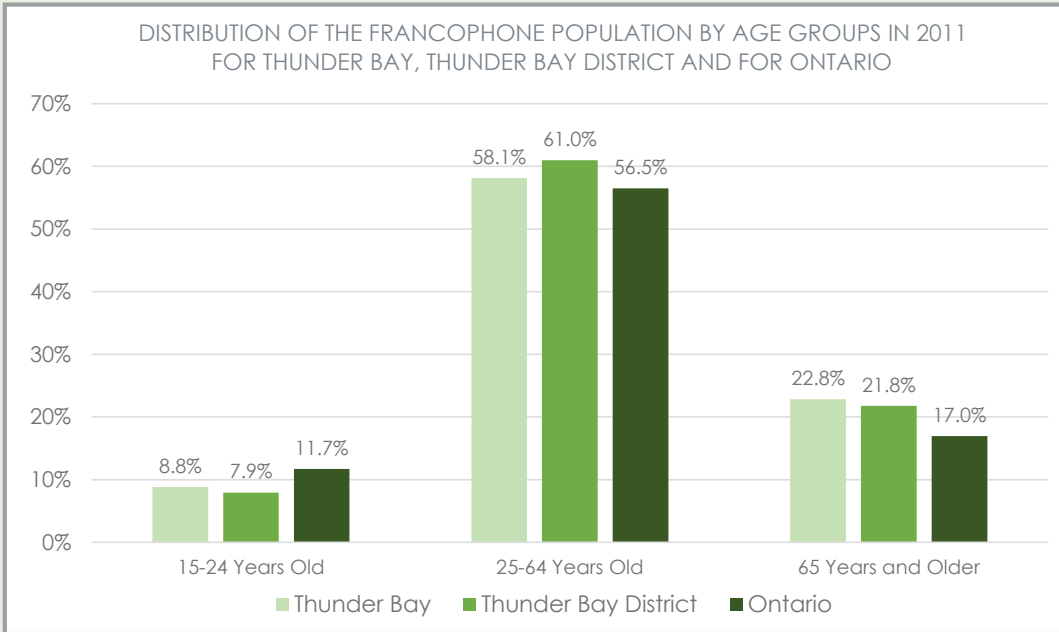
### DISTRIBUTION OF THE POPULATION BY POPULATION GROUPS IN 2011 FOR THUNDER BAY

Source: Author's calculations based on Statistics Canada, National Household Survey, 2011

\*In this context, 'Immigrant' refers to individuals who came to the community from another country in the last 5 years.

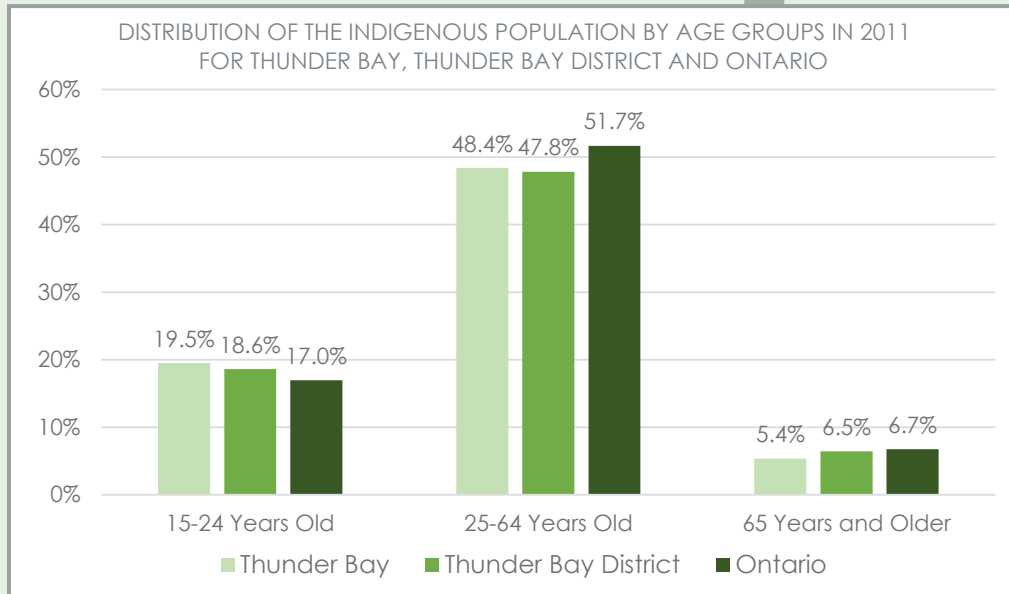
- Francophones
- Indigenous
- Immigrants
- Rest of Population

FIGURE 5



Source: Author's calculations based on Statistics Canada, National Household Survey, 2011

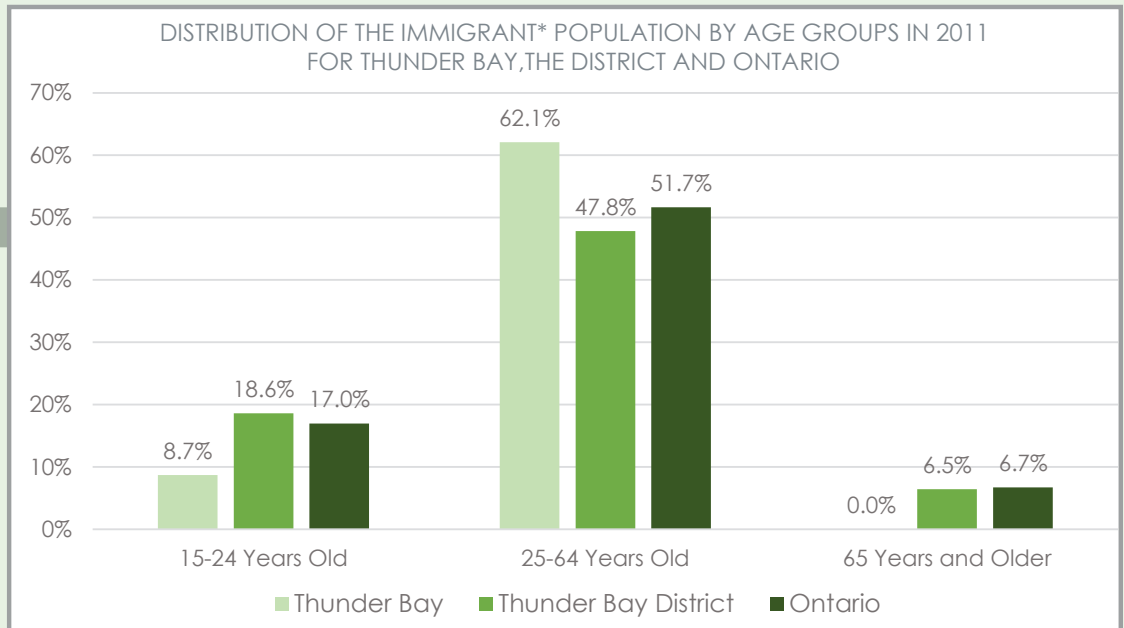
FIGURE 6



Source: Author's calculations based on Statistics Canada, National Household Survey, 2011

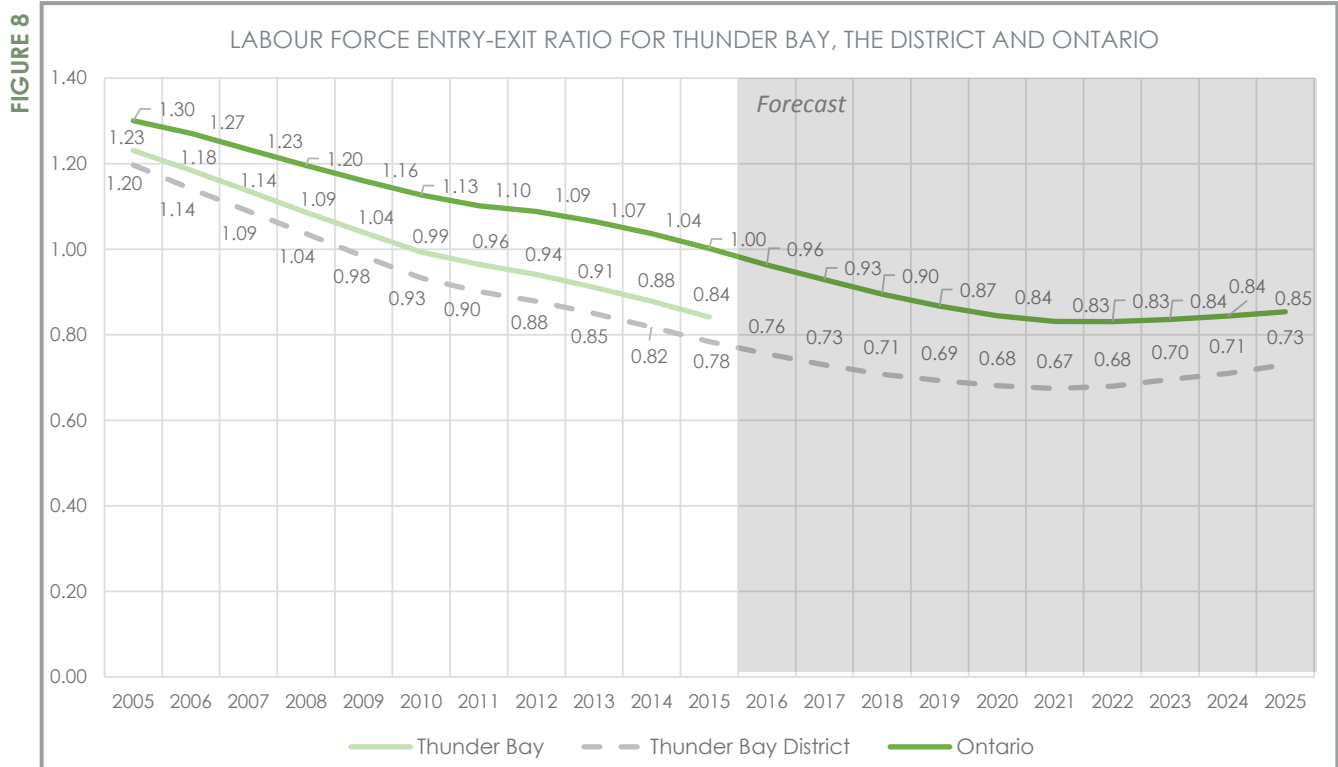


FIGURE 7



Source: Author's calculations based on Statistics Canada, National Household Survey, 2011

\*In this context, 'Immigrant' refers to individuals who came to the community from another country in the last five years

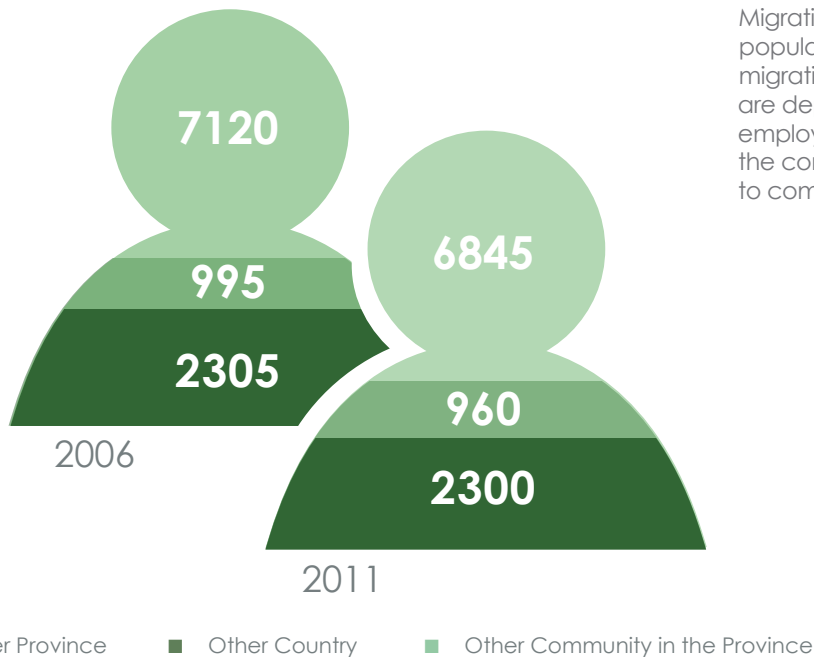


Source: Author's calculations based on Statistics Canada estimation of population and Ontario Ministry of Finance forecasts, spring 2016 population projections update, for the forecast

The labour force entry-exit ratio reflects the number of workers ready to enter the workforce (i.e., 15 to 24 years old) and replace those who are approaching retirement age (i.e., 55 to 64 years old – Figure 8). In Thunder Bay, the ratio of 0.84 indicates that there are not enough workers entering the labour market to ensure that retiring employees will be replaced. Therefore, if the situation remains unchanged, and an insufficient number of working-age newcomers are attracted to address this discrepancy, Thunder Bay may experience a labour shortage in the future.

## 06. Migration

Migration patterns can influence the population changes in an area. An area's migration patterns can also reflect, and are dependent on, among other things, employment opportunities, quality of life in the community, and the services available to community members.



**FIGURE 9**  
NEWCOMERS TO THUNDER BAY  
BY ORIGIN, 2006 AND 2011

Sources: Statistics Canada, Census, 2006,  
and National Household Survey, 2011

**TABLE 10**

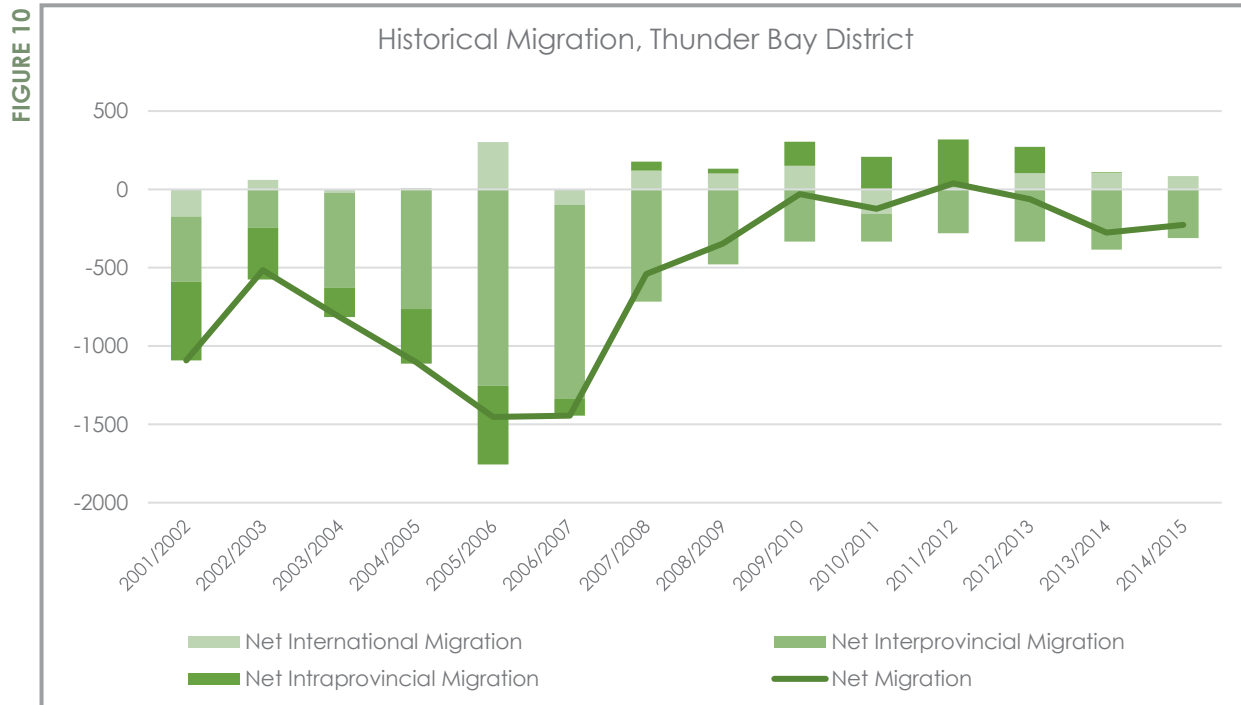
PERMANENT RESIDENTS BY INTENDED DESTINATION										
Intended Destination	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Thunder Bay	125	140	110	180	145	140	120	150	110	95
Thunder Bay District	140	150	130	190	160	150	130	155	125	105

Source: Citizenship and Immigration Canada, Permanent Residents Rounded Data Cube, 2012

The number of newcomers—from abroad, another province, or another community in the province—to Thunder Bay decreased by 3 percent between 2006 and 2011 (Figure 9). However, it is difficult to draw conclusions regarding the effect of immigration on population growth as community-level data on emigration are not available.

applies a downward pressure on population growth (Tables 11 and 12). When looking at the districts of origin and destination, it is interesting to note the many exchanges that occur between the Thunder Bay District and districts west of Thunder Bay, such as Kenora or Rainy River, or even districts in Alberta and Manitoba.

For the Thunder Bay District, the number of emigrants was greater than the number of immigrants, resulting in negative net migration during this period, which



Source: Author's calculations based on Statistics Canada, Components of population growth by census division, sex, and age group for the period from July 1 to June 30, between 2001 and 2015, based on the Standard Geographical Classification (SGC) 2011, CANSIM Table: 051-0063

**TABLE 11**

10 LARGEST ORIGINATING CANADIAN COMMUNITIES FOR IN-MIGRANTS BY AGE GROUP, 2012-2013						
District of Origin of In-migrants	0-17	18-24	25-44	45-64	65+	TOTAL
Kenora	151	102	149	65	25	492
Toronto	28	25	80	22	15	170
Rainy River	30	27	42	16	15	130
Division No. 11 - Manitoba	17	12	42	22	11	104
Algoma	15	13	40	22	8	98
Ottawa	21	11	53	9	3	97
Division No. 6 - Alberta	28	10	39	14	2	93
Simcoe	19	15	29	16	7	86
Greater Sudbury / Grand Sudbury	20	10	35	12	7	84
Cochrane	21	11	29	9	4	74
<b>Total In-migrants</b>	<b>599</b>	<b>452</b>	<b>1,060</b>	<b>417</b>	<b>180</b>	<b>2,708</b>

Source: Taxfiler

**TABLE 12**

10 LARGEST CANADIAN DESTINATIONS FOR OUT-MIGRANTS BY AGE GROUP, 2012-2013						
District of Destination of Out-migrants	0-17	18-24	25-44	45-64	65+	TOTAL
Kenora	132	51	126	59	8	376
Toronto	7	51	83	13	9	163
Division No. 6 - Alberta	22	17	72	17	12	140
Division No. 11 - Alberta	25	26	54	23	5	133
Ottawa	18	24	50	21	5	118
Algoma	32	12	38	17	4	103
Division No. 11 - Manitoba	21	18	42	16	4	101
Greater Vancouver	6	19	45	8	4	82
Rainy River	23	10	21	19	8	81
Cochrane	13	10	26	17	7	73
<b>Total Out-migrants</b>	<b>596</b>	<b>464</b>	<b>1,162</b>	<b>495</b>	<b>157</b>	<b>2,874</b>

Source: Taxfiler

## 07. Education, Literacy, Skills, and Training

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Employers often require education or experience to fill positions. Therefore, educational attainment and experience can be either a source of employment growth or a constraint if the skills available in the community do not match the local employment opportunities.

Between 2001 and 2011, a greater proportion of Thunder Bay's population achieved secondary or

post-secondary education (Figure 11).<sup>5</sup> This proportion (87.4 percent) is still slightly lower than that of the province (89.0 percent) but is higher than that of the District (86.2 percent). The distribution of secondary and post-secondary degrees is different in Thunder Bay as compared to

the province. Indeed, a smaller percentage of people hold university degrees, but a higher percentage possesses college degrees or apprenticeships.

However, the portrait of Thunder Bay's Indigenous community was quite different as of 2011. Indeed, the proportion of Indigenous people that achieved secondary or post-secondary education in Thunder Bay was 14 percent lower (see Figure 12) than that of Ontario's average population (Figure 11). This may pose a challenge in the future, given that the Indigenous population is young and will be vital in ensuring a sustainable workforce down the road (Cuddy and Moazzami, 2016).

The Francophone community had a different range of educational achievements as compared to the rest of the population, with a

lower rate of both university degrees (22.7 percent compared to 24.3 percent for Thunder Bay - Figure 11 and Figure 13) and college degrees (21.5 percent compared to 27.3 percent for Thunder Bay - Figure 11 and Figure 13) than the province, but a higher rate of apprenticeships (Figure 13).

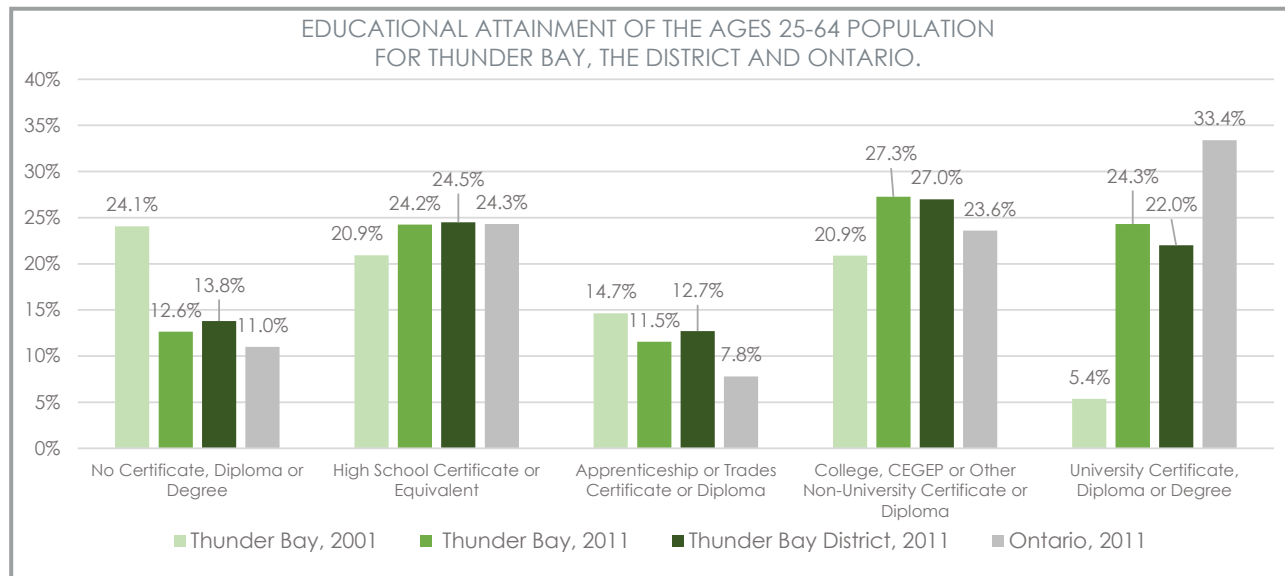
Interestingly, immigrants in Thunder Bay posted high rates of secondary or post-secondary education, but those rates were slightly lower than that of immigrants across the province (88.8 percent compared to 89.9 percent - Figure 14). However, more immigrants in Thunder Bay possessed college degrees, apprenticeships, and trade certificates than university degrees

and high school diplomas, and those rates were higher than that of immigrants in other communities across the province.

Finally, more immigrants possessed university diplomas than the average population of Thunder Bay (50.5 percent compared to 24.3 percent - Figure 11 and Figure 14).

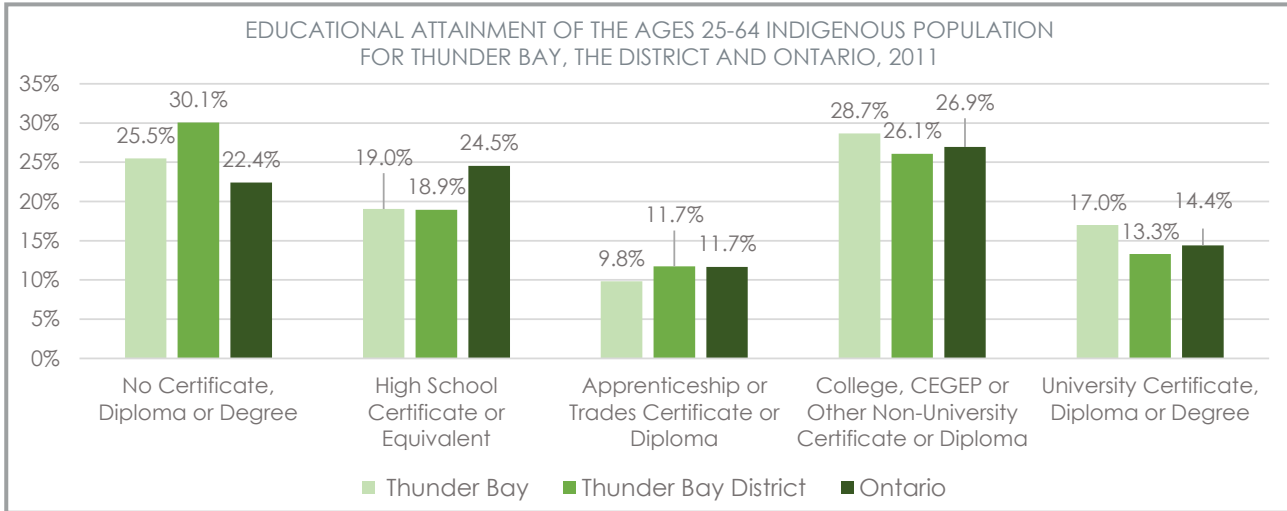
<sup>5</sup>The detailed definition of the qualifications included in each education category can be found at <http://www12.statcan.gc.ca/nhs-enm/2011/ref/dict/pop038-eng.cfm>. For example, the category 'Apprenticeship or Trades Certificate or Diploma' includes registered apprenticeship certificates and Journeyperson's certificate. It also includes other trades certificates or diplomas such as pre-employment or vocational certificates and diplomas and brief trade programs completed at community colleges, institutes of technology, vocational centres, and similar institutions.

**FIGURE 11**



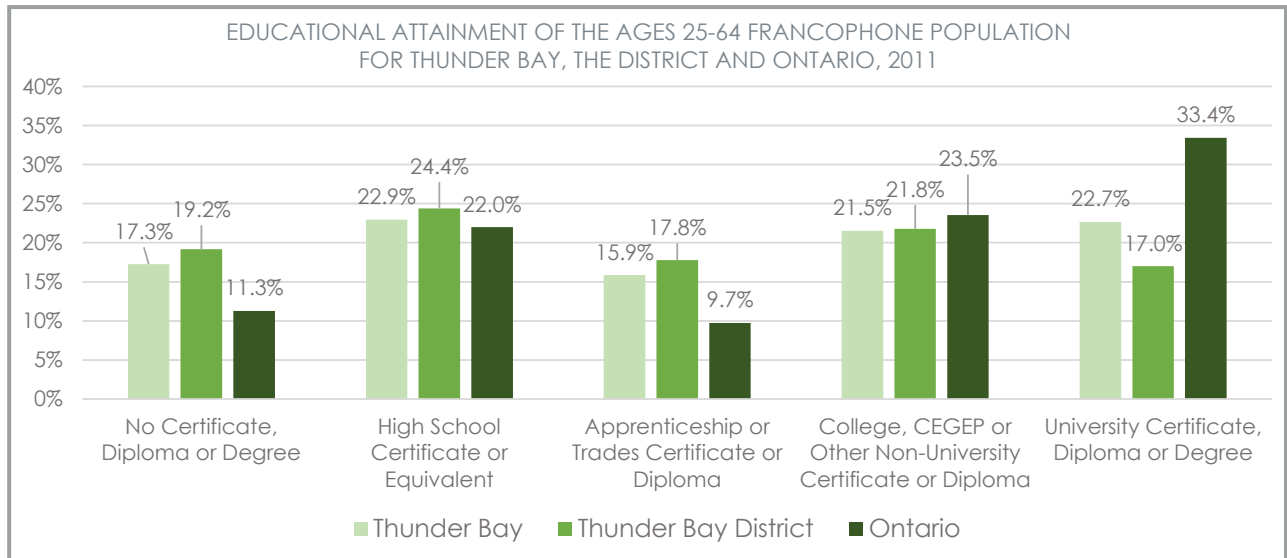
Sources: Author calculations based on Statistics Canada, Census 2001 and National Household Survey 2011

**FIGURE 12**



Source: Author's calculations based on Statistics Canada, National Household Survey, 2011

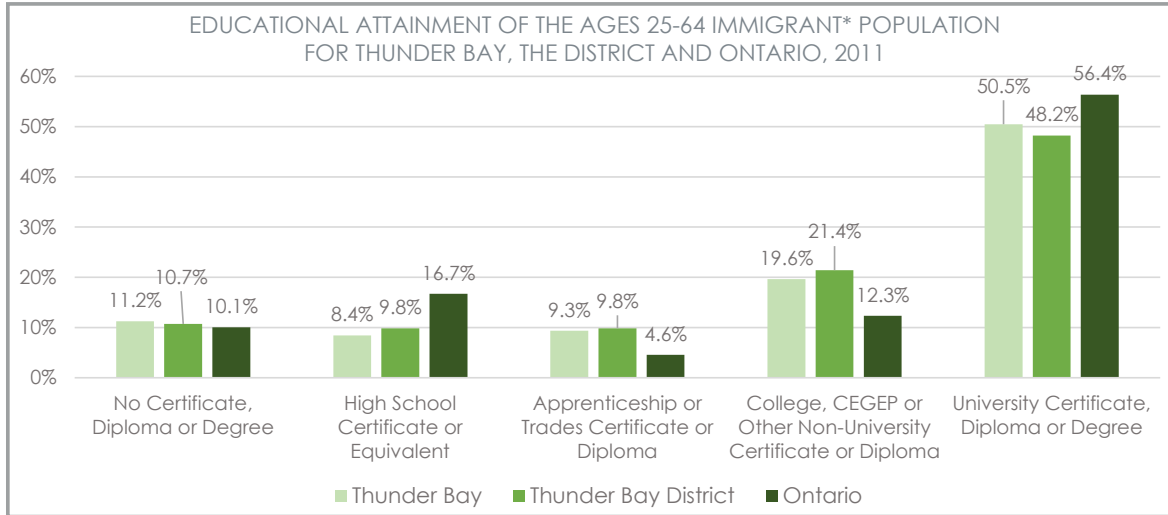
**FIGURE 13**



Source: Author's calculations based on Statistics Canada, National Household Survey, 2011



**FIGURE 14**



Source: Author's calculations based on Statistics Canada, National Household Survey, 2011

\*In this context, 'Immigrant' refers to individuals who came to the community from another country in the last five years

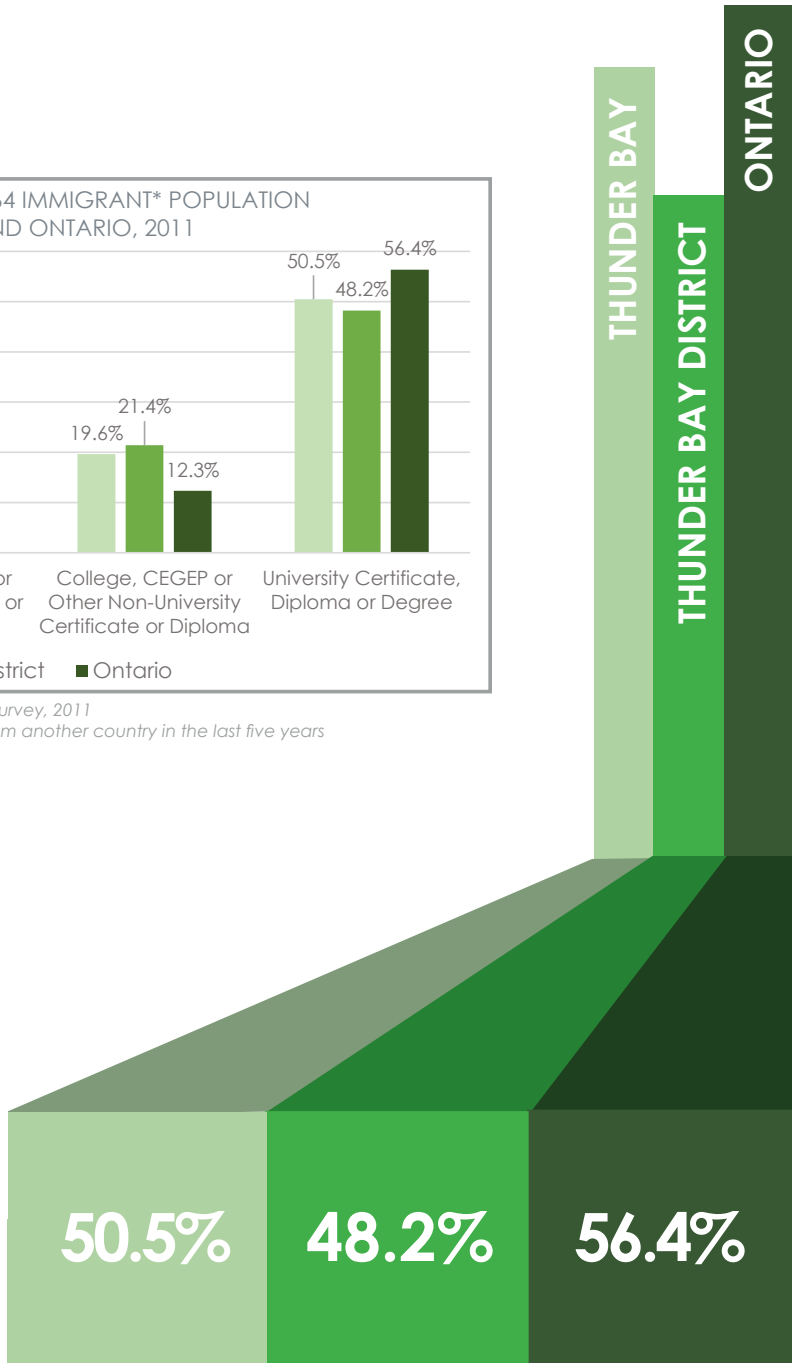
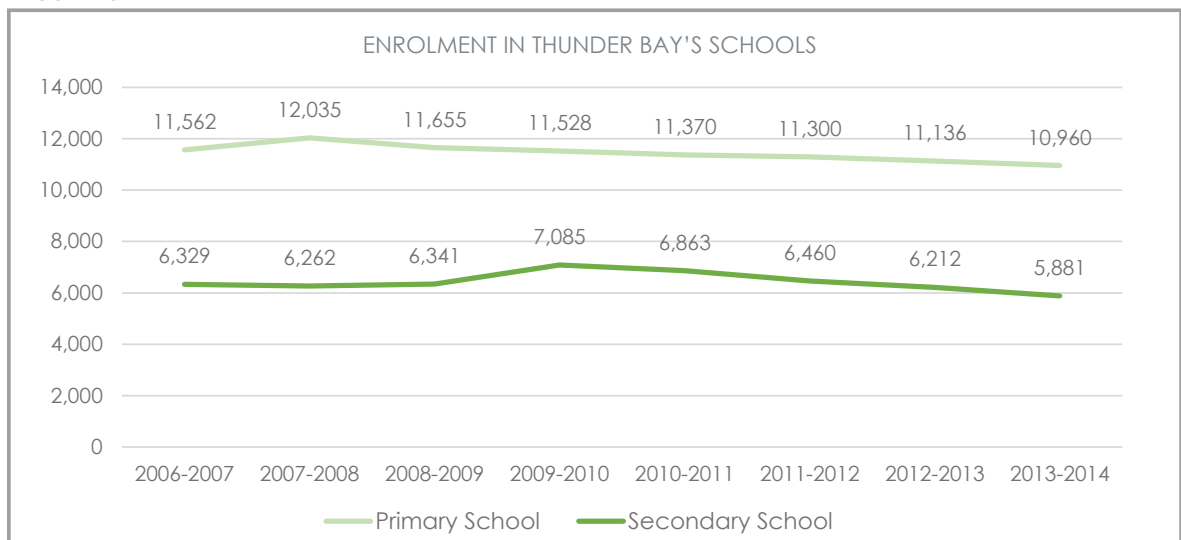


FIGURE 15



Source: Author's calculations based on Ministry of Education, as reported by schools in the Ontario School Information System (OnSIS)

# ALIGNMENT

## 08. Labour Force Participation

Participation, employment, and unemployment rates reflect whether an individual is willing and able to find employment, and whether an employer is able and willing to hire them. All the previous indicators, and more, have an influence on a worker's ability to find a job and an employer's ability to find a worker.

Since 2006, the number of taxfilers declaring employment income in Thunder Bay CMA increased slightly and the number of taxfilers declaring employment insurance decreased (Figures 18 and 19). The participation rate remained relatively stable amid fluctuations (Figure 16).

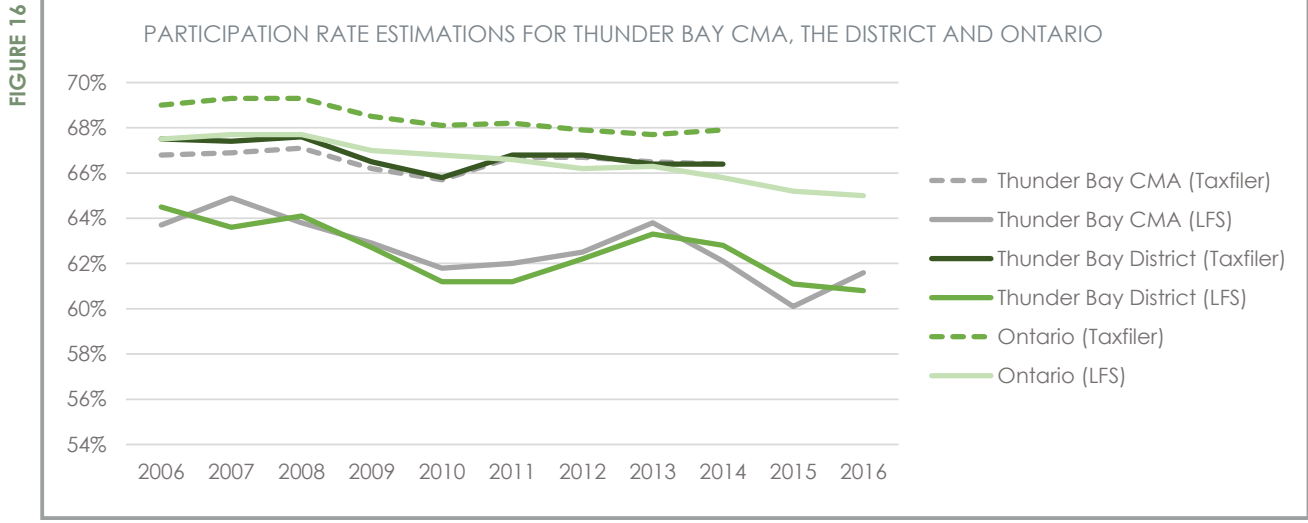
In 2011, the Francophone participation rate was close to that of the total population (59 percent and 61.3 percent respectively – Figure 17).<sup>6</sup> The employment rate of the Francophone labour force was 3.4 percent lower than that of the total labour force (Figure 19), while the unemployment rate was 2.0 percent higher than that of the total labour force (Figure 21).

Also, the Indigenous participation rate (54.0 percent) was significantly lower than the overall Thunder Bay participation rate (61.3 percent - Figure 17). The Indigenous employment rate (44.0 percent) was lower than that of Thunder Bay's overall population (56.4

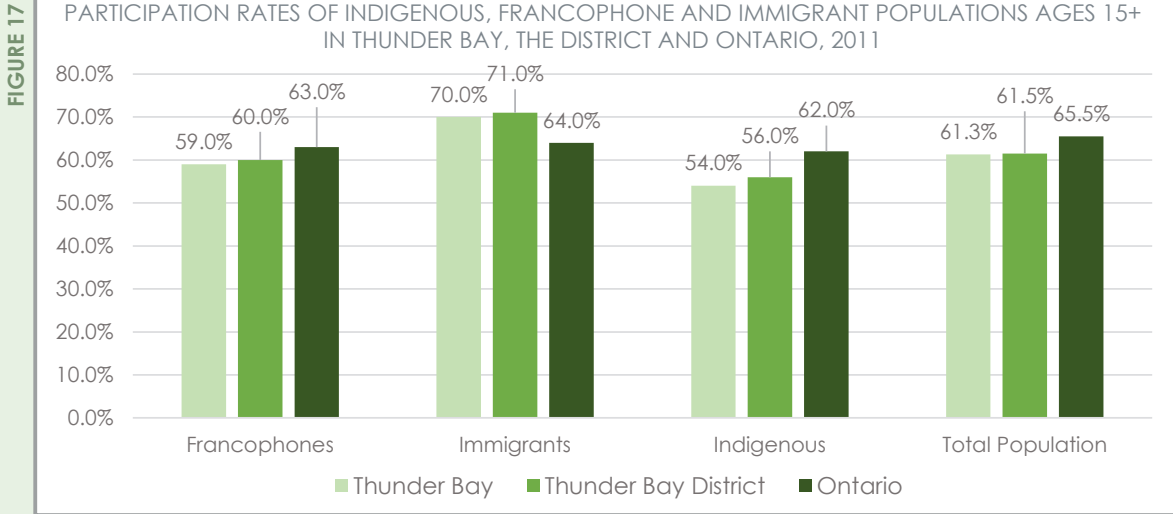
percent - Figure 19), and thus the unemployment rate was higher (20.0 percent versus 8.0 percent in the rest of population – Figure 21).

However, immigrants in Thunder Bay exhibited a participation rate (70 percent) that was significantly higher than the overall population (61.3 percent - Figure 17). The immigrant employment rate (66.0 percent) was much higher than that of the total population (56.4 percent - Figure 19), and the unemployment rate was lower (6 percent compared to 8.0 percent for the overall labour force– Figure 21).

<sup>6</sup> Age distribution of the population groups may slightly skew the data. For example, Francophones are older than the rest of the population, therefore, as a whole, they may participate less in the labour market, but the 25 to 64 age group could be participating more than the rest of the population. Unfortunately, participation, employment, and unemployment data are not available for any age group other than age 15 and older.

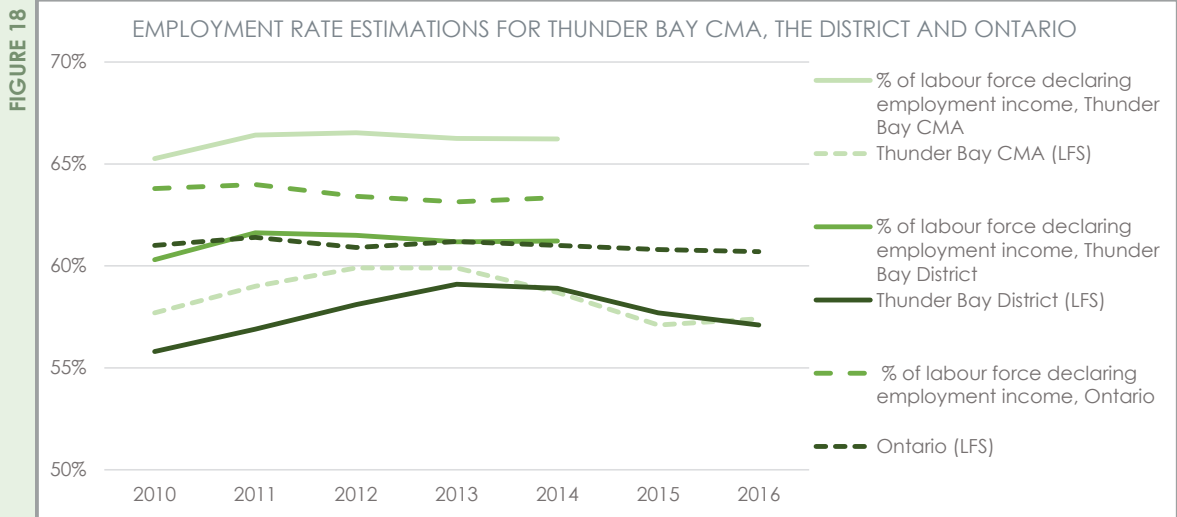


Sources: Taxfiler, participation rate calculated as the number of people receiving labour income in the total population over the age of 15; Labour Force Survey (LFS) two-year average estimates, participation rate calculated as the number of civilian, non-institutionalized persons age 15 or over who are employed or unemployed in the total population.

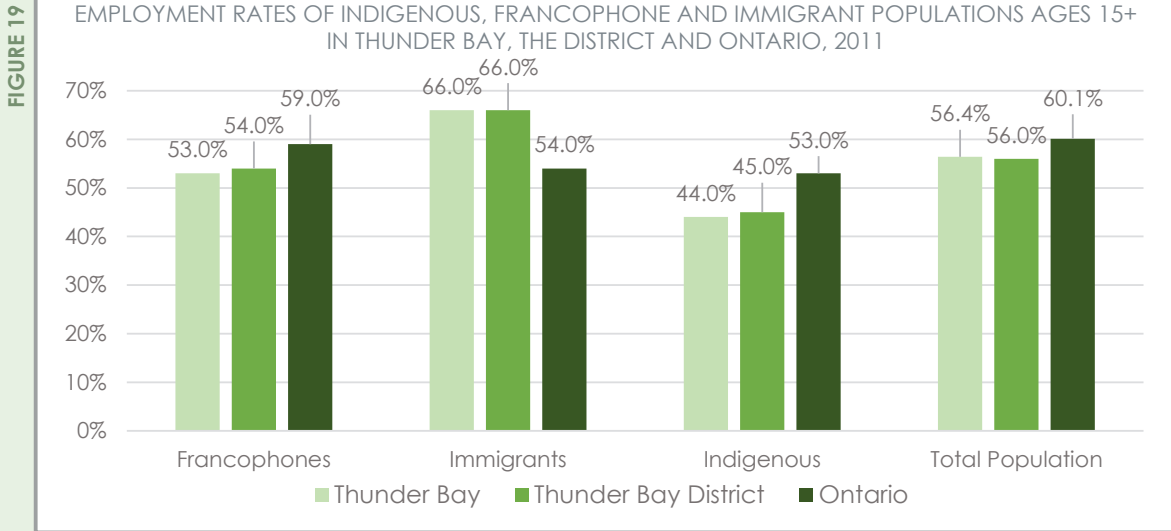


Source: Statistics Canada, National Household Survey, 2011

\*In this context, 'Immigrant' refers to individuals who came to the community from another country in the last five years

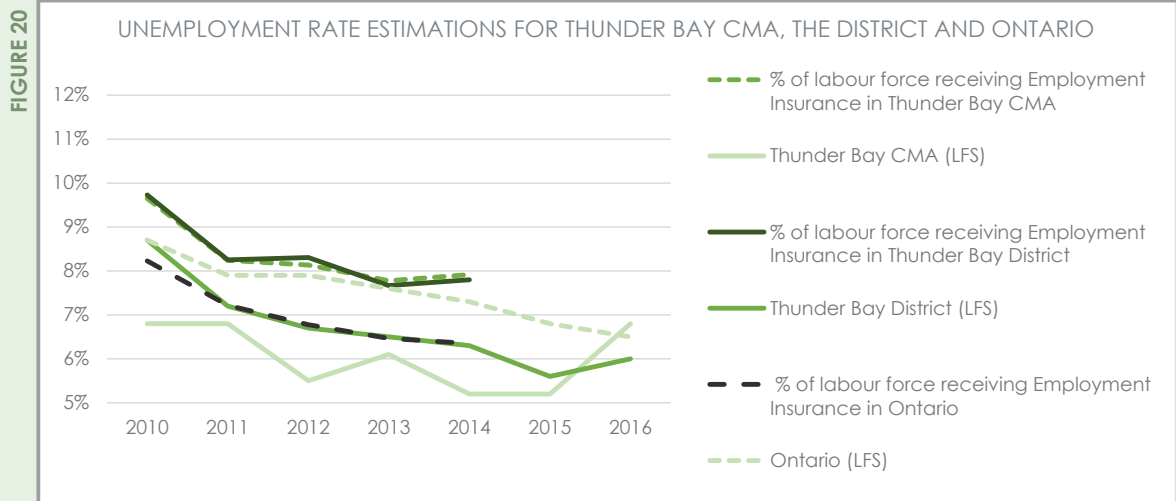


Source: Author's calculations based on Taxfiler, number of people declaring Employment Income; Statistics Canada estimation of population; Labour Force Survey (LFS) two-year average estimates



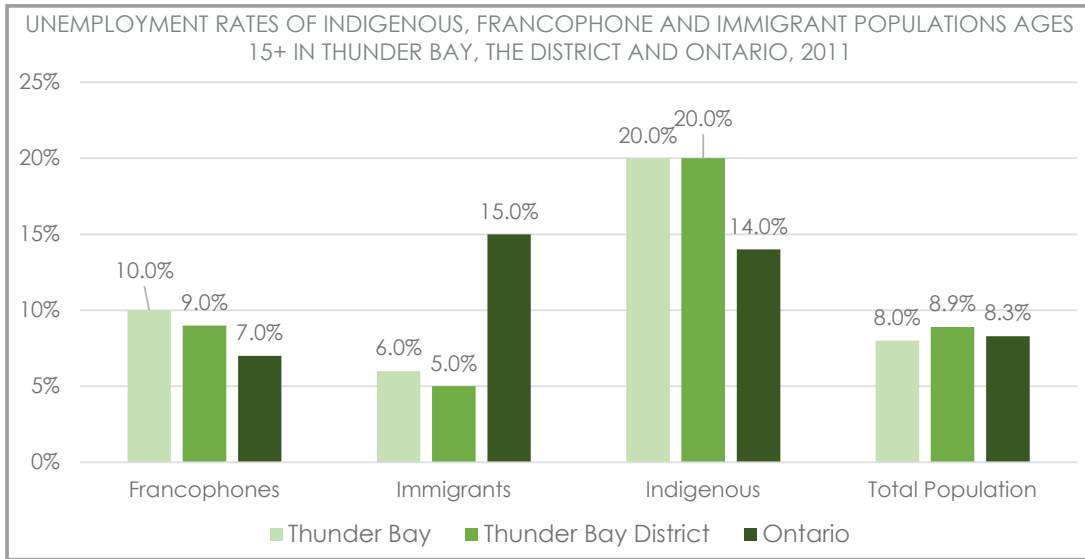
Source: Statistics Canada, National Household Survey, 2011

\*In this context, 'Immigrant' refers to individuals who came to the community from another country in the last five years



Source: Author's calculations based on Taxfiler, number of people declaring Employment Insurance (EI); Statistics Canada estimation of population; Labour Force Survey (LFS) two-year average estimates

FIGURE 21



Source: Statistics Canada, National Household Survey, 2011

\*In this context, 'Immigrant' refers to individuals who came to the community from another country in the last five years

## 09. Wages<sup>7</sup>

Wages—or the hourly rate an employee is compensated for their work—can have an impact on the capacity to attract candidates and to fill a position. On the other hand, if an area offers wages inferior to the rest of the province, it can be perceived as a competitive advantage and attract employers.

<sup>7</sup> For a more detailed analysis of salary comparison in the North, please see Sundmark, J. (2016).

"Average salary comparison" [blog] Available at: [northernpolicy.ca](http://northernpolicy.ca)

TABLE 13

Average Hourly Wages Offered by Occupation, 2015	Northwestern Ontario	Ontario	Difference
Professional occupations in health (except nursing)	\$ 70.73	\$ 48.71	\$ 22.01
Industrial, electrical and construction trades	\$ 28.49	\$ 22.06	\$ 6.43
Professional occupations in business and finance	\$ 32.85	\$ 26.74	\$ 6.11
Finance, insurance and related business administrative occupations	\$ 15.15	\$ 24.48	\$ -9.33
Professional occupations in natural and applied sciences	\$ 25.29	\$ 34.39	\$ -9.10
Retail sales supervisors and specialized sales occupations	\$ 16.00	\$ 23.46	\$ -7.46

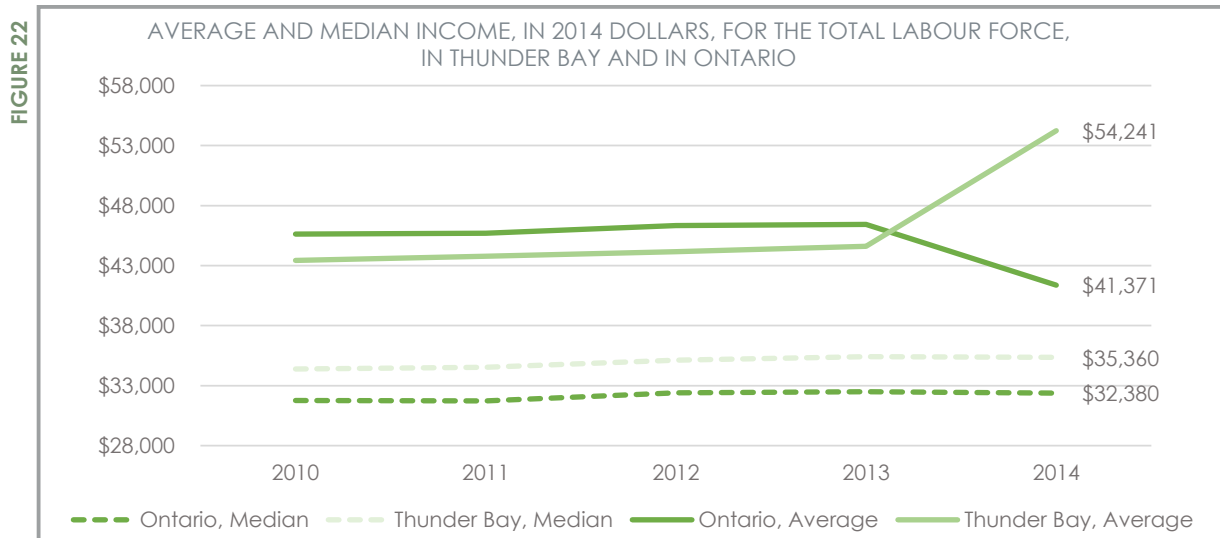
Source: Author's calculations based on Statistics Canada, Job vacancy and wages survey, 2015 (average of all quarters)

## 10. Income

Average and median income indicate how well-off an area and its inhabitants are compared to others. Sources of income also provide information about how much of the community's income comes from the labour market, and how much comes from other sources. As such, it can be an indication about the prevalence of employment and the sustainability of the community.

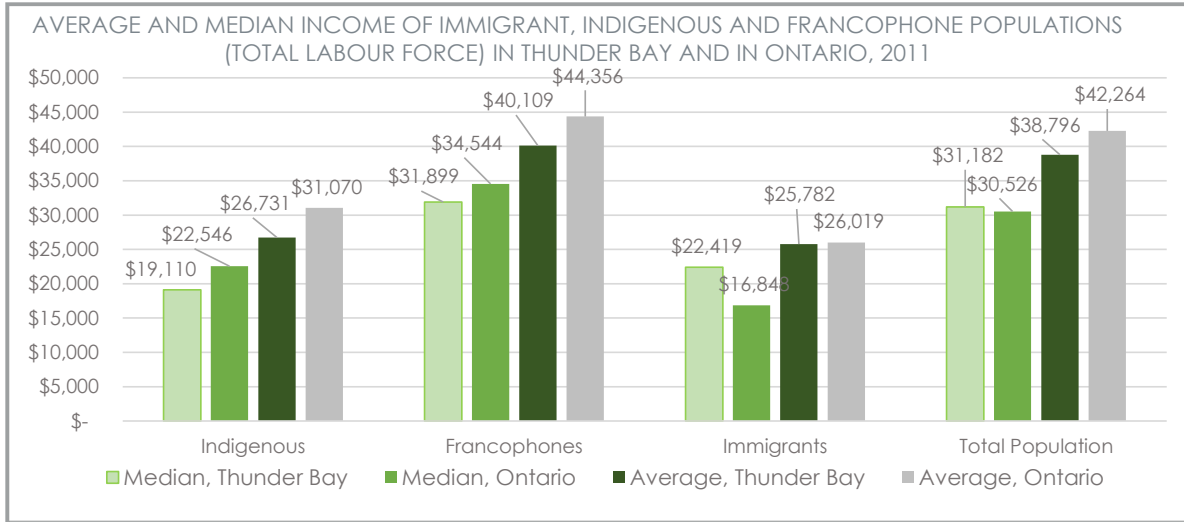
Average income depends on multiple factors, such as the type of jobs available (part-time or full-time) and the dominant industry in a community. In 2011, Thunder Bay's average annual income (\$38,796) was lower than the provincial average (\$42,264 - Figure 23). In looking at the total population average and median income in 2011, the gap between the two was smaller for Thunder Bay than for Ontario, since the Thunder Bay median is higher than the Ontario median. Thus, Thunder Bay can also be considered economically more homogeneous than Ontario.

The economic dependency ratio (Figure 24)—the amount of government transfers received compared to the amount of income earned through employment—is higher in Thunder Bay (0.24) than in the rest of Ontario (0.17). Unsurprisingly, since Thunder Bay accounts for a significant share of the Thunder Bay District, the dependency ratios for the city and district were quite similar (0.23 for the district). The major sources of government transfers for Thunder Bay were Old Age Security pension and Canada Pension Plan payments (Table 14). When combined, those two benefits represented a larger share of total government transfers than that for Ontario (60.6 percent compare to 59.2 percent for Ontario). In the meantime, child benefits represented a smaller proportion of transfers in Thunder Bay than in Ontario and the combined transfers for Employment Insurance and welfare were very similar in proportion to the provincial levels.



Source: Author's calculations based on Taxfiler, Thunder Bay "city total", and Ontario; and Consumer Price Index from the Bank of Canada

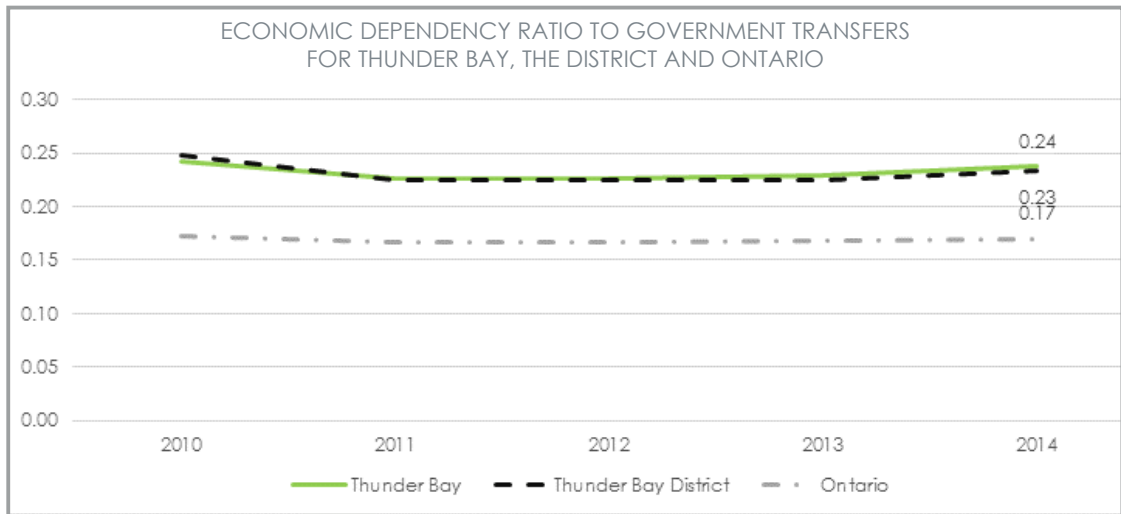
FIGURE 23



Source: National Household Survey, 2011

\*In this context, 'Immigrant' refers to individuals who came to the community from another country in the last five years

FIGURE 24



Source: Author's calculations based on Taxfiler, Thunder Bay "city total", Thunder Bay District, Ontario



**TABLE 14**

DISTRIBUTION OF THE INCOME OF THE COMMUNITY BY SOURCE OF INCOME			
Amount of Dollars by Source of Income, 2014	Thunder Bay	Thunder Bay District	Ontario
Wages/salaries/commissions only	64.11%	64.9%	67.7%
Self-employment only	2.29%	2.3%	4.3%
<b>Employment income</b>	<b>66.40%</b>	<b>67.2%</b>	<b>72.0%</b>
Employment Insurance	1.26%	1.4%	1.1%
OAS/Net federal supplements	3.98%	3.8%	3.3%
CPP/QPP	5.55%	5.4%	3.9%
CCTB	1.01%	1.1%	1.1%
Workers compensation	0.89%	1.0%	0.4%
Social Assistance	1.61%	1.5%	1.1%
Other government transfers	1.44%	1.4%	1.3%
<b>Government transfers</b>	<b>15.75%</b>	<b>15.7%</b>	<b>12.2%</b>
Private pensions	11.15%	10.6%	7.7%
RRSP	0.42%	0.4%	0.4%
Investment	4.03%	3.8%	5.3%
Other income	2.3%	2.3%	2.5%
<b>Total income</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Author's calculations based on Taxfiler, Thunder Bay "city total", Thunder Bay District, Ontario

POPULATION



104909 (2016)



447.5KM<sup>2</sup>

AT THE HEAD OF LAKE SUPERIOR

HOME OF THE

SLEEPING GIANT

48°22'N  
89°14'W

# THUNDER BAY



UNTAPPED WORK

**POTENTIAL**

PRESENTS MULTIPLE

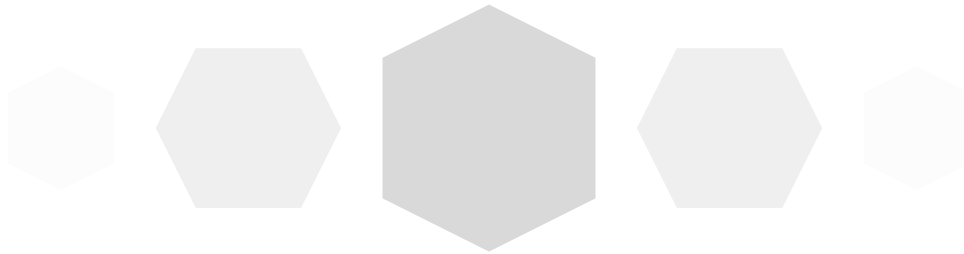
OPPORTUNITIES

FOR THE COMMUNITY

# CONCLUSION

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The City of Thunder Bay is facing several challenges and opportunities. One of the most important opportunities lies in its Indigenous labour force, which faces a higher rate of unemployment than the non-Indigenous labour force. Such untapped work potential might help the city mitigate some of the challenges associated with an aging workforce—more people retiring than starting careers. How best to address labour challenges is for the community to decide, but data indicate that Thunder Bay has multiple opportunities at its disposal.



**NOTE TO READERS:** Moving forward, the Community Labour Market Report Series will be replaced by Community Accounts. This online portal, [no.communityaccounts.ca](http://no.communityaccounts.ca), will provide reliable information on key economic and social indicators, broken down to the community, regional, provincial and national levels over census years 2001, 2006, 2011 and 2016. Community Accounts will be publically available to allow anyone to access data for their community in tables, charts and other formats.

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# REFERENCES

Cuddy, J. and Moazzami, B. (2016). Northern Projections: Thunder Bay District. Thunder Bay: Northern Policy Institute.

**About the Local Employment Planning Council (LEPC):**

LEPC in Thunder Bay is a pilot project led by the North Superior Workforce Planning Board (NSWPB) with the support of Northern Policy Institute (NPI) as data and research partner. The LEPC uses community consultation, research, and evidence-based practices to spur innovation in workforce development in our region.

**About North Superior Workforce Planning Board (NSWPB):**

The North Superior Workforce Planning Board (NSWPB) is one of twenty-six Workforce Planning zones across Ontario, mandated through the Ministry of Training, Colleges and Universities to identify, assess and prioritize the skills and knowledge needs of community, employers and individual participants/learners in the local labour market through a collaborative, local labour market planning process.

**About Northern Policy Institute (NPI):**

Northern Policy Institute is Northern Ontario's independent think tank. We perform research, collect and disseminate evidence, and identify policy opportunities to support the growth of sustainable Northern communities. Our operations are located in Thunder Bay, Sault Ste. Marie, and Sudbury. We seek to enhance Northern Ontario's capacity to take the lead position on socio-economic policy that impacts Northern Ontario, Ontario, and Canada as a whole.



**Local Employment**  
Planning Council

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