

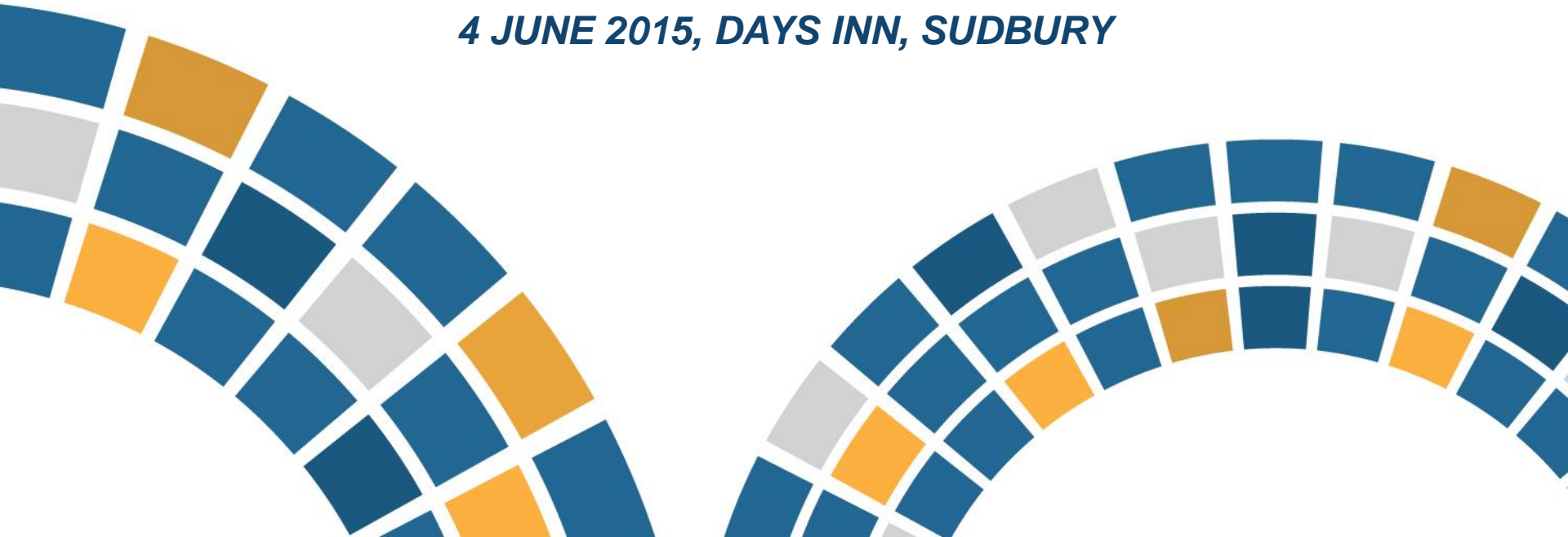
**NORTHERN**  
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INSTITUT DES POLITIQUES  
**DU NORD**

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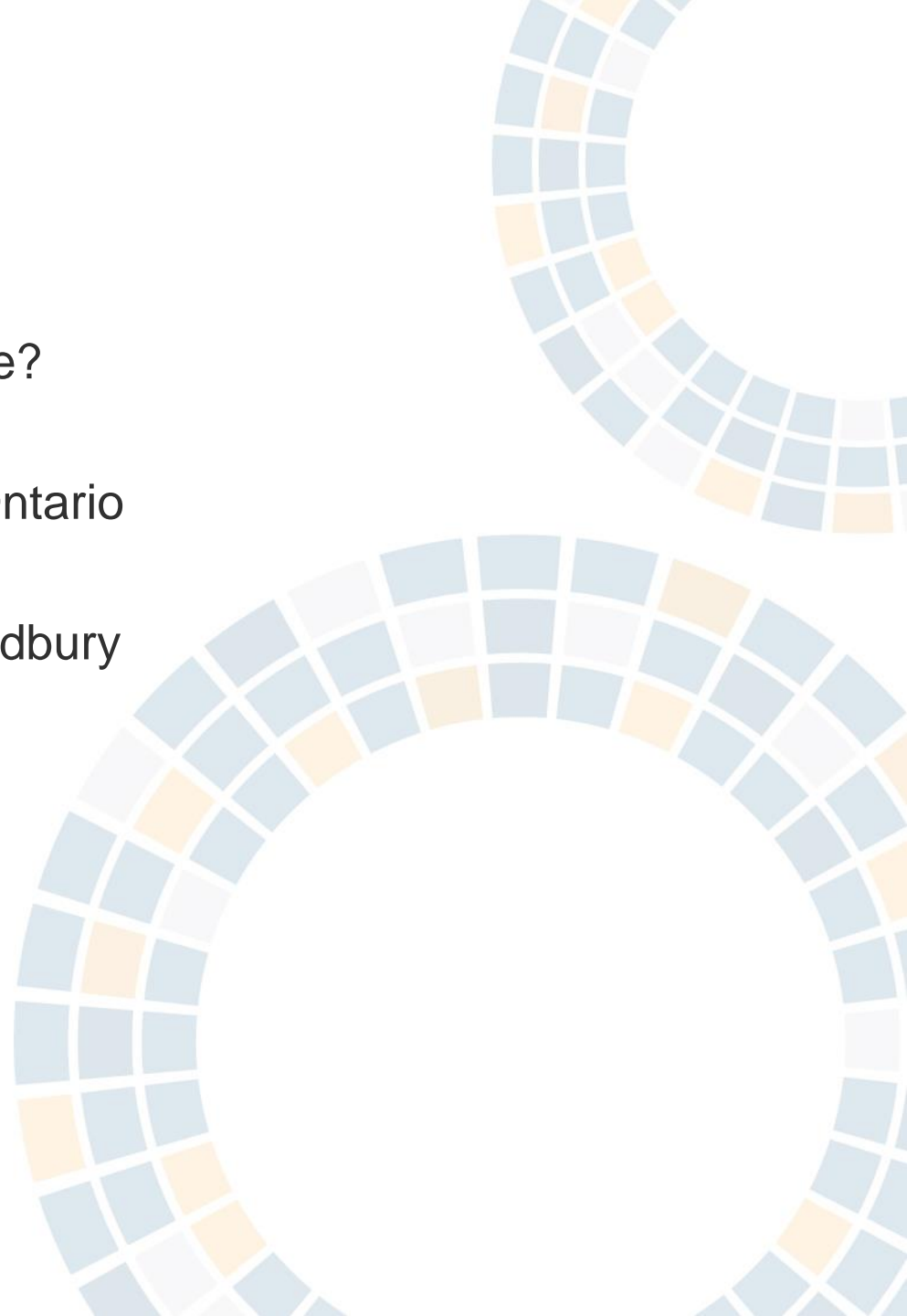
***RESEARCH COORDINATOR, JAMES CUDDY***

***4 JUNE 2015, DAYS INN, SUDBURY***



# Overview

- What is Northern Policy Institute?
- Economic growth in Northern Ontario
- Economic growth in Greater Sudbury
- Conclusions and observations
- Q/A and Discussion



# What IS Northern Policy Institute

Independent -

There are a couple of **BIG** differences between “working **WITH** a Policy Institute” and “**HIRING** a consultant”: we don’t work for you and we can’t guarantee an answer you will like.

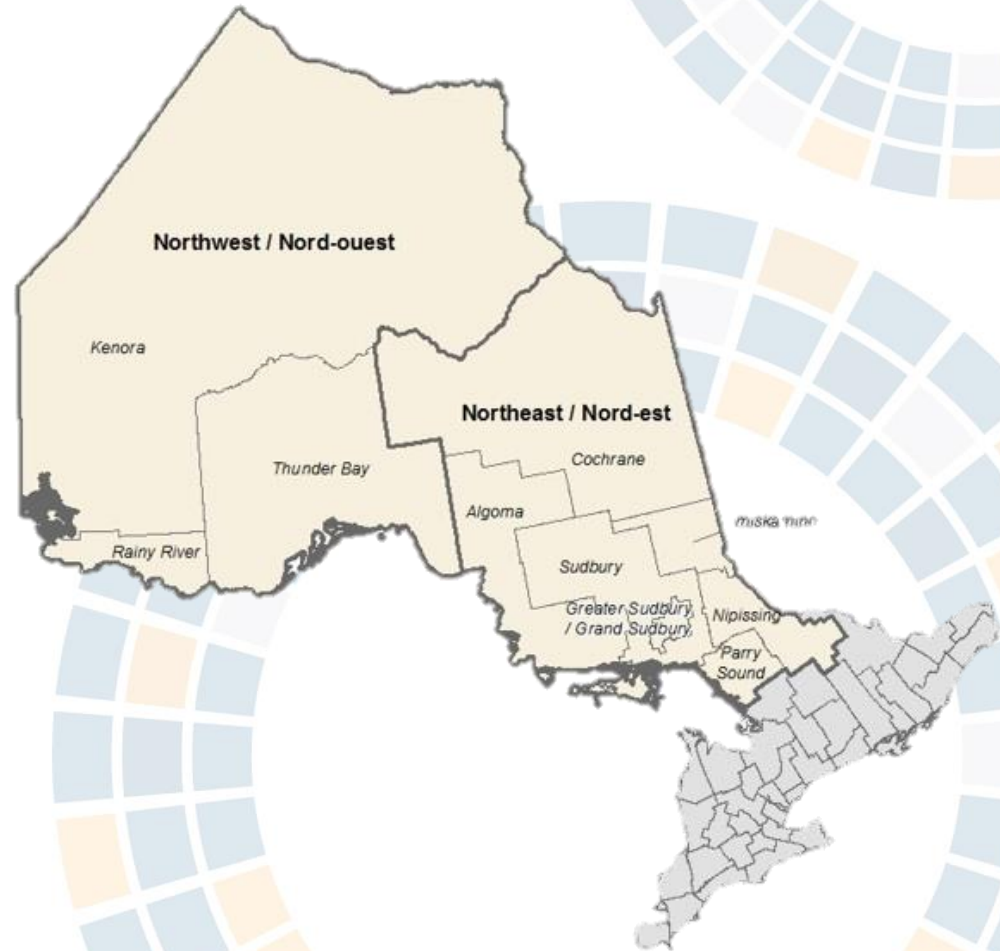
Independent means just that –

- Funders, members and stakeholders do not direct the work of Northern Policy Institute.
- Board, funders, members and stakeholders do not “pick” projects or pre-determine results.
- Staff and contract authors follow the evidence
  - Northern Policy Institute does NOT take positions – we ask the questions – the authors provide, and defend, the answers.
  - Their analysis is tested before publication: Double blind peer review – just like academic journals.

# Our Region

Northern Ontario consists of  
(Census, 2011):

- 2 Economic Regions
- 11 Districts
- 166 Communities
  - 72 First Nations
  - 94 Municipalities
- **~ 780,000 individuals**



# 780,000 bosses

We work for and take direction from the people of Northern Ontario.

Over 100 meetings and events in the past twelve months throughout Northern Ontario and beyond. Top ten issues:

1. Cost of electricity: WAY too high.
2. Need for partnership and collaboration among our communities.
3. Importance of the issues and challenges facing aboriginal communities.
4. Who decides our fate?
5. Our communities are dying; How do we sustain them and keep people in (attract new people to) the North?
6. Infrastructure: transportation and communication.
7. Protecting/understanding/reflecting the northern way of life.
8. Training – access and relevance to local opportunities.
9. Do we really know ourselves? Data and measurement.
10. Where does all the money from the North go?

# Know the North

Statscan knows a little:

- 2 summer interns
- Drill down (to postal codes) then build up (to community level)

Collectively, we know a lot:

- 6 summer interns
- Municipalities, First Nations Communities, Aboriginal Groups, Economic Development Agencies, Research Institutes, Unions, Chambers and other Community/ Grassroots Organizations
  - What do you know? – your data
  - How do you know it? – your tools, your timing (one time or cyclical?)
  - Common tools - provincial surveys, common questions, common measures
  - Examples: chamber and municipal satisfaction surveys, Sioux Lookout mining permit survey, Kenora growth project, Thunder Bay index, everything you ask or know about your community

**The KEY – open honest sharing of information**

# Three ways YOUR issue gets on OUR to-do list

## 1. Research if necessary:

Northern Policy Institute standing consultation tools will be used to inform, test and reset our internal research agenda and priorities. If your issue is shared by your friends and neighbours, it will likely get onto our to-do list.

## 2. But not necessarily research:

YOU do the work, commission the study, and you send it to us for re-publication or dissemination. Big parts of our job involve avoiding wasteful duplication of effort and getting the word out about what has already been done.

## 3. Working WITH Northern Policy Institute:

NOT a consulting service, but will partner – in cash, or in kind – to expedite needed work.



# Trends and Characteristics in the North



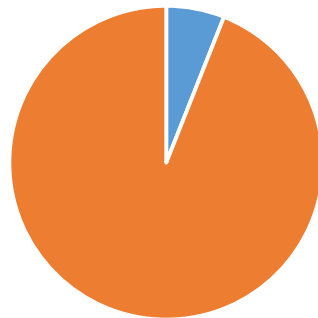


# We are a small piece of the provincial pie in population terms

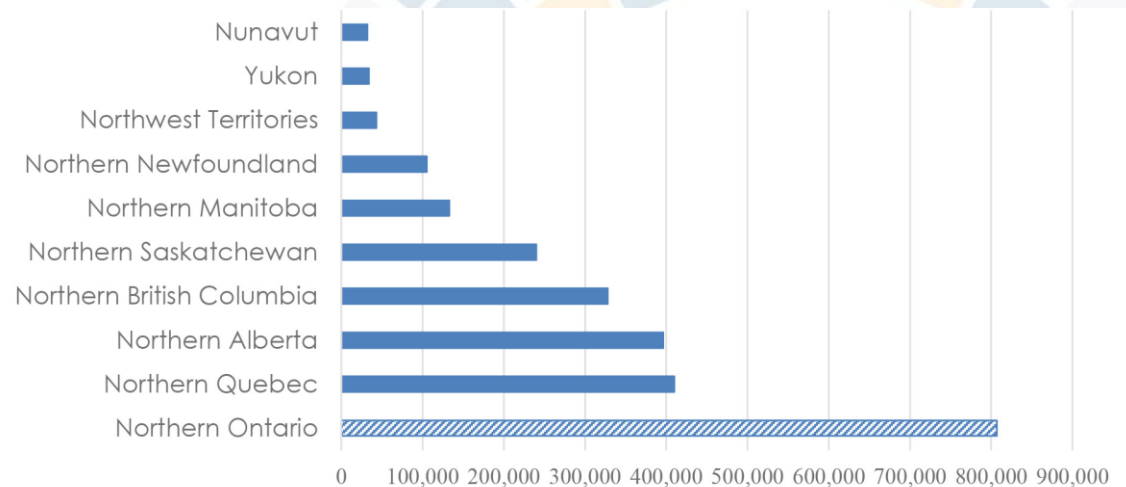
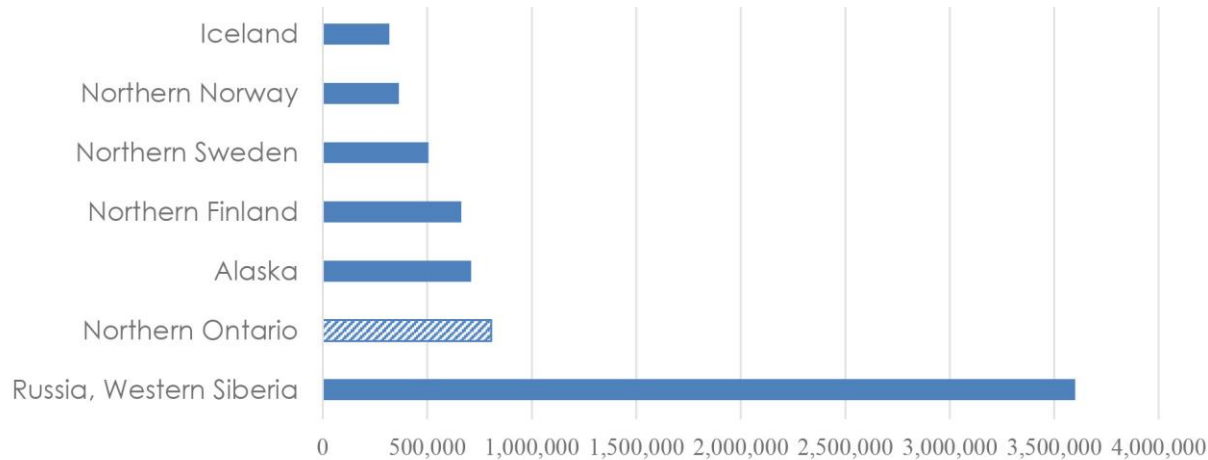
- The north makes up only **6%** of Ontario's total population (Census, 2011)

■ Northern Ontario

■ Rest of Province



# BUT, we are a big part of the global “north”

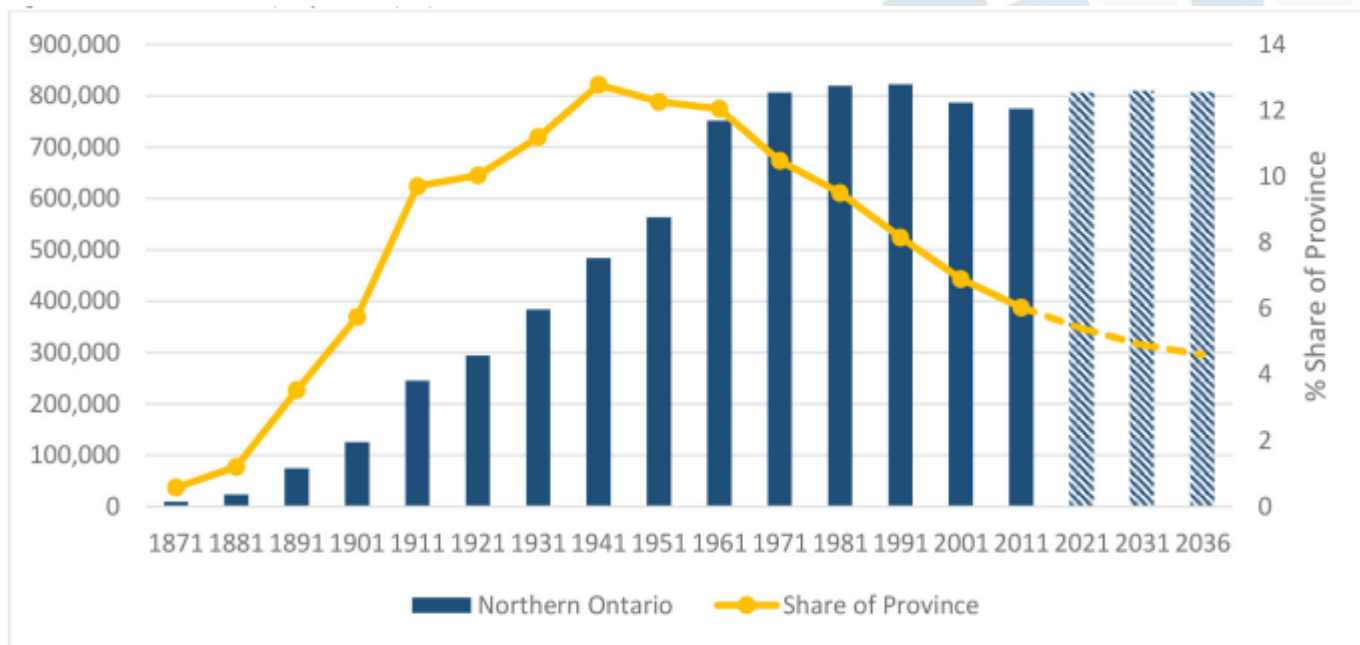


# AND, our resources are of global significance

- Northern Ontario is one of the most important resource producing regions in Canada.
- In 2013, Northern Ontario accounted for almost all the metals production and 23% of the non-metals produced in Ontario,
- Since 2006 the region has consistently produced between 67 and 79% of the value of all Ontario's mineral production.

# POPULATION

- Historical and projected population in Northern Ontario, 1871-2036
- Population is expected to increase to 807,100 (0.5%) by 2036
  - NW expected to increase by 3.9%
  - NE expected to decrease by 1%



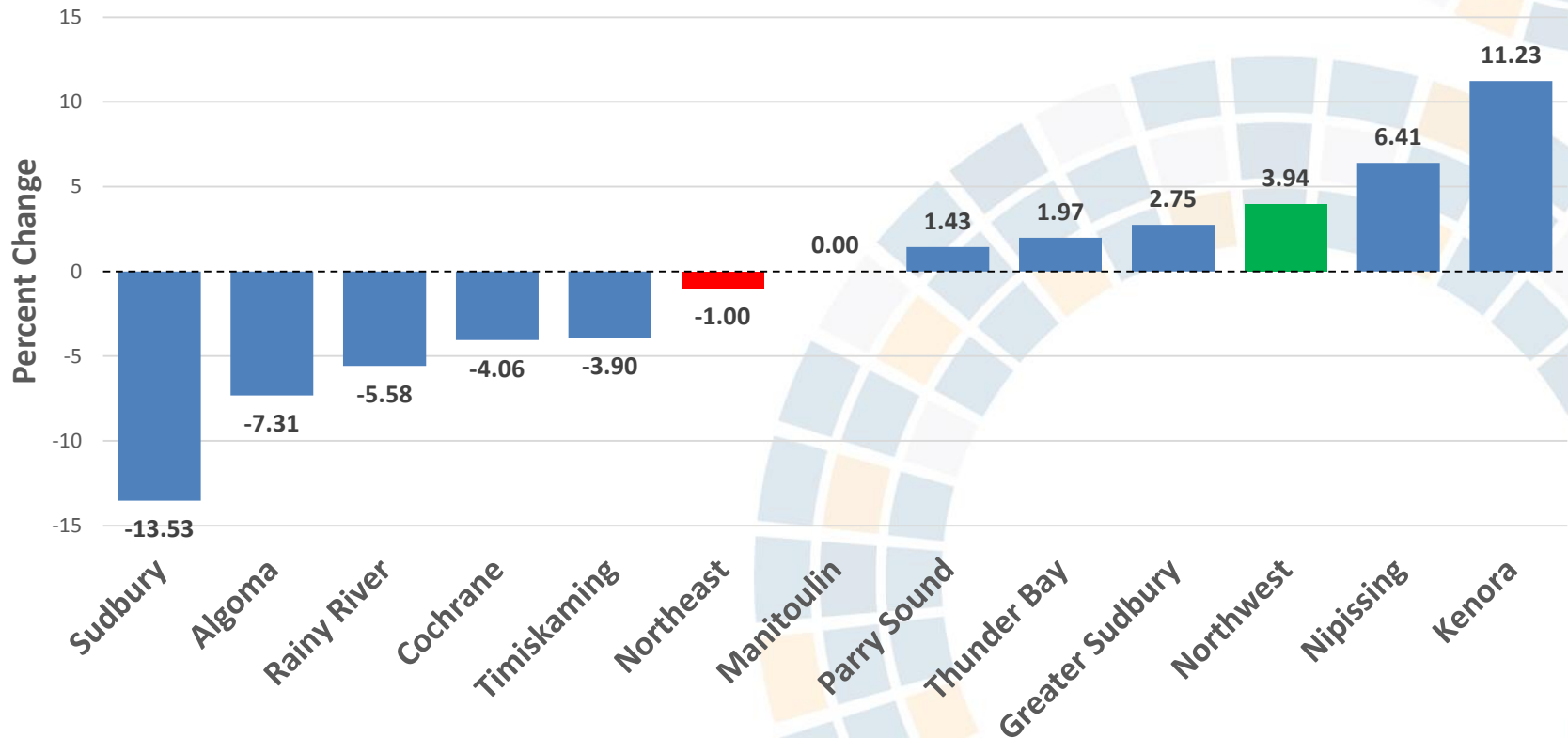
# Northern Ontario HAS grown – in places

	Population		Population Change	
	2001	2013	Difference	Percent
<b>Manitoulin</b>	12,713	13,538	825	6.5
<b>Kenora</b>	66,526	70,002	3,476	5.2
<b>Parry Sound</b>	41,201	43,077	1,876	4.6
<b>Greater Sudbury</b>	161,146	165,087	3,941	2.4
<b>Nipissing</b>	86,313	87,362	1,049	1.2
<b>Thunder Bay</b>	157,034	149,604	-7,430	-4.7
<b>Algoma</b>	123,763	117,600	-6,163	-5.0
<b>Timiskaming</b>	35,700	33,509	-2,191	-6.1
<b>Cochrane</b>	89,509	82,289	-7,220	-8.1
<b>Rainy River</b>	22,943	20,166	-2,777	-12.1
<b>Sudbury</b>	24,202	21,086	-3,116	-12.9
<b>Northern Ontario</b>	823,051	805,333	-17,718	-2.2

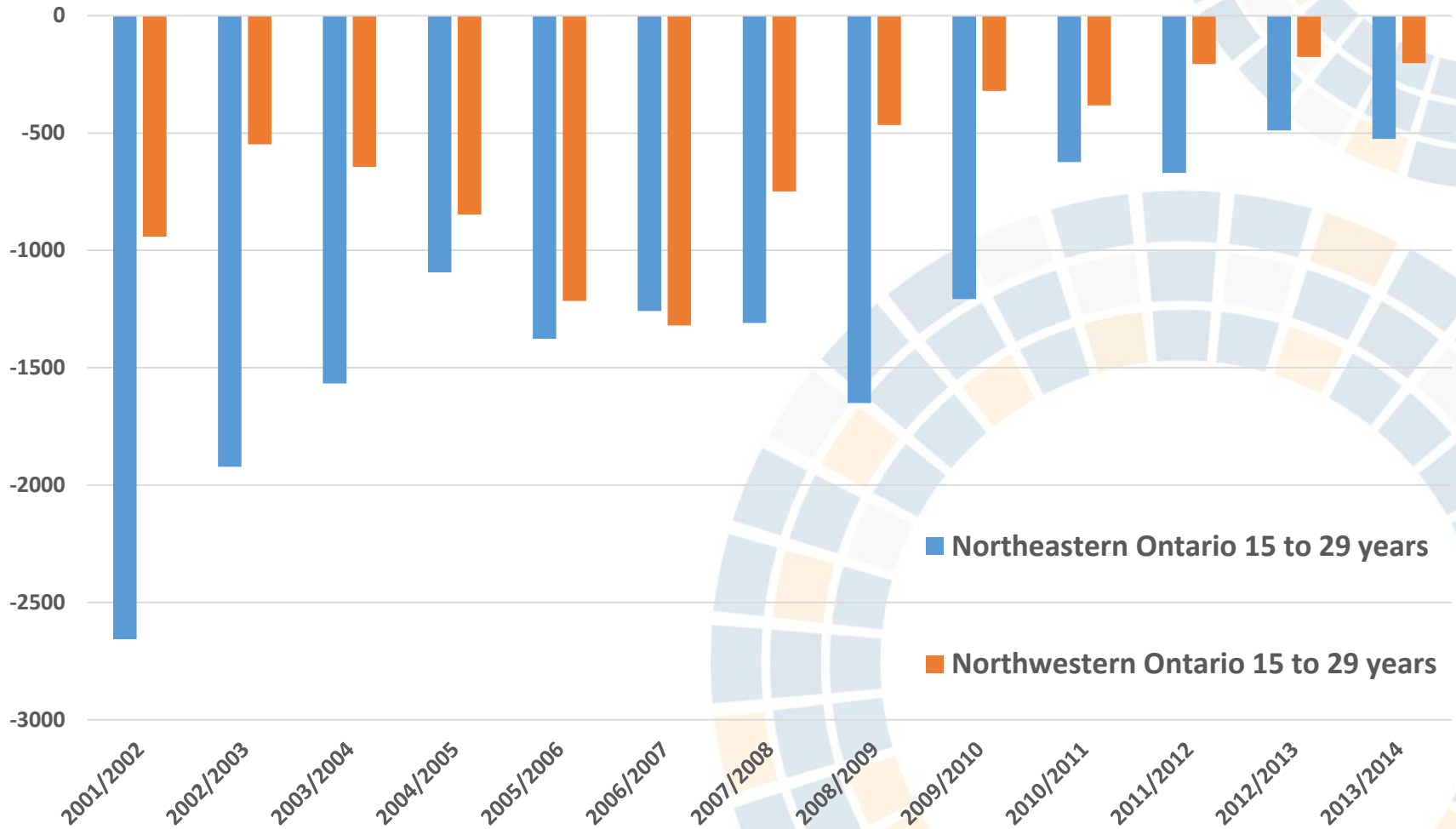
Source: *Diversify, Innovate, Invest & Grow Northern Policy Institute 2015*

# Northern Ontario WILL grow – in places

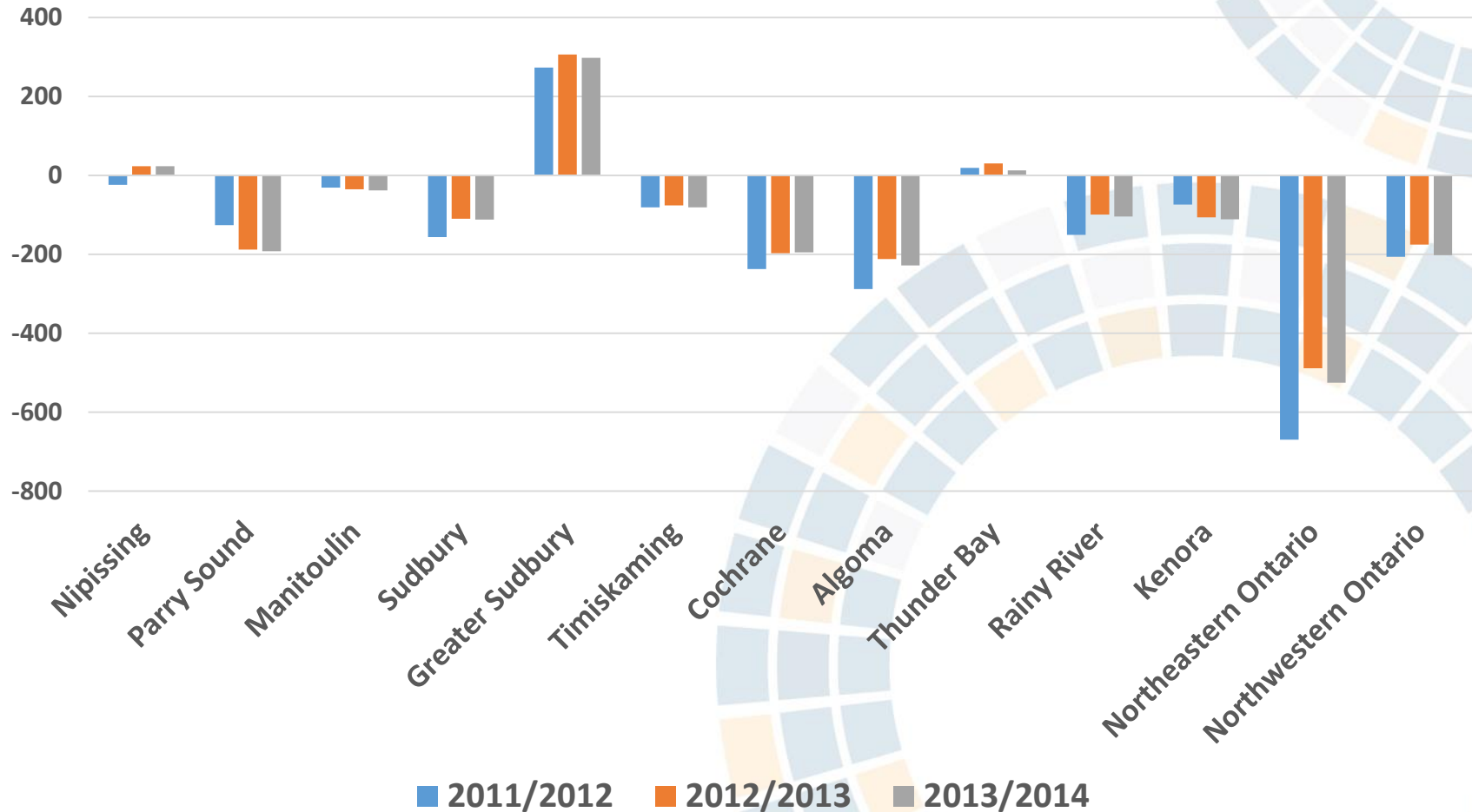
Northern Districts - Projected population percent change, 2012-2036



# Youth (15-24) out-migration is slowing



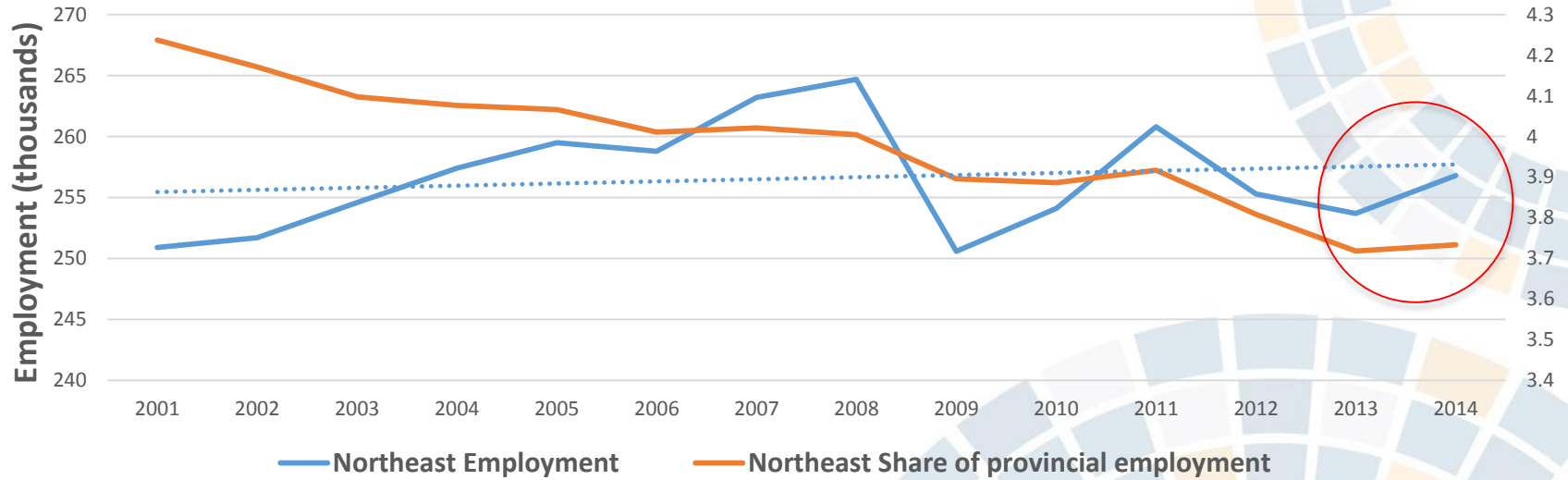
# But each district is different...



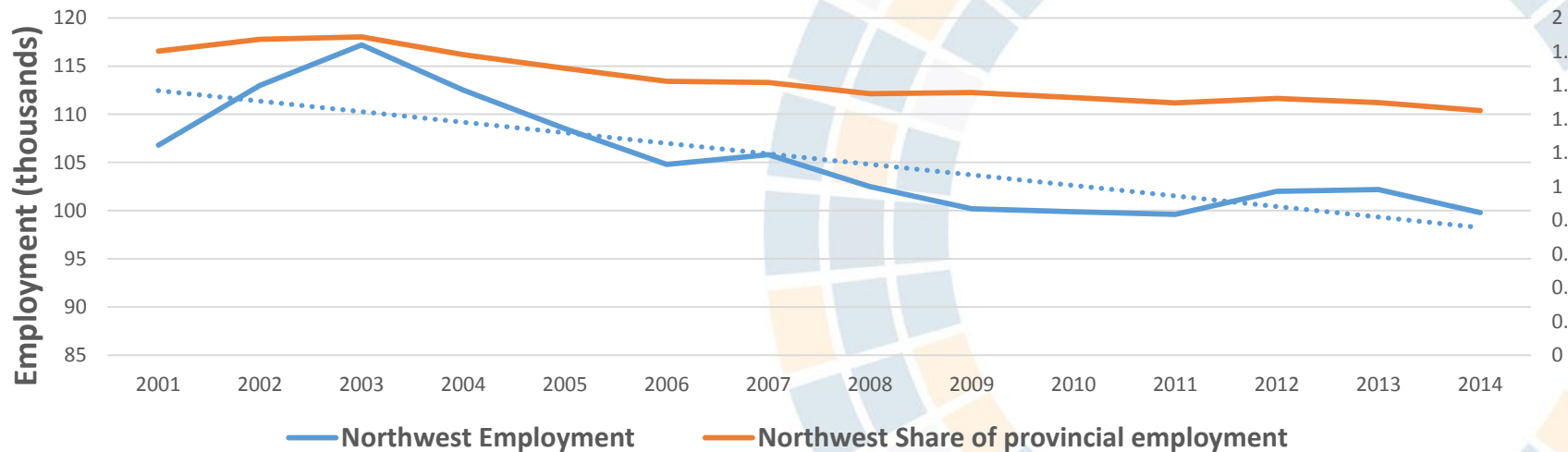


# Employment

## Northeast



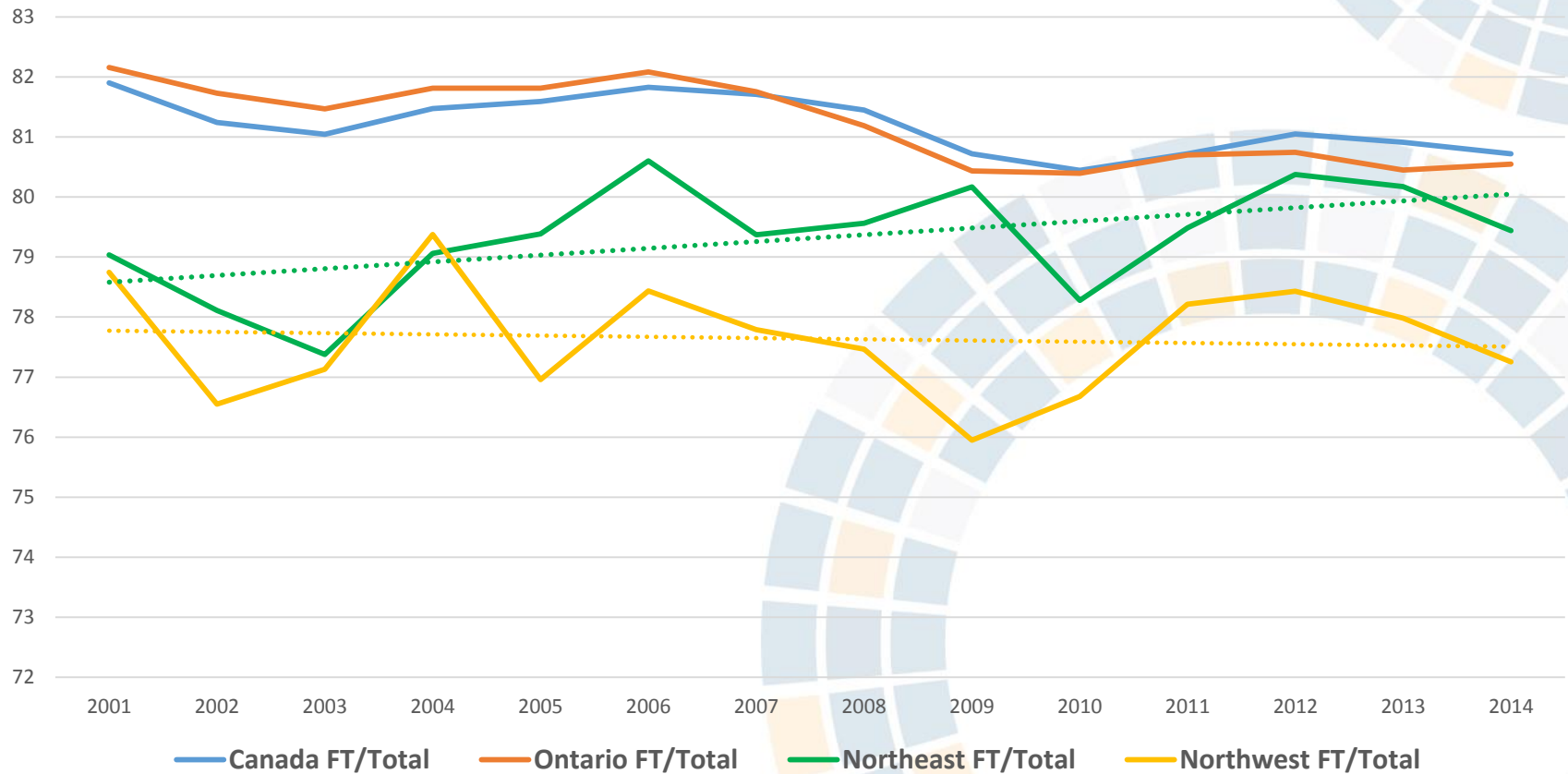
## Northwest



Sources: *Settling Down in the Northwest*, Northern Policy Institute 2015; *From Laggard to Leader (Almost)*, Northern Policy Institute, 2015.

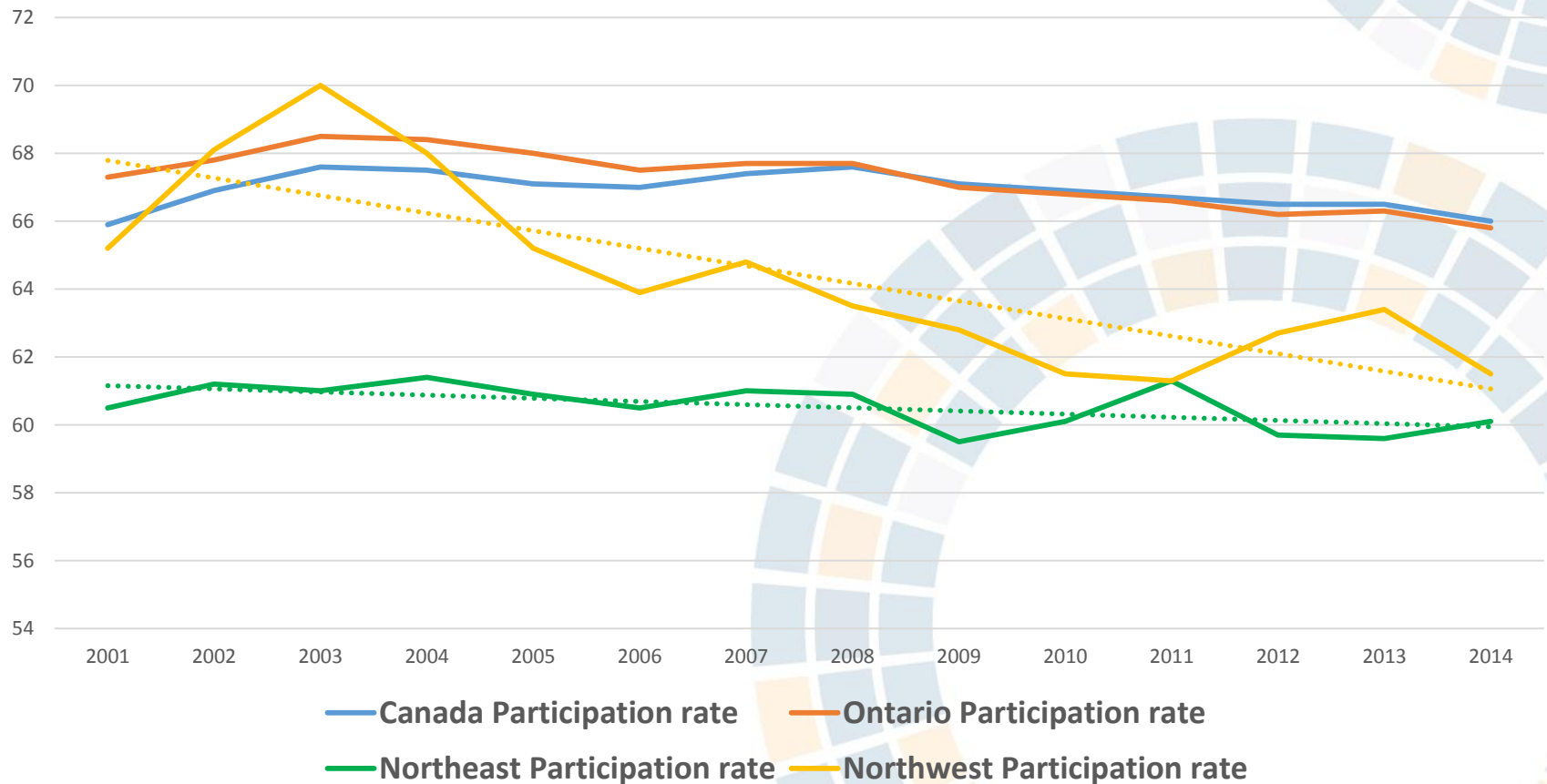
# Full-time employment

## Full-time jobs as a share of total employment (%)

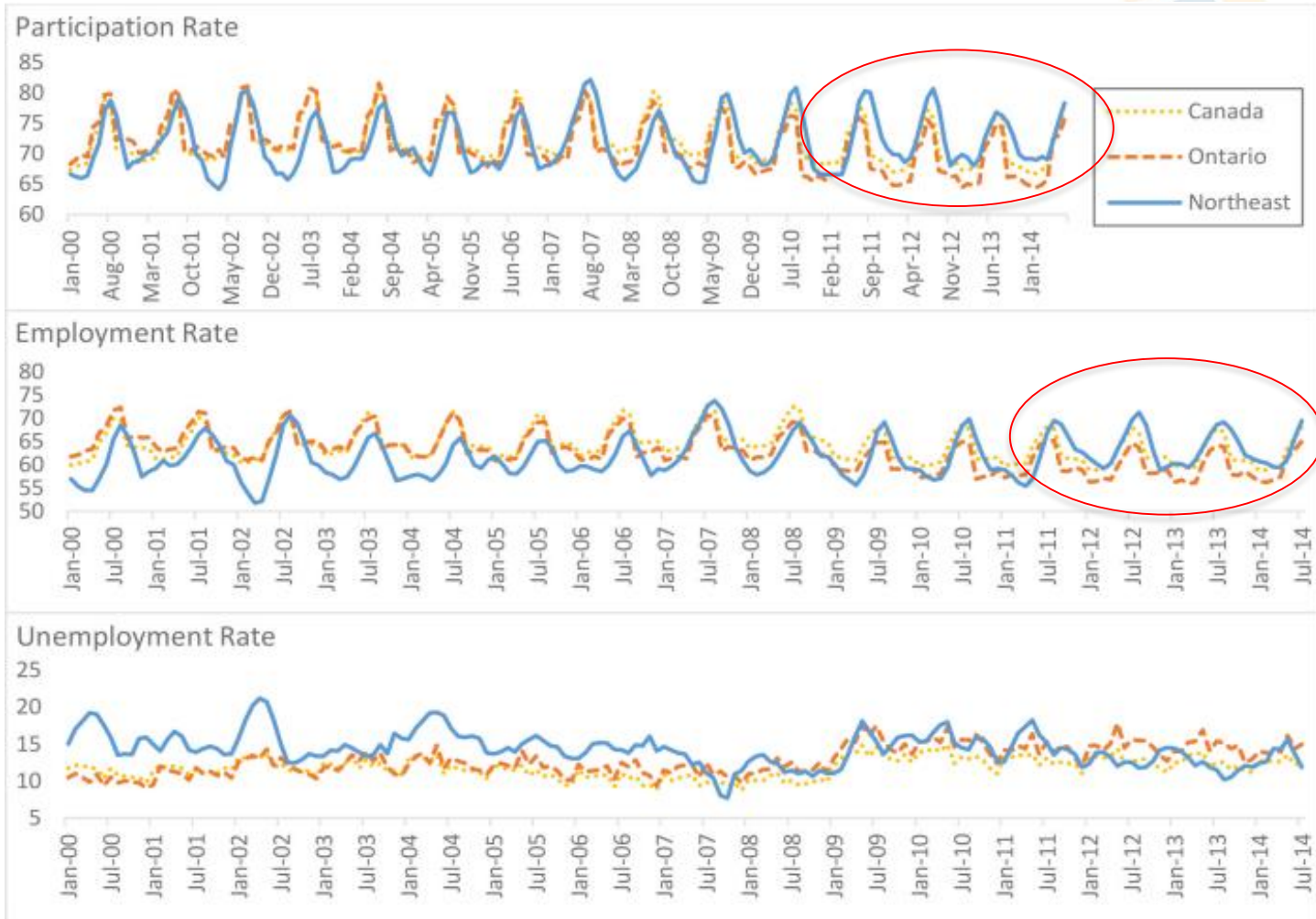


# Participation Rates

Percent of working age individuals participating in the labour force



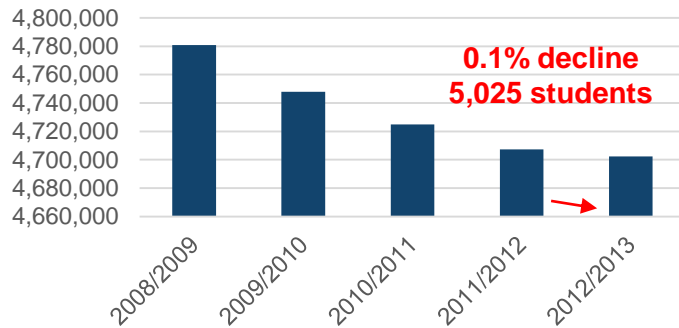
# Youth Labour Force in the Northeast



Source: *From Laggard to Leader (Almost)*, Northern Policy Institute 2015

# Elementary and secondary school enrolment is falling

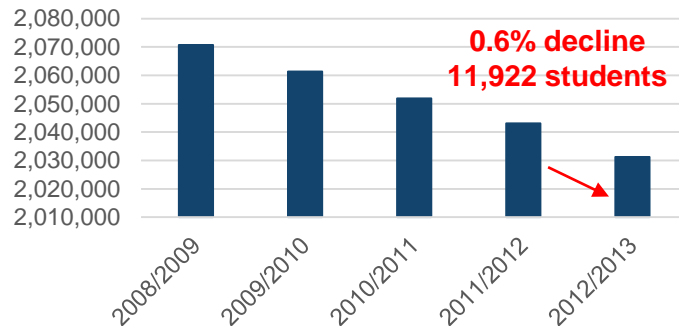
## Canada



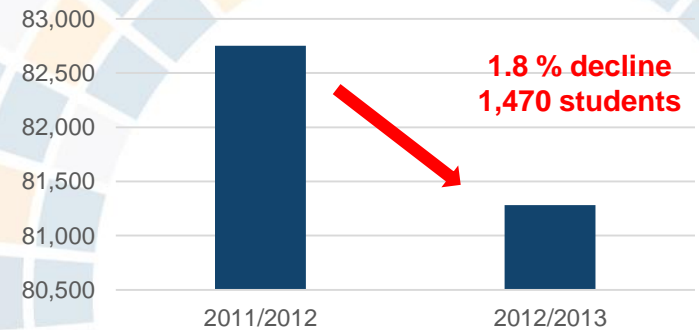
## Northwest Ontario



## Ontario



## Northeast Ontario



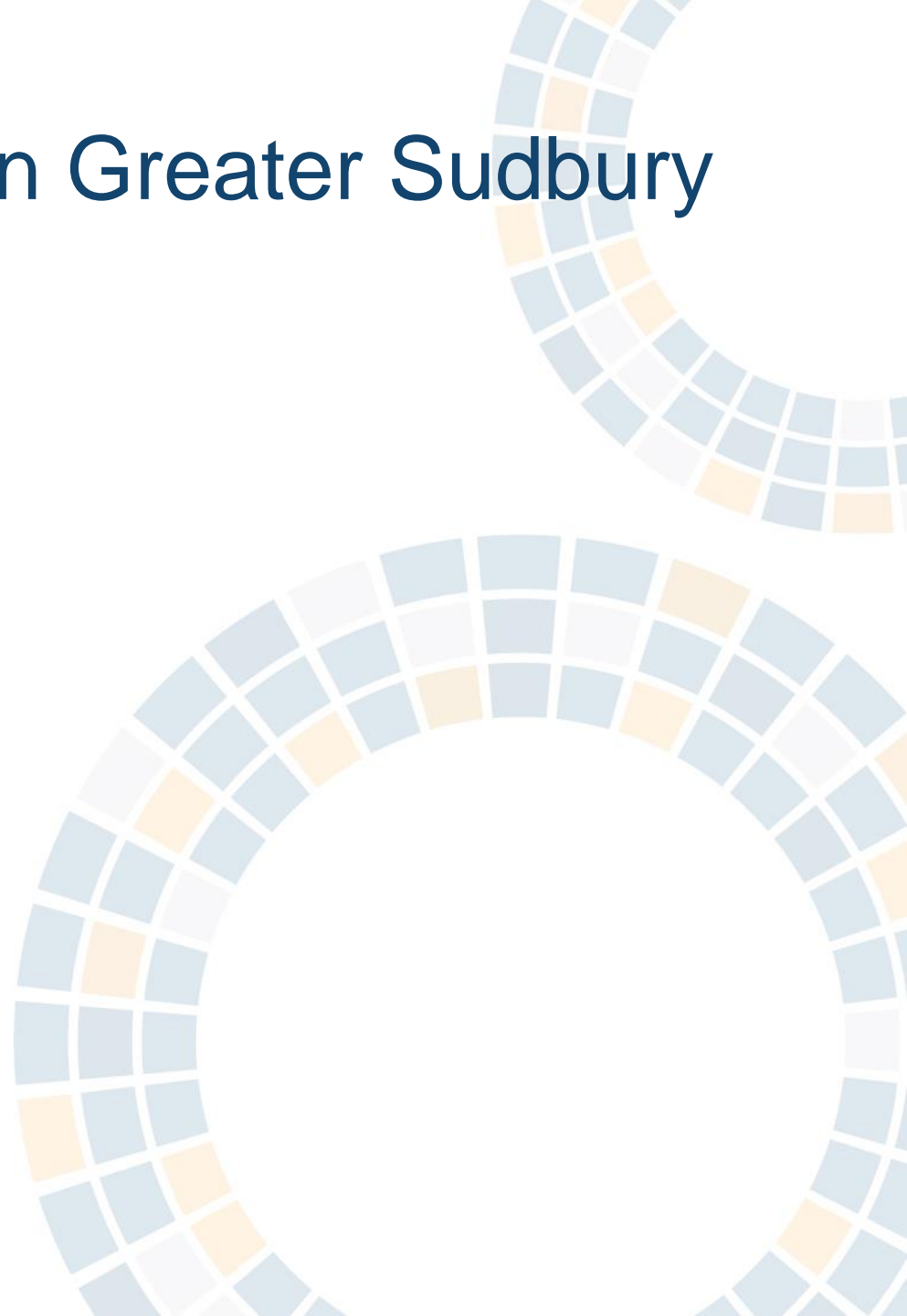
Source: Statistics Canada, CANSIM Table 477-0037; Ontario Ministry of Education

# Still – our education levels are rising

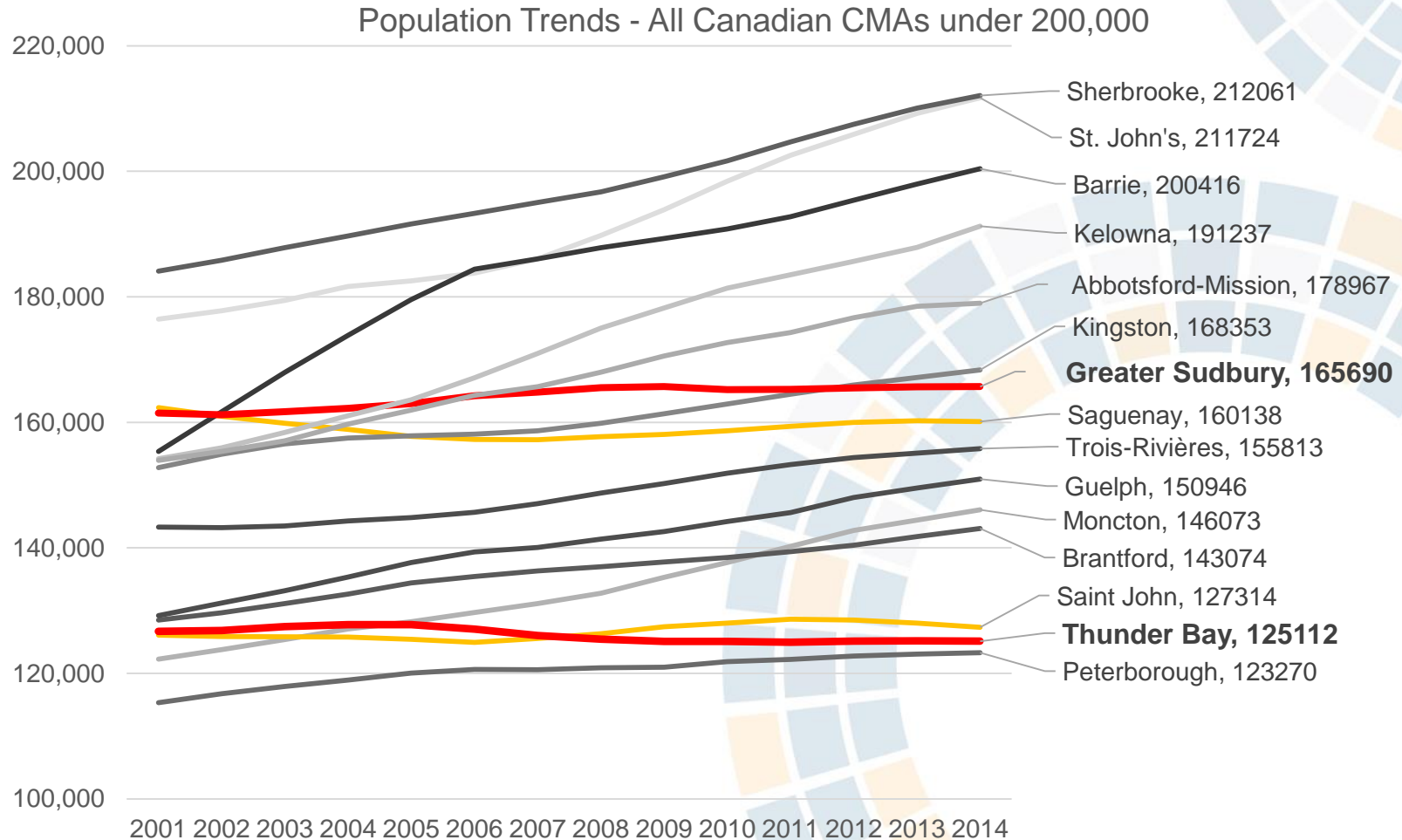
<b>Census 2006</b>	Less than highschool %	Apprenticeship or trades certificate or diploma %	College, CEGEP or other non-university certificate or diploma %	<b>University certificate, diploma or degree</b>
Northwestern Ontario	30.1%	11.2%	18.6%	<b>12.1%</b>
Northeastern Ontario	28.8%	11.4%	21.0%	<b>11.1%</b>
Ontario	22.2%	8.0%	18.4%	<b>20.5%</b>
<b>NHS 2011</b>	Less than highschool %	Apprenticeship or trades certificate or diploma %	College, CEGEP or other non-university certificate or diploma %	<b>University certificate, diploma or degree (at or above bachelor level)</b>
Northwestern Ontario	25.2%	11.3%	21.3%	<b>14.4%</b>
Northeastern Ontario	23.8%	11.3%	23.7%	<b>13.1%</b>
Ontario	18.7%	7.4%	19.8%	<b>23.4%</b>

# Economic Growth in Greater Sudbury

1. Population
2. Employment
3. Infrastructure



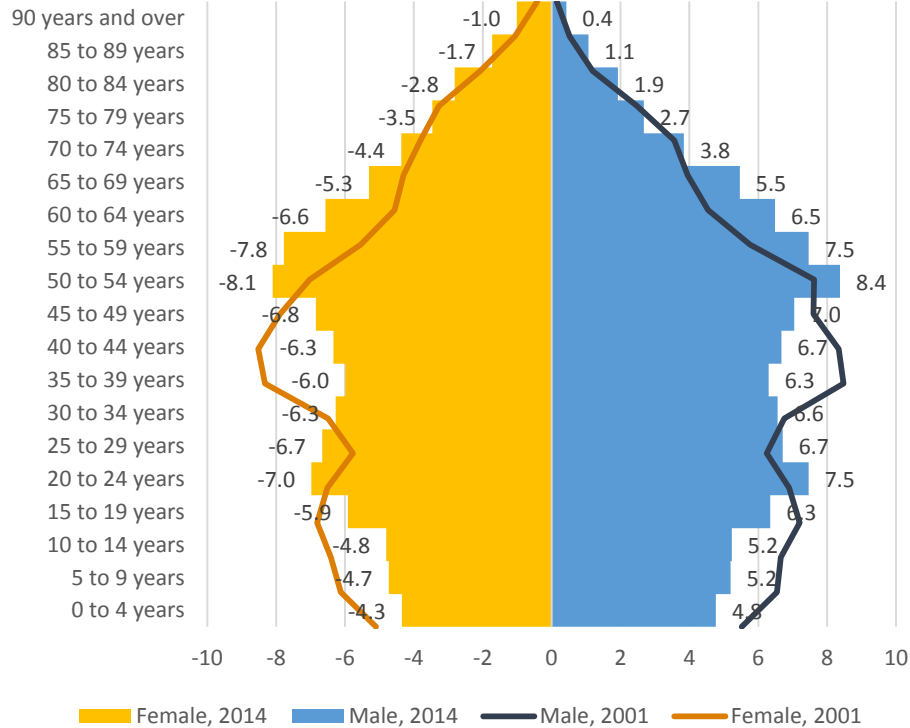
# Trends in population in large Canadian cities



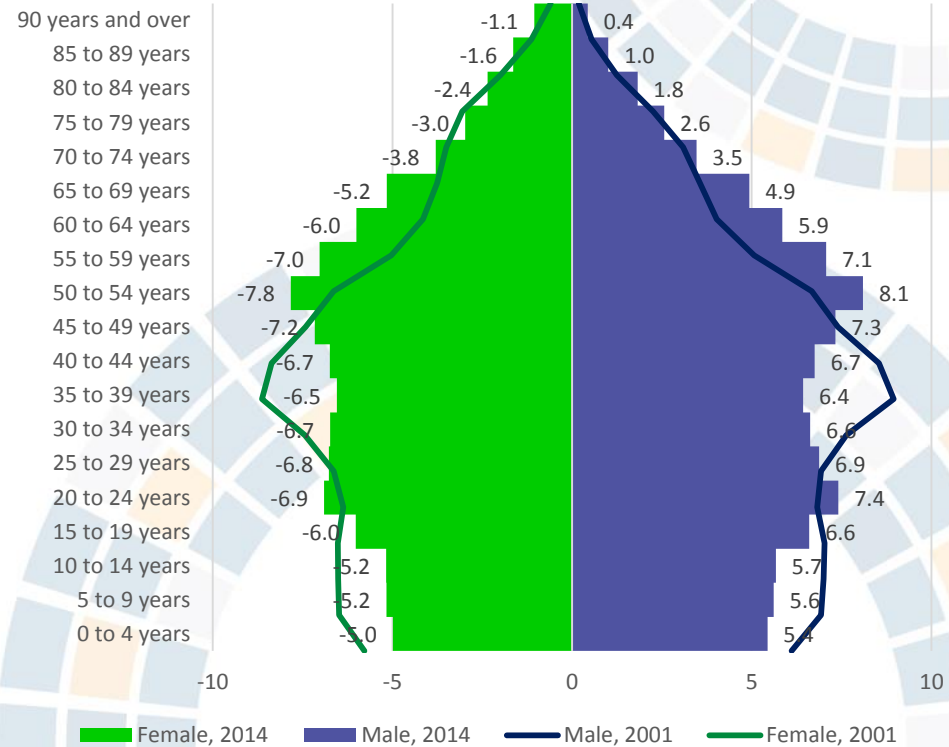


# Population Pyramids

## Greater Sudbury

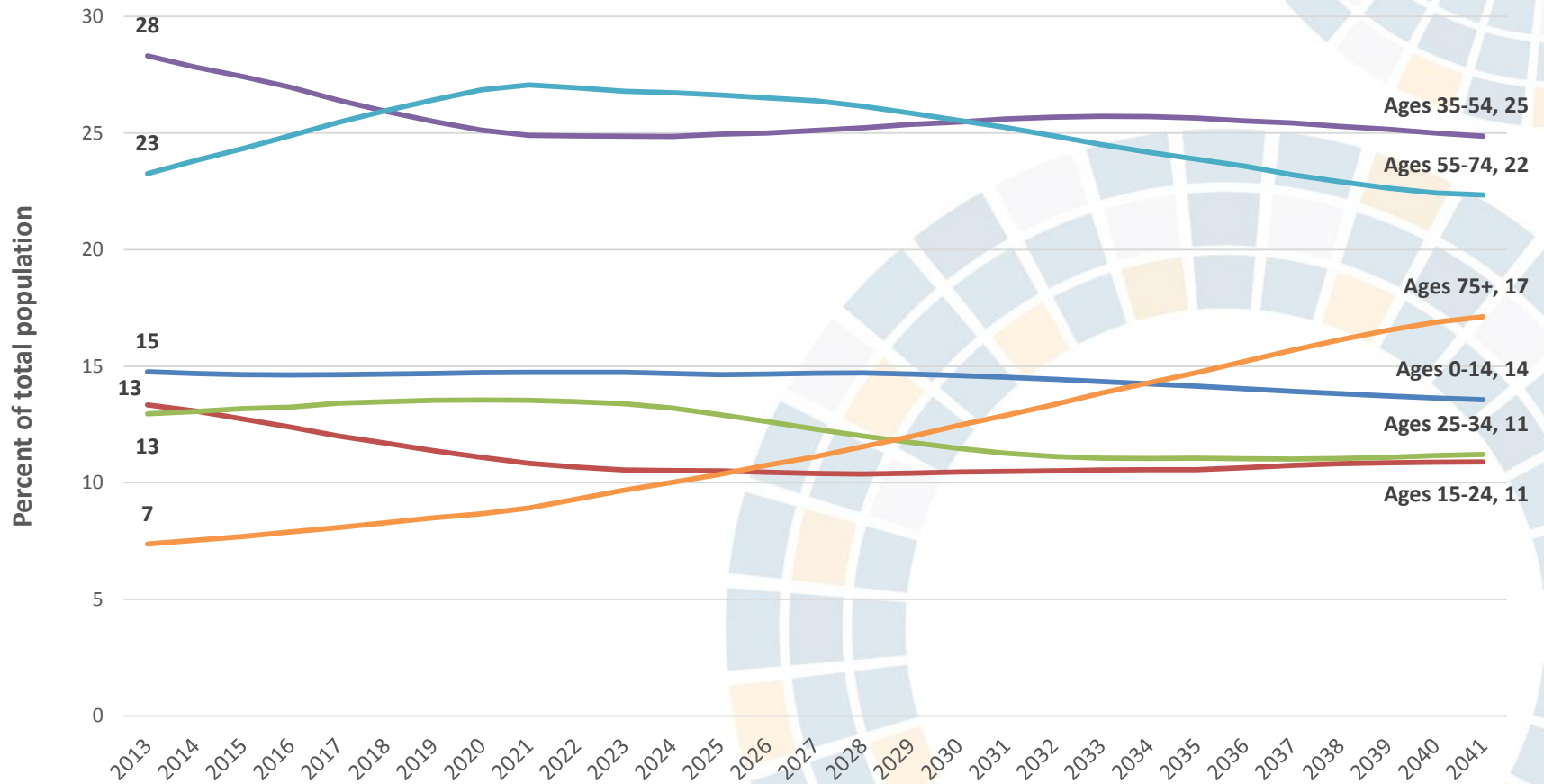


## Ontario

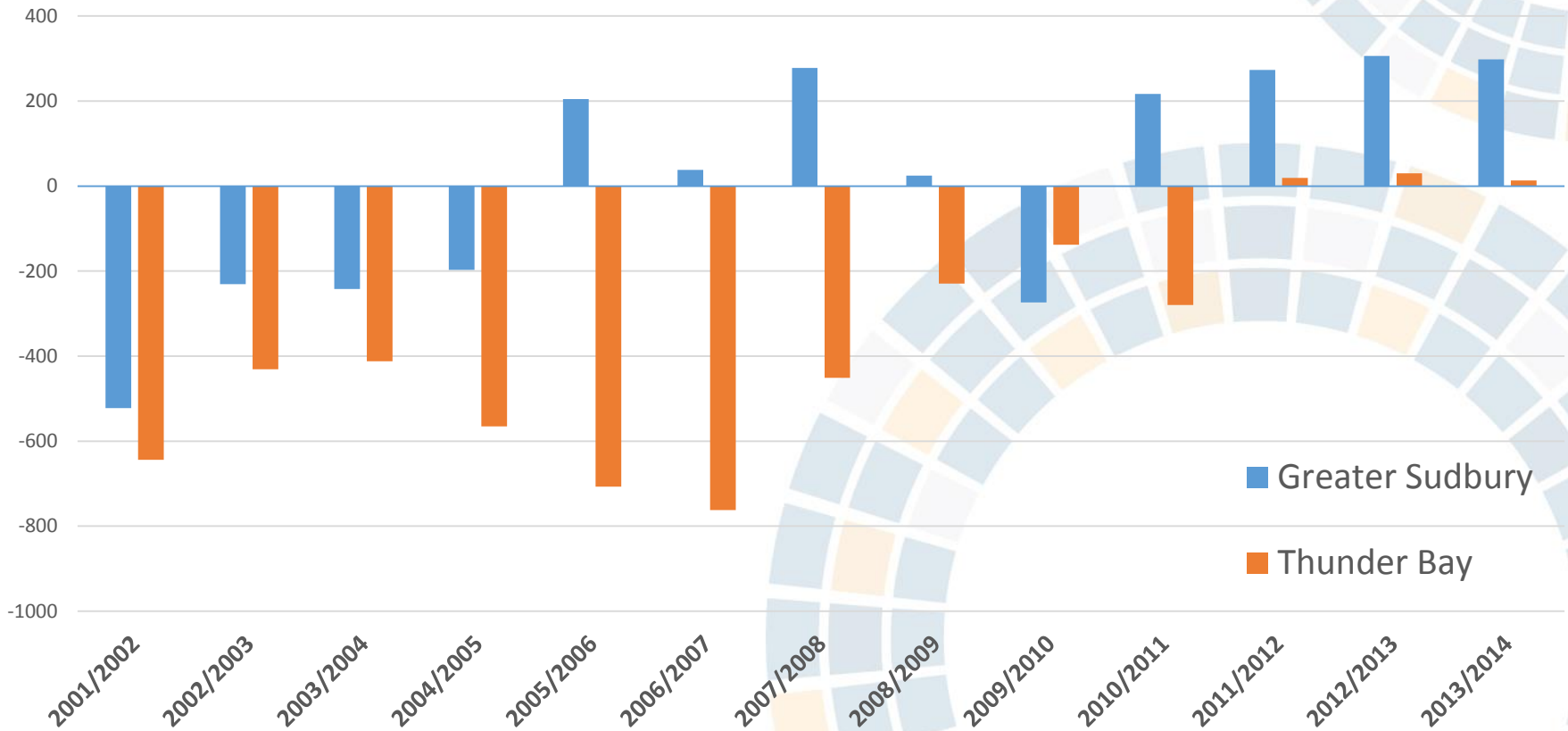


# Greater Sudbury Population Projections

Population Projections by Age Group, 2013-2041

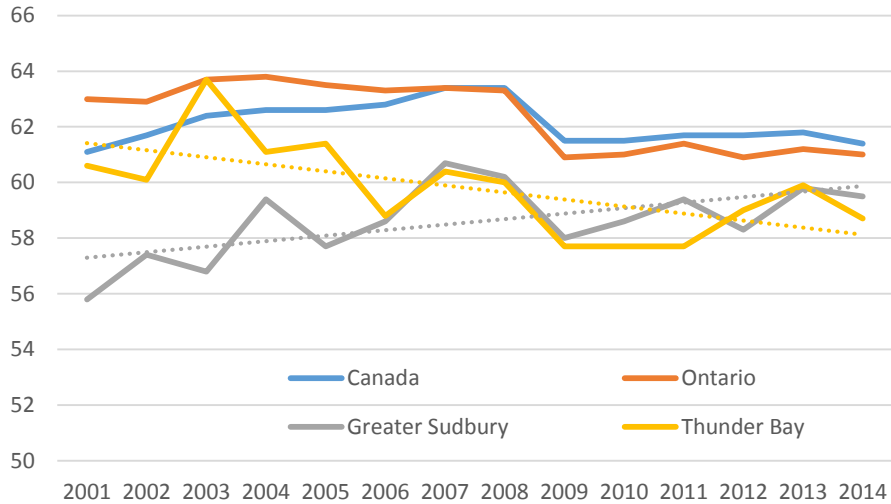


# Trends in Youth (15-24) Migration in Greater Sudbury and Thunder Bay

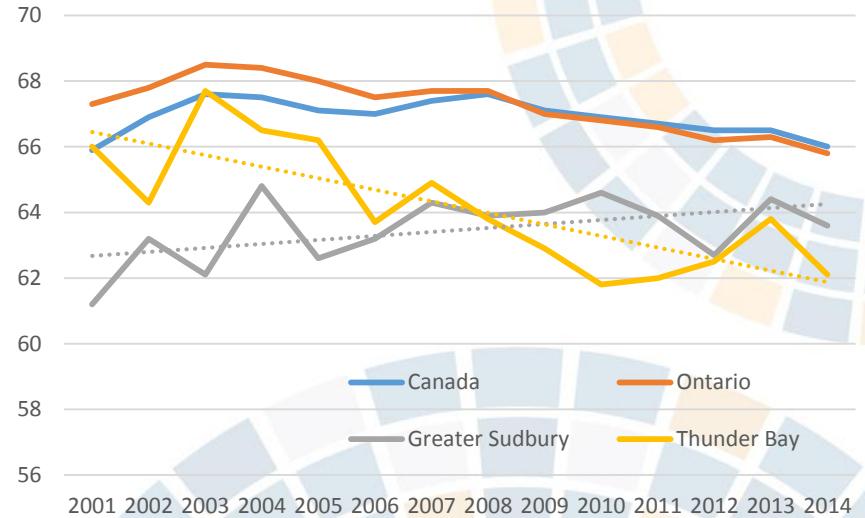


# Labour Force Characteristics

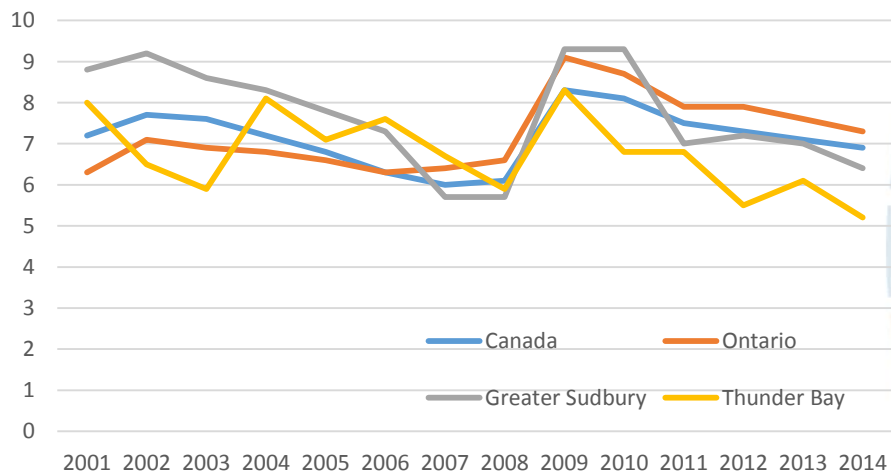
## Employment Rate (%)



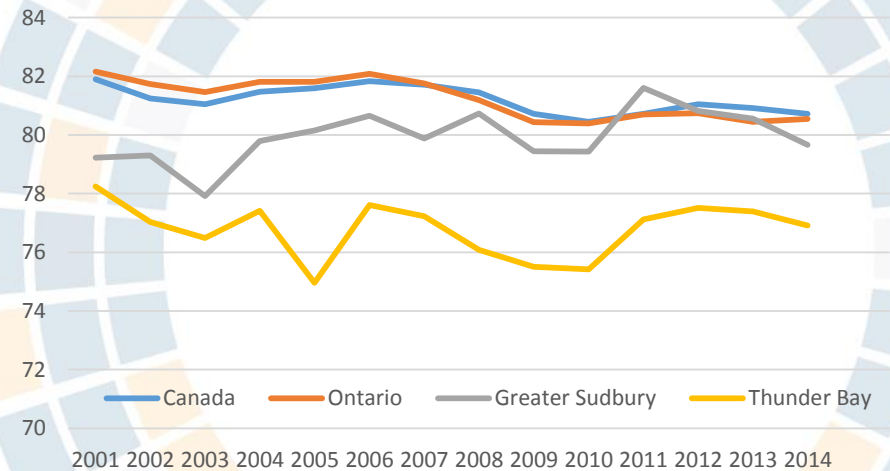
## Participation Rate (%)



## Unemployment Rate (%)

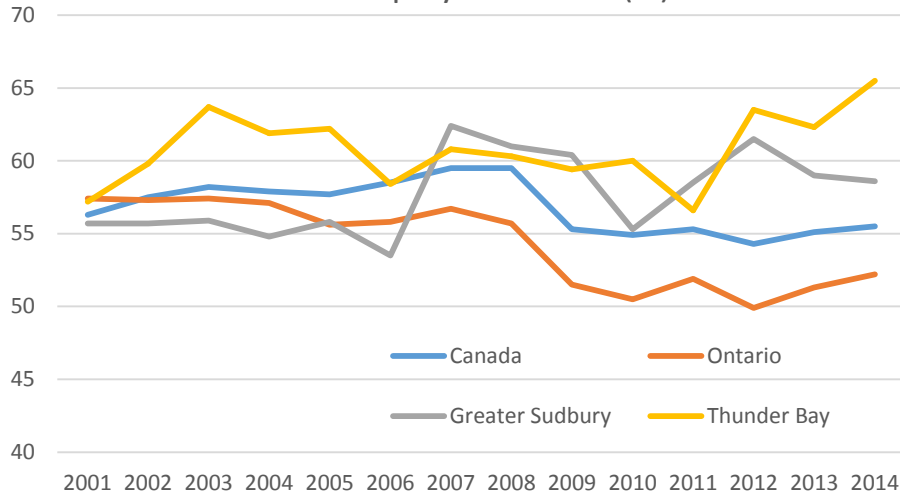


## Full Time Jobs (% of total)

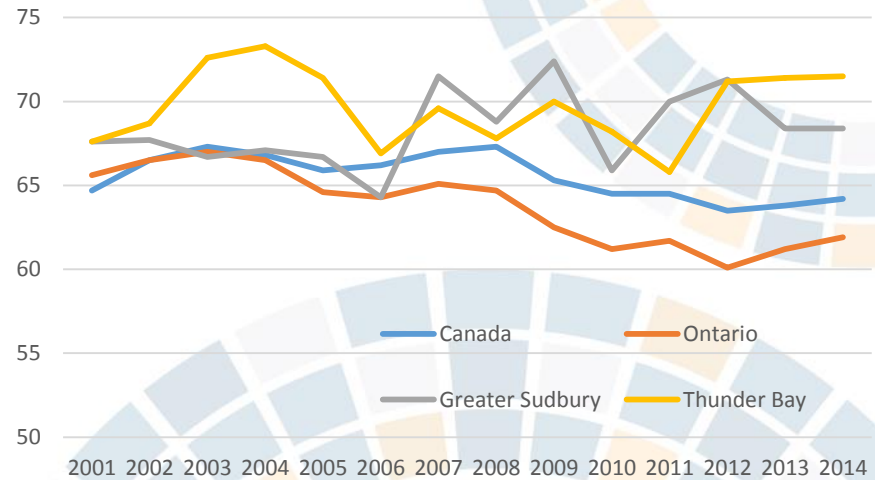


# Youth Labour Force Characteristics

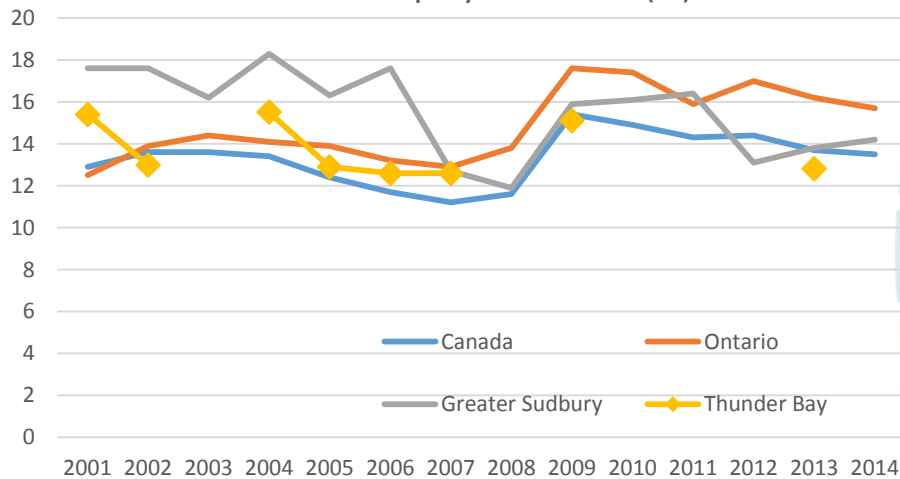
## Youth Employment Rate (%)



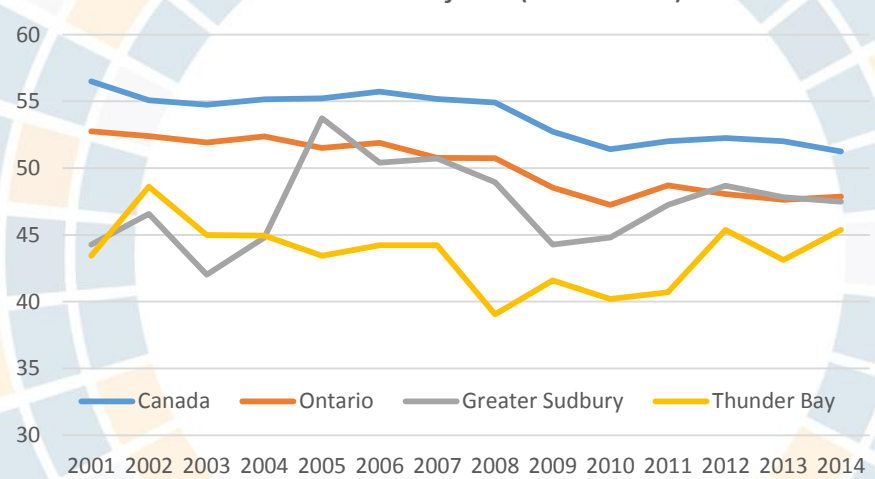
## Youth Participation Rate (%)



## Youth Unemployment Rate (%)



## Youth full-time jobs (% of total)



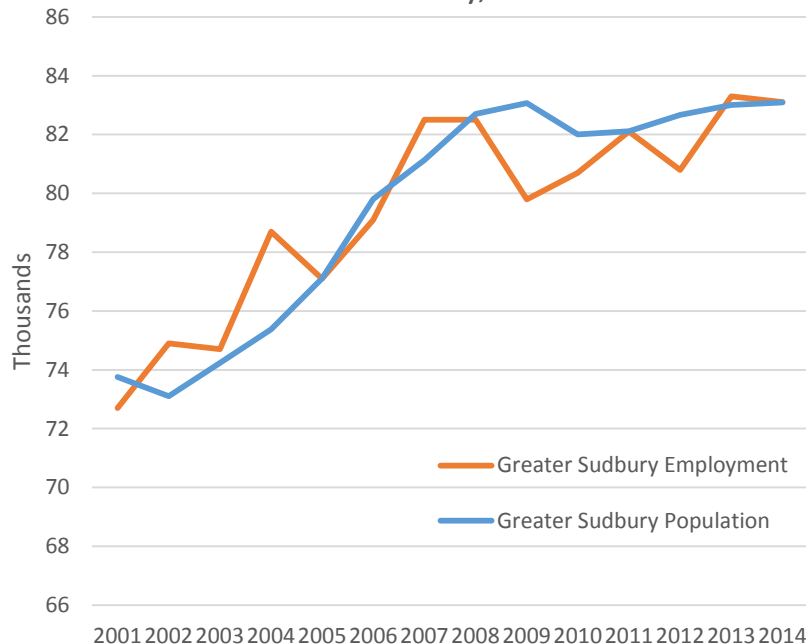
# Employment vs Population: Correlation

Can we have population growth without job growth, and vice versa?

## Greater Sudbury:

- Corr = 0.91
- Ave annual population change = 323
- Ave. annual employment change = 800

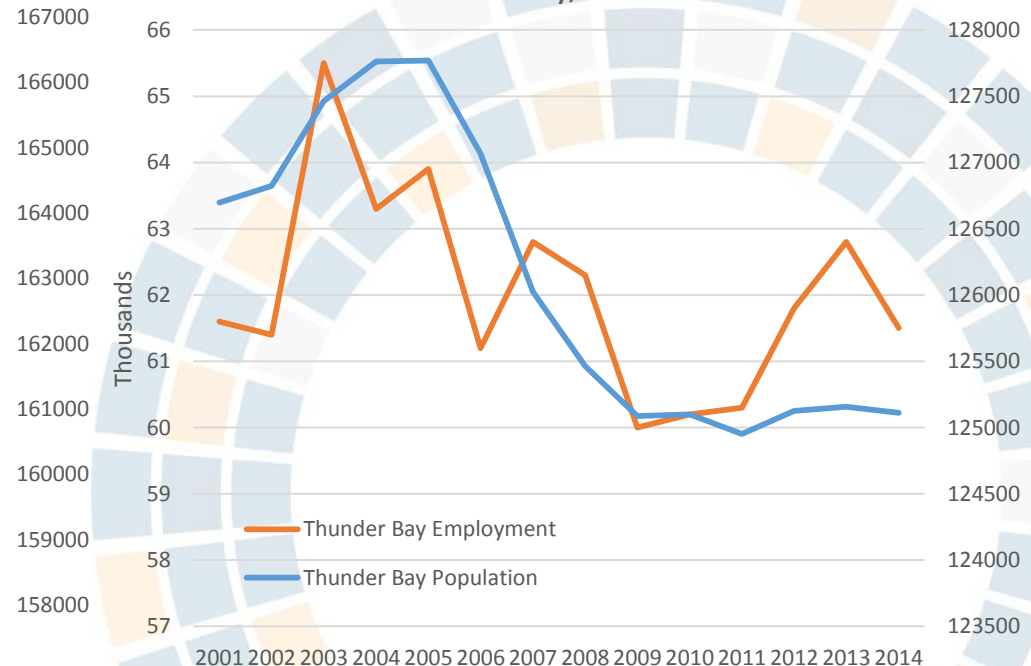
Greater Sudbury, 2001-2014



## Thunder Bay:

- Corr = 0.64
- Ave annual population change = -122
- Ave. annual employment change = -8

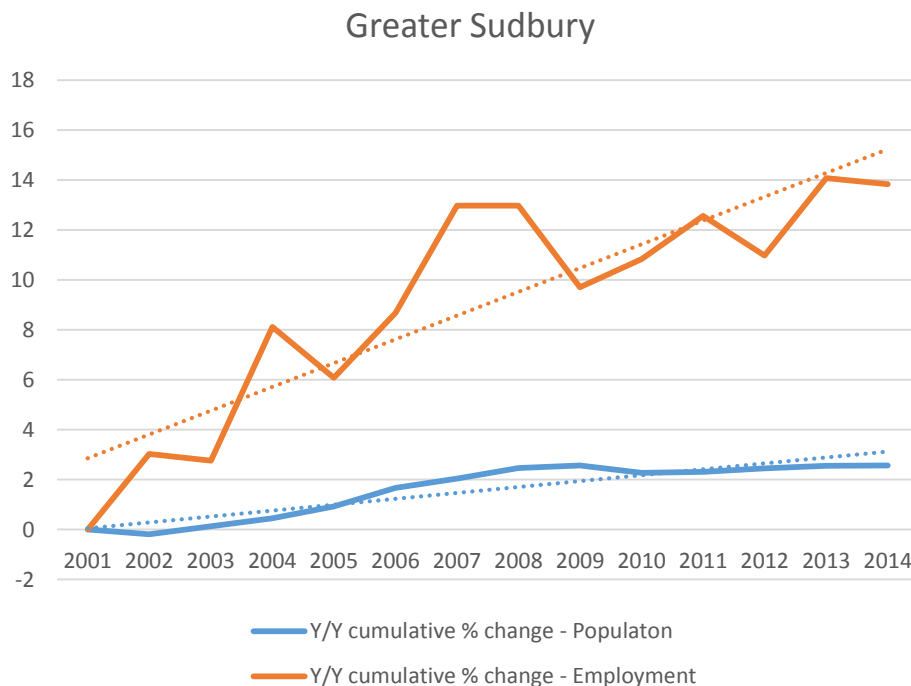
Thunder Bay, 2001-2014



# Employment vs Population: Cumulative Y/Y Growth Rates, 2001-14

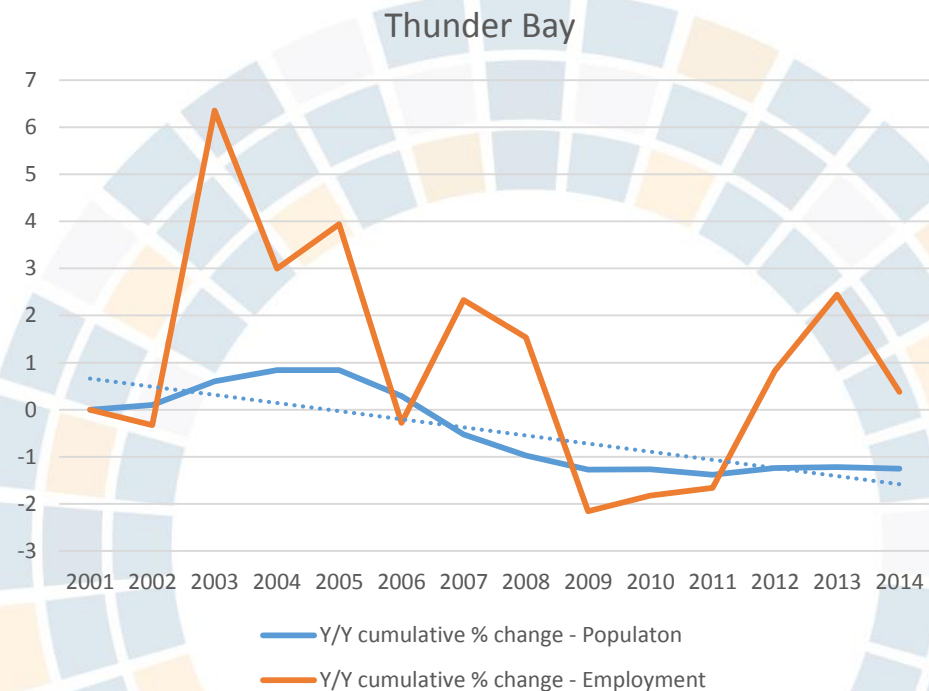
## Greater Sudbury:

- Ave annual pop growth rate = 0.2%
- Ave annual emp growth rate = 1.1%



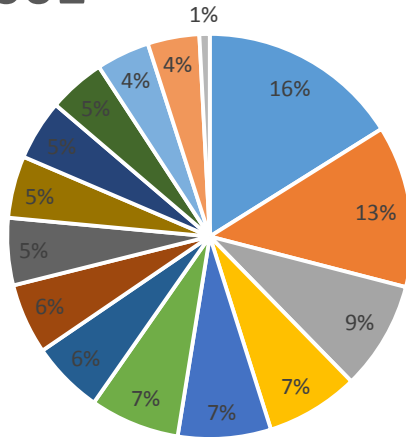
## Thunder Bay:

- Ave annual pop growth rate = - 0.1%
- Ave annual emp growth rate = 0.03%



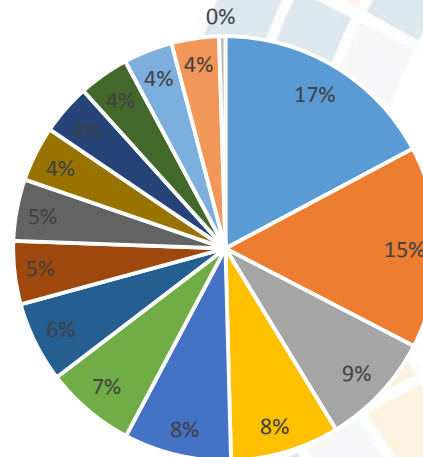
# Distribution of Jobs – Greater Sudbury

2001



- Trade
- Health care and social assistance
- Forestry, fishing, mining, quarrying, oil and gas
- Educational services
- Accommodation and food services
- Public administration
- Business, building and other support services
- Construction
- Finance, insurance, real estate and leasing
- Manufacturing
- Transportation and warehousing
- Other services
- Professional, scientific and technical services
- Information, culture and recreation
- Agriculture + Utilities

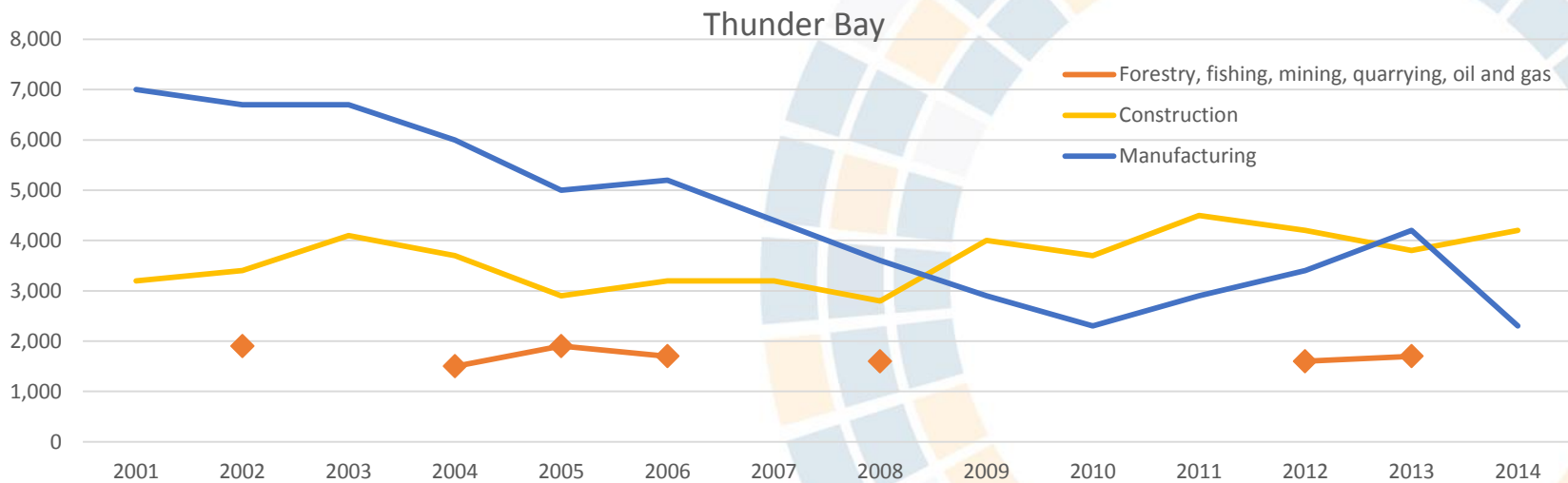
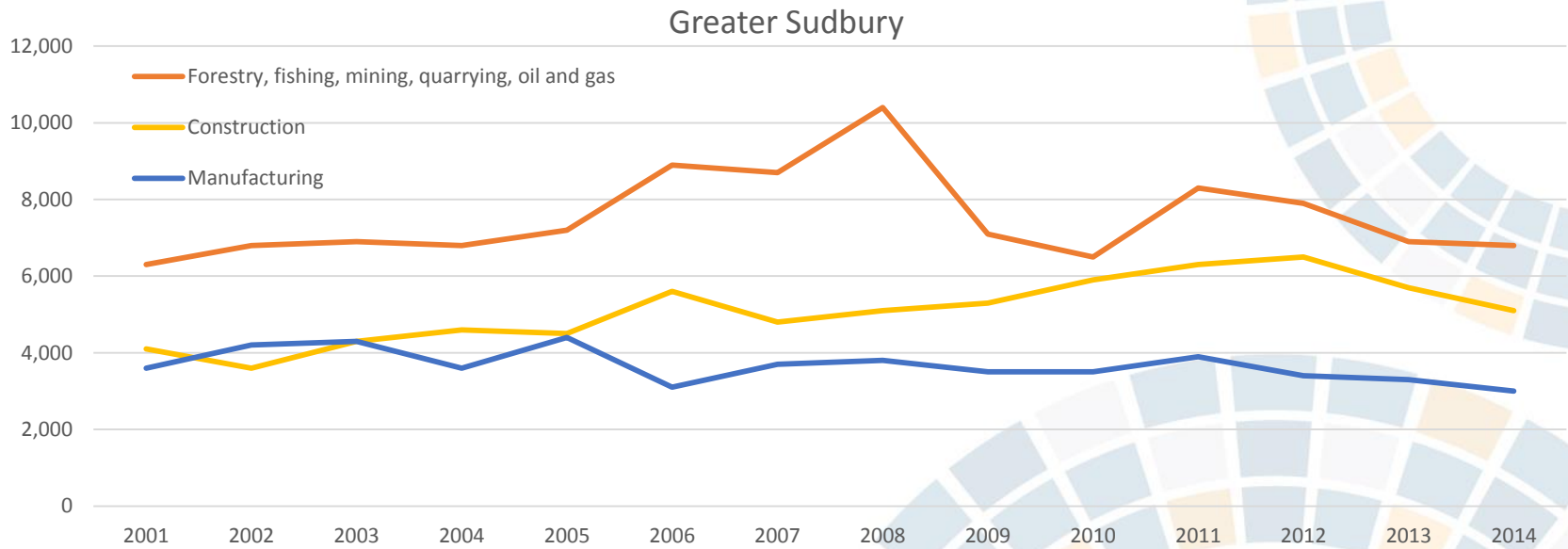
2014



- Trade
- Health care and social assistance
- Educational services
- Accommodation and food services
- Forestry, fishing, mining, quarrying, oil and gas
- Public administration
- Construction
- Transportation and warehousing
- Professional, scientific and technical services
- Business, building and other support services
- Finance, insurance, real estate and leasing
- Information, culture and recreation
- Other services
- Manufacturing
- Agriculture + Utilities

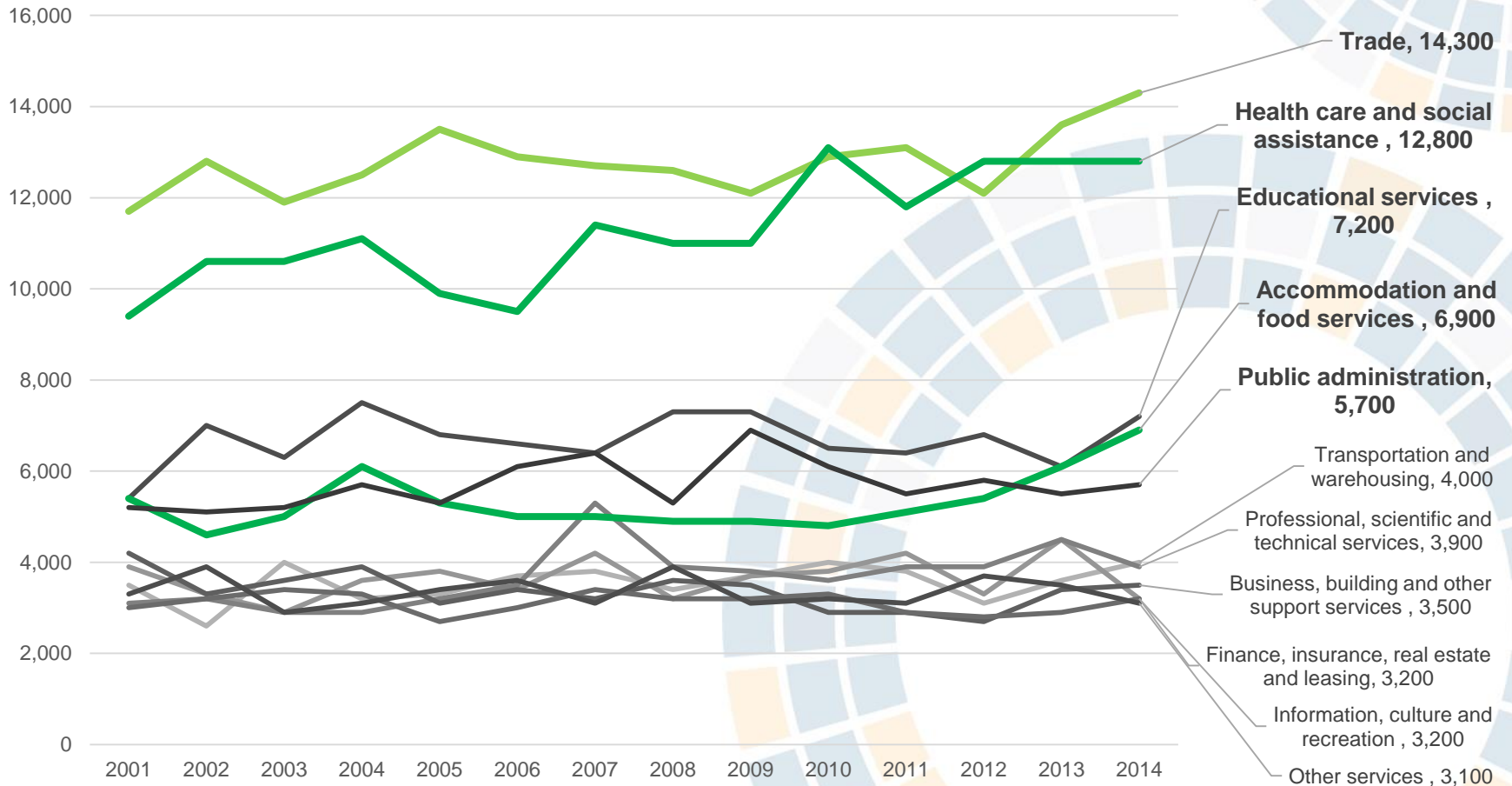


# Goods-producing Sector



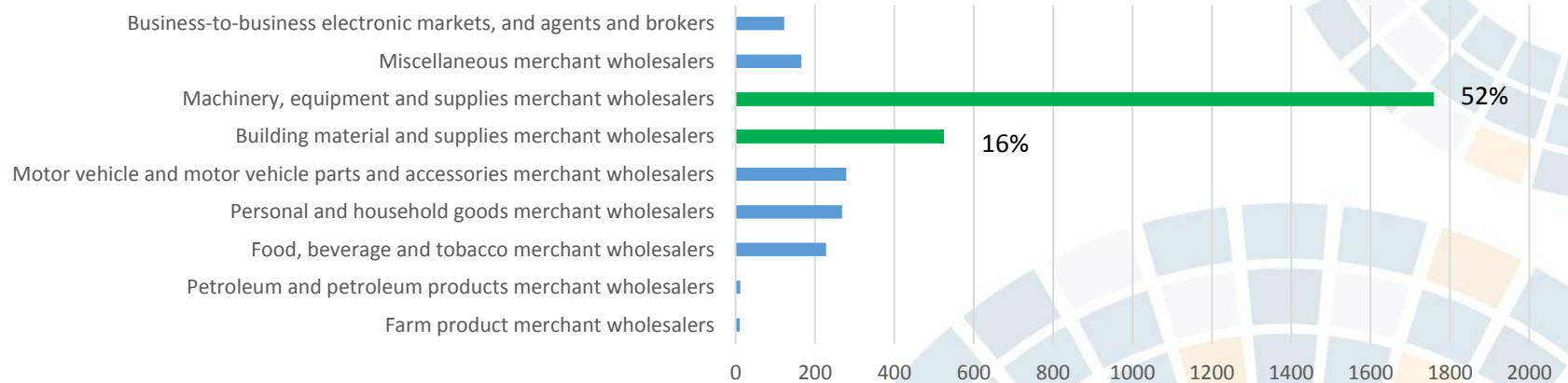
# Services-producing Sector – Greater Sudbury

Employment by Industry – Greater Sudbury

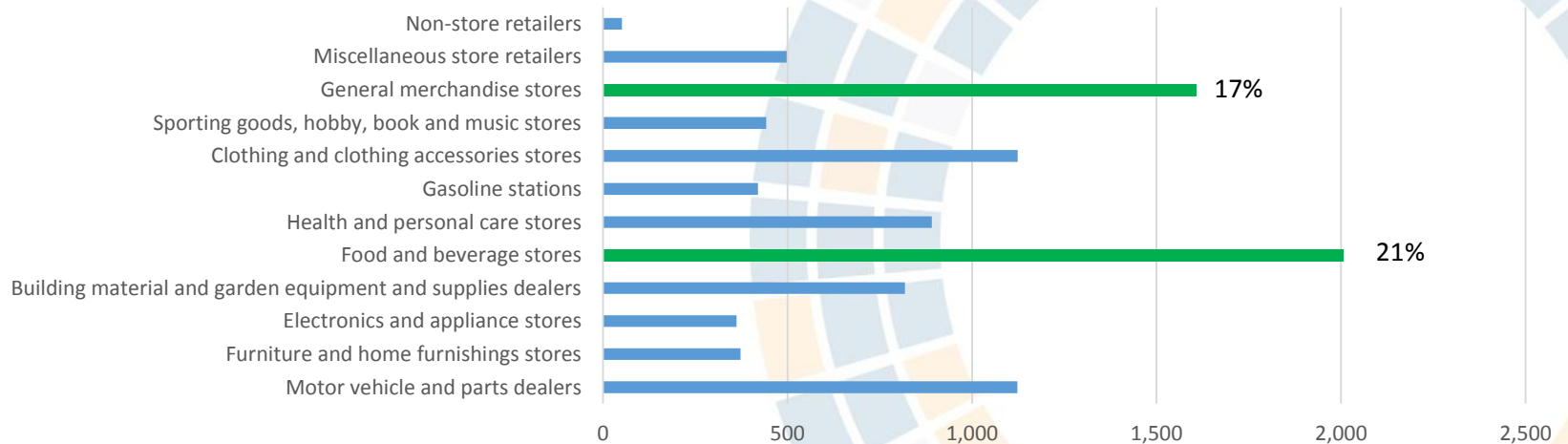


# Trade in Sudbury – A closer look...

## Wholesale Trade, 2013 (26% of total trade)

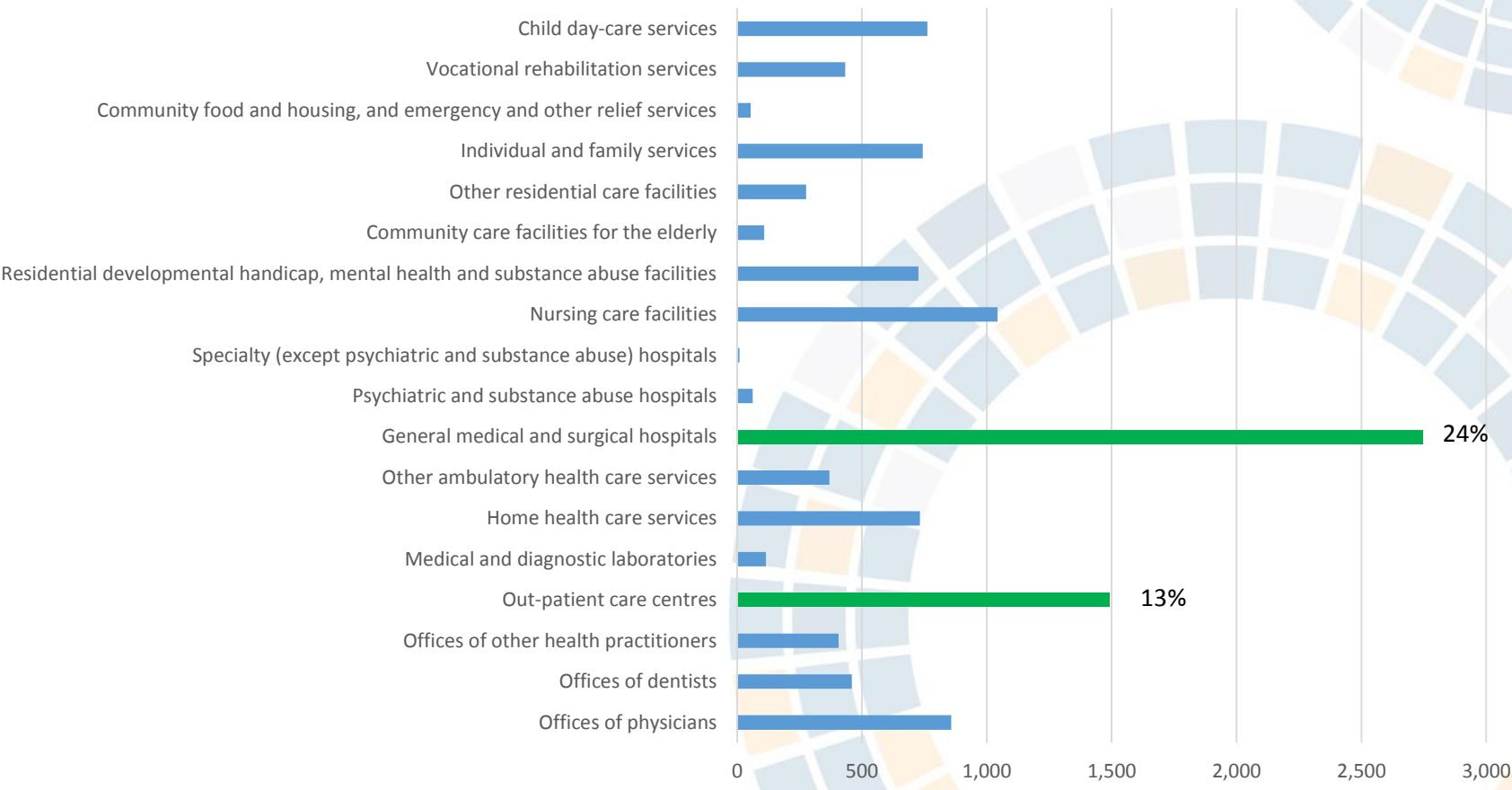


## Retail Trade, 2013 (74% of total trade)



# Health Care in Sudbury – A closer look...

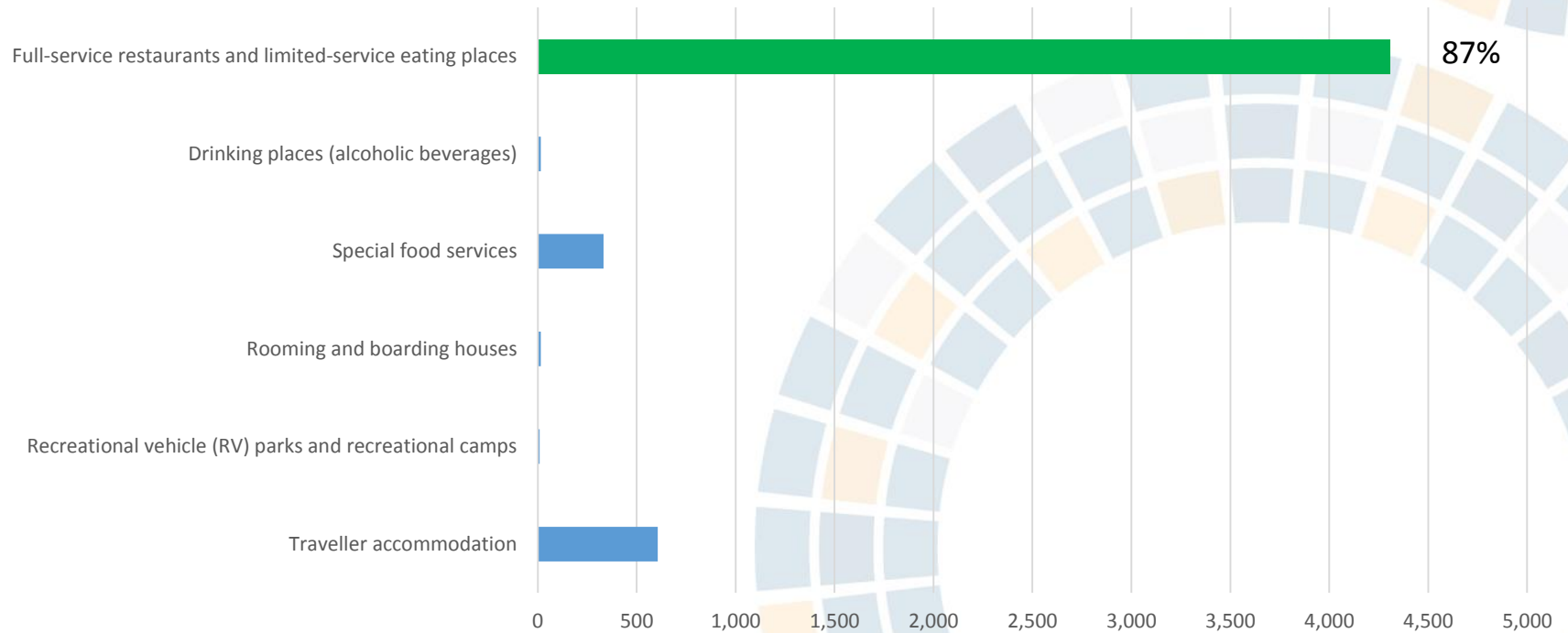
Health Care and Social Assistance, 2013



Source: EMSI Analyst (based on 2011 Census)

# Accommodation and Food in Sudbury – a closer look...

Accommodation and Food Services, 2013

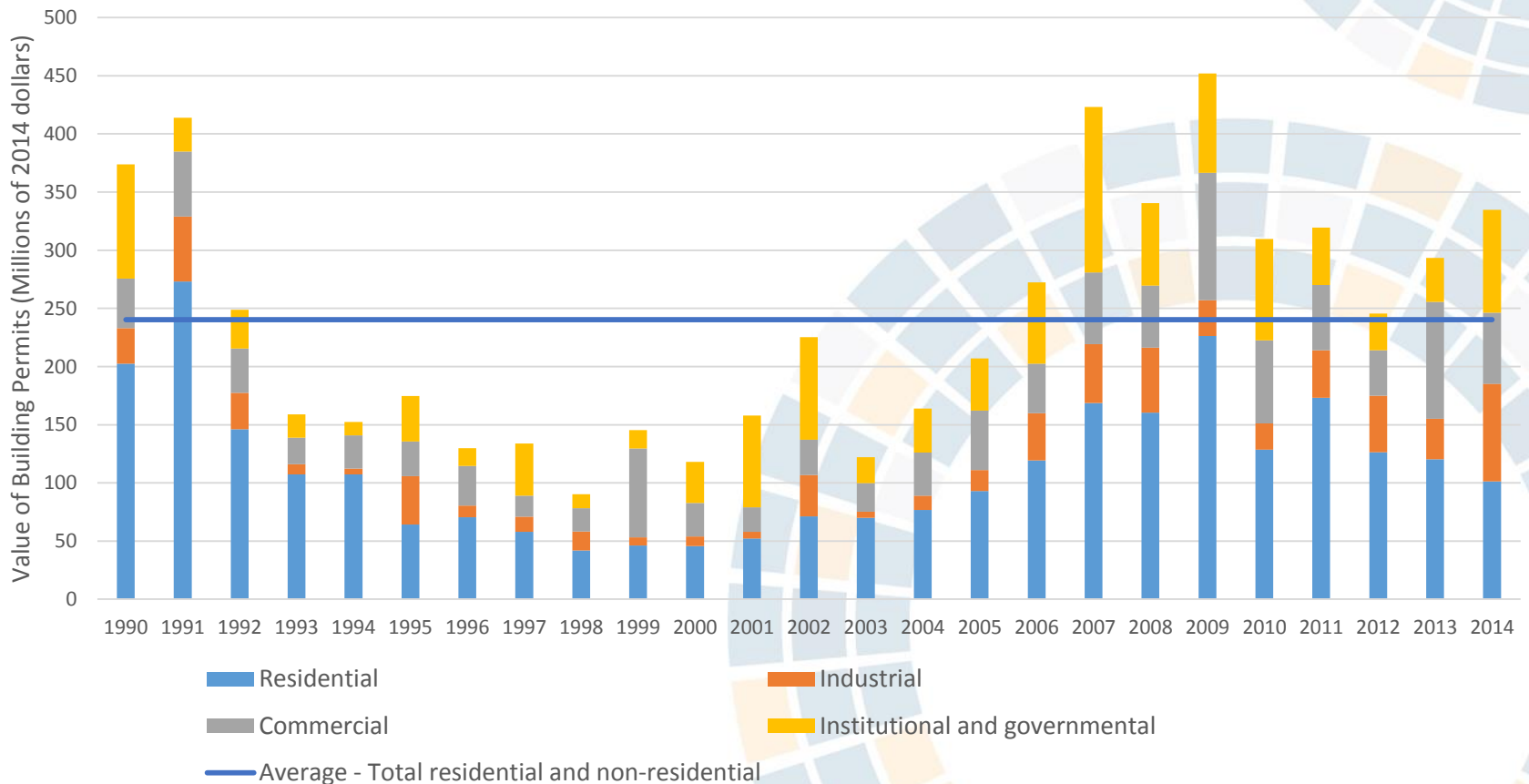


# Greater Sudbury Infrastructure Indicators (bricks and mortar)

- Building Permits
  - Industrial
  - Commercial
  - Institutional and Governmental
  - Residential
- Source: Statistics Canada, CANSIM Table 026-0006 (Adjusted for inflation, expressed in 2014 dollars)

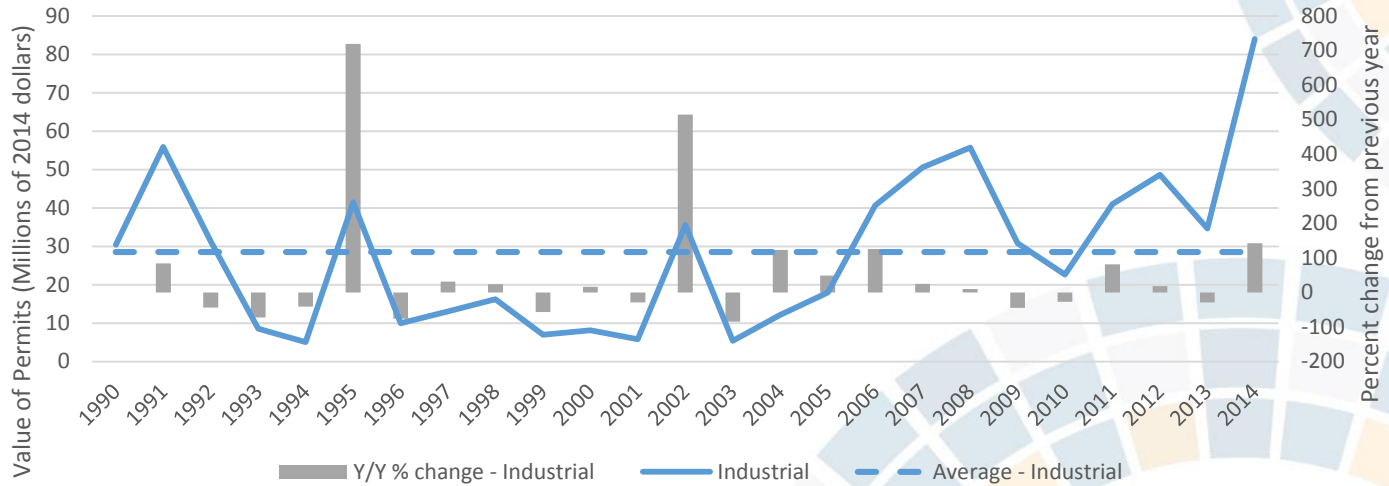
# Value of Building Permits, all purposes

## Value of Building Permits

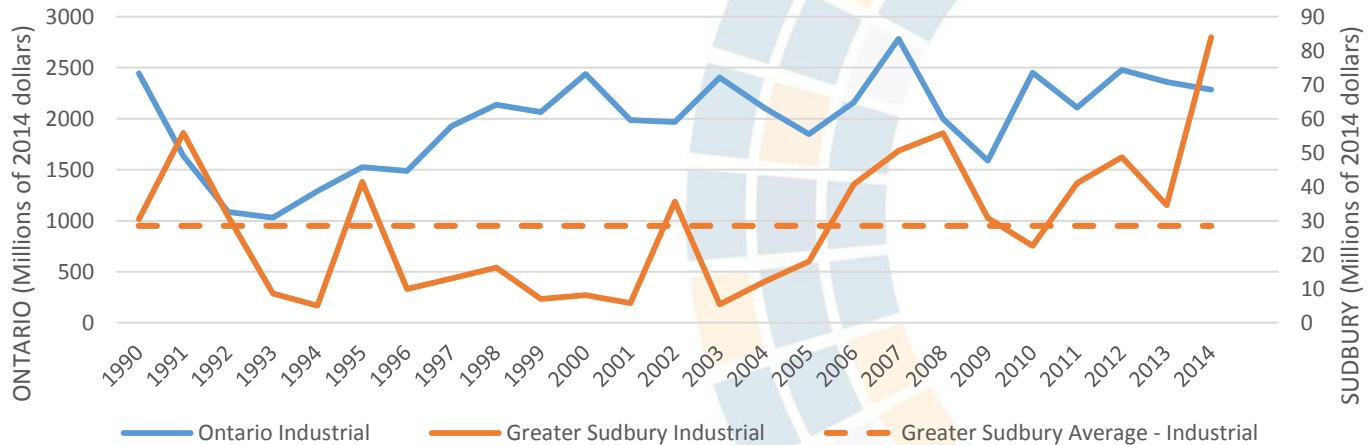


# Industrial Building Permits

## Value of Industrial Building Permits, Trend



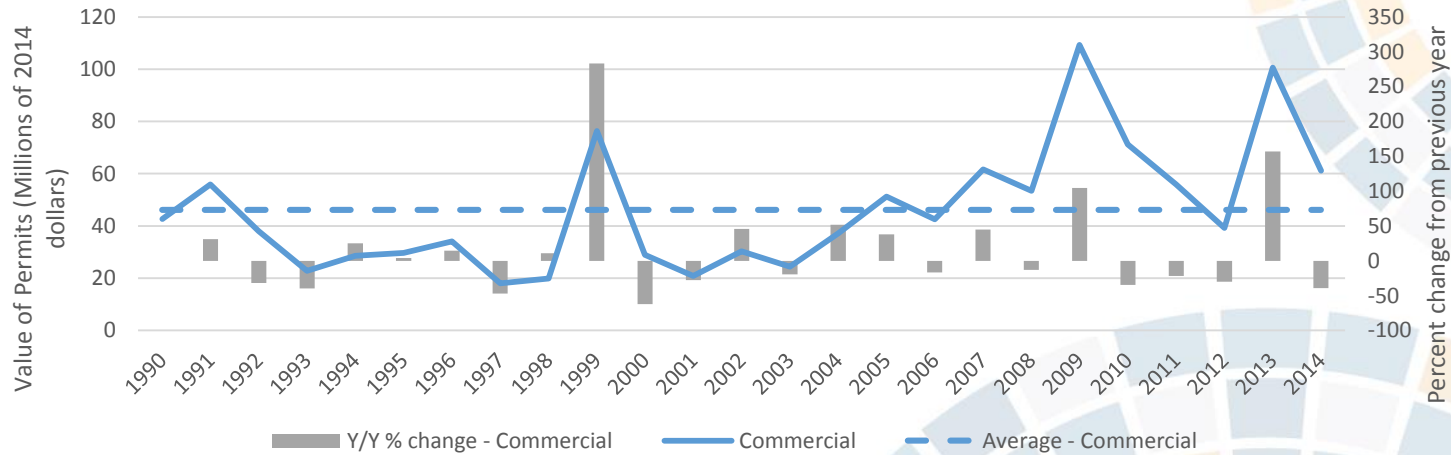
## Comparative Trend



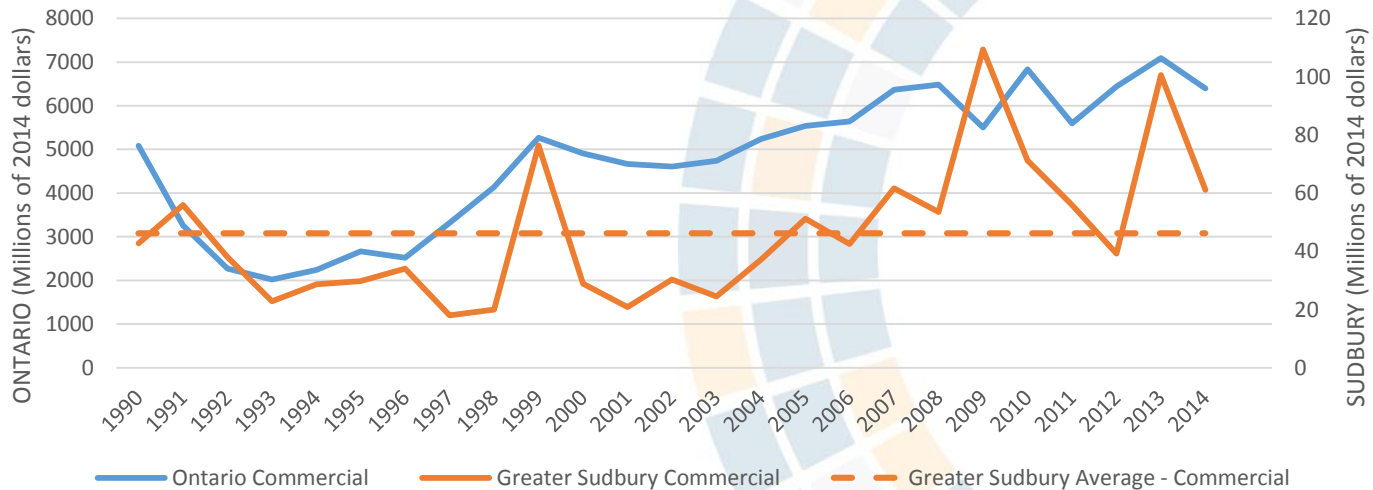


# Commercial Building Permits

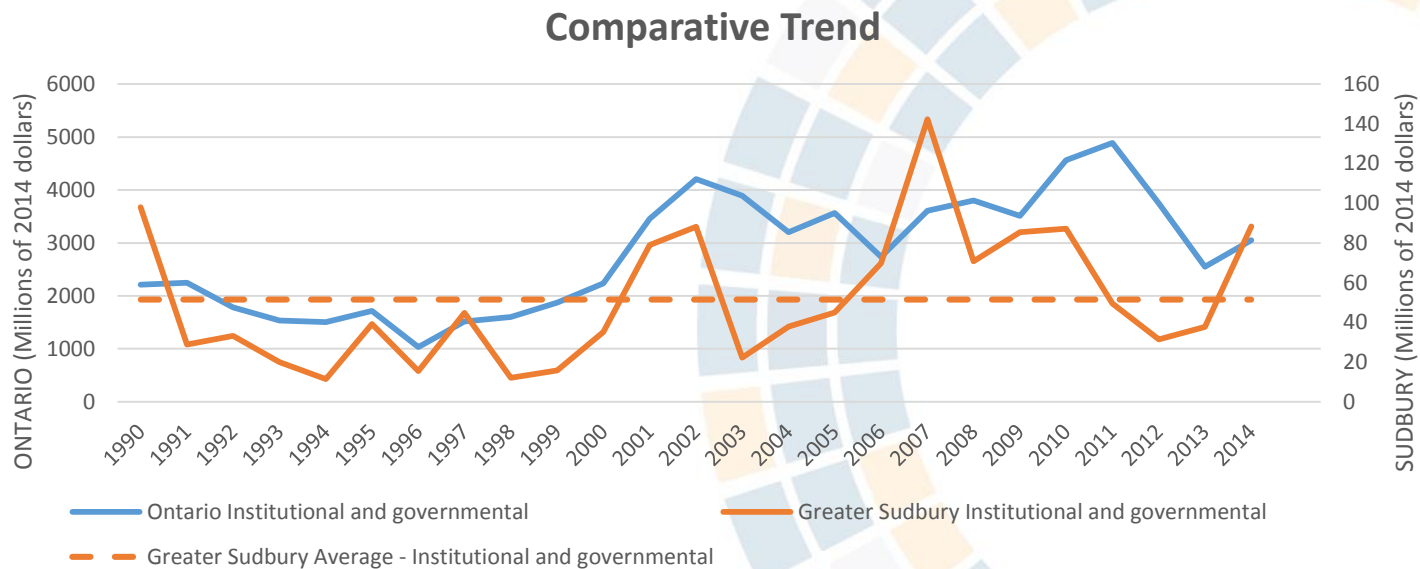
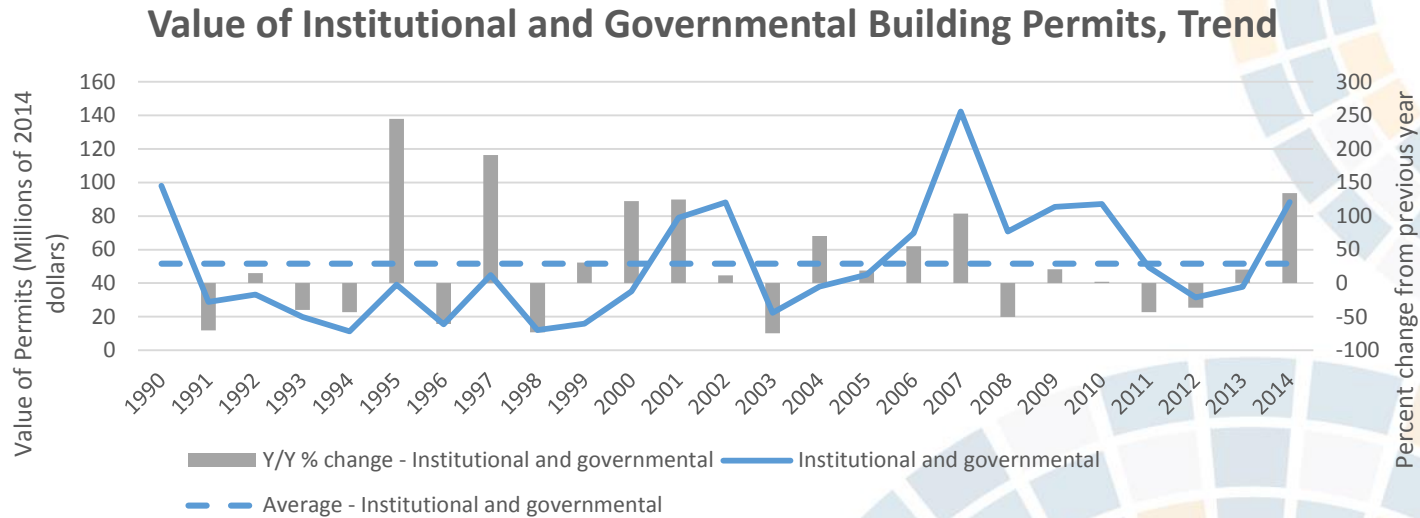
## Value of Commercial Building Permits, Trend



## Comparative Trend

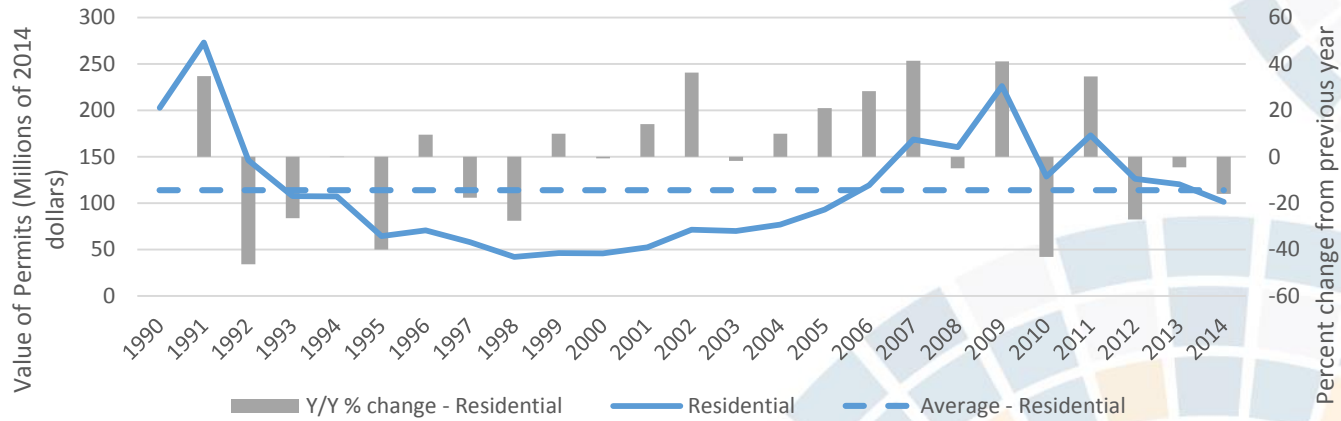


# Institutional and Governmental Permits

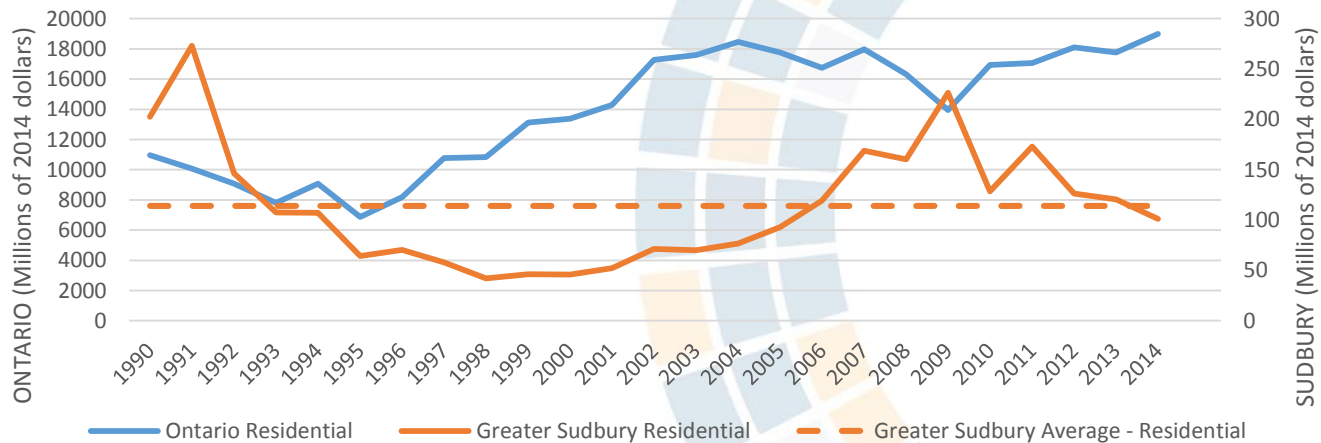


# Residential Building Permits

## Value of Residential Building Permits, Trend



## Comparative Trend



# Conclusions and Observations

- Sudbury's population projections are weak, but not written in stone
- The number of working age women in Sudbury is disproportionately low
- Employment (including full-time) and participation rates in Sudbury are at or nearing provincial and national levels – the gap is closing
- Youth migration in the North is slowing; Sudbury is leading the way
- Youth labour force indicators in Sudbury are strong – recent influx of youth are added benefit **but more needs to be done**
- The food services industry shows promising signs of growth
- Trends in commercial building appear to be highly volatile
- Growth in residential building has not recovered from the financial crisis

Thank you. Merci. Miigwetch.

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# Discussion Questions

How can the public AND private sector:

1. Continue to attract and retain youth in Sudbury?
2. Attract and retain women in Sudbury?
3. Encourage local entrepreneurial endeavours?
4. Foster greater certainty and growth in commercial and residential investments?