

# ECONOMIC DEVELOPMENT YEAR 1, UNIVERSITY OF WATERLOO STATE OF THE NORTH

22 JUNE 2018, THUNDER BAY

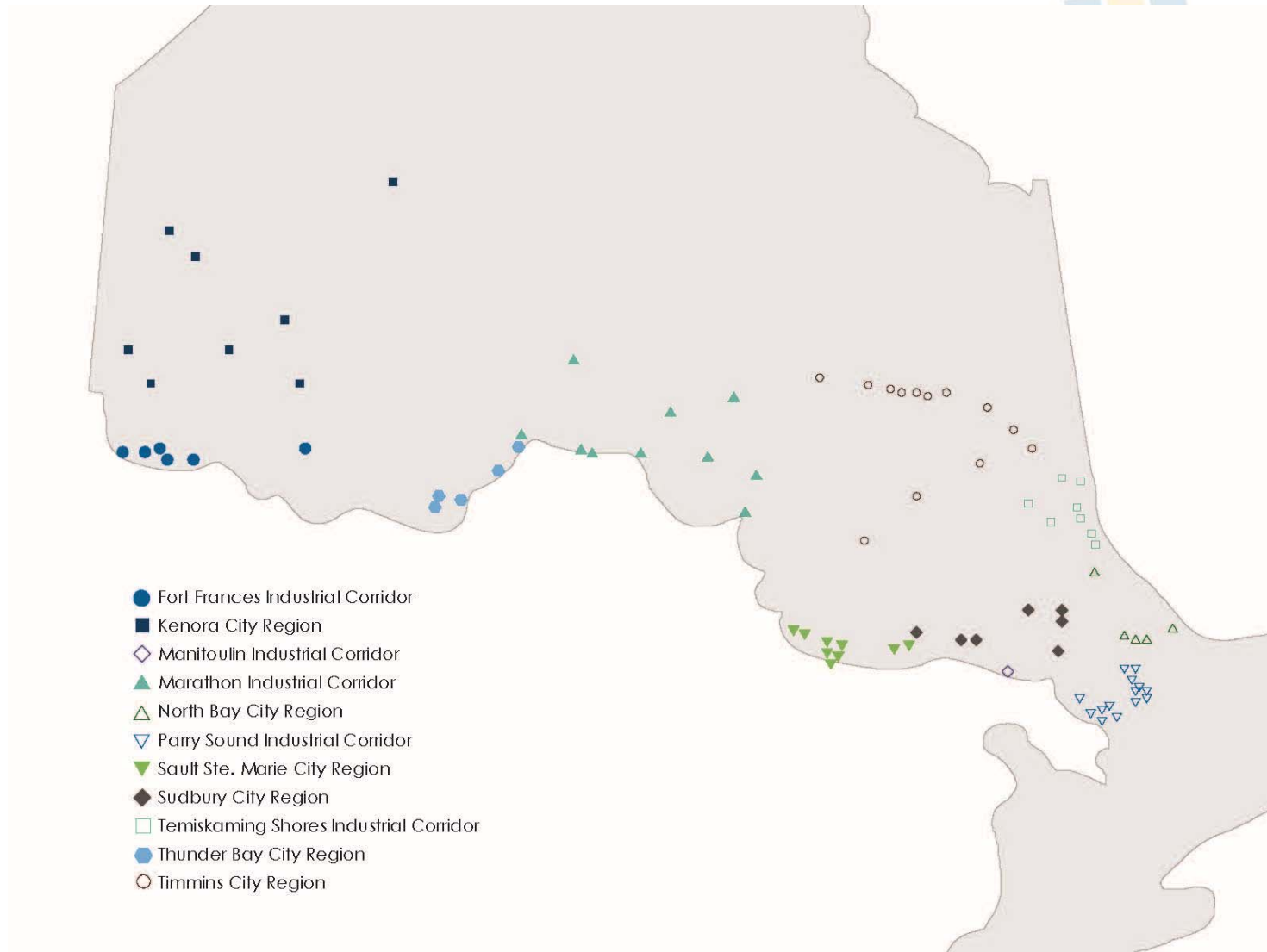


# Overview

- Introduction to Northern Policy Institute
- The Economy **of Ontario's Northern Regions**
  - EXERCISE 1
  - BREAK
- Demographics of Ontario's Northern Regions
- Education in Ontario's Northern Regions
- Employment in Ontario's Northern Regions
- Income in Ontario's Northern Regions
- Migration in Ontario's Northern Regions
  - EXERCISE 2
  - CONCLUDE



# Ontario's Northern Economic Regions



# What is NPI?

- “Think tank”
- Independent – authors are free from interference from everyone, including us
- Non-partisan – we do not take “sides”
- Evidence based – we collect, measure and interpret data
- IN the North – we deal with local, regional, provincial, national and international issues from a northern perspective
- Not an advocacy group



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

## 1. Top Ten Northern Issues:

Northern Policy Institute is the **ONLY** Think Tank in Canada that sets its research agenda based on feedback we receive from our stakeholders, all 780,000 of them. If your issue is shared by your friends and neighbours, it will likely get onto our to-do list.

## 2. Single Window on Northern Issues:

**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. Willing to Partner – but no guarantees:


**NOT** a consulting service, but will partner – in cash, or in kind – to expedite needed work. We just can't promise you will like the answer.



**North Superior**  
Workforce Planning Board

**Mowat Centre**  
ONTARIO'S VOICE ON PUBLIC POLICY

# Sample Publications




**NORTHERN** | INSTITUT DES POLITIQUES  
POLICY INSTITUTE | DU NORD

Commentary No. 22 | May 2018

**Places to Grow:**  
Best Practices for Community-based Regional  
Economic Development in Ontario's North

By Jamie McIntyre [northernpolicy.ca](http://northernpolicy.ca)



**NORTHERN** | INSTITUT DES POLITIQUES  
POLICY INSTITUTE | DU NORD

Research Paper No. 26 | November 2017

**A University for Timmins?**  
Possibilities and Realities

By Ken Coates [northernpolicy.ca](http://northernpolicy.ca)



**NORTHERN** | INSTITUT DES POLITIQUES  
POLICY INSTITUTE | DU NORD

Commentary No. 21 | January 2018

**Taking Off:**  
Factors Impacting Thunder Bay's Air Traffic

By Curtis McIntyre [northernpolicy.ca](http://northernpolicy.ca)

# Sample Tools



## Mapping the North:

- <http://www.northernpolicy.ca/boundarymap>
- <http://www.northernpolicy.ca/infrastructuremap>
- **Other Maps of Interest**

# A QUICK VISIT – (ASSUMING TECHNOLOGY WORKS)

[NPI.COMMUNITYACCOUNTS.CA](http://NPI.COMMUNITYACCOUNTS.CA)



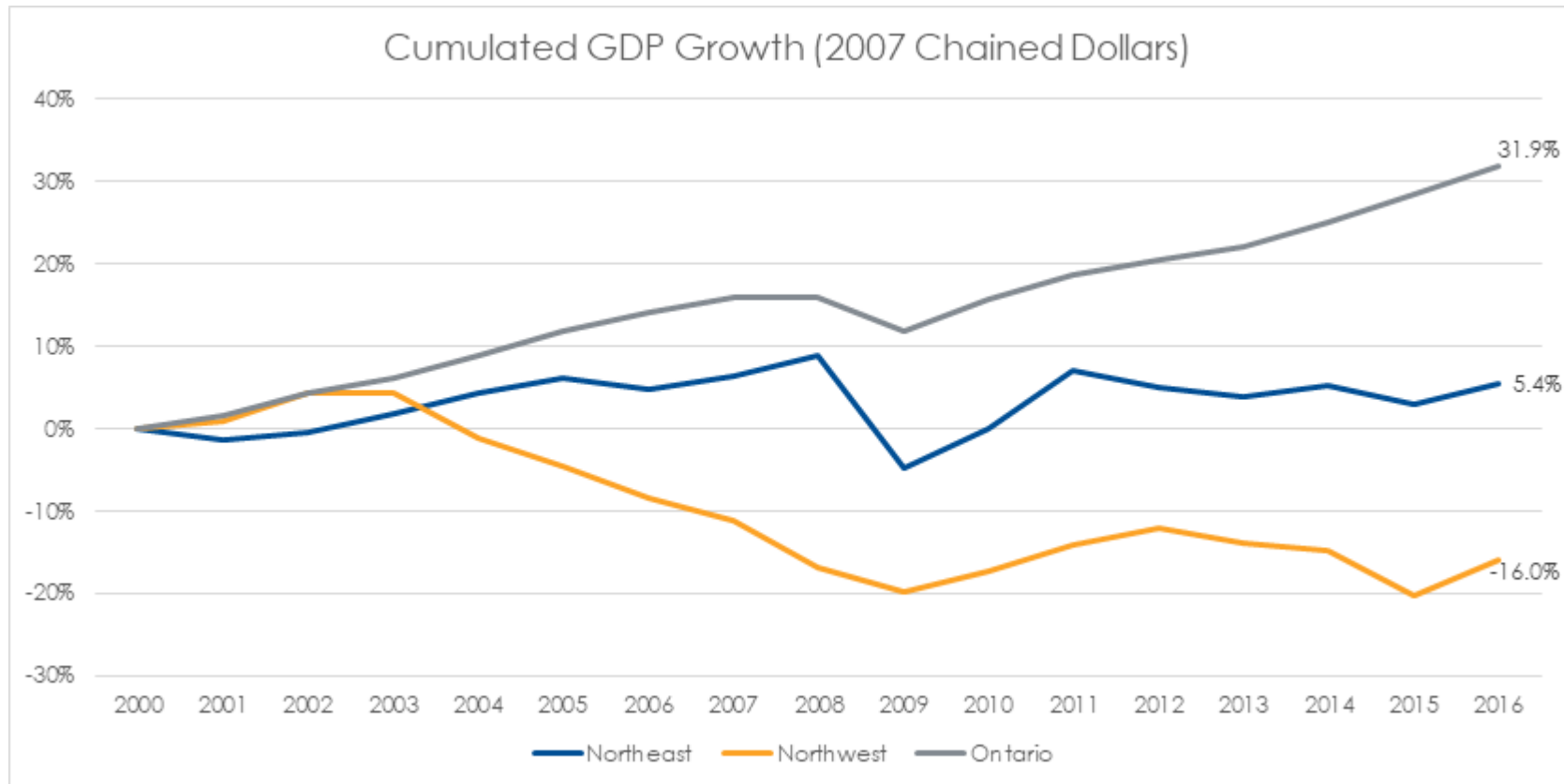


# THE ECONOMY



# The Economic Base

Some GDP Growth Amid the Fluctuations

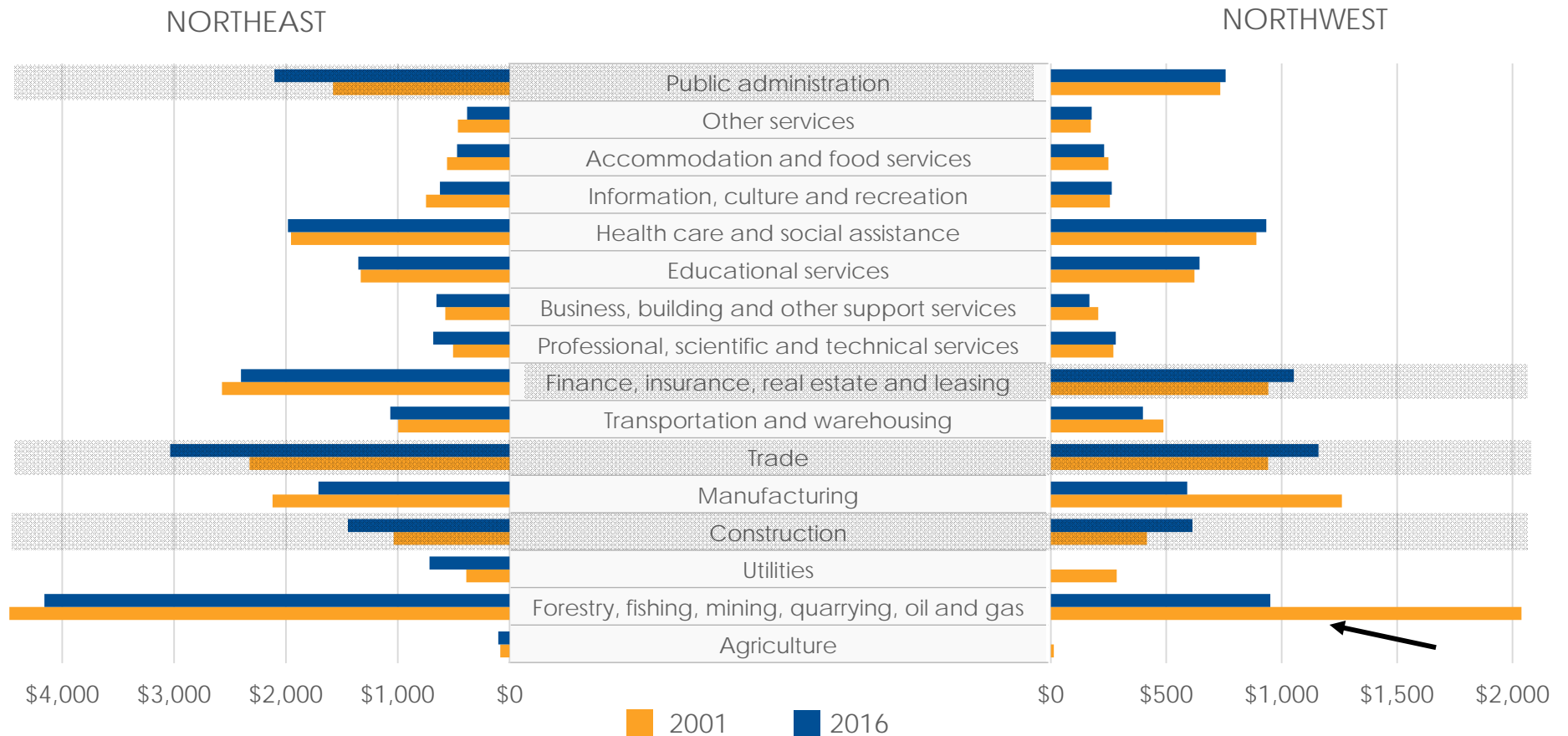


Source: Author's calculations based on Statistics Canada Labour Force Survey (cansim table 282-0125), and GDP estimations (cansim Table 382-0004)

# The Economic Base

...Hiding Significant Changes in Industries

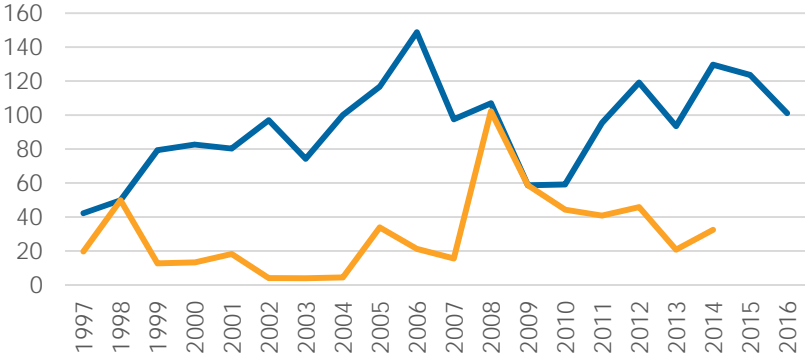
GDP BY INDUSTRY (2007 CHAINED DOLLARS, IN MILLIONS)



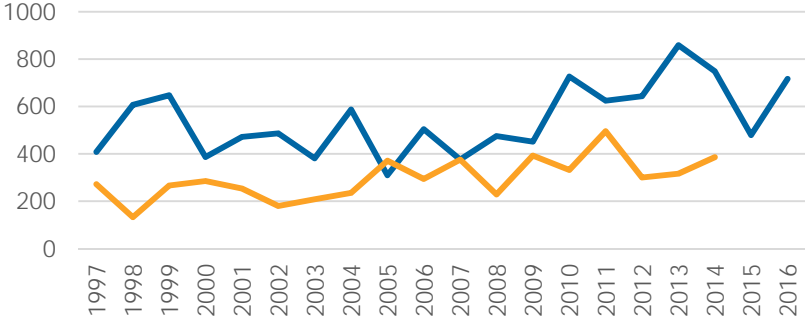
Source: Author's calculations based on Statistics Canada Labour Force Survey (cansim table 282-0125), and GDP estimations (cansim Table 382-0004)

# GDP by Goods-Producing Industry (Chained 2007 Dollars x1,000,000)

## AGRICULTURE

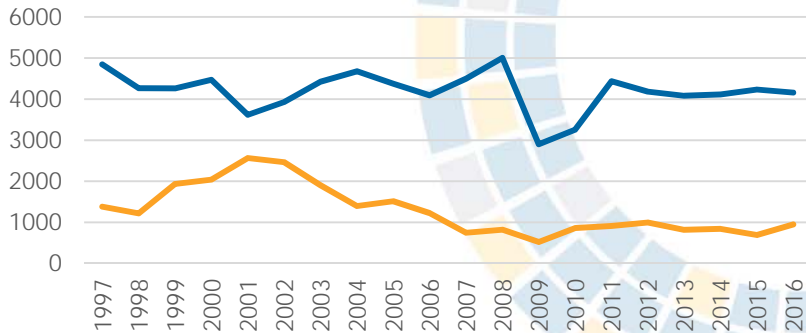


## UTILITIES

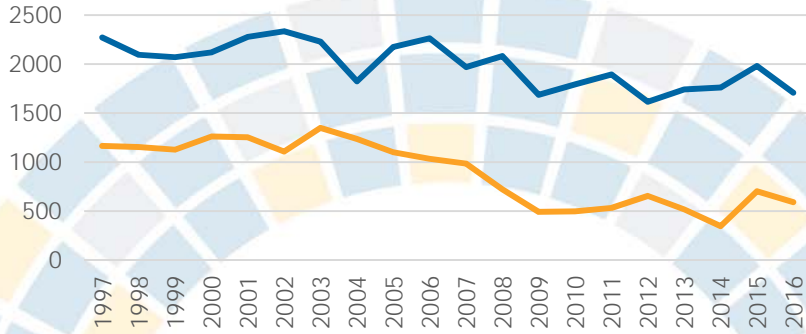


■ Northeast ■ Northwest

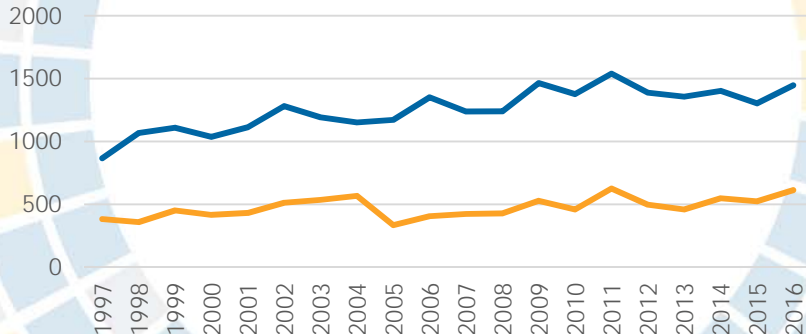
## FORESTRY, FISHING, MINING, QUARRYING, OIL AND GAS



## MANUFACTURING



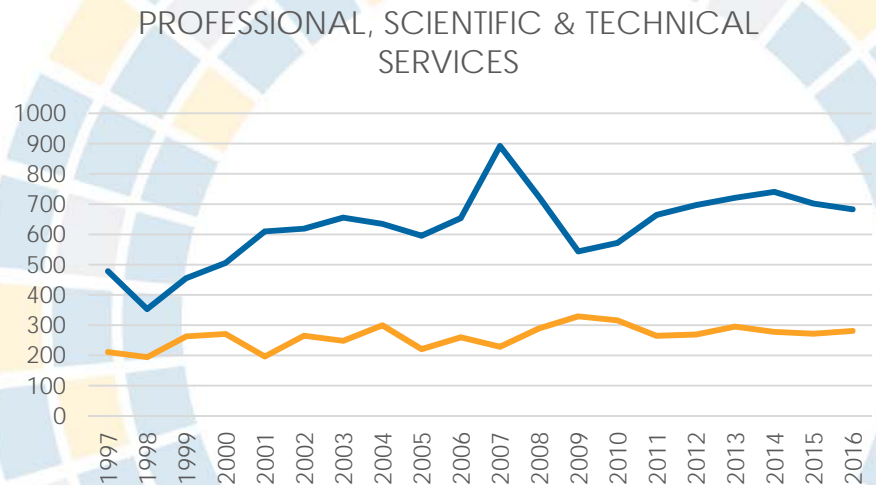
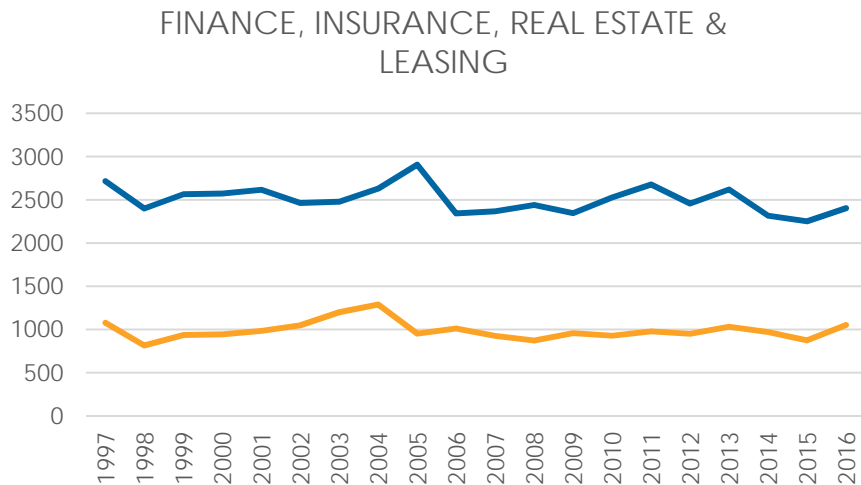
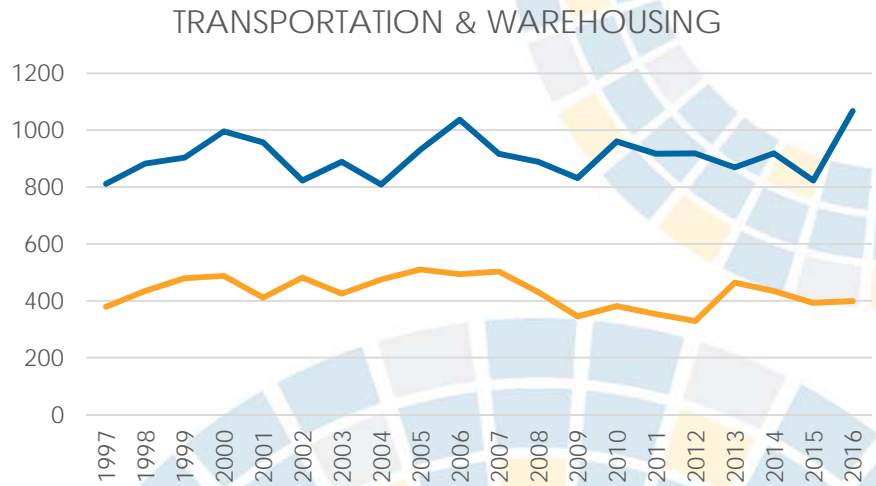
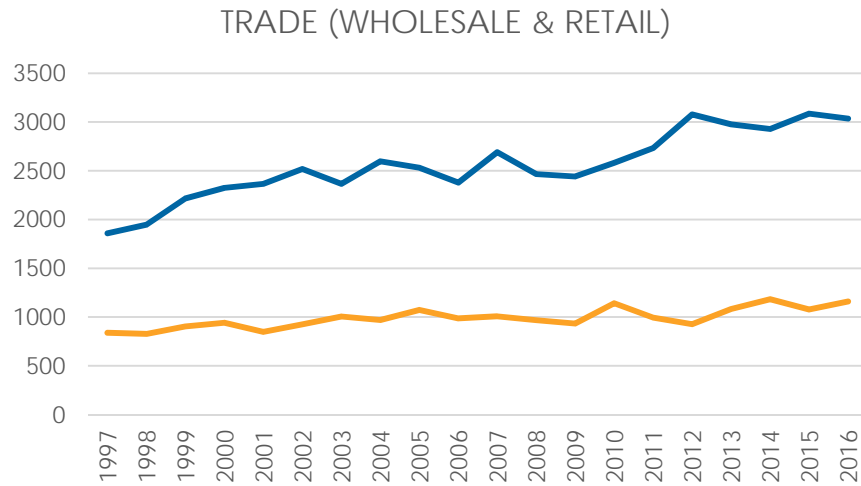
## CONSTRUCTION



Source: Author's calculations based on Statistics Canada Labour Force Survey (Cansim Table 282-0125), and GDP estimations (382-0004)

# GDP by Service-Producing Industry (Chained 2007 Dollars x1,000,000) (1)

■ Northeast ■ Northwest

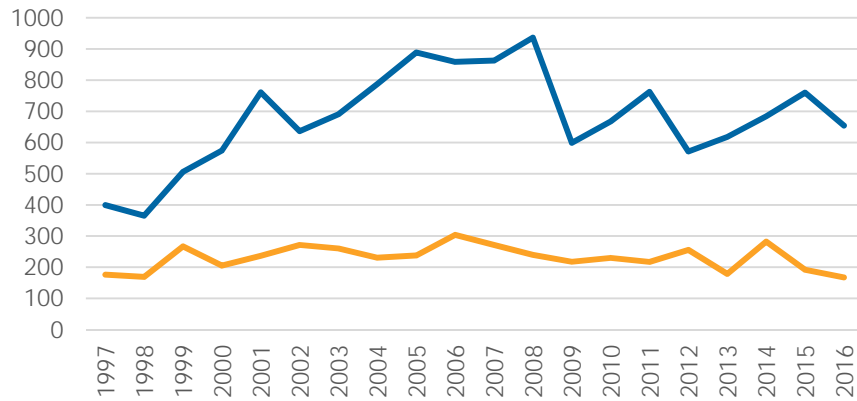


Source: Author's calculations based on Statistics Canada Labour Force Survey (Cansim Table 282-0125), and GDP estimations (382-0004)

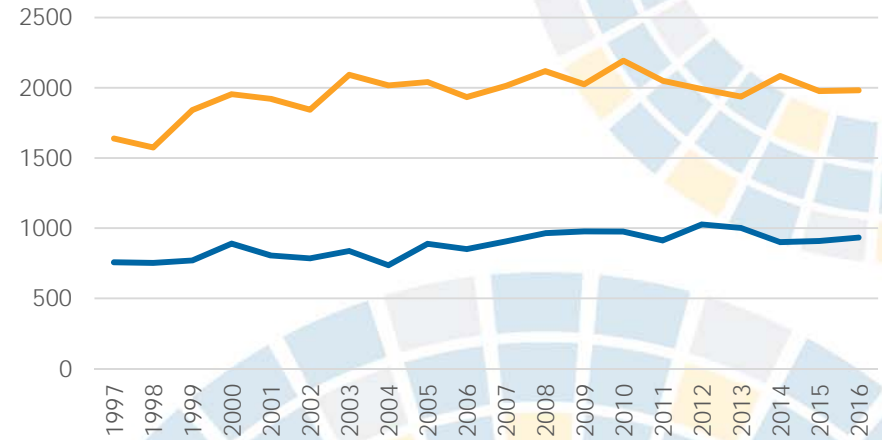
# GDP by Service-Producing Industry (Chained 2007 Dollars x1,000,000) (2)

■ Northeast ■ Northwest

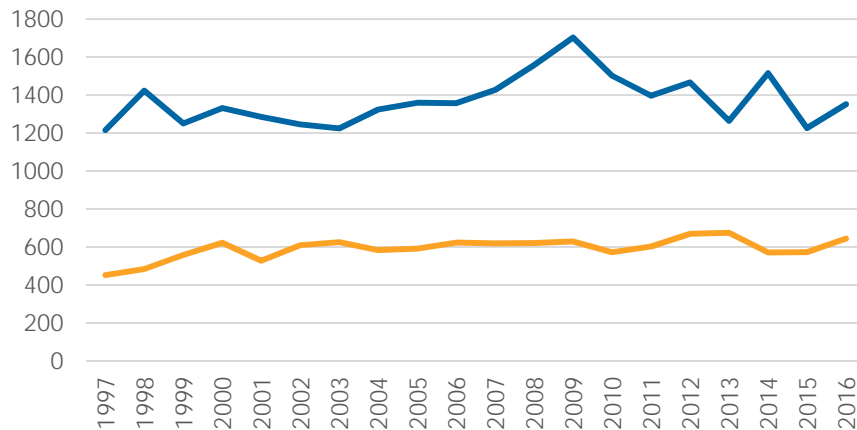
### BUSINESS, BUILDING & OTHER SUPPORT SERVICES



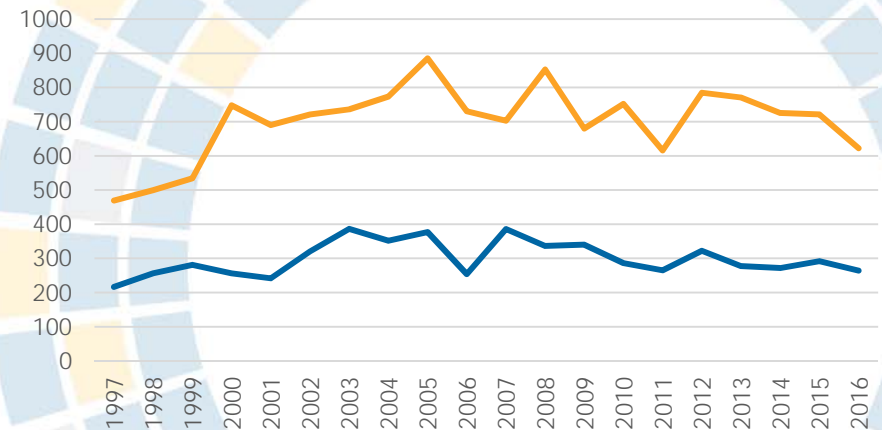
### HEALTH CARE & SOCIAL ASSISTANCE



### EDUCATIONAL SERVICES



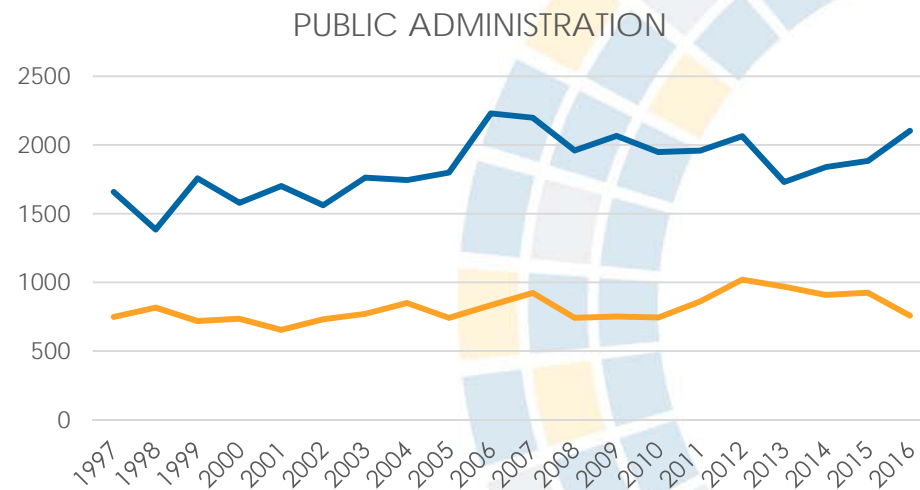
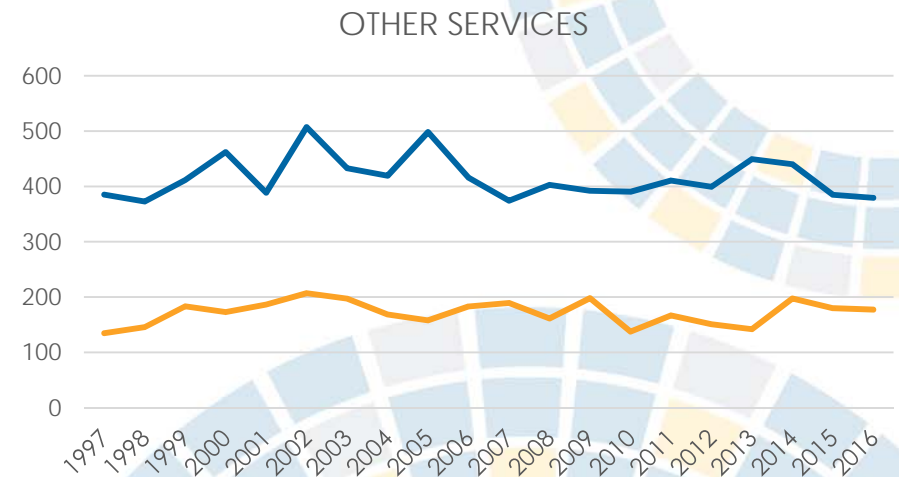
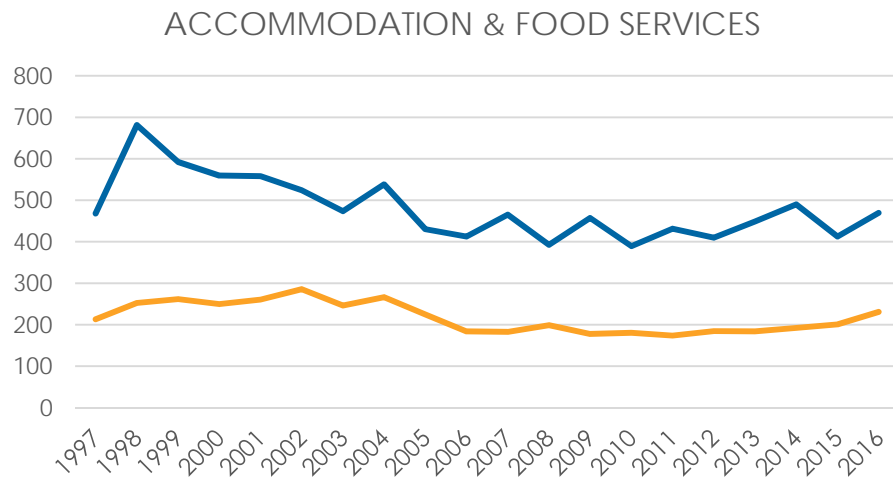
### INFORMATION, CULTURE & RECREATION



Source: Author's calculations based on Statistics Canada Labour Force Survey (Cansim Table 282-0125), and GDP estimations (382-0004)

# GDP by Service-Producing Industry (Chained 2007 Dollars x1,000,000) (3)

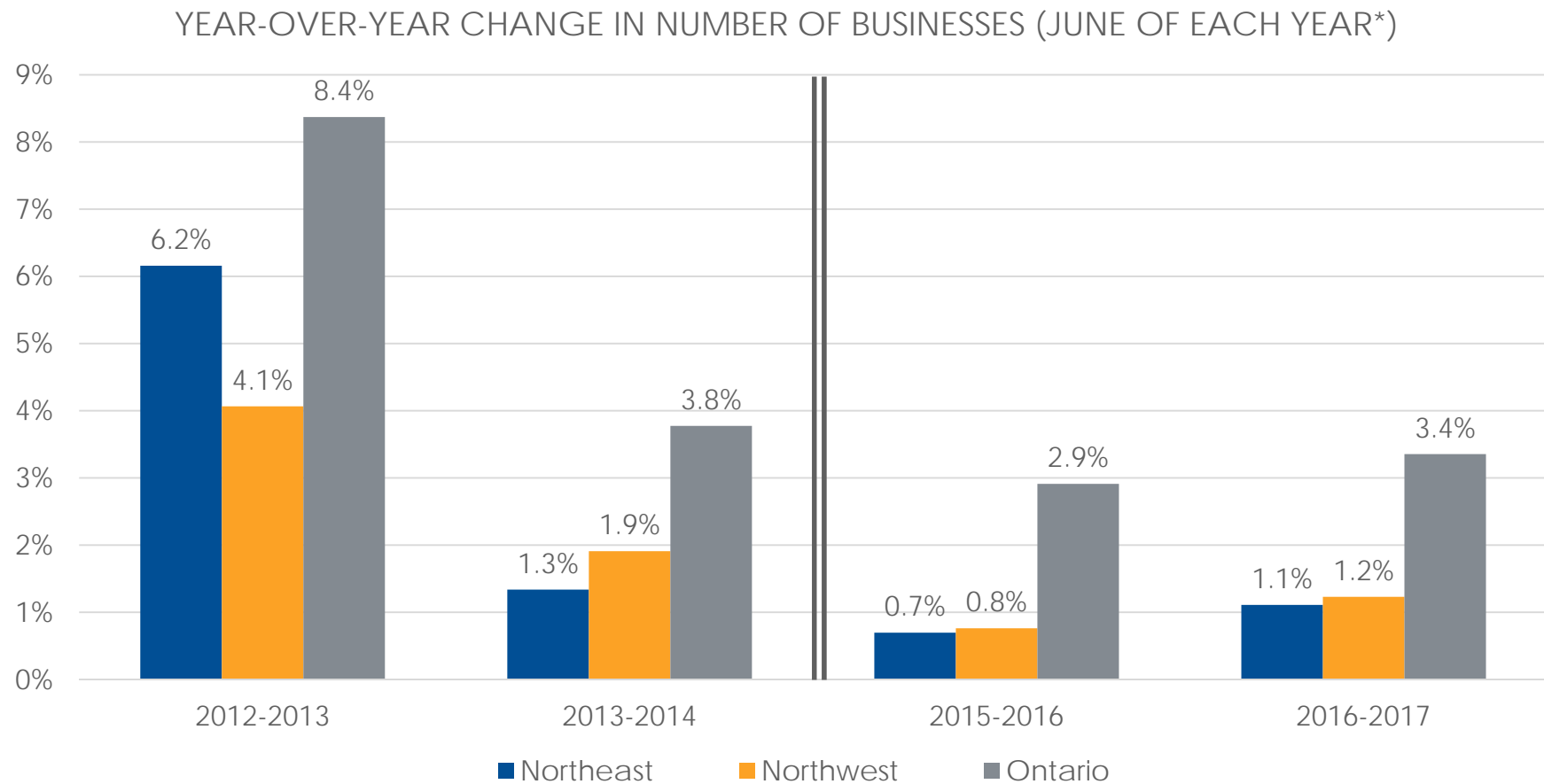
■ Northeast ■ Northwest



Source: Author's calculations based on Statistics Canada Labour Force Survey (Cansim Table 282-0125), and GDP estimations (382-0004)

# Investment and Business Attraction

## Growth in the Total Number of Businesses



\*As the methodology to collect data for Business Counts changed greatly in December 2014, it is not possible to calculate the year-over-year change for June 2014- June 2015, and readers should analyze this data with caution.

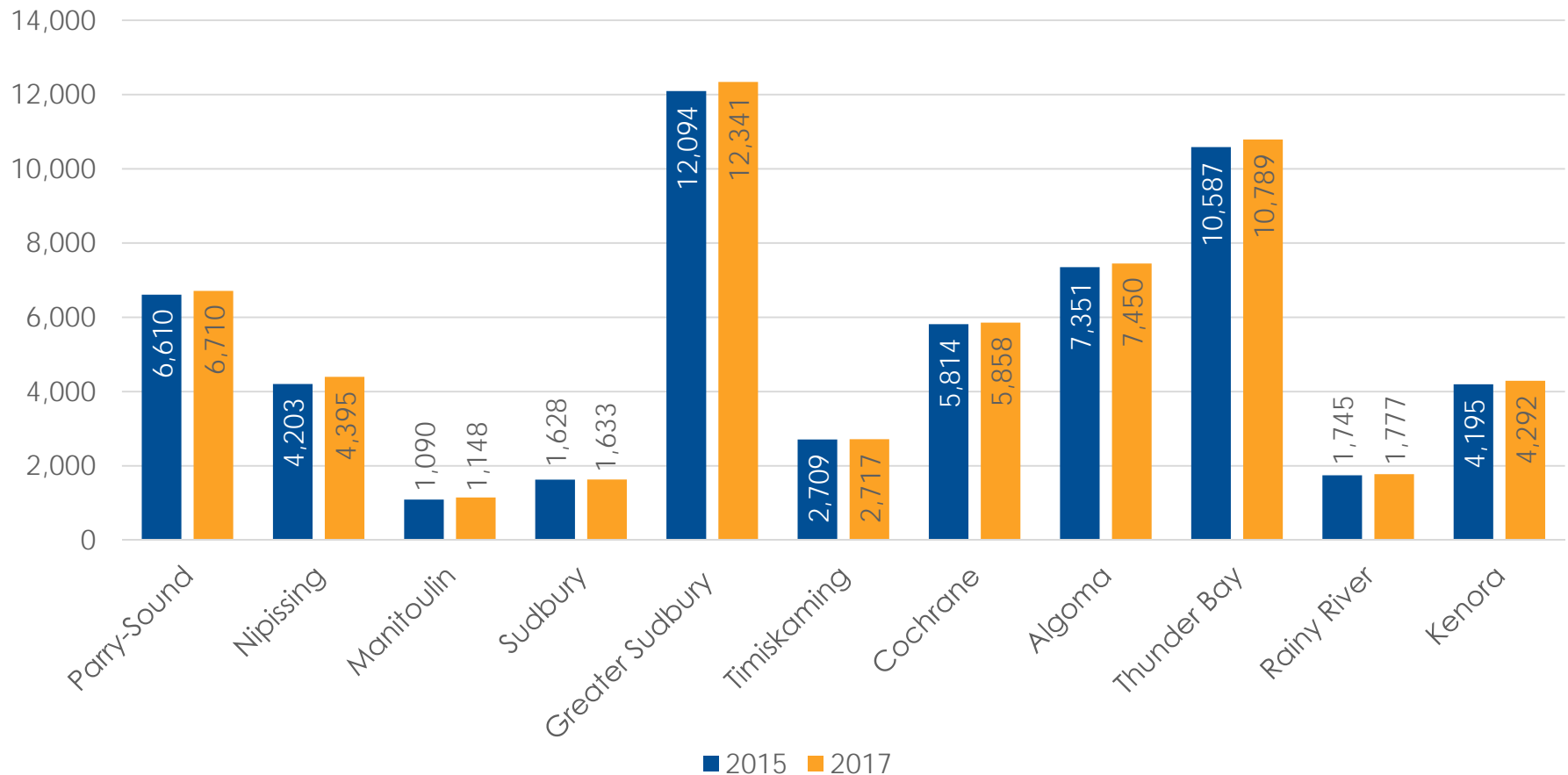
Source: Author's calculations based on Statistics Canada, Business Counts.



# Investment and Business Attraction

Growth in Every District in the Total Number of Businesses

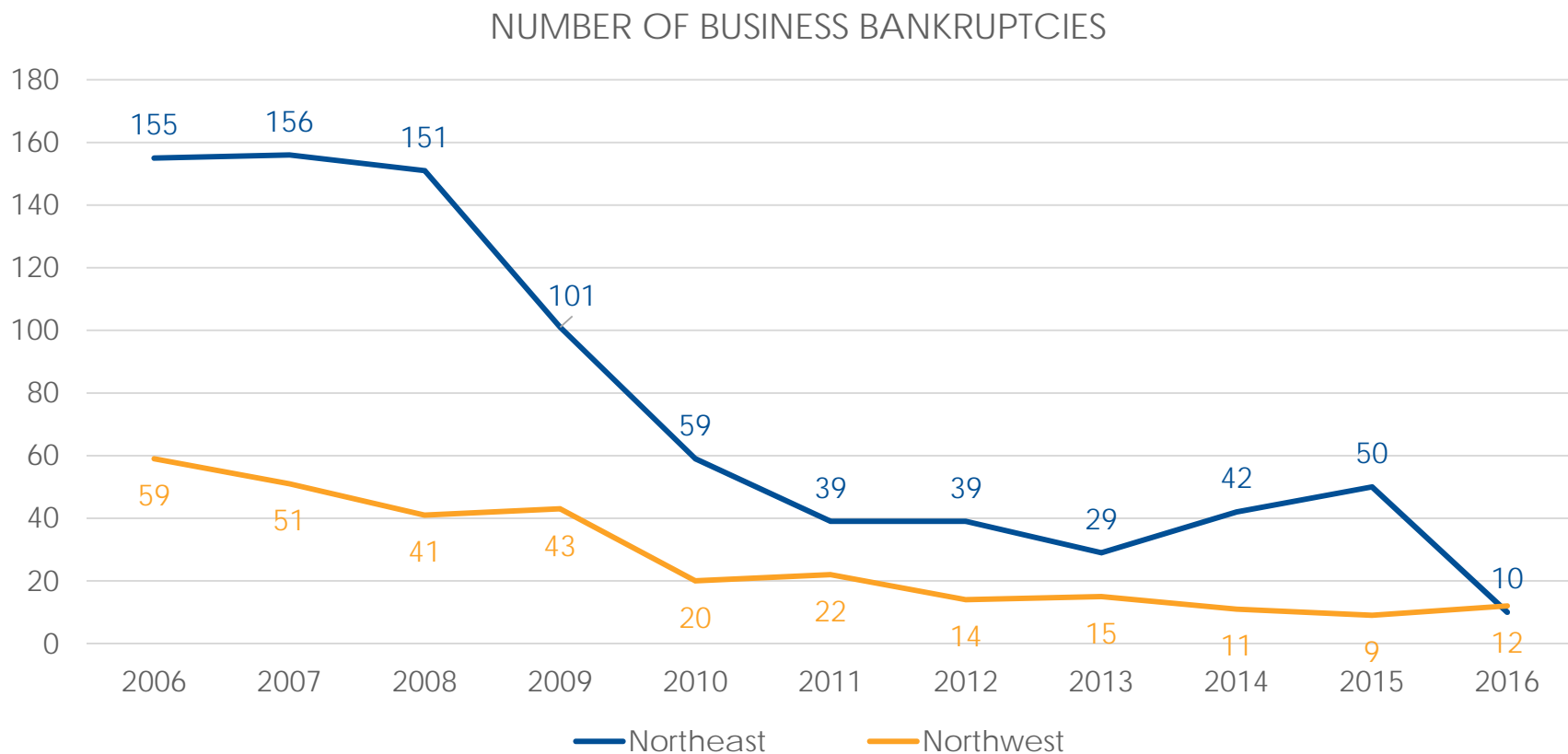
NUMBER OF BUSINESSES BY DISTRICT (JUNE OF EACH YEAR)



Source: Author's calculations based on Statistics Canada, Business Counts.

# Investment and Business Attraction

A Decreasing Number of Bankruptcies

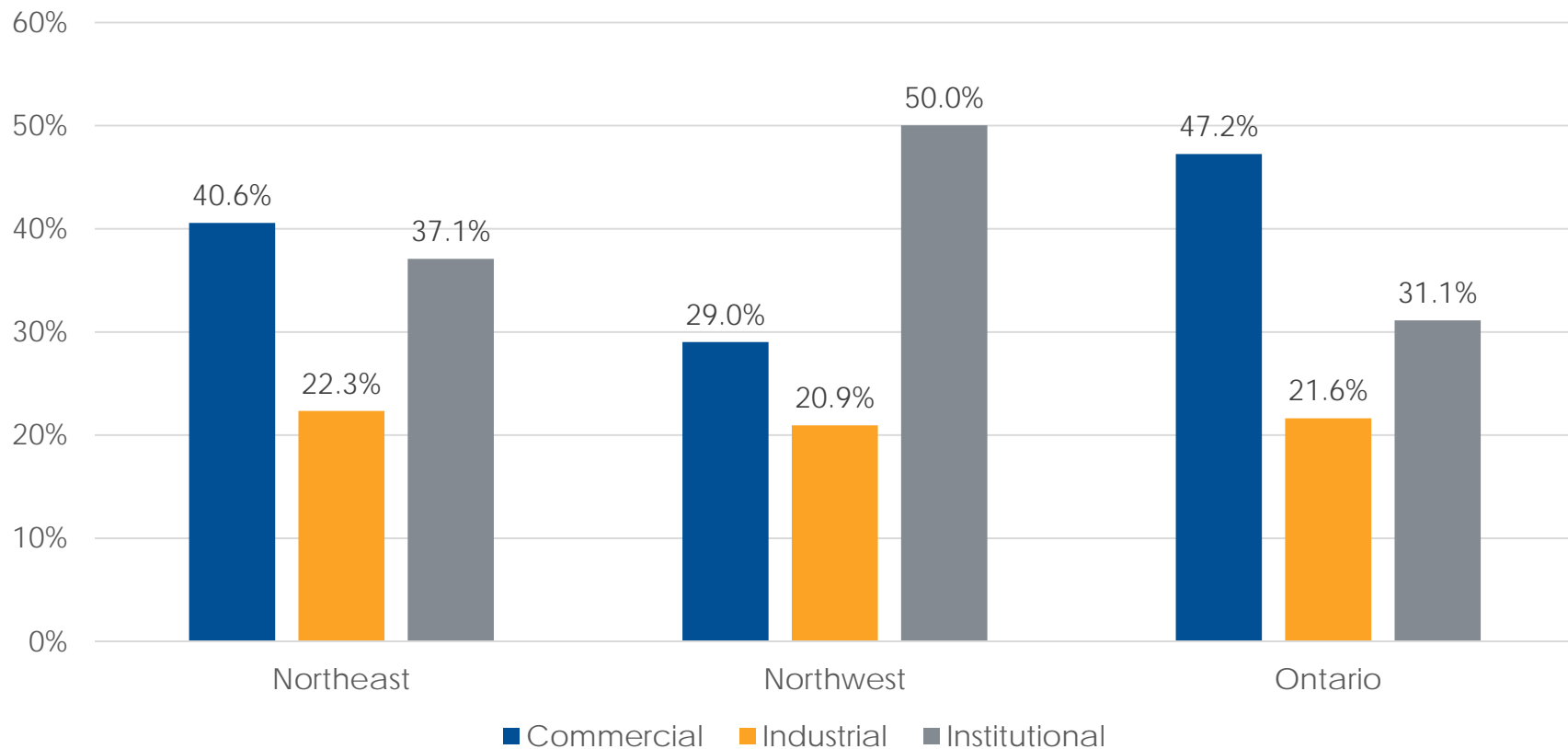


Source: Author's calculations based on Industry Canada, Office of the Superintendent of Bankruptcy.

# Investment and Business Attraction

More Investment in Institutional Buildings, less in Commercial than Ontario

DISTRIBUTION BY TYPES OF NON-RESIDENTIAL BUILDING PERMITS (VALUE),  
AVERAGE OVER THE 2000-2016 PERIOD

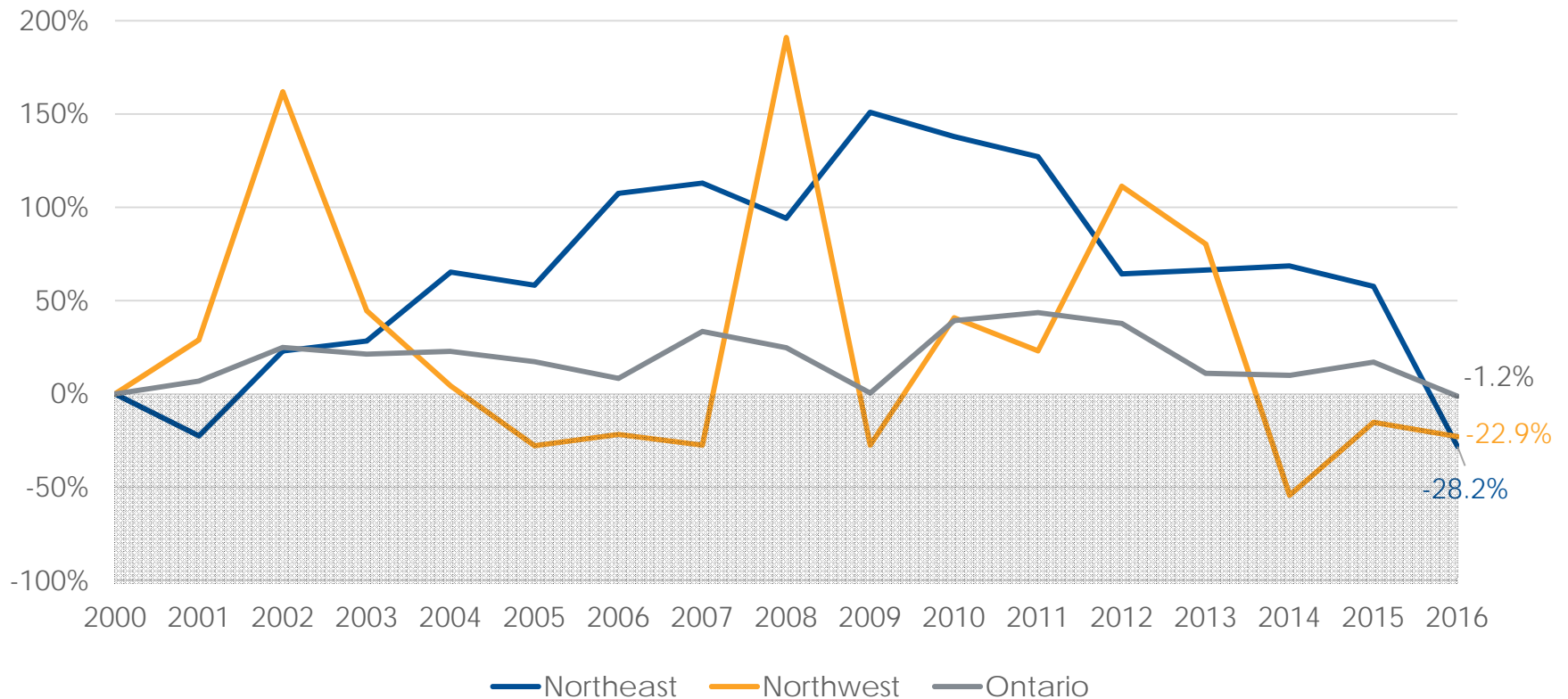


Source: Author's calculations based on Statistics Canada, Investment and Capital Stock Division, and Bank of Canada, Consumer Price Index

# Investment and Business Attraction

## Negative Growth in the Value of Non-Residential Building Permits

CUMULATED GROWTH OF NON-RESIDENTIAL BUILDING PERMITS VALUE  
(IN 2016 DOLLARS)

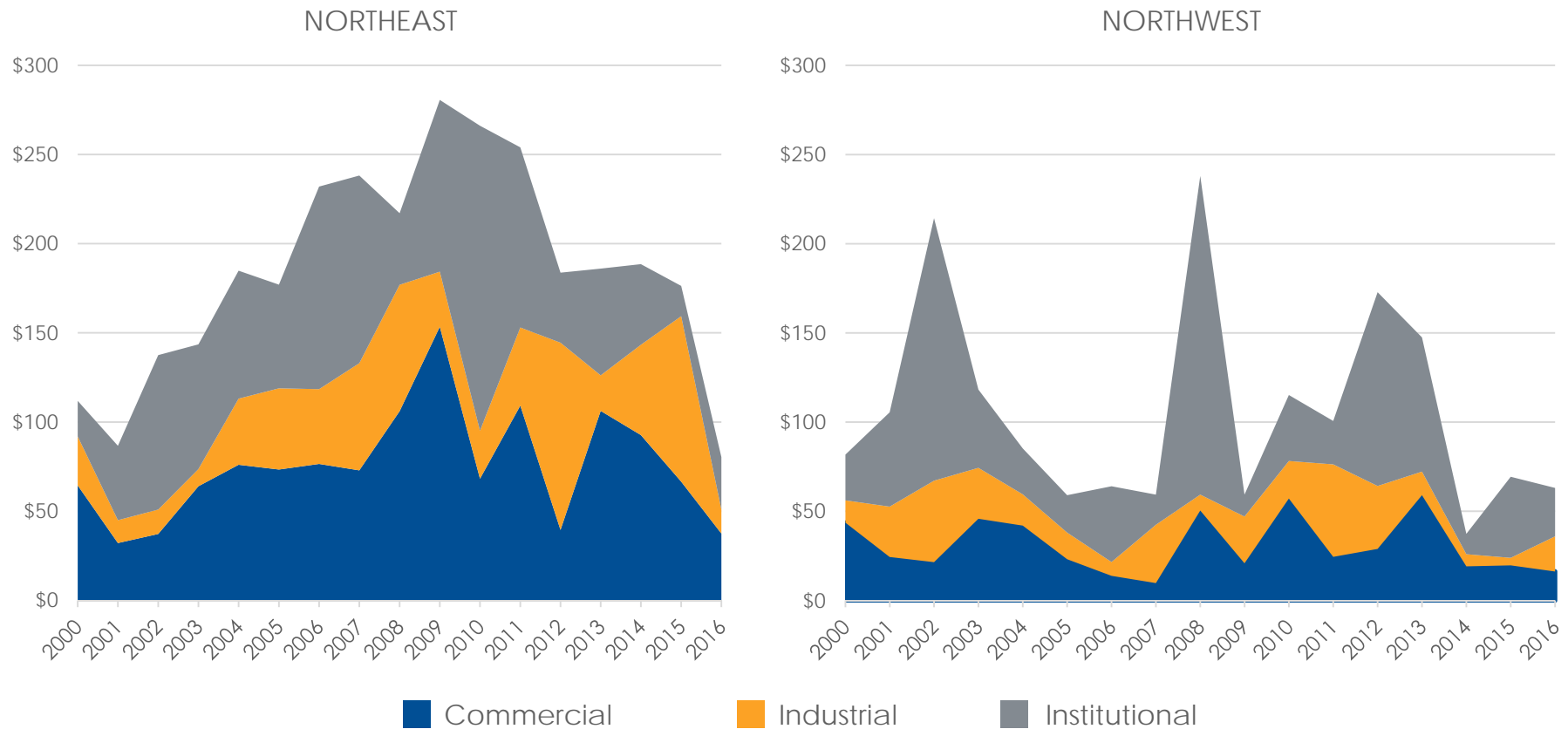


Source: Author's calculations based on Statistics Canada, Investment and Capital Stock Division, and Bank of Canada, Consumer Price Index

# Investment and Business Attraction

## Negative Growth in the Value of Non-Residential Building Permits

VALUE OF NON-RESIDENTIAL BUILDING PERMIT BY TYPE (IN 2016 DOLLARS, IN MILLIONS)

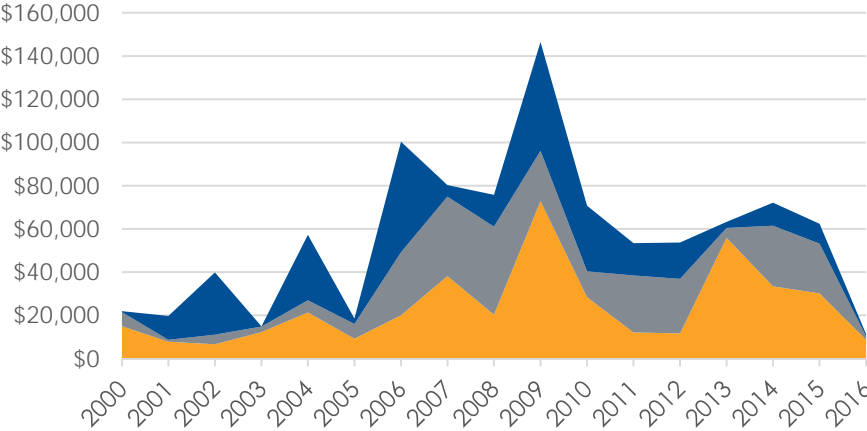


Source: Author's calculations based on Statistics Canada, Investment and Capital Stock Division, and Bank of Canada, Consumer Price Index

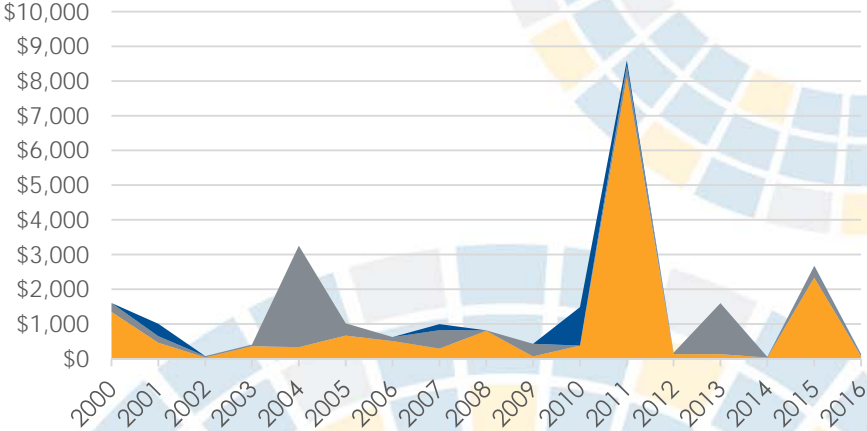
# Value of Non-Residential Building Permits (In 2016 Dollars x1,000) (1)

- Commercial
- Industrial
- Institutional

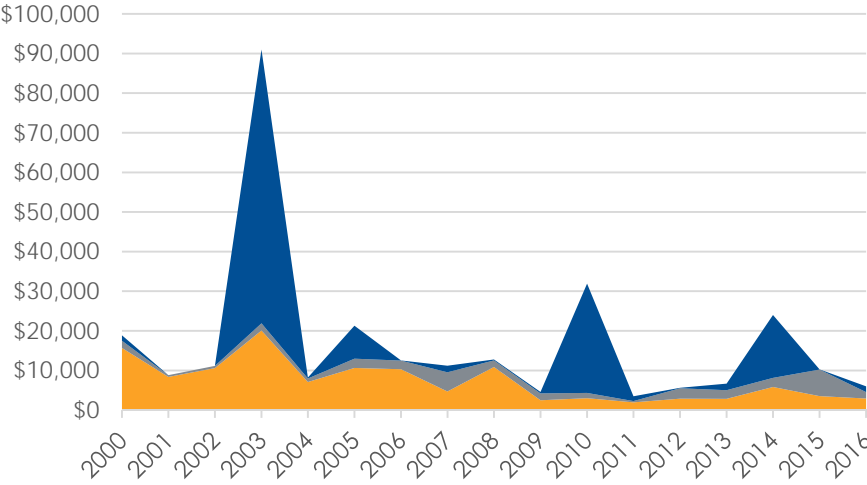
GREATER SUDBURY



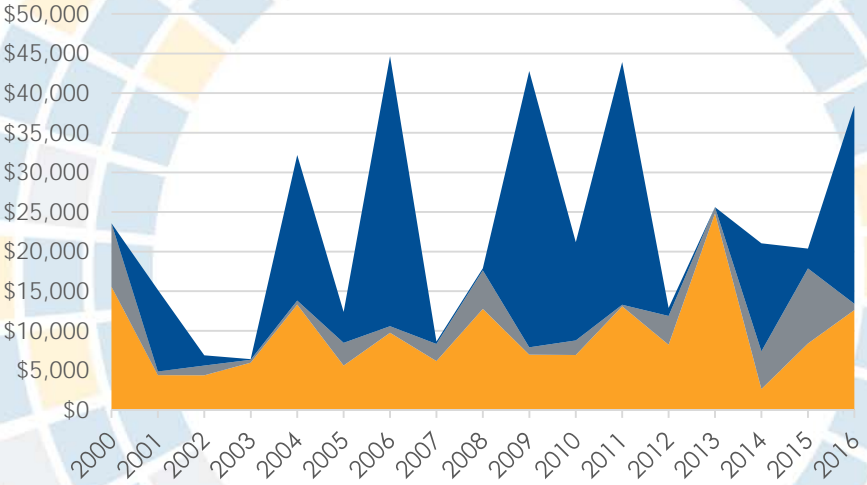
MANITOULIN DISTRICT



PARRY SOUND DISTRICT



NIPISSING DISTRICT

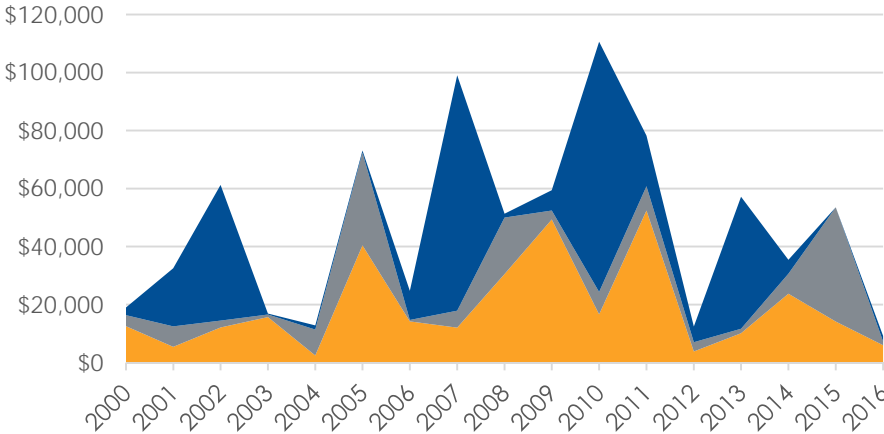


Source: Author's calculations based on Statistics Canada, Investment and Capital Stock Division, and Bank of Canada, Consumer Price Index

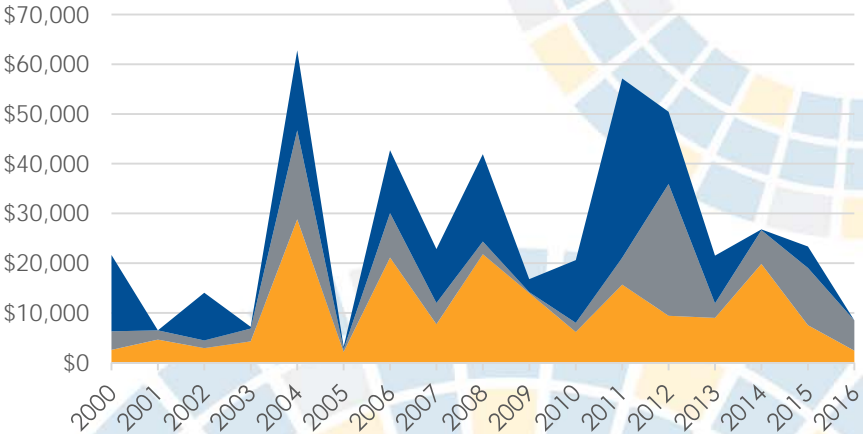
# Value of Non-Residential Building Permits (In 2016 Dollars x1,000) (2)

- Commercial
- Industrial
- Institutional

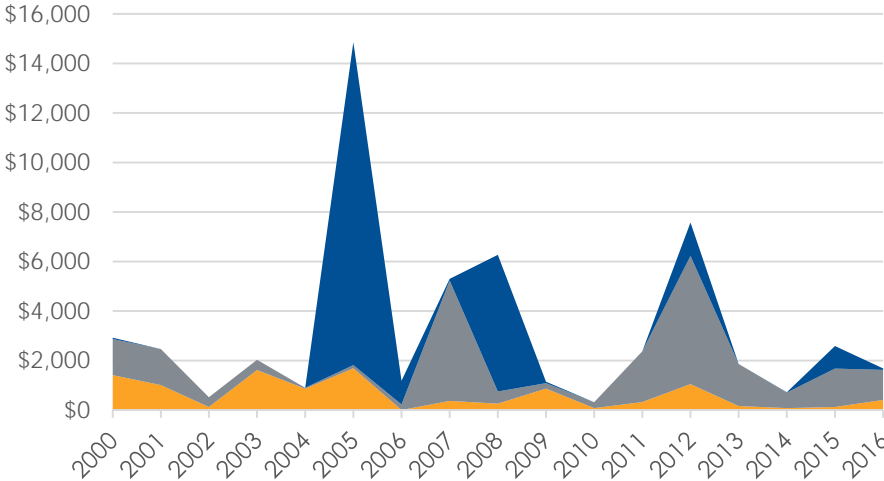
ALGOMA DISTRICT



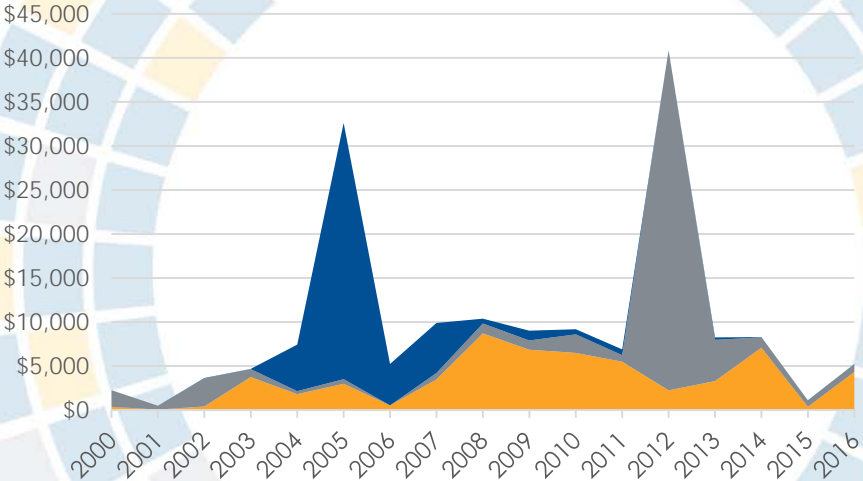
COCHRANE DISTRICT



SUDBURY DISTRICT



TIMISKAMING DISTRICT

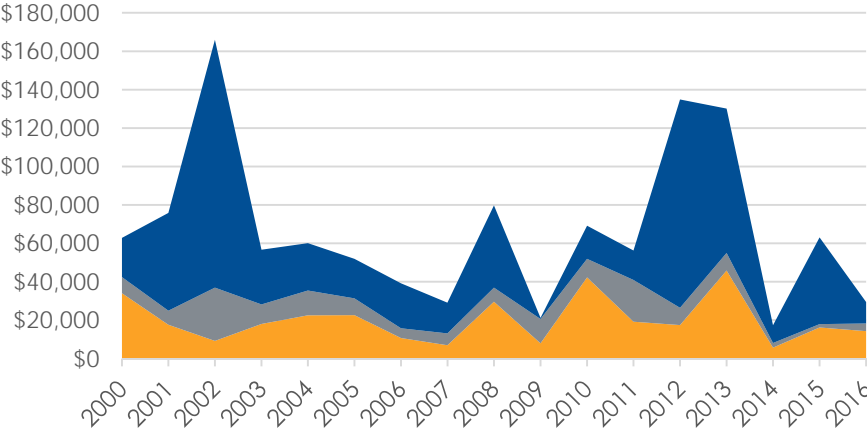


Source: Author's calculations based on Statistics Canada, Investment and Capital Stock Division, and Bank of Canada, Consumer Price Index

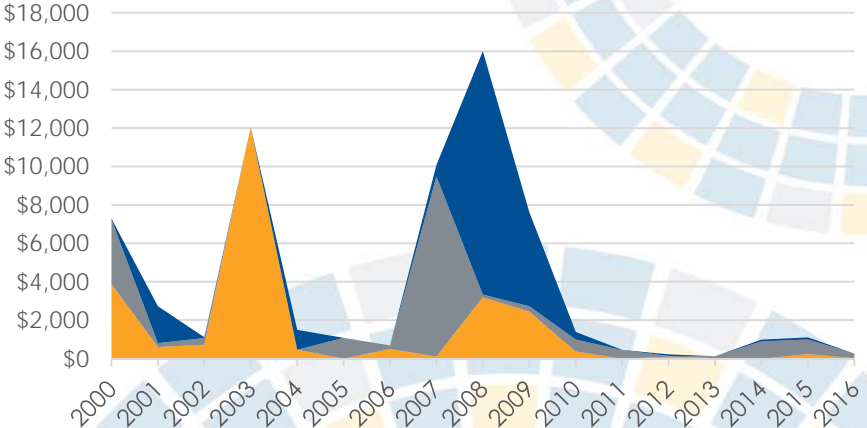
# Value of Non-Residential Building Permits (In 2016 Dollars x1,000) (3)

- Commercial
- Industrial
- Institutional

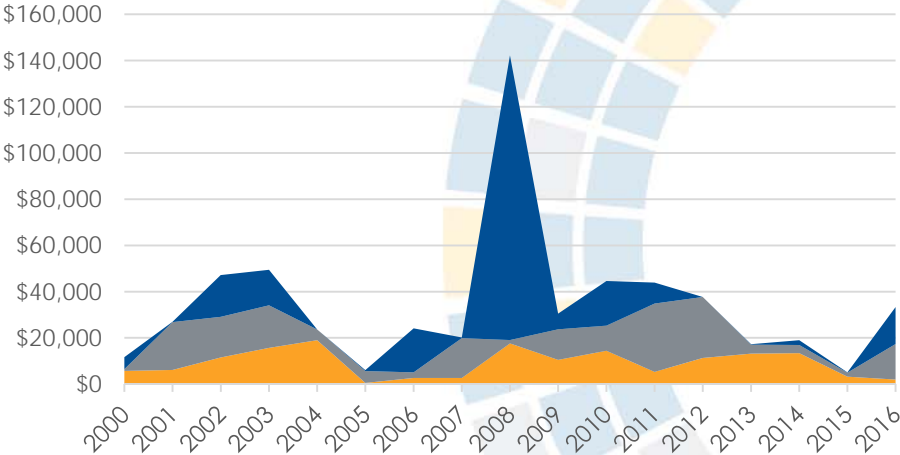
THUNDER BAY DISTRICT



RAINY RIVER DISTRICT



KENORA DISTRICT



Source: Author's calculations based on Statistics Canada, Investment and Capital Stock Division, and Bank of Canada, Consumer Price Index



# EXERCISE NUMBER ONE



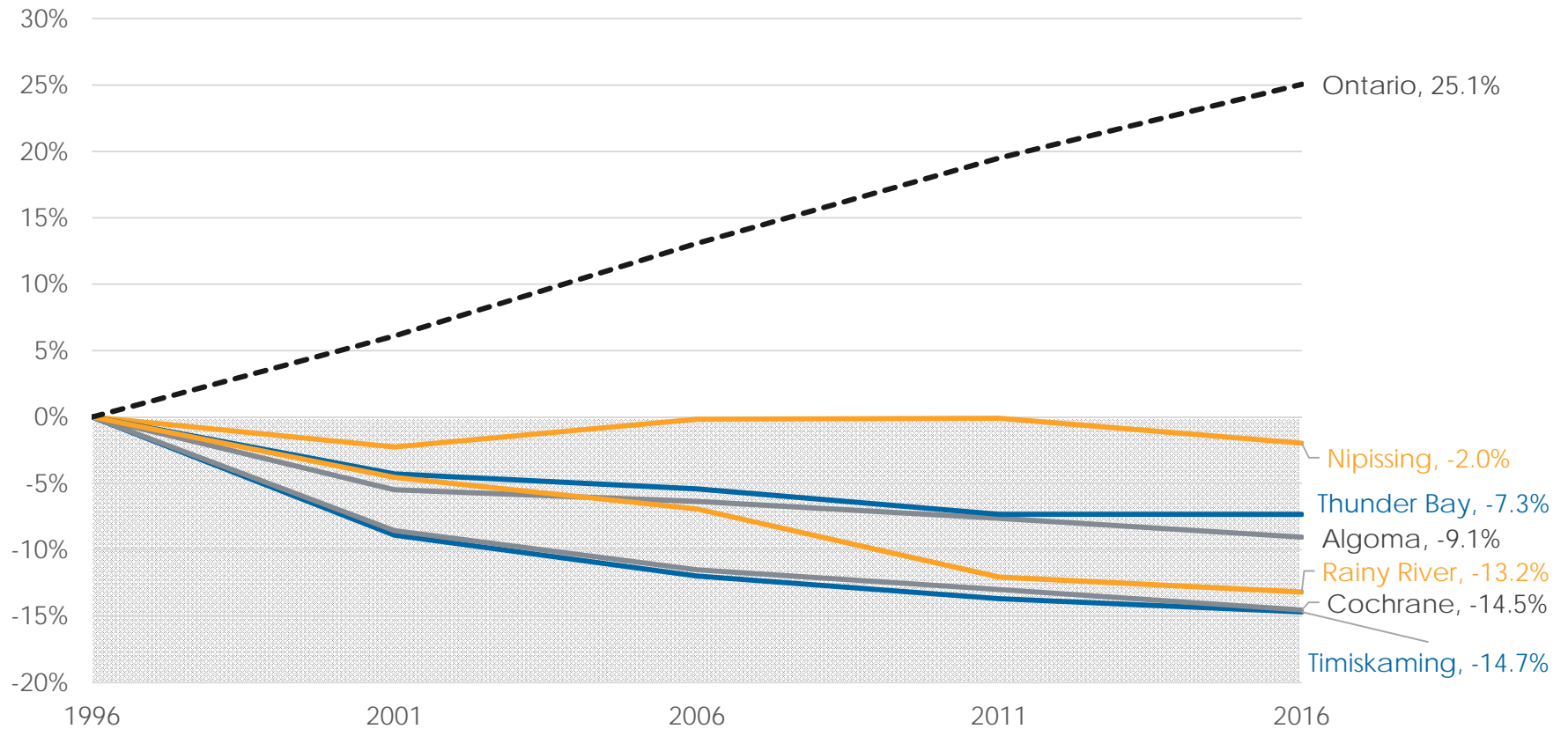
# DEMOGRAPHICS



# Demographics

Negative Population Growth in Some Districts...

CUMULATIVE POPULATION GROWTH SINCE 1996 BY DISTRICT

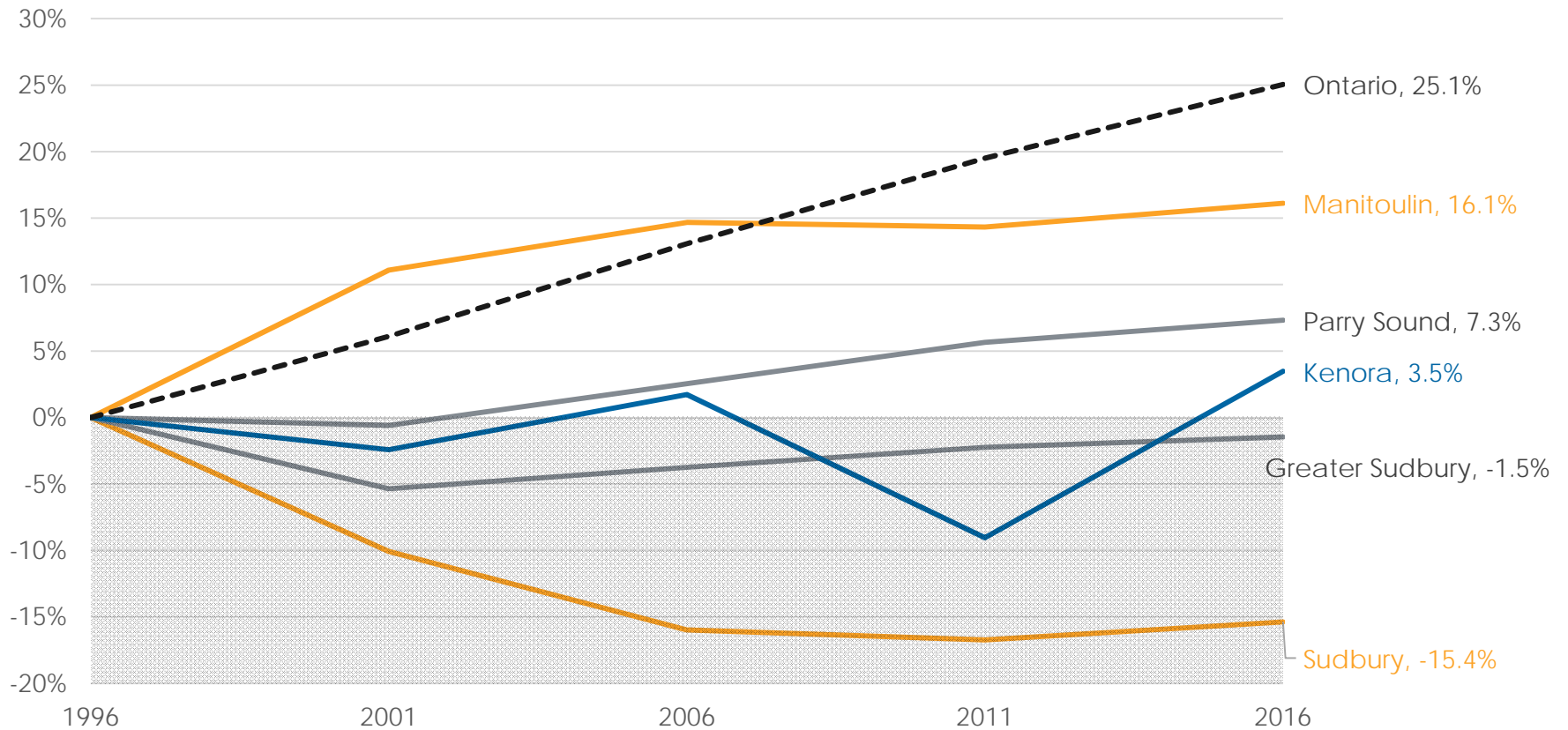


Source: Author's calculation based on Statistics Canada, Census, Various Years.

# Demographics

... But Positive Growth in Others

CUMULATIVE POPULATION GROWTH SINCE 1996 BY DISTRICT

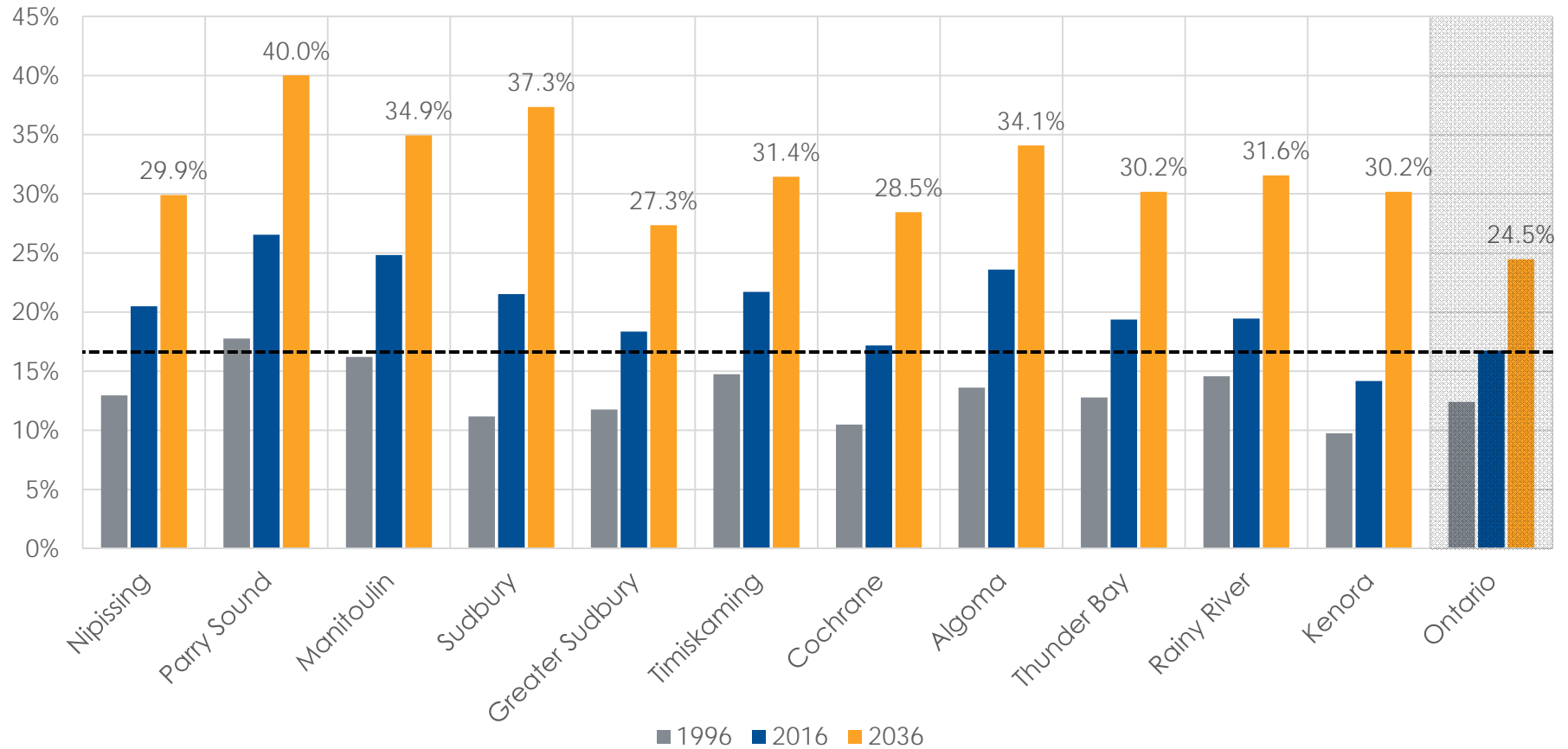


Source: Author's calculation based on Statistics Canada, Census, Various Years.

# Demographics

An Aging Population in Every District

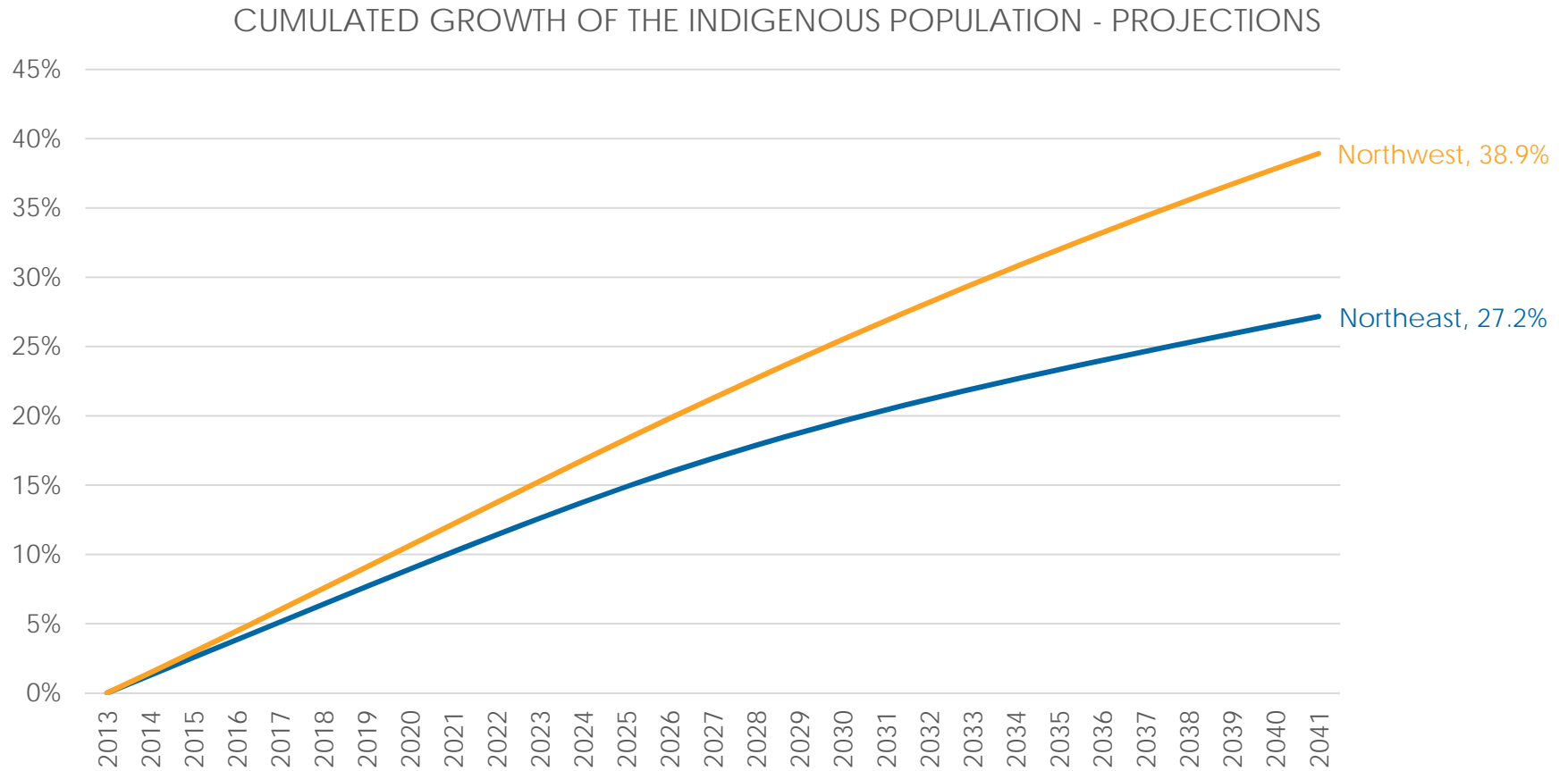
POPULATION 65 YEARS OLD AND OVER AS A PERCENTAGE OF THE TOTAL POPULATION



Source: Author's calculation based on Statistics Canada, Census, various years, and Ontario Ministry of Finances Population Projections

# Demographics

Young and Growing Indigenous Population...

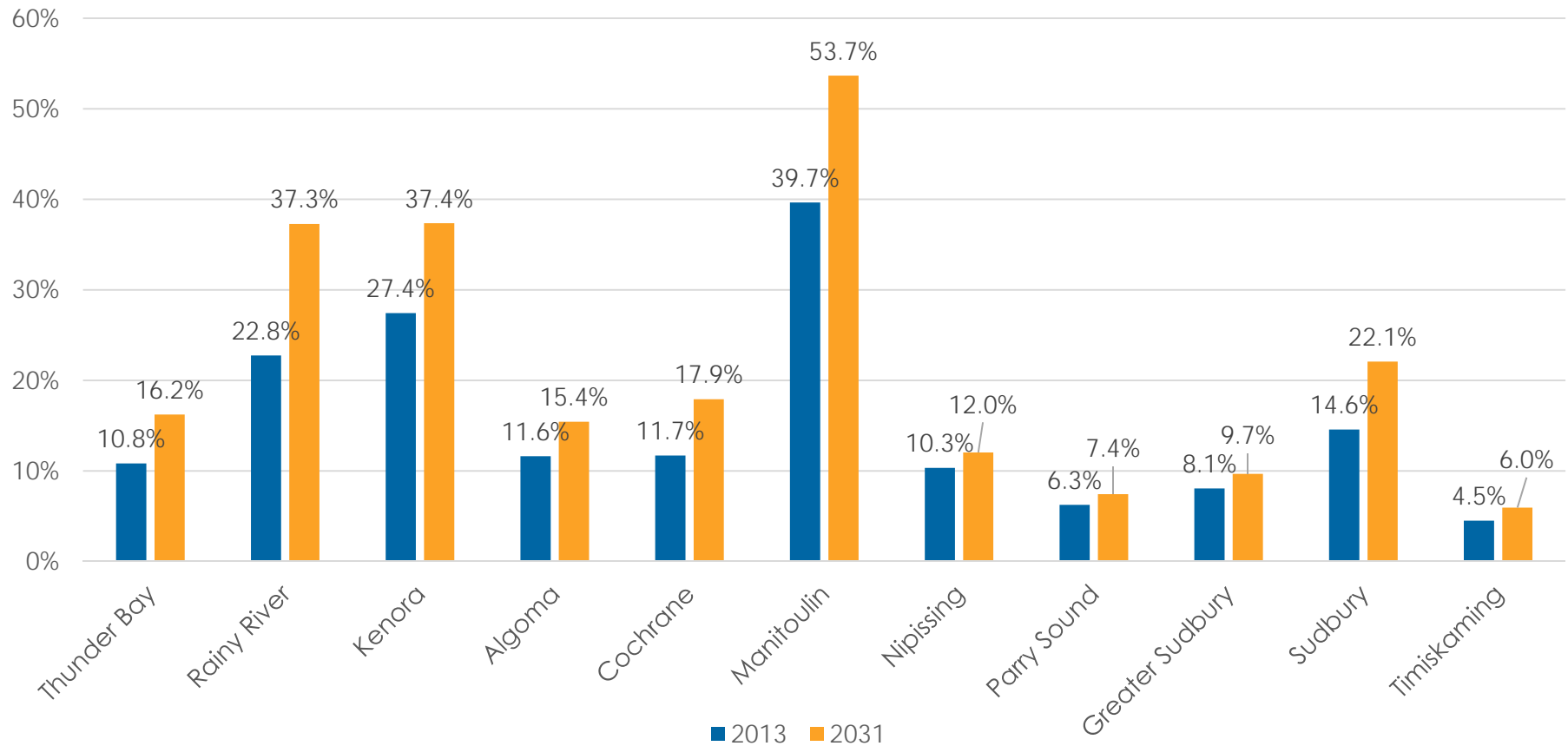


Source: Author's estimates based on Statistics Canada's 2006 Census Microdata file (Moazzami & Cuddy District reports)

# Demographics

... That Will Represent an Increasing Share of the Labour Force

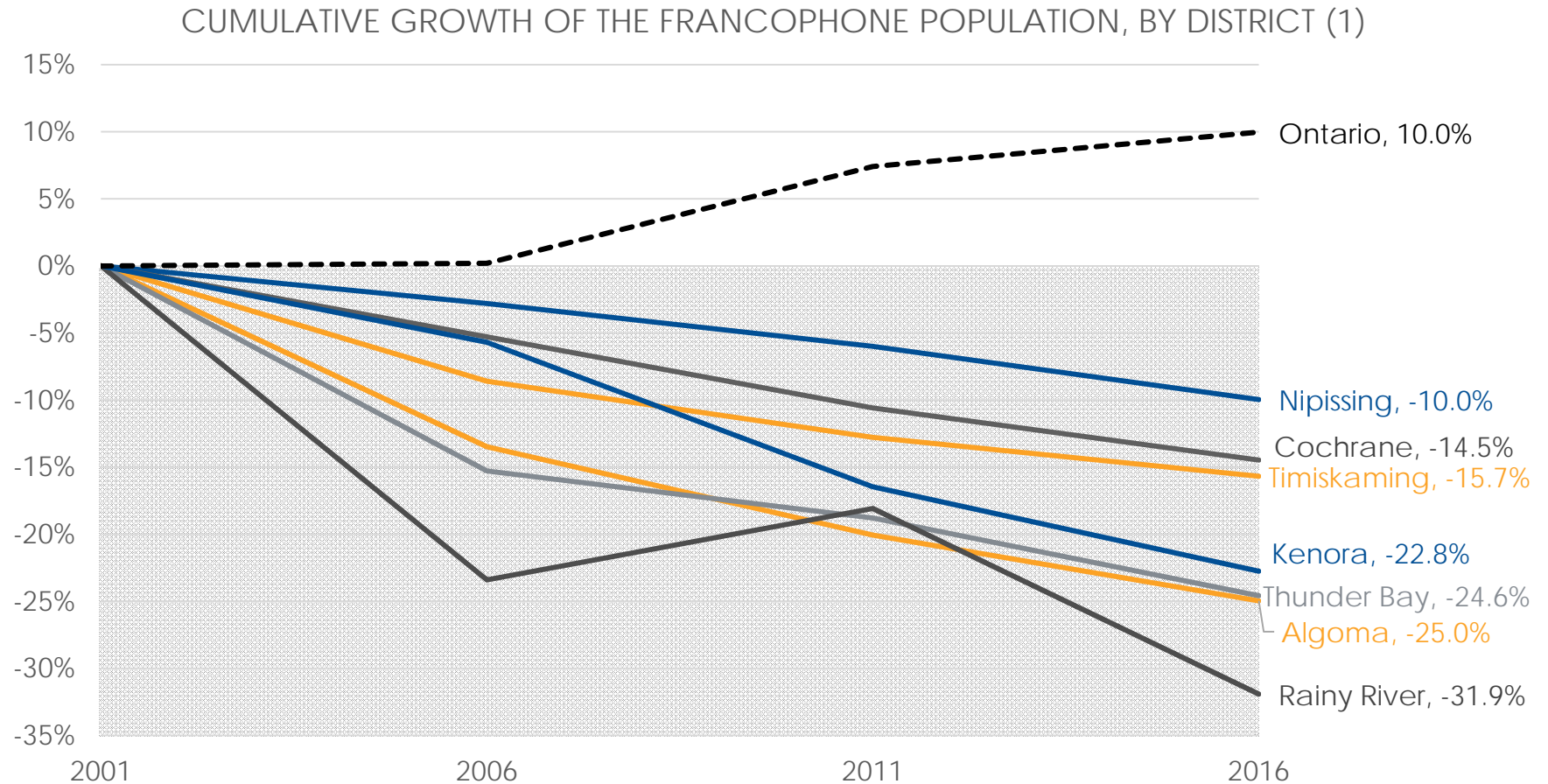
INDIGENOUS SHARE OF THE TOTAL LABOUR FORCE - PROJECTIONS



Source: Author's estimates based on Statistics Canada's 2006 Census Microdata file (Moazzami & Cuddy District reports)

# Francophone Population

Francophone Population Has Been Decreasing in Most of the Northern Districts...

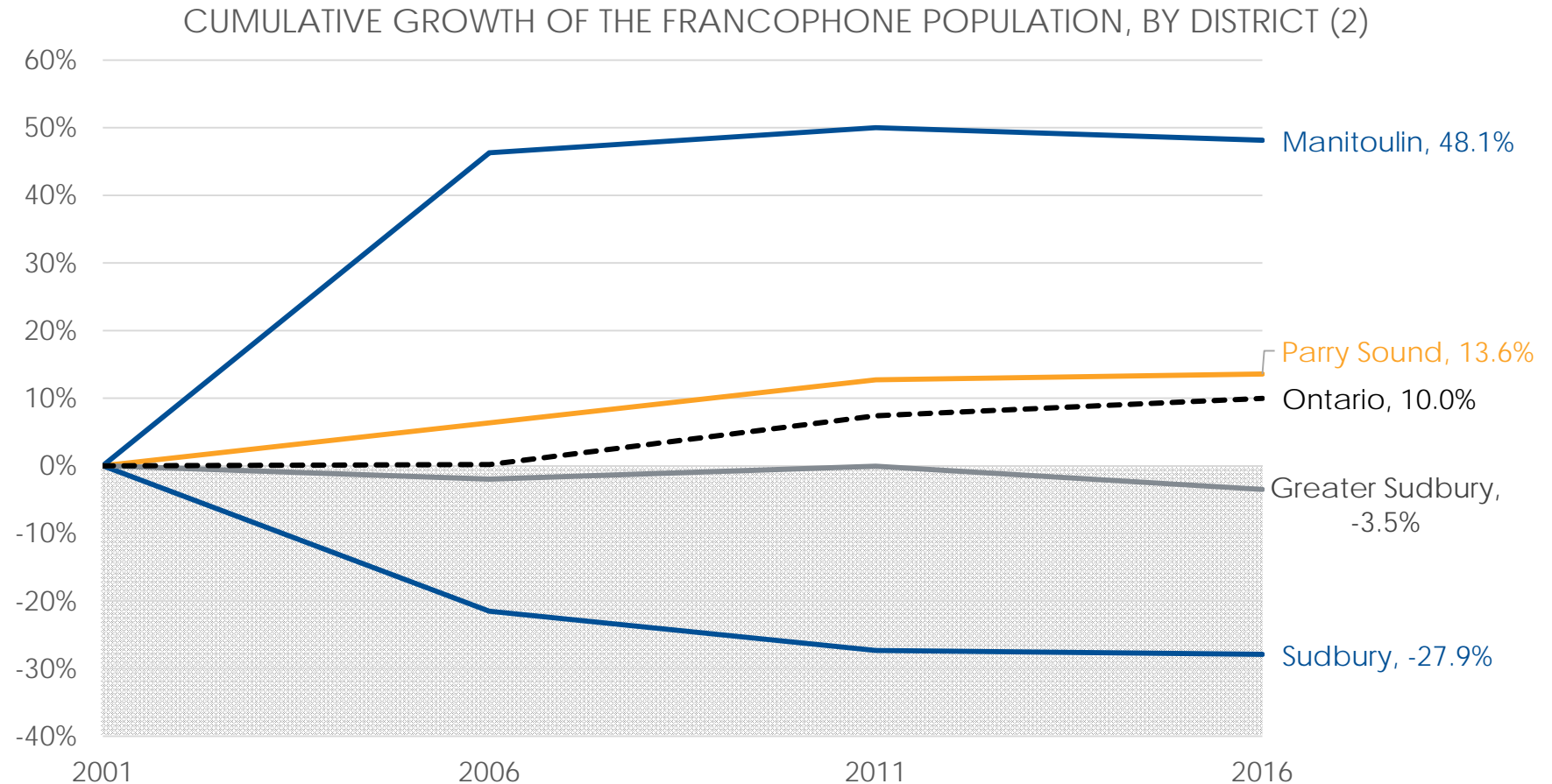


Source: Author's calculations based on Statistics Canada, Census, various years



# Francophone Population

... But in Parry Sound and Manitoulin Districts

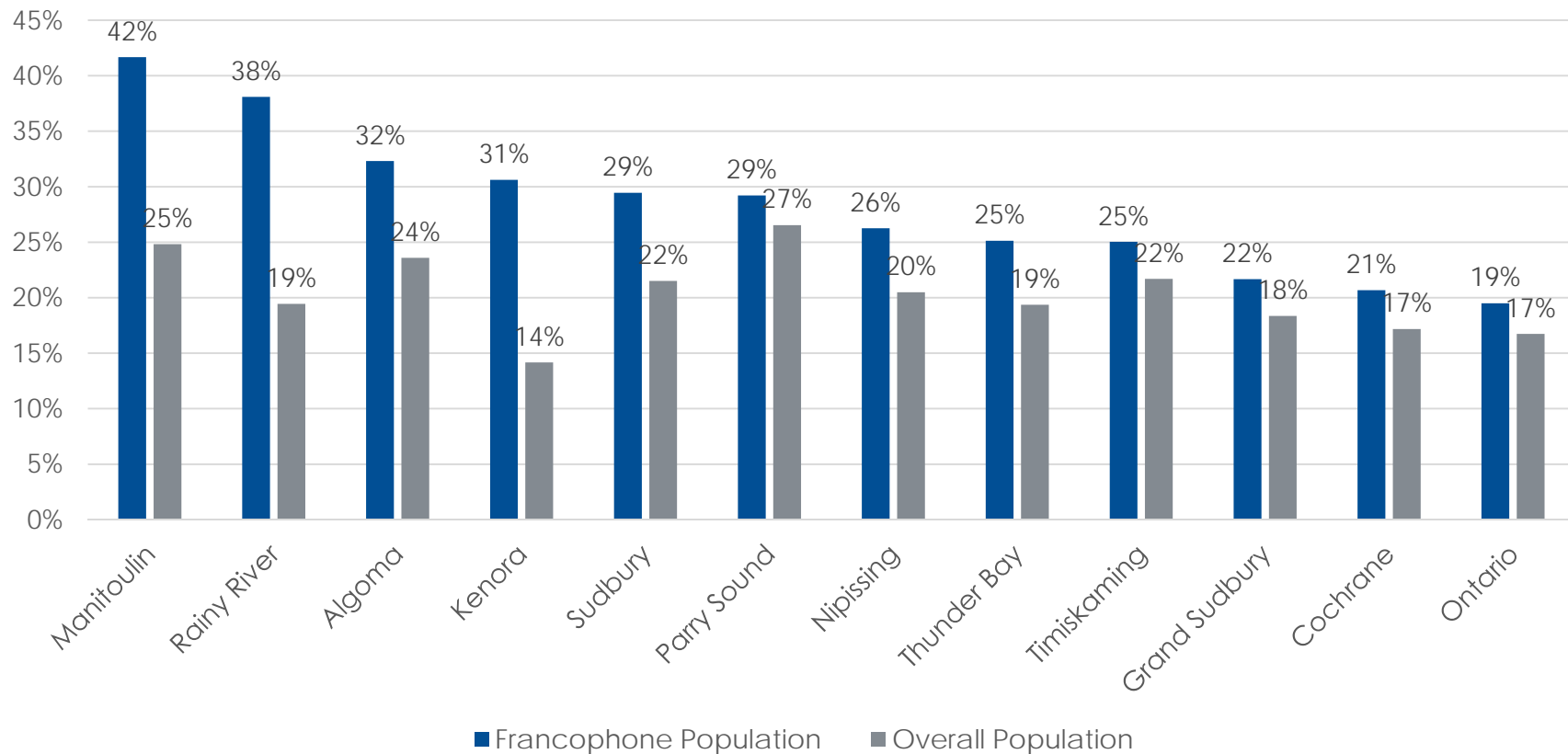


Source: Author's calculations based on Statistics Canada, Census, various years

# Francophone Population

The Francophone Population is Older Than the Overall Population

PROPORTION OF POPULATION OVER 65 YEARS OLD, 2016



Source: Author's calculations based on Statistics Canada, Census, 2016

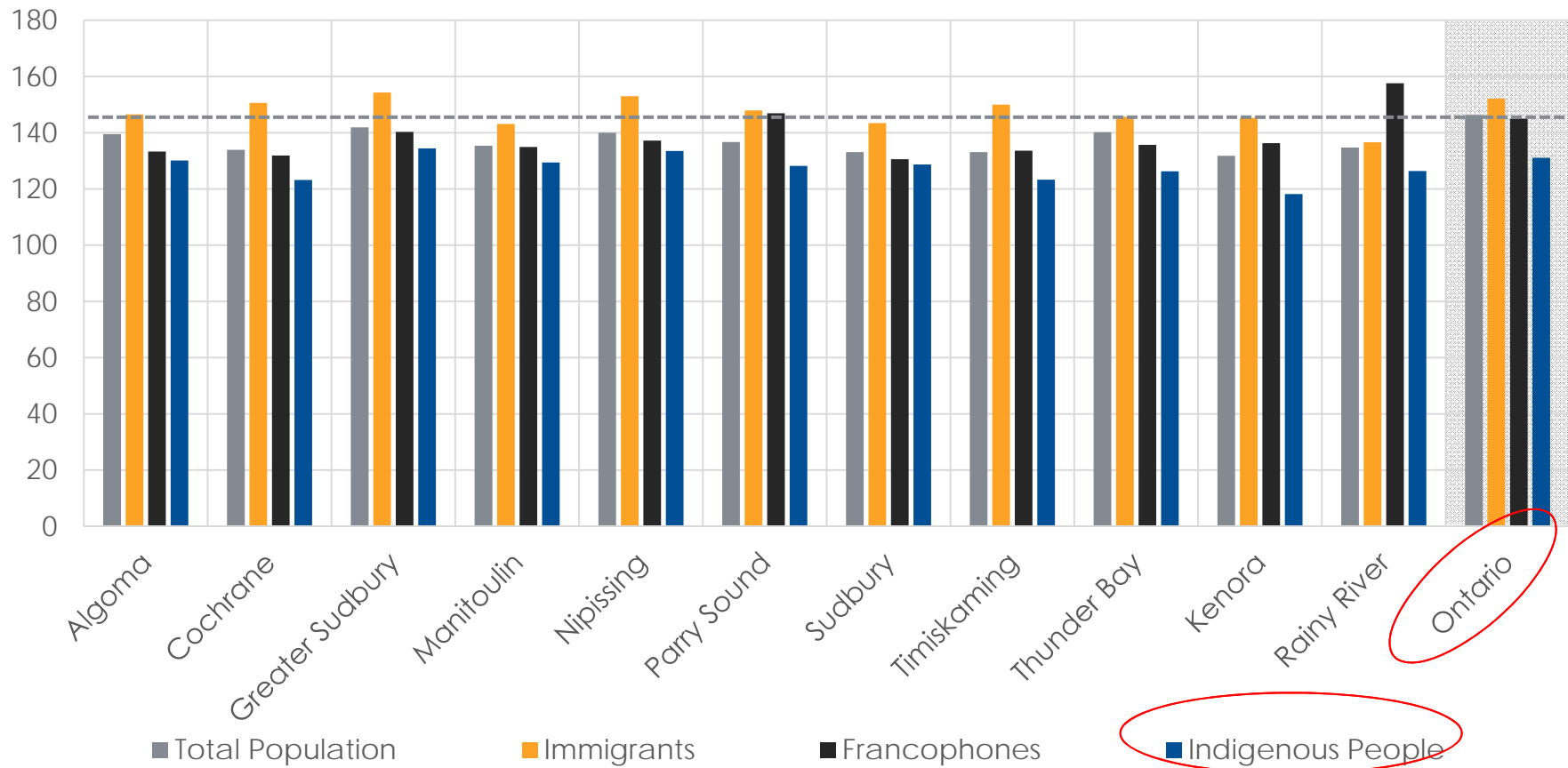
# EDUCATION & SKILLS



# Education and Skills

Lower Human Capital Index than Ontario, but Inequalities Between Population Groups Exist

HUMAN CAPITAL INDEX, 2011 *(Comparison pending for 2016 data)*

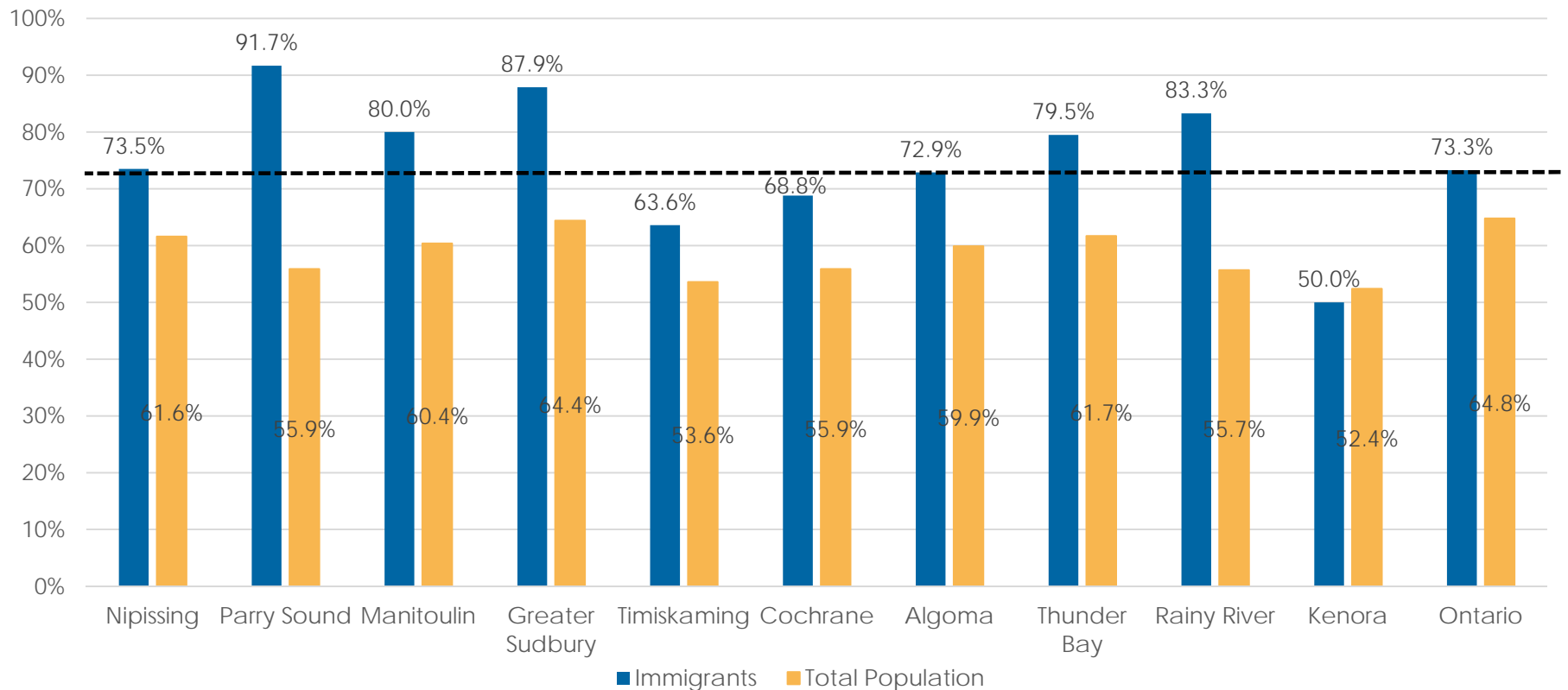


Source: Cuddy & Moazzami, 2016, Northern Projections – Human Capital Serie (Northern Policy Institute)

# Immigrant Population

In the 11 northern districts, a higher percentage of immigrants hold a postsecondary certificate, diploma, or degree than the total population and the Ontario average.

ATTAINMENT OF A POSTSECONDARY CERTIFICATE, DIPLOMA OR DEGREE FOR THE POPULATION AGES 25-64, 2011



\*Data not displayed for Sudbury as data is suppressed for this district due to the low number of immigrants

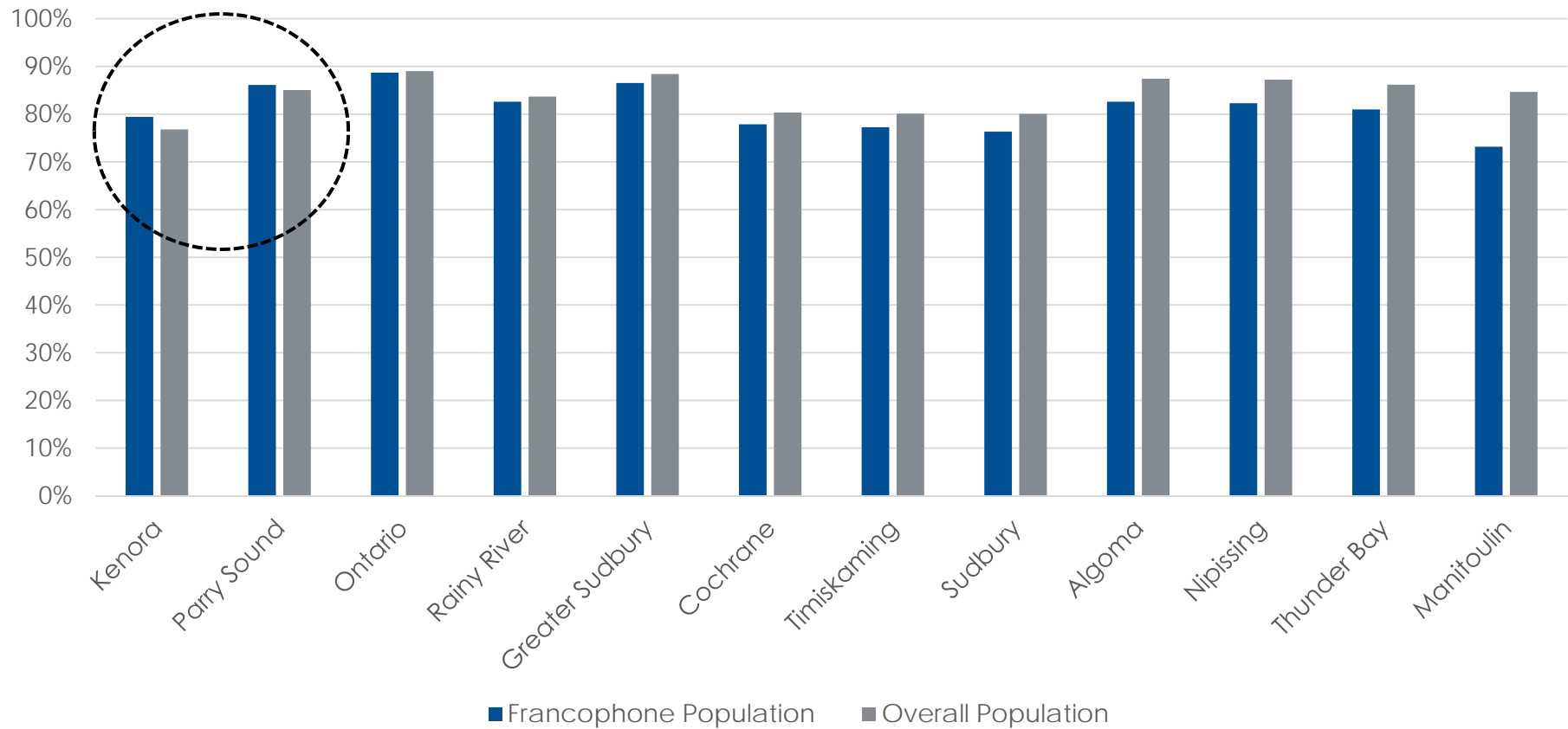
\*\*Immigrant here refers to persons who came to Canada from abroad in the last 5 years

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

# Francophone Population

In Kenora and Parry-Sound District, a Larger Proportion of the Francophone Population Has a Post-Secondary Education Than the Overall Population

PERCENTAGE OF THE 25-64 YEARS OLD POPULATION WITH POST-SECONDARY EDUCATION, 2011

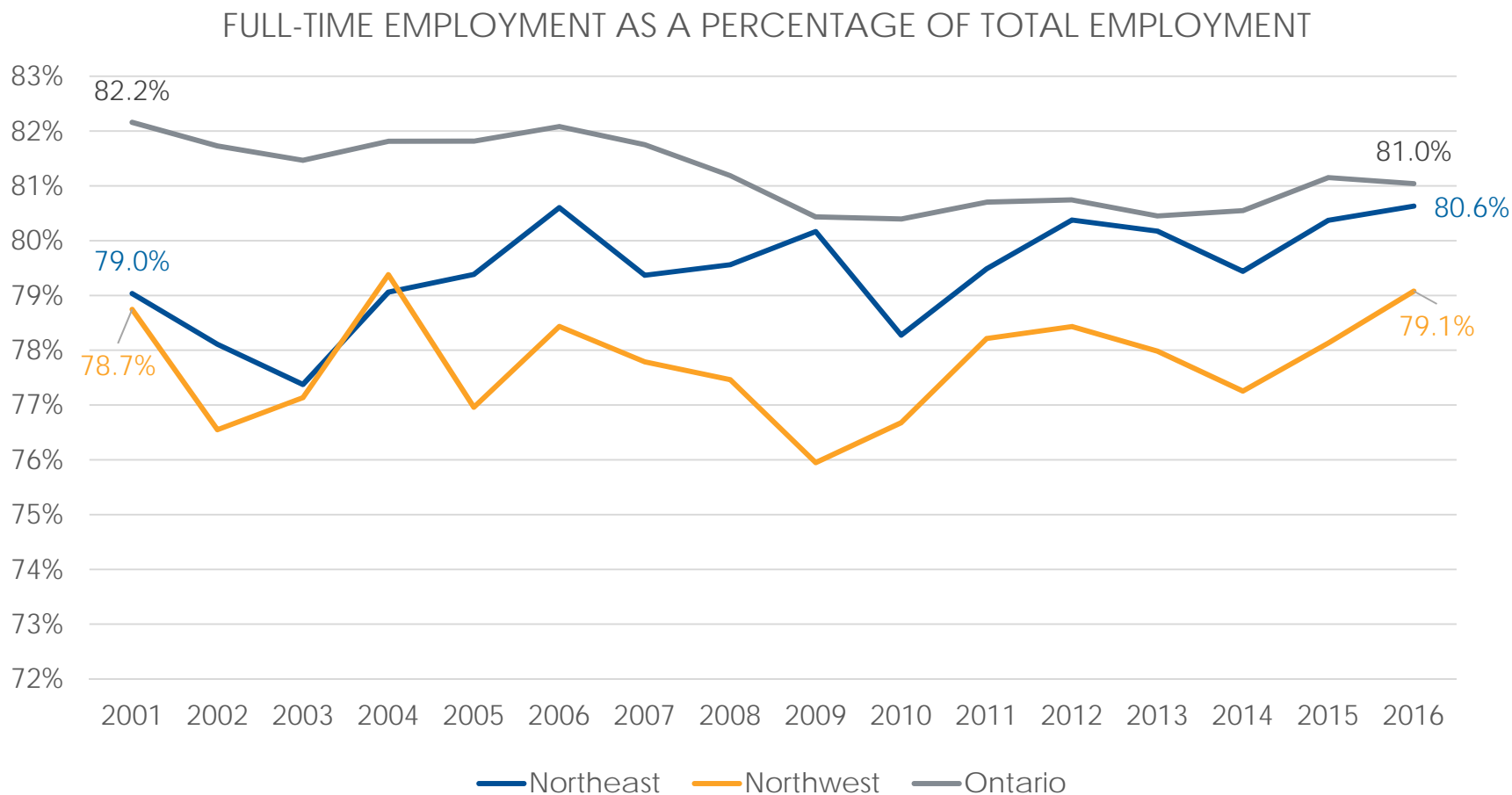


Source: Author's calculations based on Statistics Canada, Census, 2016

# THE LABOUR MARKET



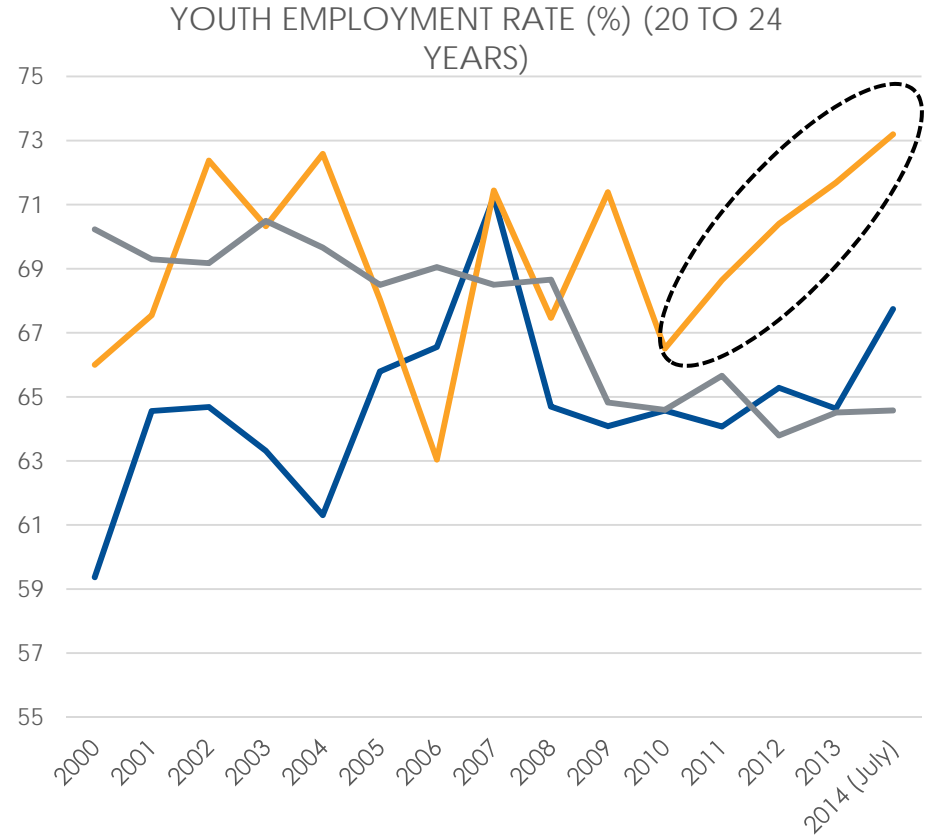
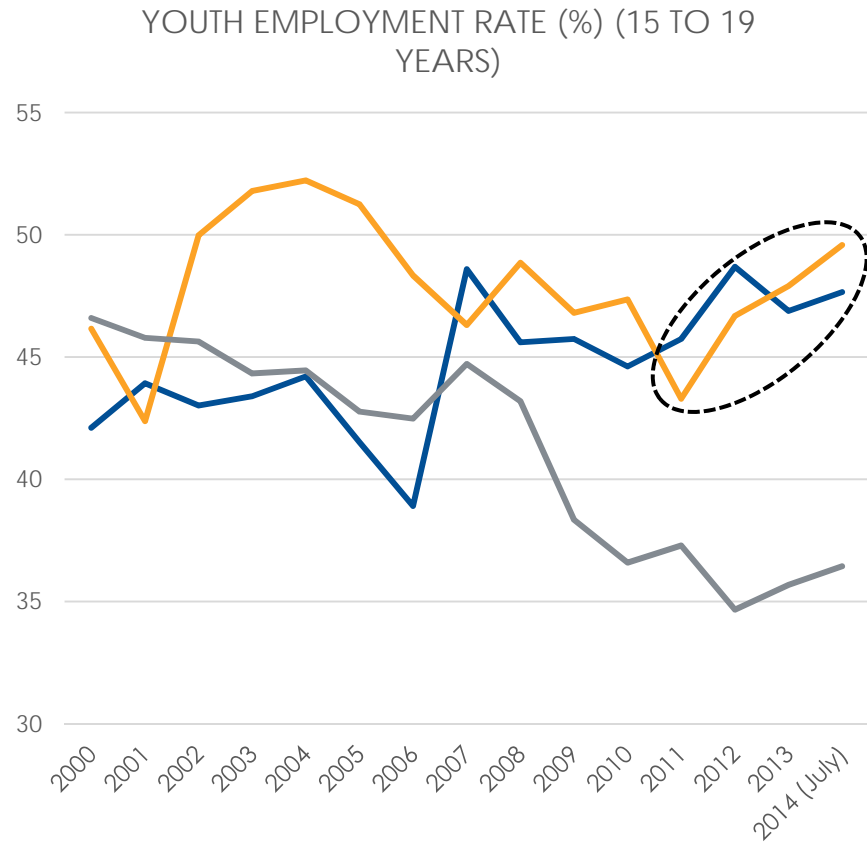
# Proportion of full-time jobs increased in Northern Ontario



Source: Statistics Canada. Table 282-0123 - Labour force survey estimates (LFS), annual



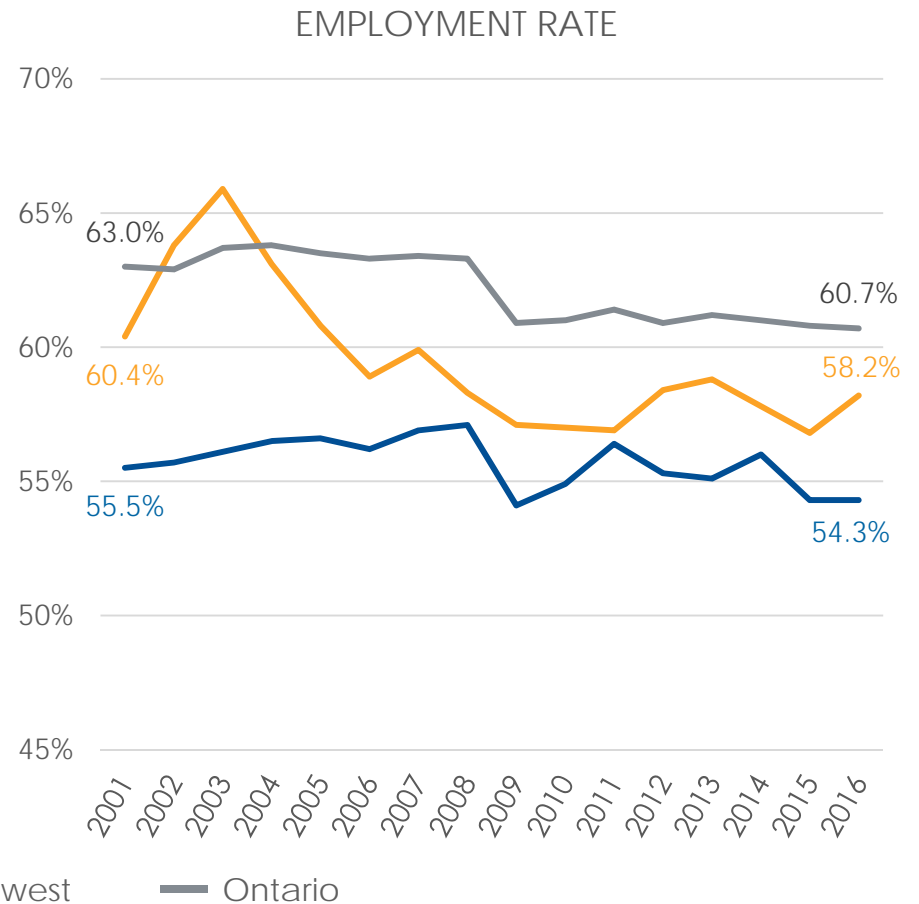
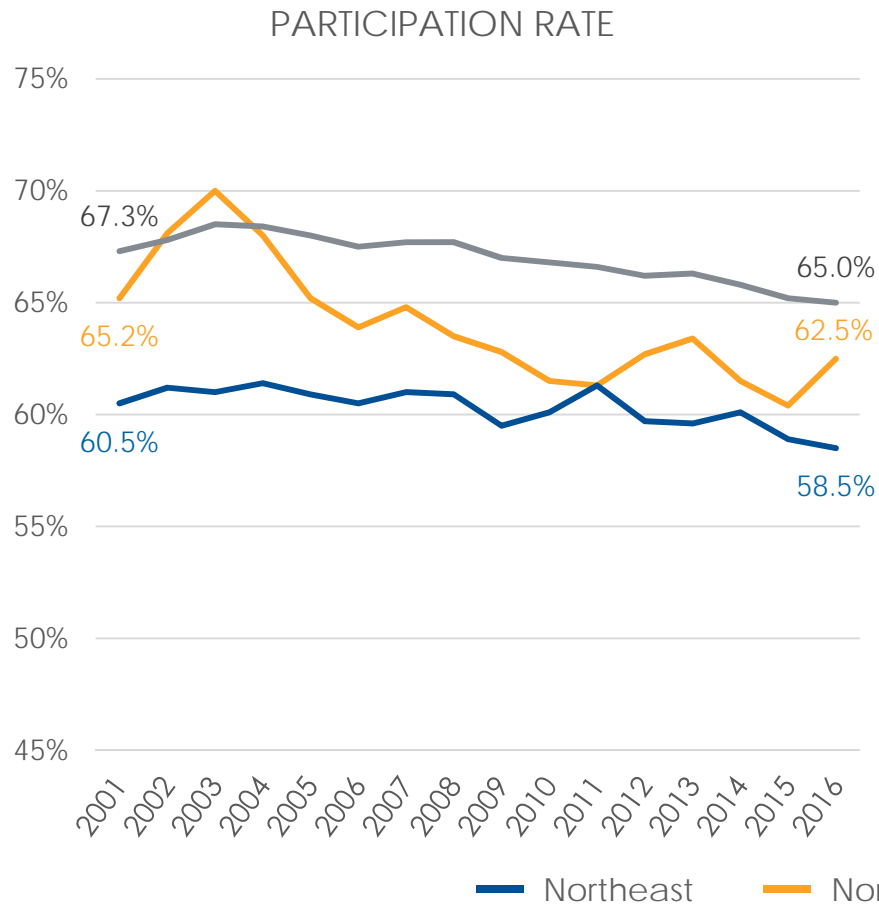
# A Bright Spot: Youth Employment Rates



— Northeast — Northwest — Ontario

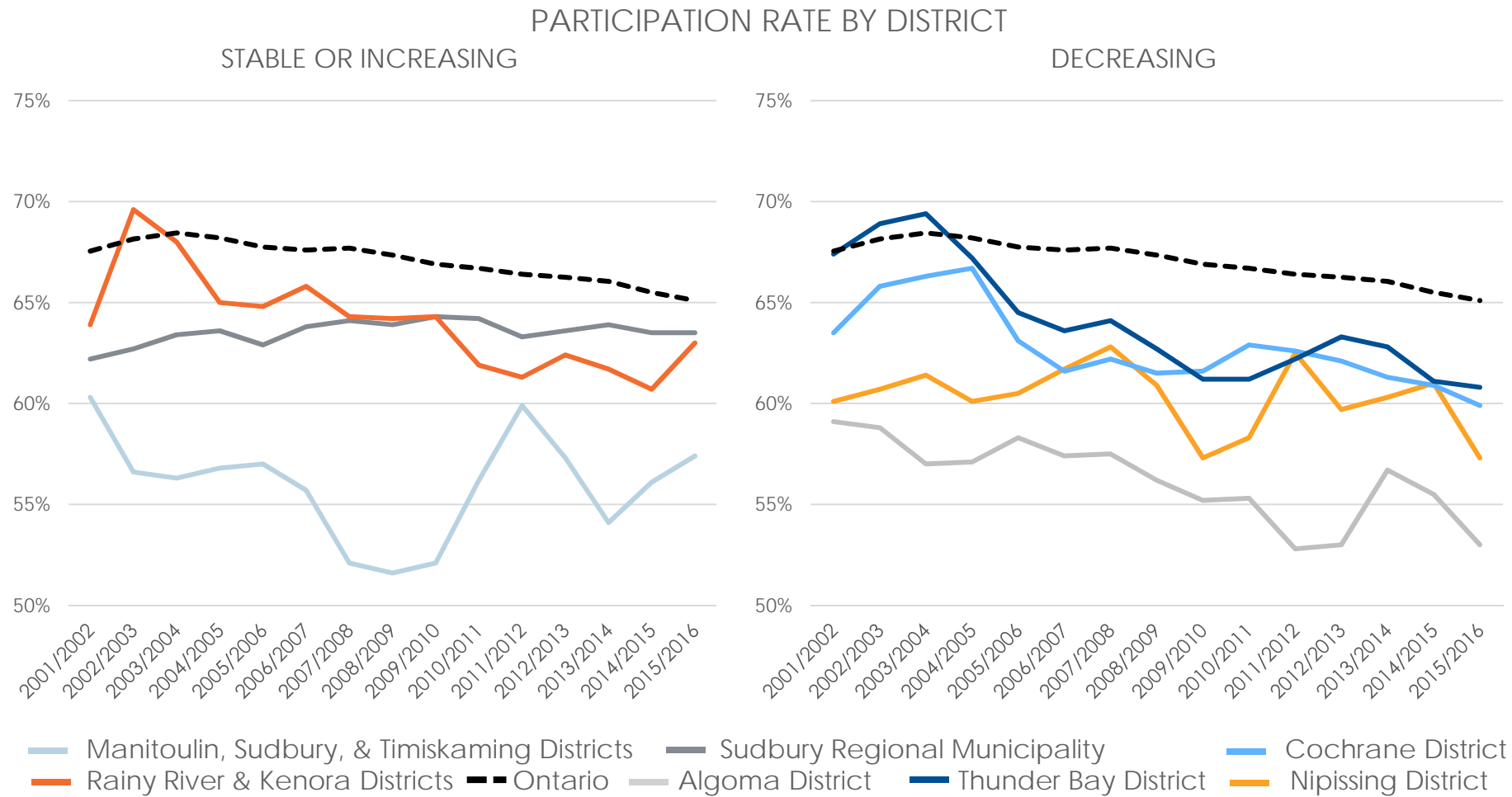
Source: Author's calculations based on Statistics Canada, Labour Force Survey, custom tabulation

# Higher participation and employment rate in the Northwest



Source: Statistics Canada. Table 282-0123 - Labour force survey estimates (LFS), annual

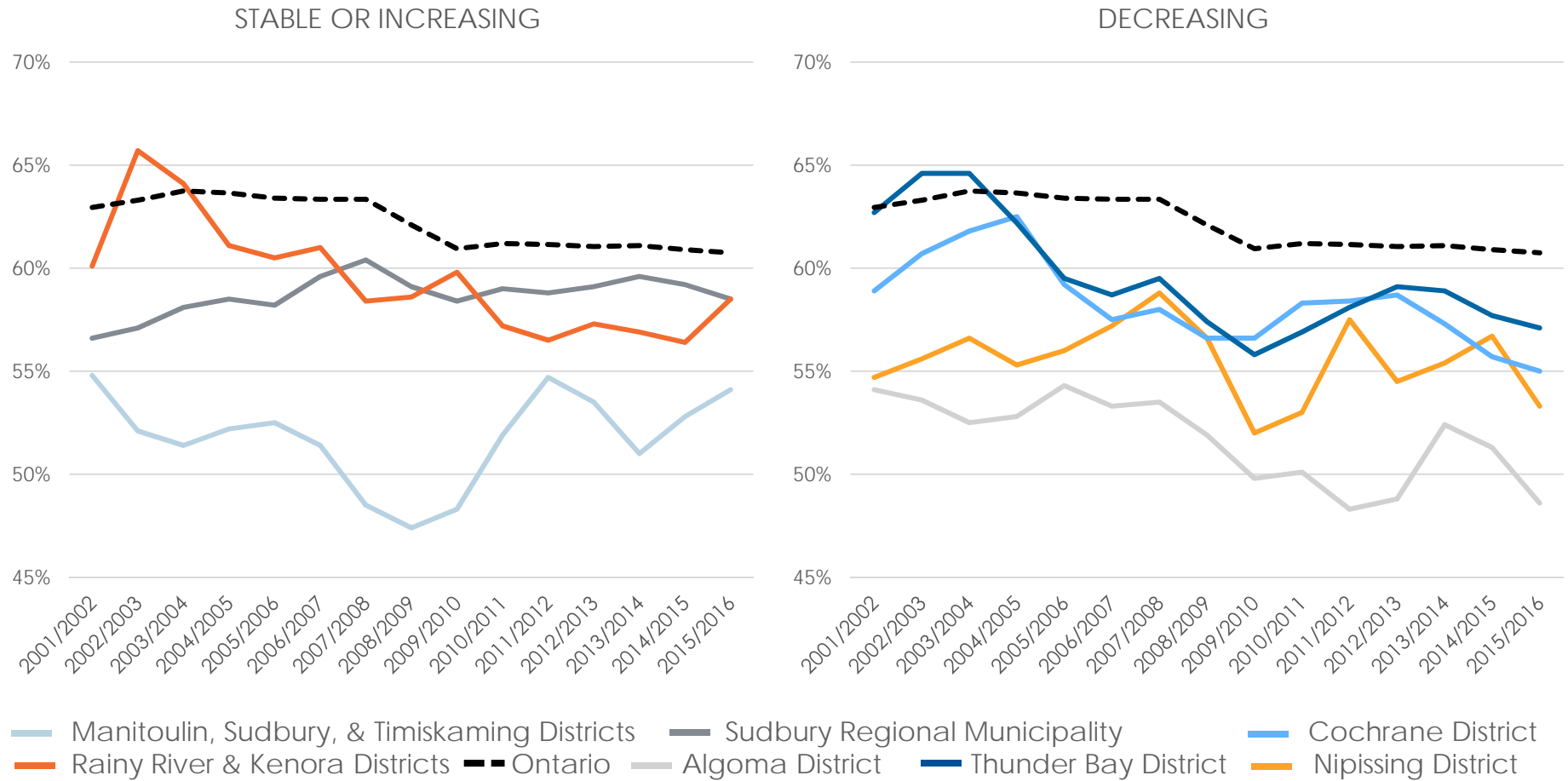
# Stable or Increasing **Participation Rate** in Greater Sudbury, Rainy River & Kenora, Manitoulin, Sudbury & Timiskaming Districts



Source: Statistics Canada, Labour Force Survey, 2 years moving average, custom tabulation

# Stable or Increasing **Employment Rate** in Greater Sudbury, Rainy River & Kenora, Manitoulin, Sudbury & Timiskaming Districts

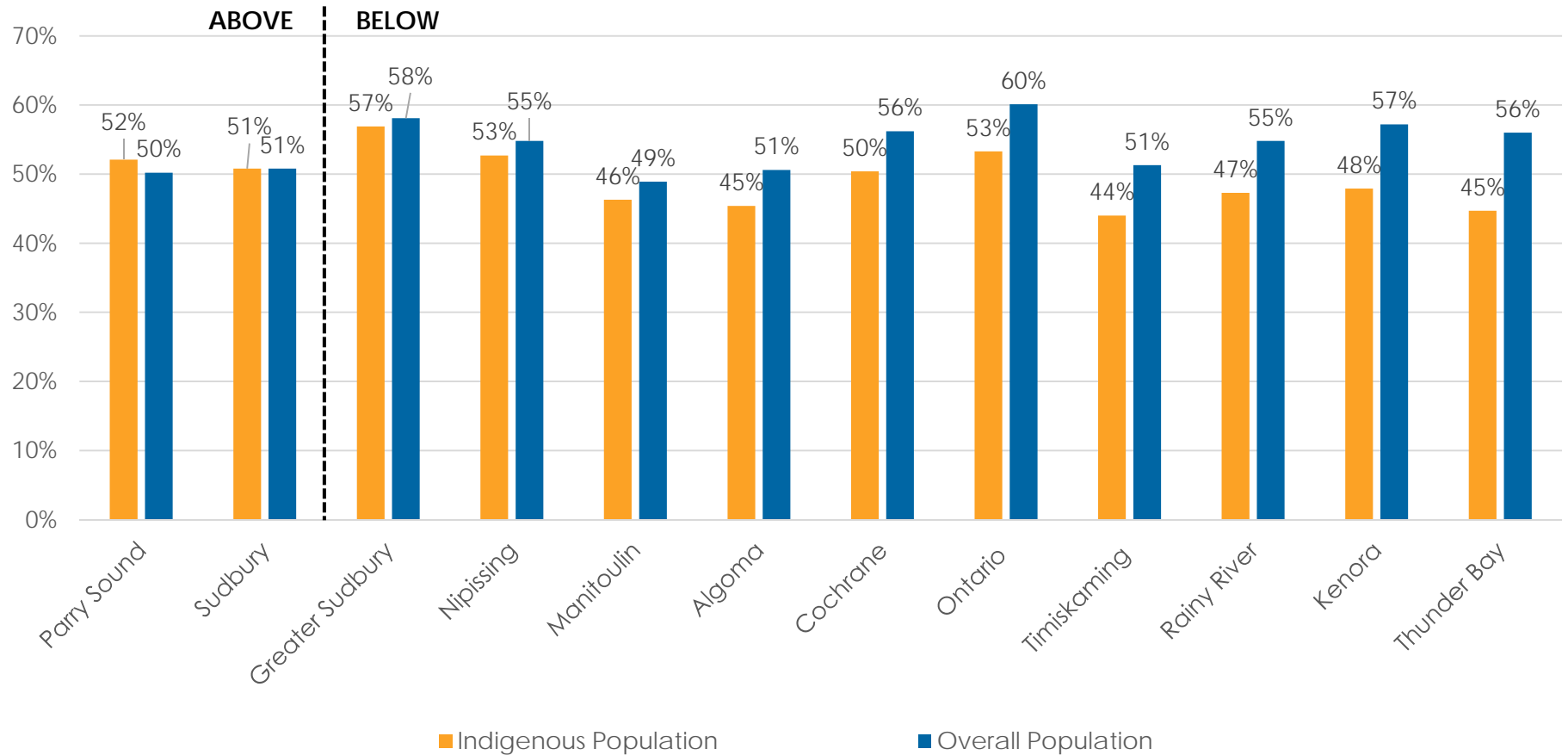
EMPLOYMENT RATE BY DISTRICT



Source: Statistics Canada, Labour Force Survey, 2 years moving average, custom tabulation

# Indigenous Employment Rate

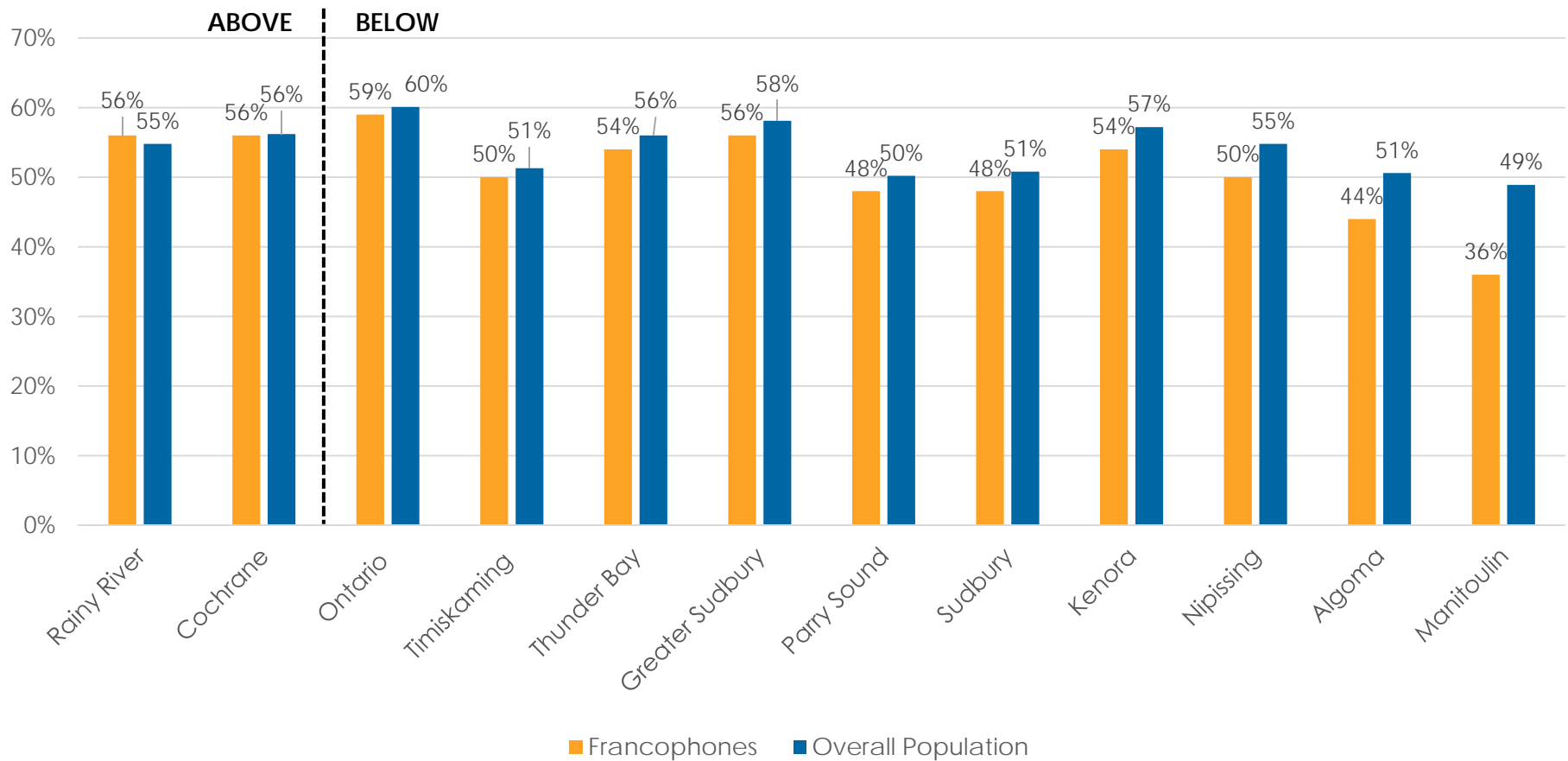
EMPLOYMENT RATE OF THE INDIGENOUS POPULATION COMPARED TO THAT OF THE OVERALL POPULATION, 2011



Source: Statistics Canada, National Household Survey, 2011, custom tabulation

# Francophone Employment Rate

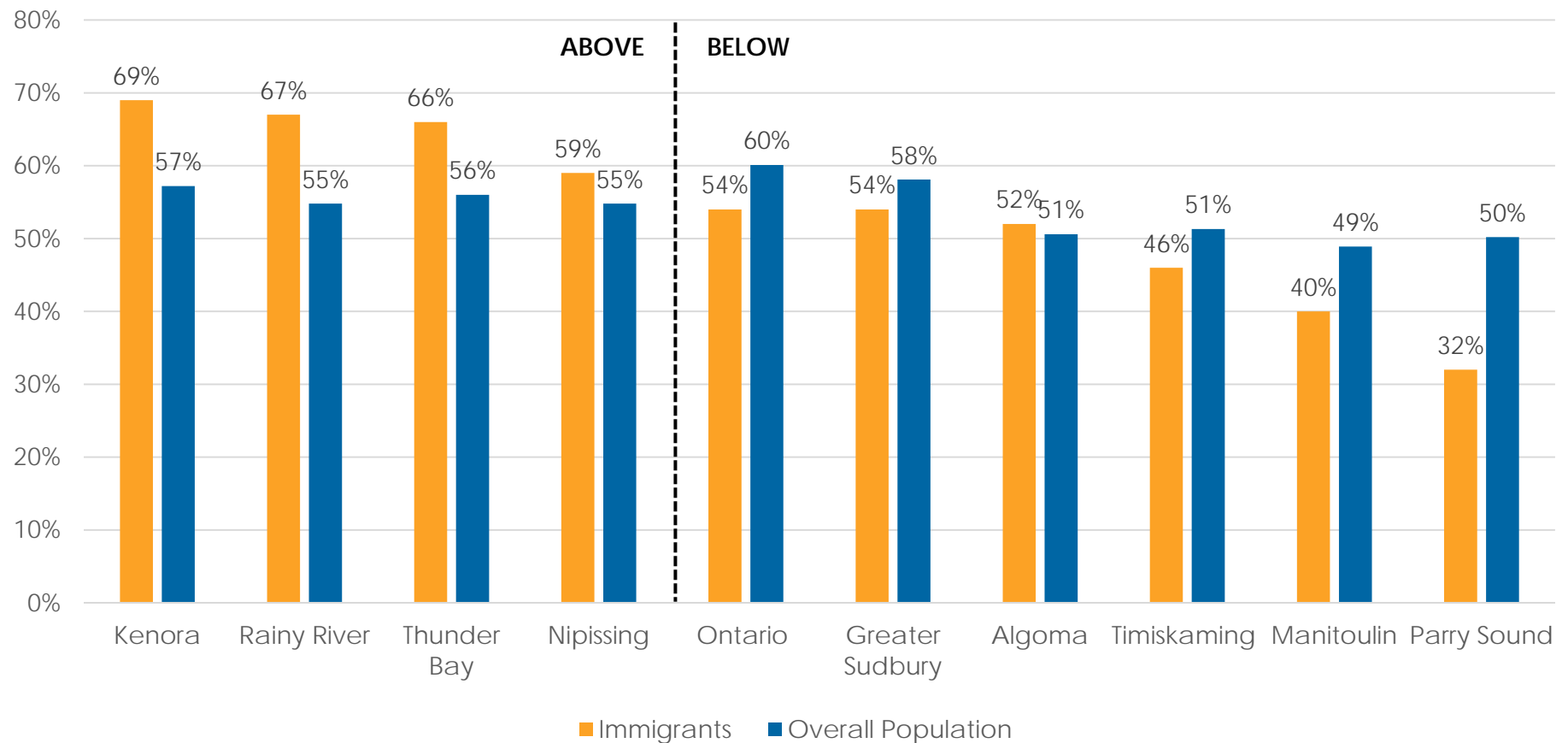
EMPLOYMENT RATE OF FRANCOPHONES COMPARED TO THAT OF THE OVERALL POPULATION, 2011



Source: Statistics Canada, National Household Survey, 2011, custom tabulation

# Immigrant Employment Rate

EMPLOYMENT RATE OF IMMIGRANTS COMPARED TO THAT OF THE OVERALL POPULATION, 2011



\*Data for Sudbury District was not available

Source: Statistics Canada, National Household Survey, 2011, custom tabulation

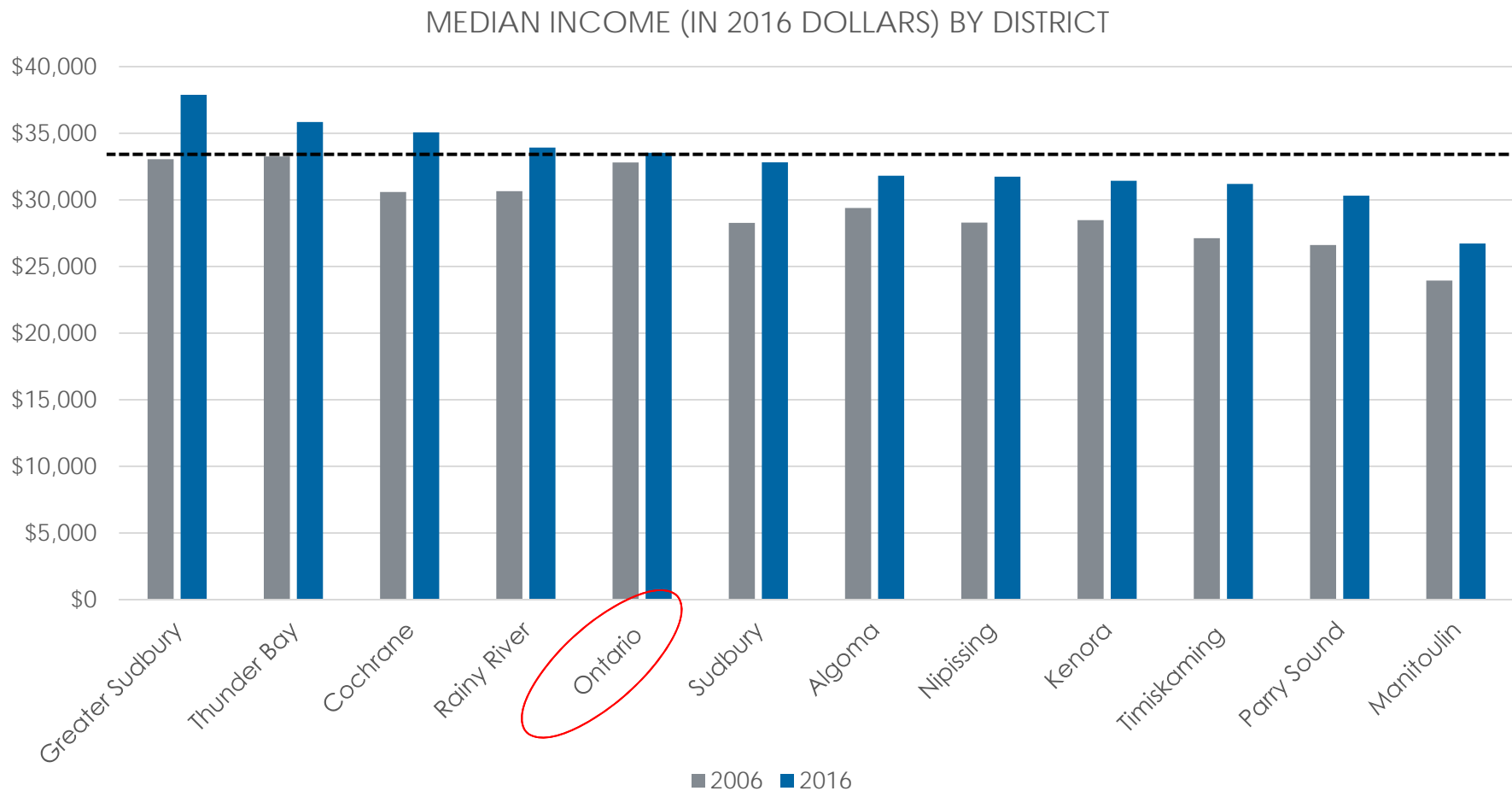
INCOME





# Income

The Median Income Increased Since 2006 in Every District

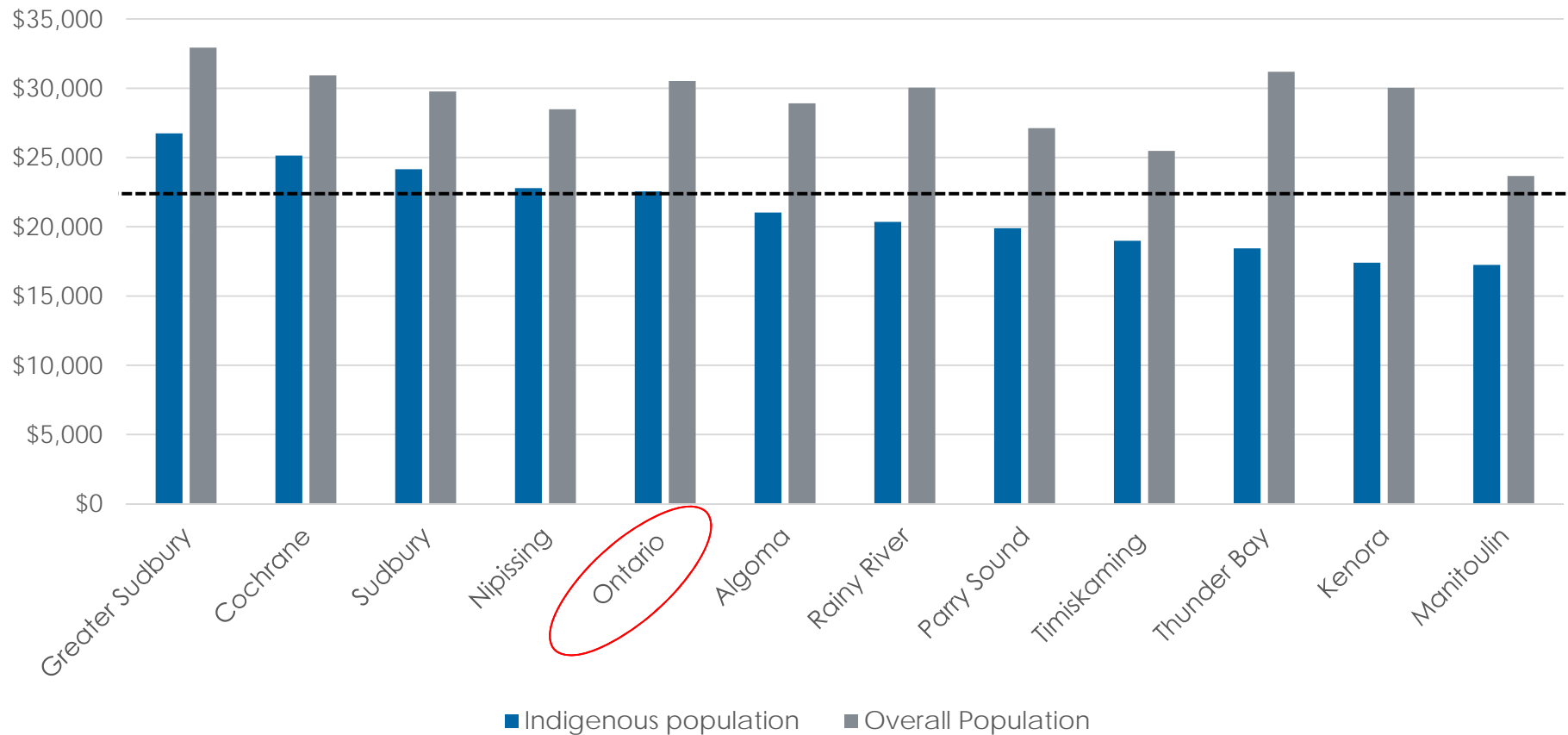


Source: Author's calculations based on Statistics Canada, Census, Various Years; and Bank of Canada, Consumer Price Index

# Income

## Indigenous Population

MEDIAN INCOME OF THE INDIGENOUS POPULATION COMPARED TO THAT OF THE OVERALL POPULATION, 2011

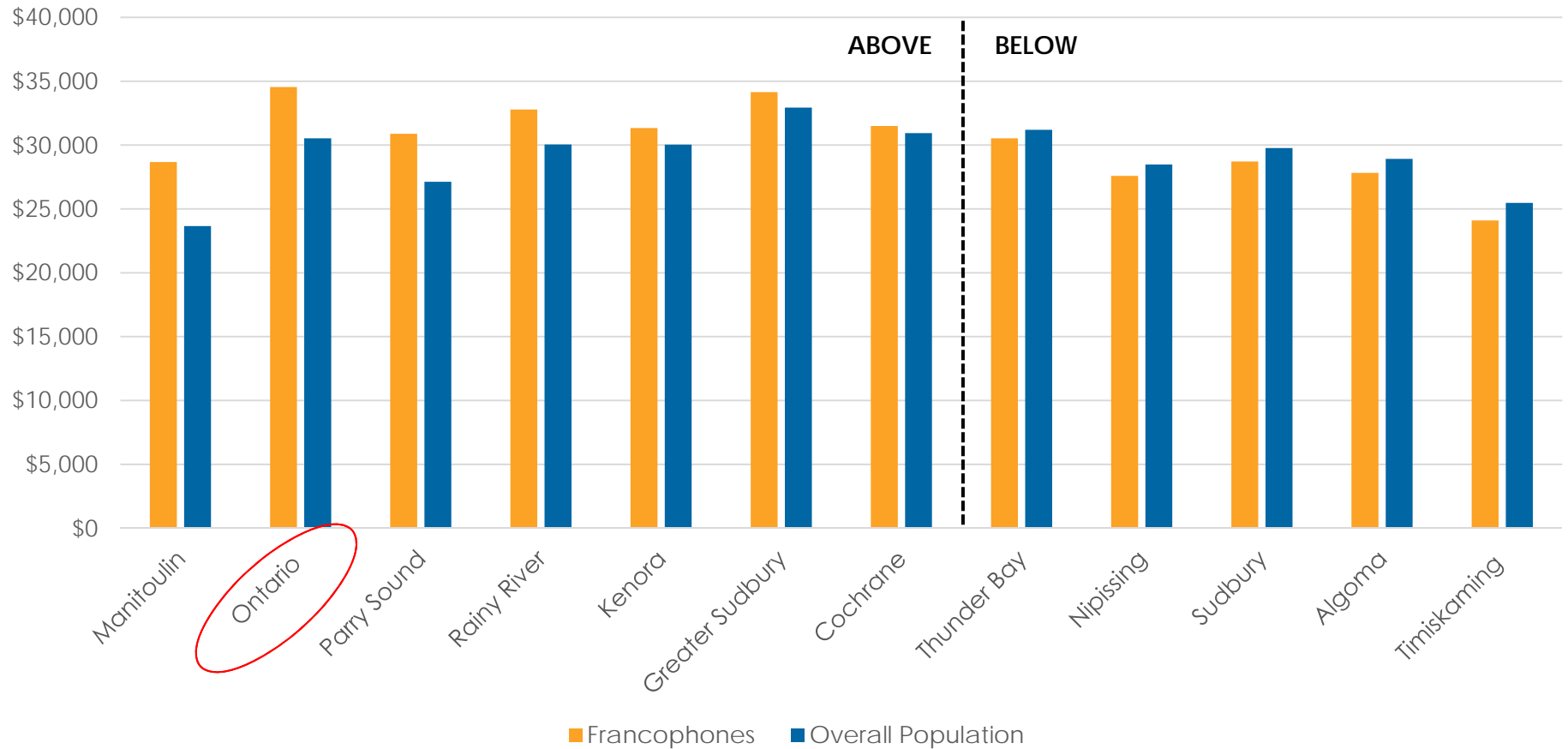


Source: Statistics Canada, National Household Survey, 2011, custom tabulation

# Income

## Francophone Population

MEDIAN INCOME OF FRANCOPHONES COMPARED TO THAT OF THE OVERALL POPULATION, 2011

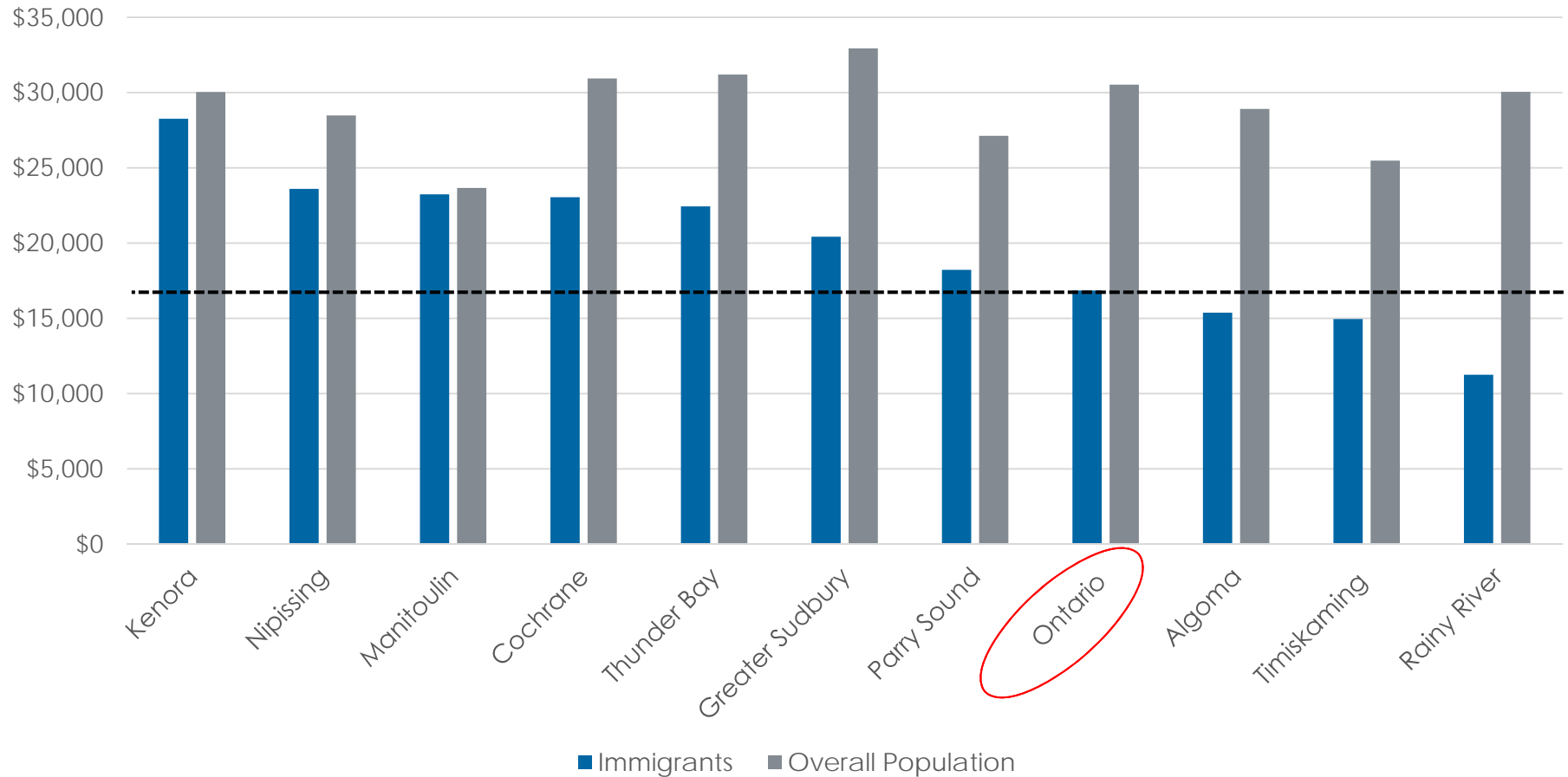


Source: Statistics Canada, National Household Survey, 2011, custom tabulation

# Income

## Immigrant Population

MEDIAN INCOME OF IMMIGRANTS COMPARED TO THAT OF THE OVERALL POPULATION, 2011



Source: Statistics Canada, National Household Survey, 2011, custom tabulation

# MIGRATION

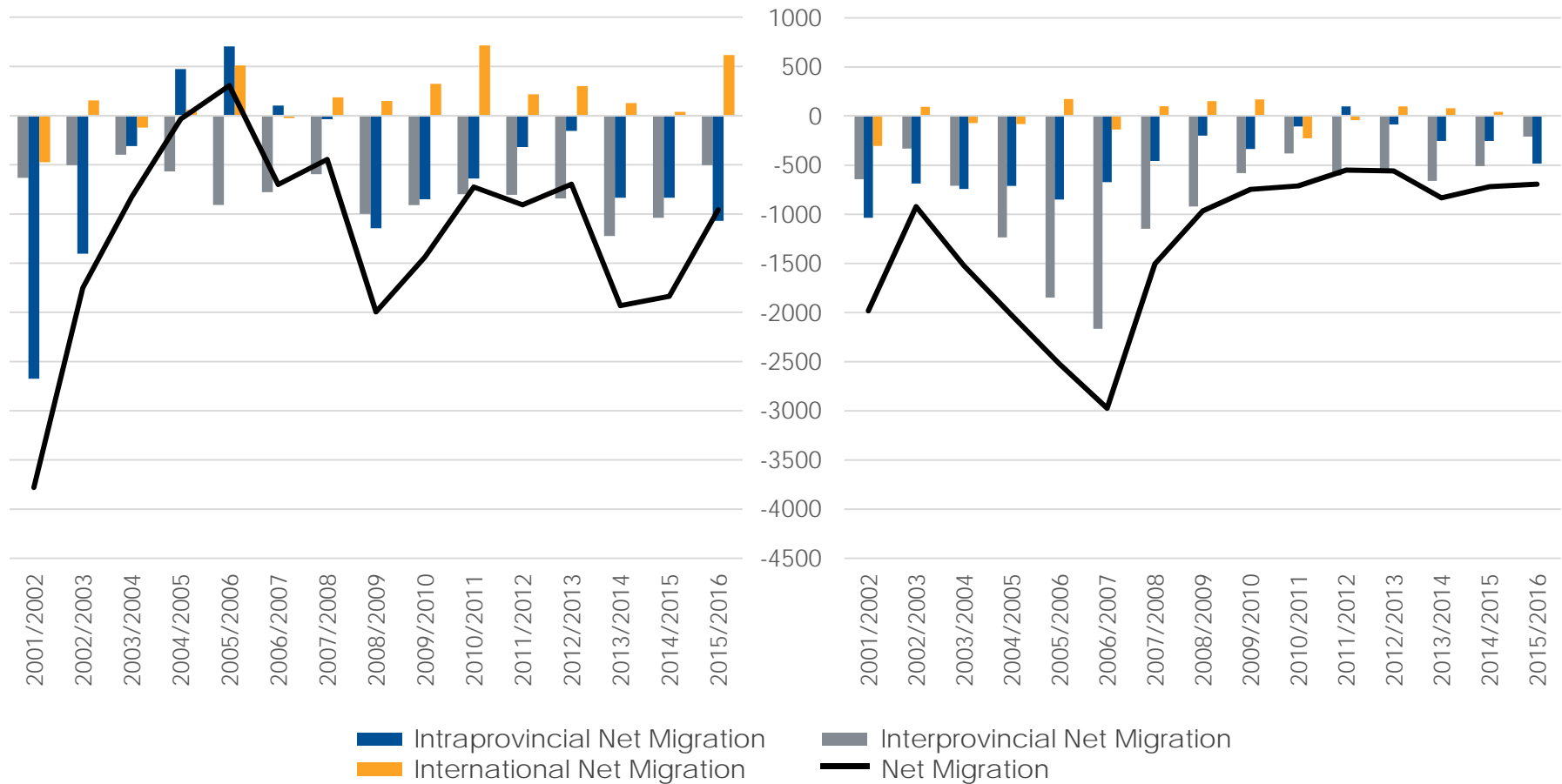


# More People Leaving Northern Ontario than Coming to the Region

NET MIGRATION AND MIGRATION COMPONENTS

NORTHEAST

NORTHWEST

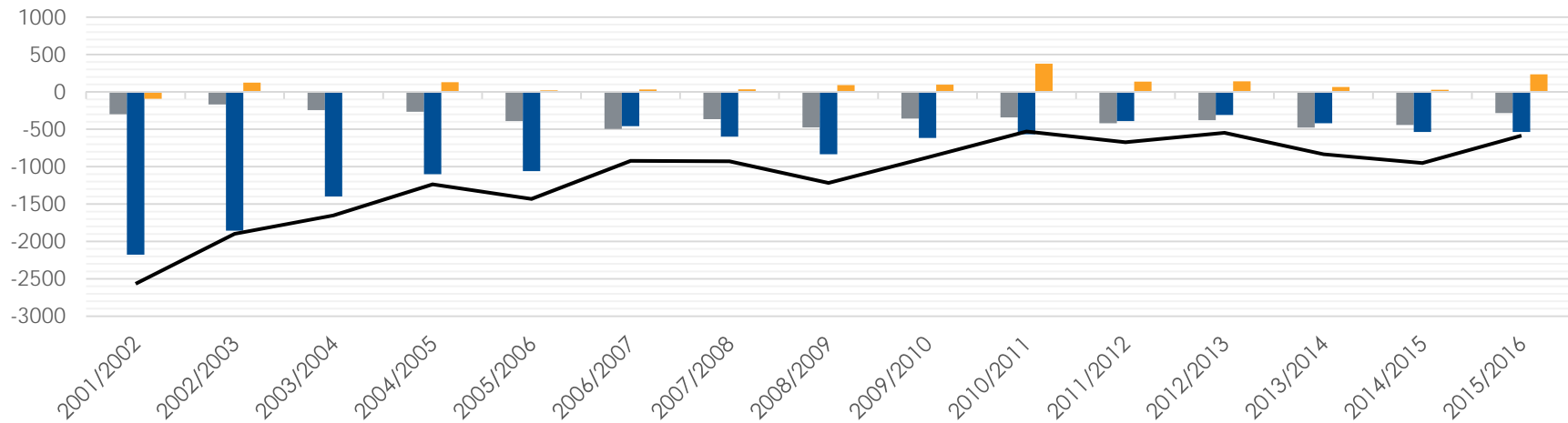


Source: Statistics Canada. Table 051-0060 - Components of population growth by economic region; and author's calculations.

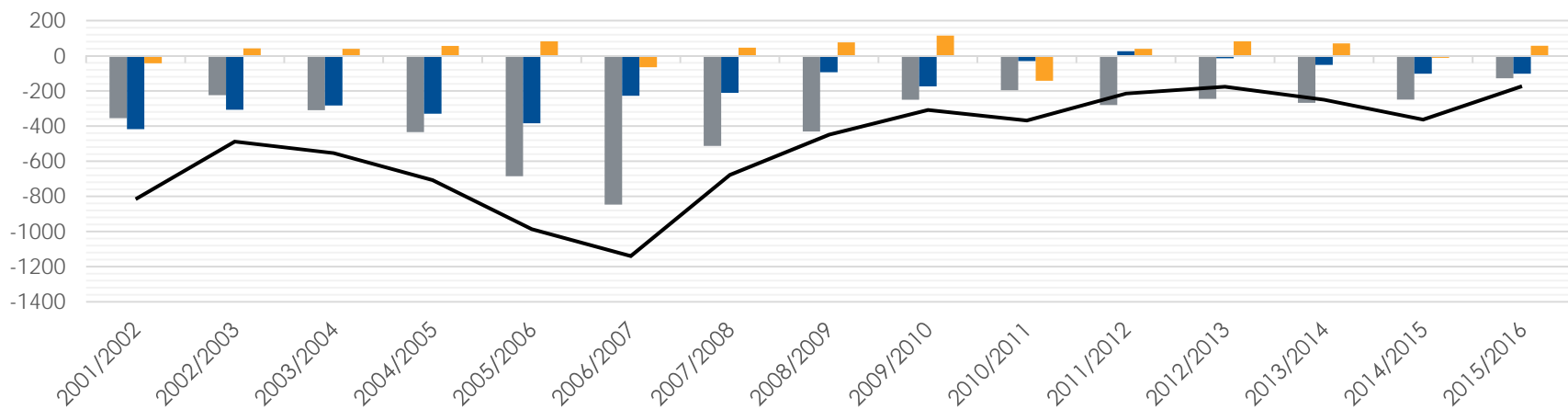
# Migration (20-29 Age Group)

- Net Interprovincial Migration
- Net International Migration
- Net Intraprovincial Migration
- Net Migration

## NORTHEAST



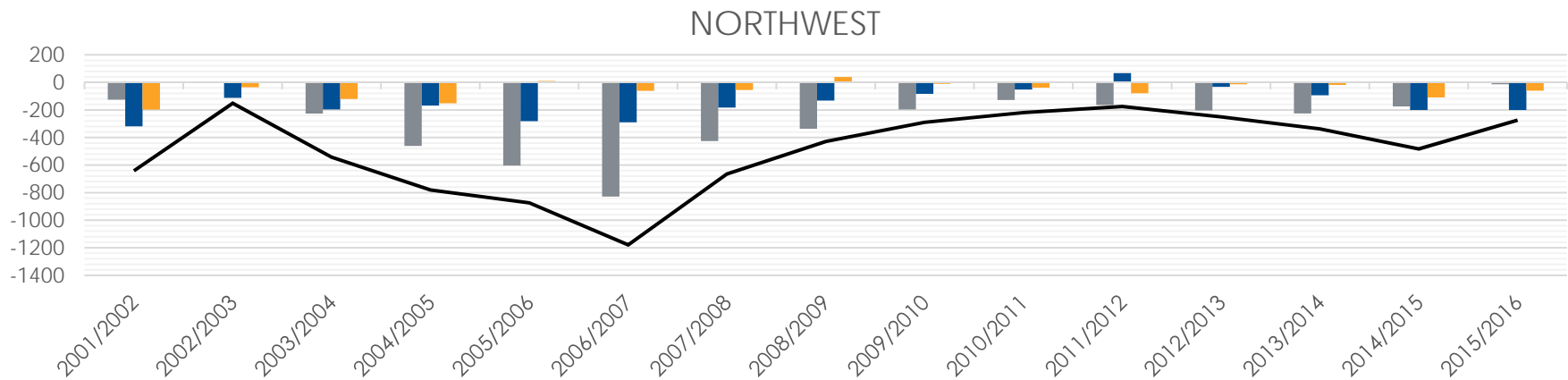
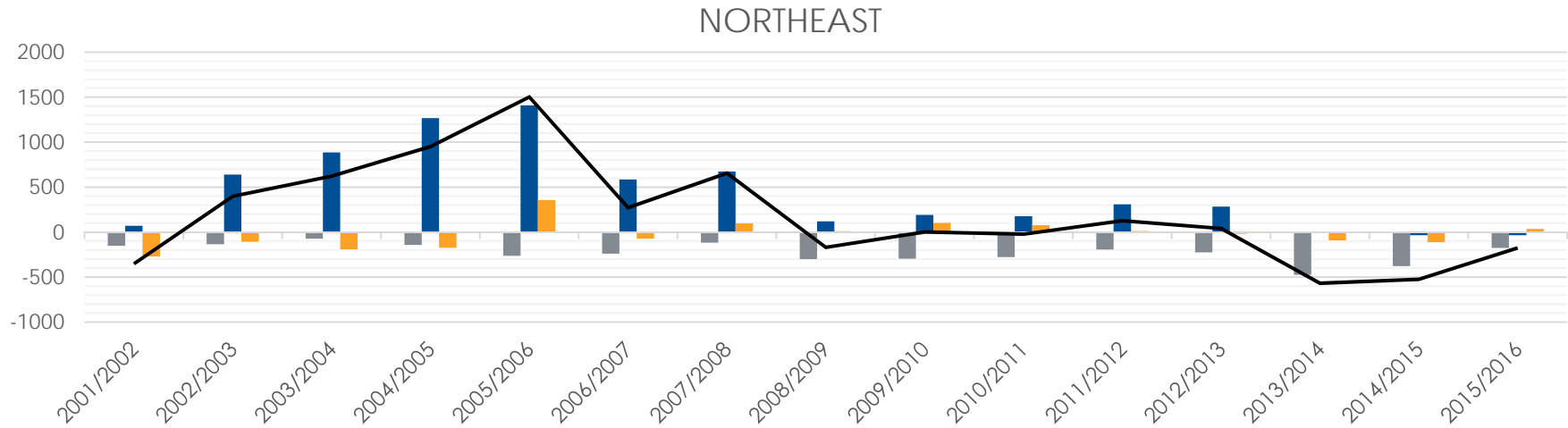
## NORTHWEST



Source: Author's calculations based on Statistics Canada, Components of population growth by economic region, sex and age group, Table 0051-0060

# Migration (30-64 Age Group)

- Net Interprovincial Migration
- Net International Migration
- Net Intraprovincial Migration
- Net Migration

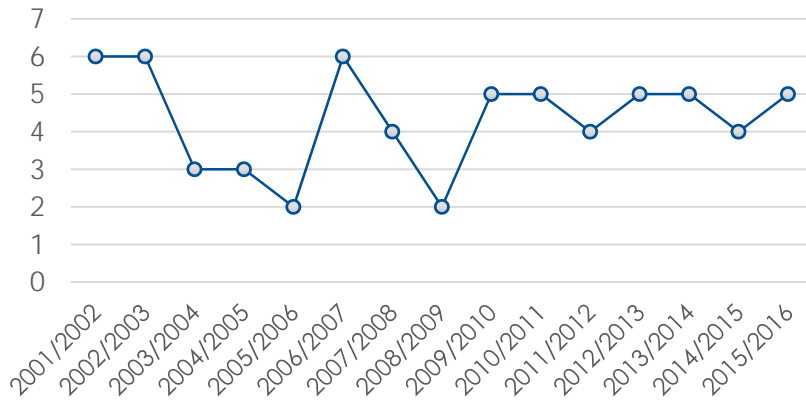


Source: Author's calculations based on Statistics Canada, Components of population growth by economic region, sex and age group, Table 0051-0060

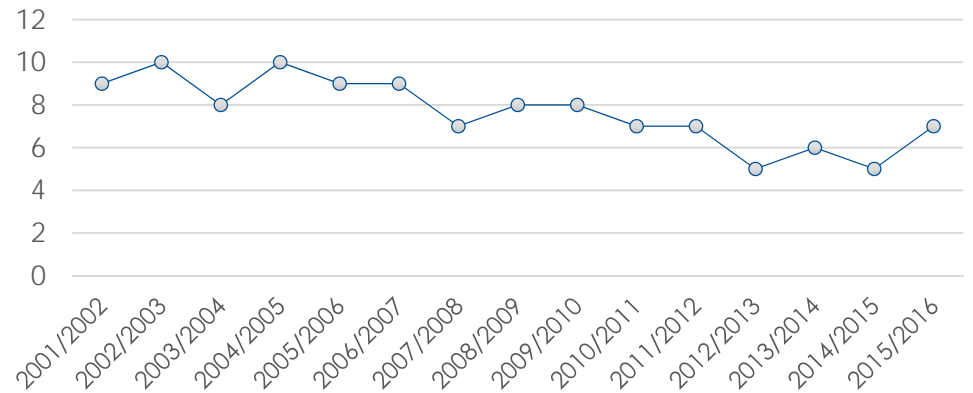


# Number of Immigrants per Capita per 10,000 People, by District

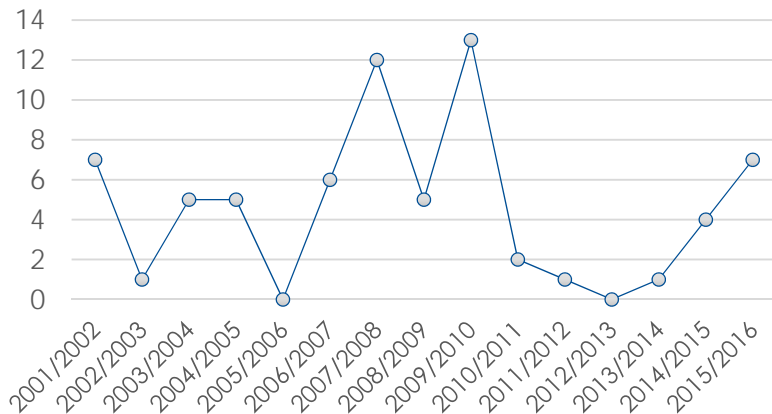
COCHRANE



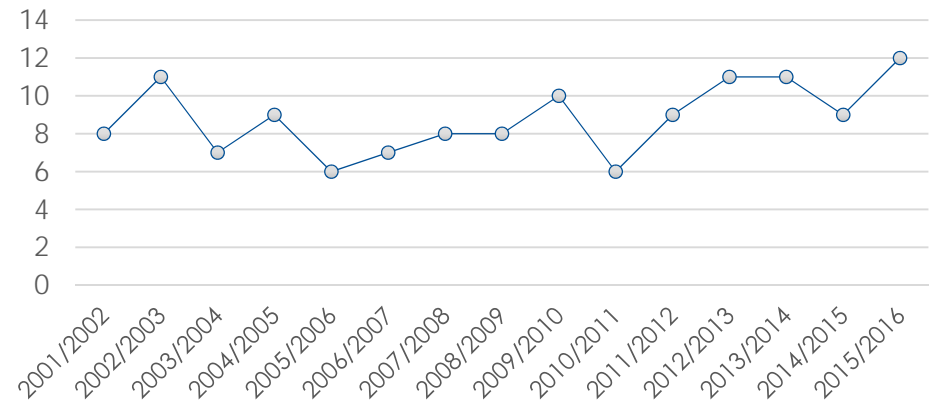
NIPISSING



MANITOULIN



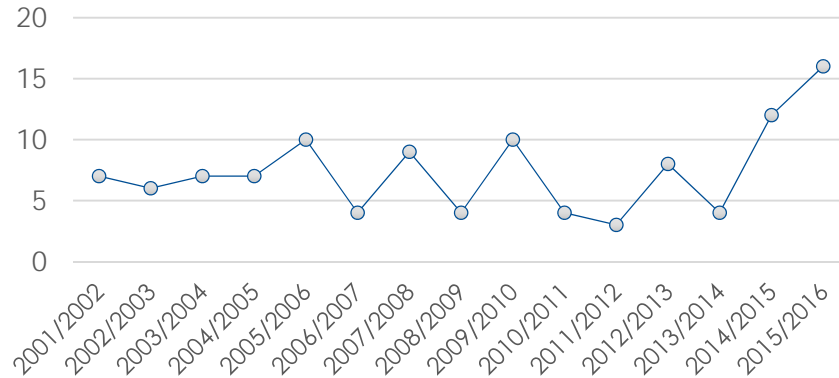
GREATER SUDBURY



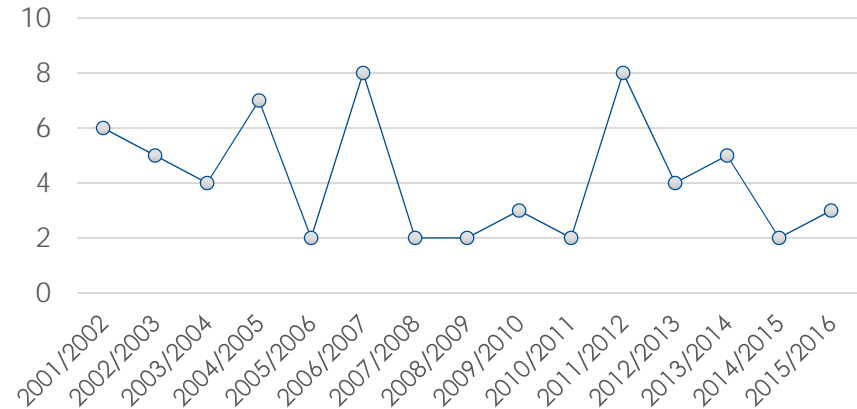
Source: Author's calculations based on Statistics Canada, Components of population growth by census division, sex and age group for the period from July 1 to June 30, Table 0051-0063

# Number of Immigrants per Capita per 10,000 People, by District

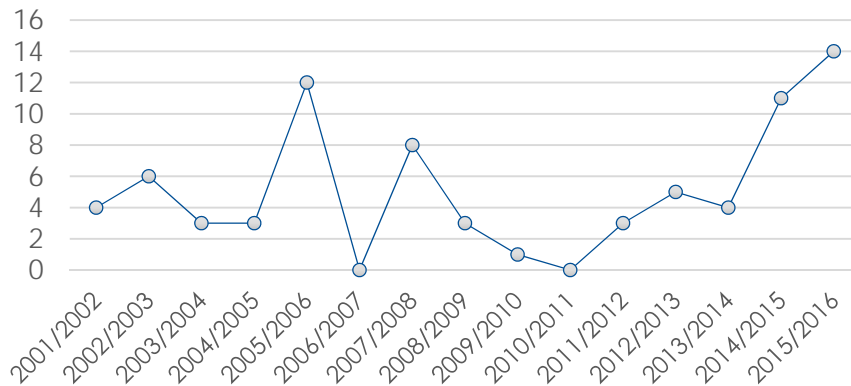
PARRY SOUND



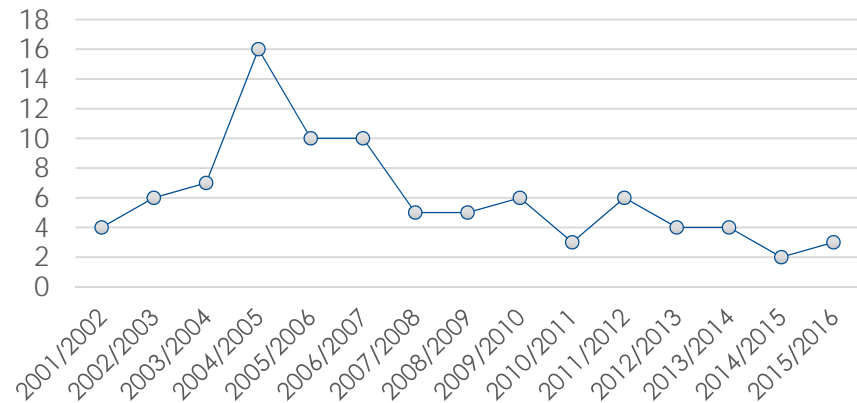
TIMISKAMING



SUDBURY



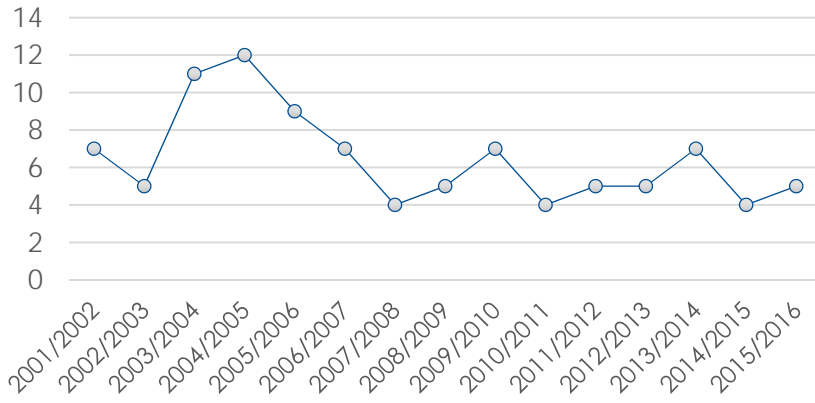
RAINY RIVER



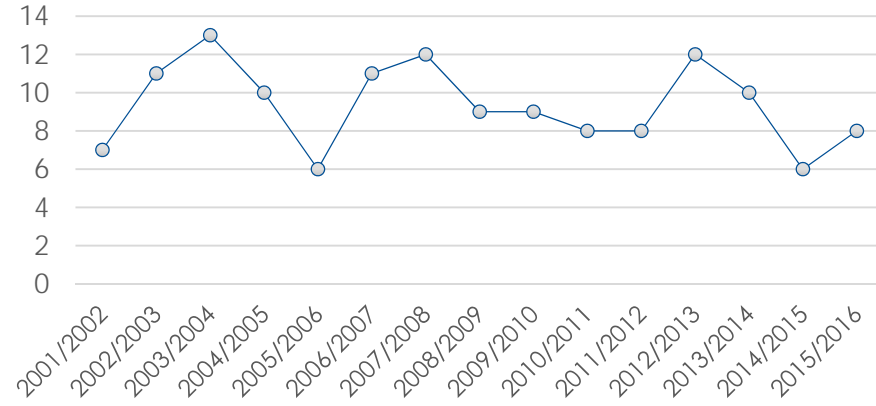
Source: Author's calculations based on Statistics Canada, Components of population growth by census division, sex and age group for the period from July 1 to June 30, Table 0051-0063

# Number of Immigrants per Capita per 10,000 People, by District

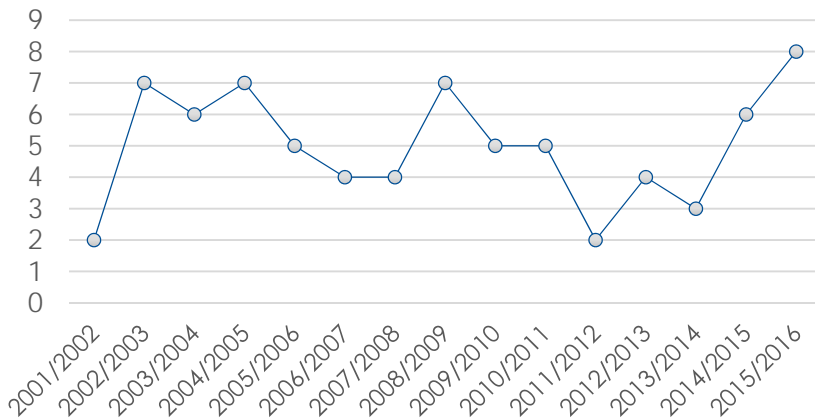
ALGOMA



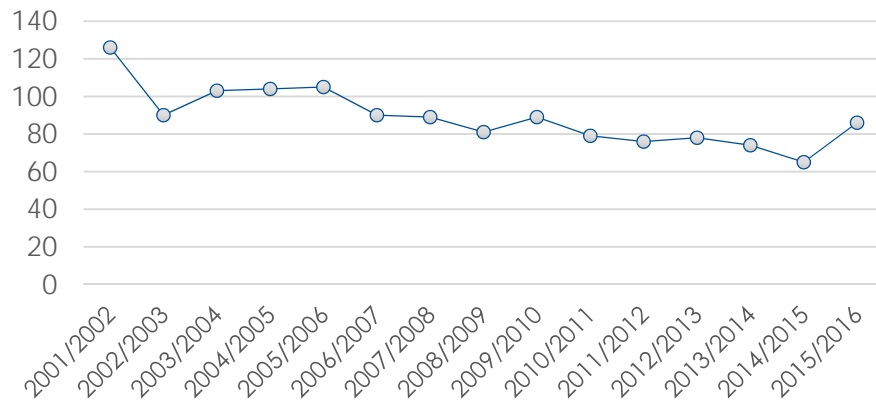
THUNDER BAY



KENORA



ONTARIO

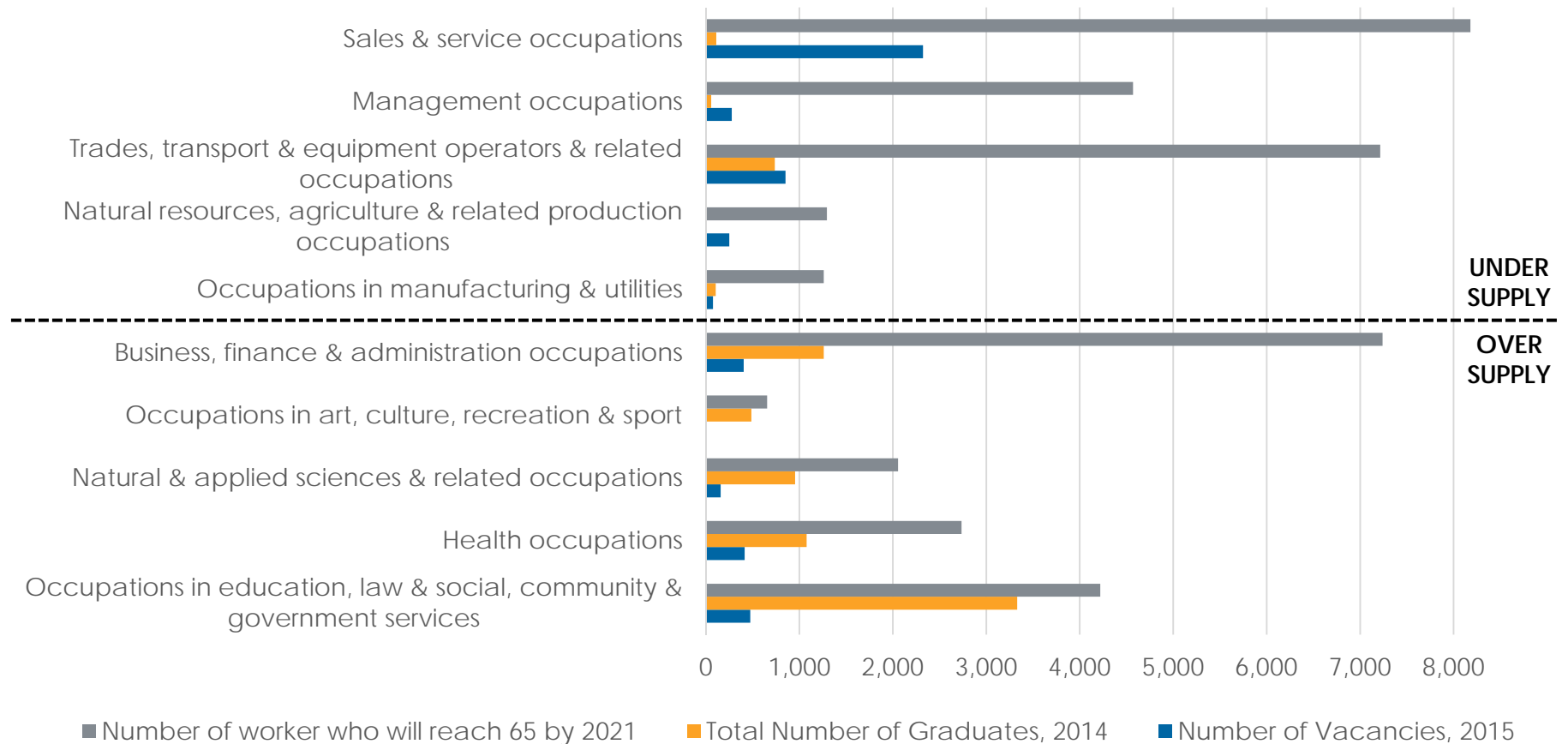


Source: Author's calculations based on Statistics Canada, Components of population growth by census division, sex and age group for the period from July 1 to June 30, Table 0051-0063

# Education and Skills

Not Enough Workers to Replace Those Who Will Retire

JOB VACANCIES IN **NORTHEASTERN ONTARIO**, NUMBER OF WORKERS REACHING RETIREMENT AGE BY 2021 AND GRADUATES BY OCCUPATION

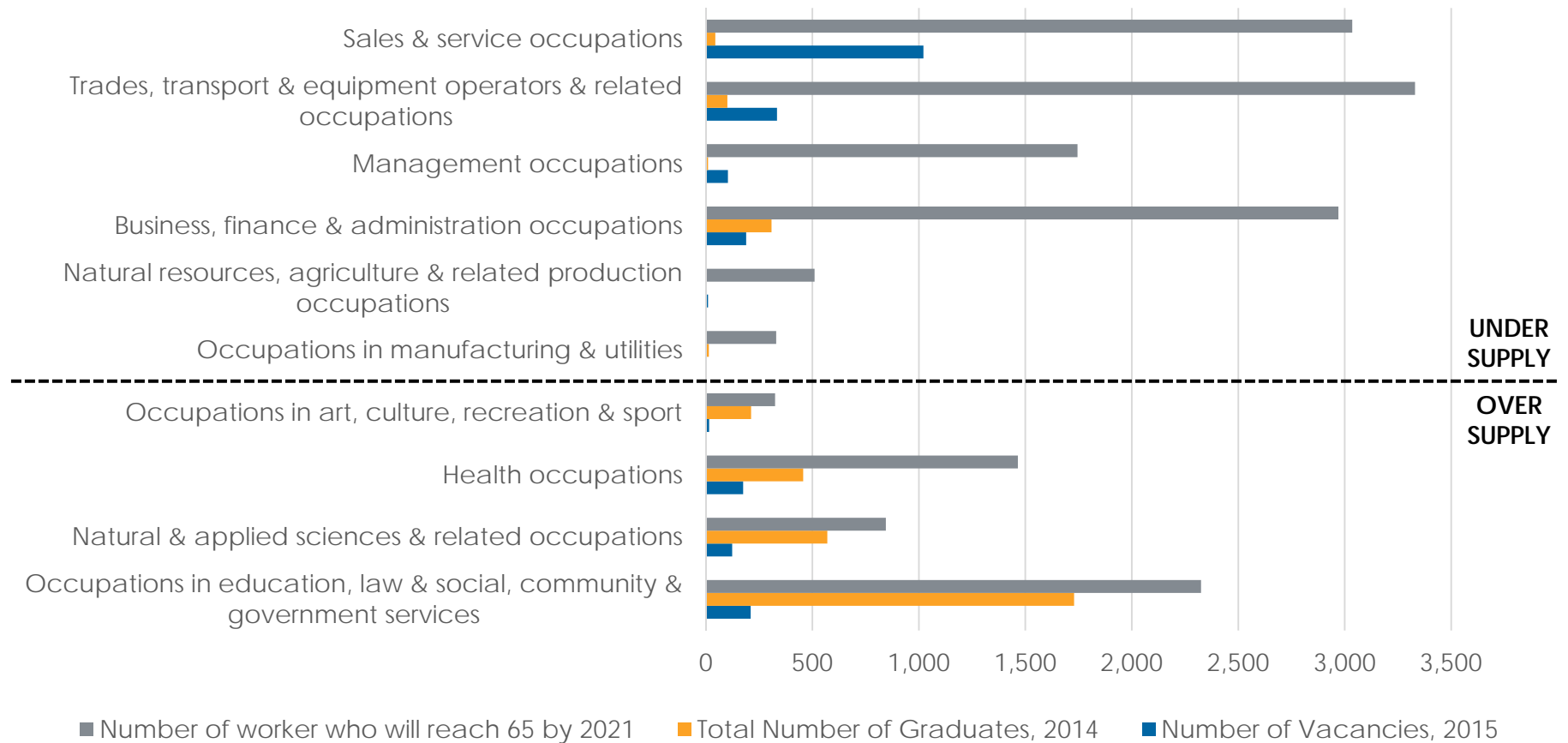


Sources: Jarrod Sundmark, "Labour Market Alignment: Education in the North" Northern Policy Institute, based on Statistics Canada Job Vacancies and Wages Survey, and CUDO/data provided by Colleges; Statistics Canada, National Household Survey, 2011.

# Education and Skills

Not Enough Workers to Replace Those Who Will Retire

JOB VACANCIES IN NORTHWESTERN ONTARIO, NUMBER OF WORKERS REACHING RETIREMENT AGE BY 2021 AND GRADUATES BY OCCUPATION



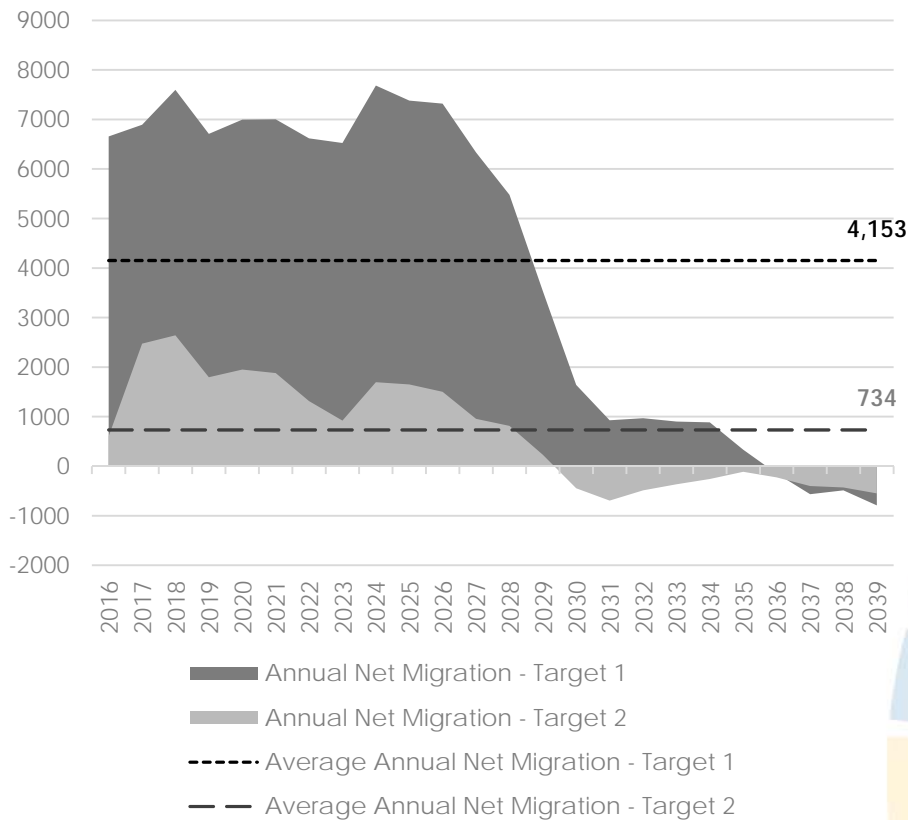
Sources: Jarrod Sundmark, "Labour Market Alignment: Education in the North" Northern Policy Institute, based on Statistics Canada Job Vacancies and Wages Survey, and CUDO/data provided by Colleges; Statistics Canada, National Household Survey, 2011.

# Demographic Trends in Northern Ontario

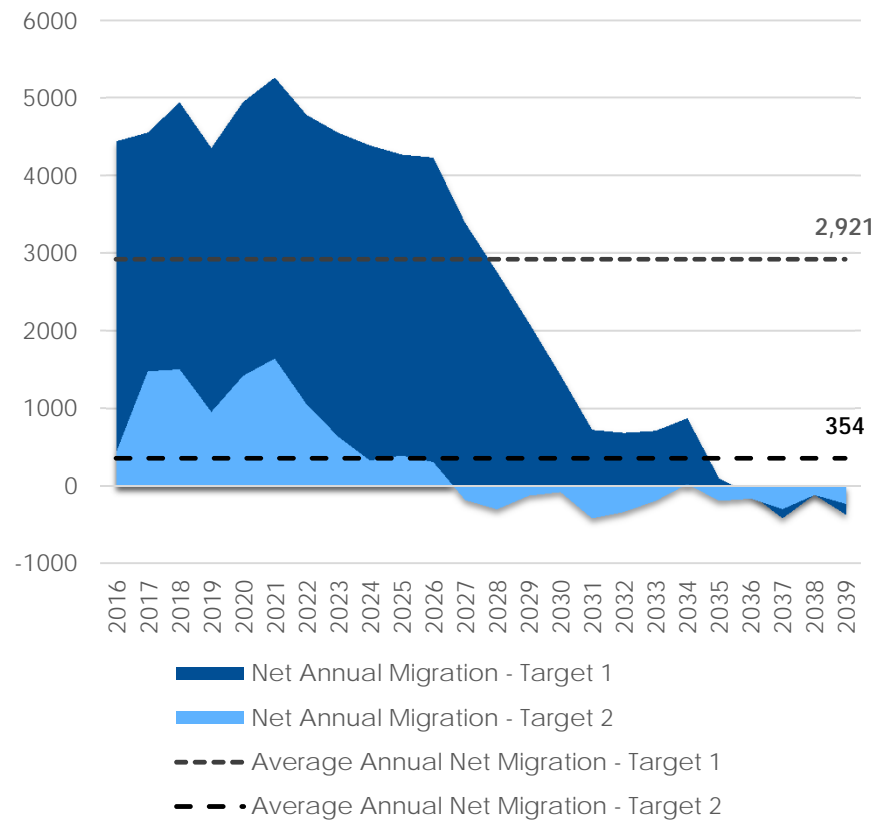
## Newcomers needed by Economic Region



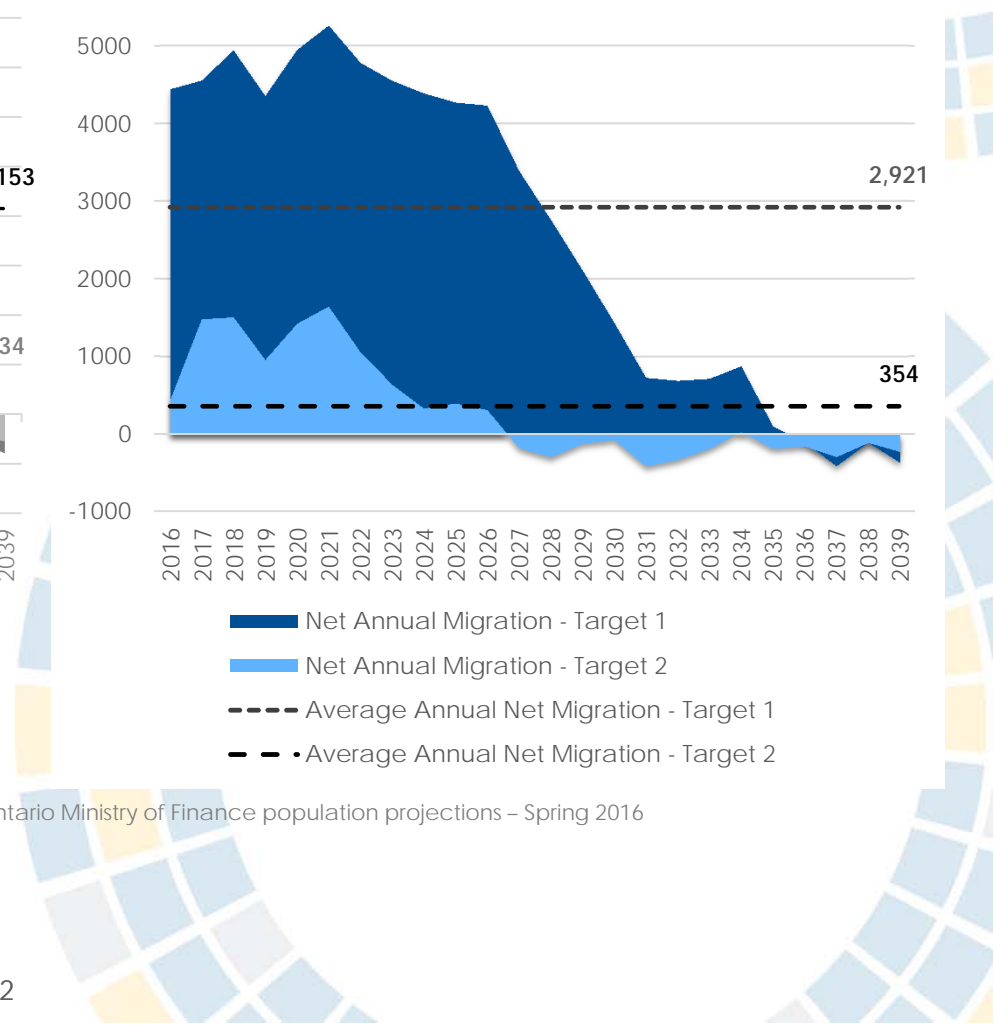
Required Annual Net Migration - **Northeast**



Required Annual Net Migration - **Northwest**



Source: Author's calculations based on Statistics Canada estimates for 2015, and Ontario Ministry of Finance population projections – Spring 2016



# EXERCISE NUMBER TWO



**NORTHERN**  
POLICY INSTITUTE

INSTITUT DES POLITIQUES  
**DU NORD**

Thank You. Merci. Miigwech. Marci.

QUESTIONS OR COMMENTS?

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