

**NORTHERN**  
POLICY INSTITUTE

INSTITUT DES POLITIQUES  
**DU NORD**

# NPI BRIEFING & THE STATE OF THE NORTH

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TRILLIUM FOUNDATION NORTHERN TEAM  
RACHEL RIZZUTO, RESEARCH MANAGER



# About Northern Policy Institute

## Who are we?

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 Ontario communities**.

- **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. Solution oriented.
- **IN the North** – we deal with local, regional, provincial, national and international issues from a northern perspective

# Impact



## Northern Attraction Series

In 2018 and 2019, NPI published *Northern Attraction Series* which, altogether, make up a Northern Newcomer Strategy to attract and retain newcomers in Northern Ontario. **The series and our work played a role in the development of the Rural And Northern Immigration Pilot launched in 2019 and has now seen the province of Ontario call for a doubling of its Provincial Nominee allocation.**



## Income Multiplier

In March 2019, *Income and Employment Multipliers for 20 Industries in 11 Census Divisions in Northern Ontario* was published by NPI. This report estimates the multiplication effect of income and employment. **The Economic Impact Calculator created along with the report was used by multiple communities in their investment attraction efforts.**



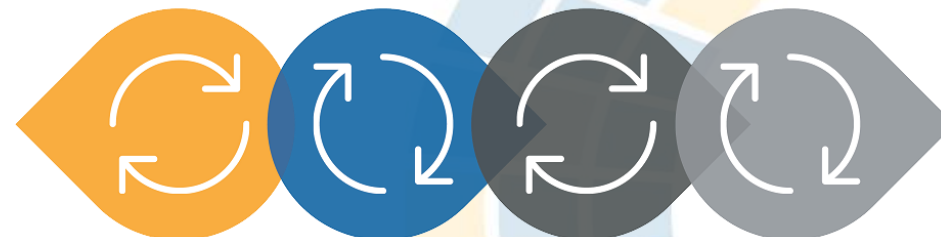
## Communities

The *Northern Projections: Human Capital Series* was released by NPI in 2017 to examine past and present trends of all 11 Northern Ontario District's economies and to forecast its future challenges and opportunities. **In 2019, due to popular demand, an updated version of this series was released.**

# NPI Tools for Municipalities



**Northern Analyst Cooperative**



**NORTHERN ONTARIO DATA CONSORTIUM**

# NPI Tools for Municipalities



## Northern Attraction Series

- How many immigrants do you need?
- How many can you handle?
- How do you attract, welcome, and retain them?

**#KNOWTHENORTH**  
**#CONNAISSEZLENORD**

## Estimating Economic Impact:

<https://www.northernpolicy.ca/ei-calculator>

## Mapping the North:

<http://www.northernpolicy.ca/boundarymap>

<http://www.northernpolicy.ca/infrastructuremap>

# How to Get Involved

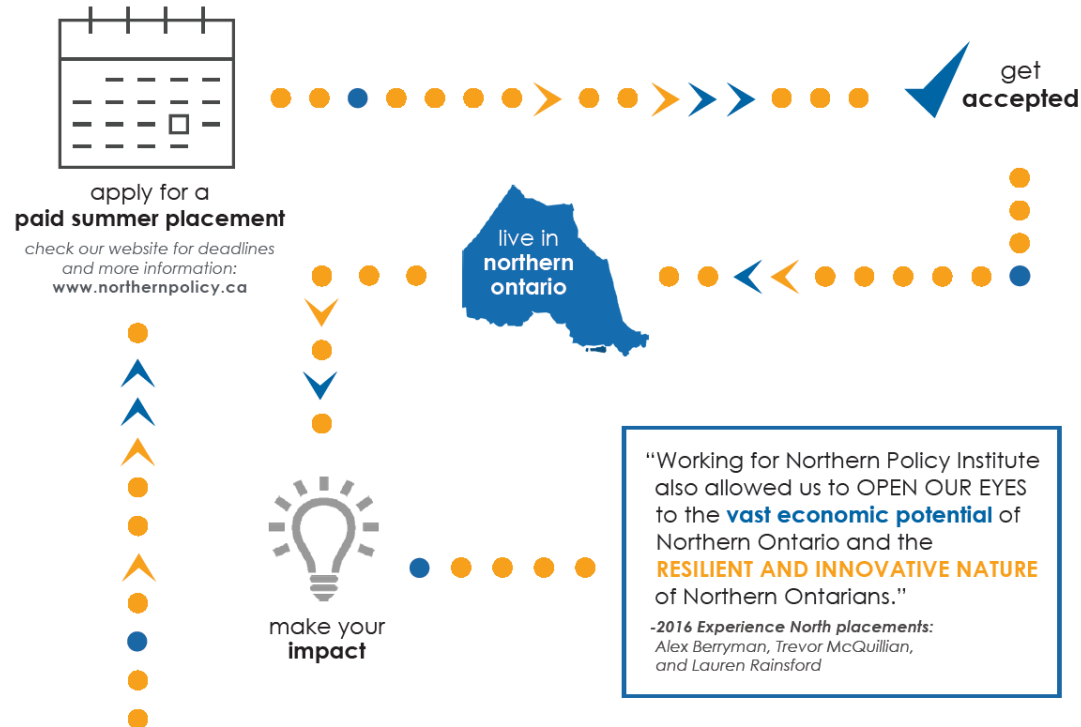
## NPI Summer Placement Program

# experience



**4 months, May to August  
in a community in  
Northern Ontario**

Research  
Communications  
Public Relations



- Learn about...
- NFP Management
- Economic & Social Issues in Northern Ontario
- Policy Research
- Community Engagement
- Research Dissemination
- Website & Social Media Management

# NPI papers “in the pipe”

## Next 12-18 months:

- **Passenger rail** in Ontario’s Northern Regions
- Current and future **jobs in demand** in Ontario’s Northern Regions
- **Urban reserves** in Ontario’s Northern Regions
- **Fiscal flows** into and out of Ontario’s Northern Regions
- **Comparative advantages** of Ontario’s Northern Regions
- Analyzing progress on **Immigration into Ontario’s Northern Regions**

**And much more!**



## STATE OF ONTARIO'S NORTHERN REGIONS

**Environment:** Mixed results

**Social:** Continued progress

**Demographics:** A BIG challenge, but lots of opportunities

**Employment:** Continued solid numbers for youth, growth in FT jobs

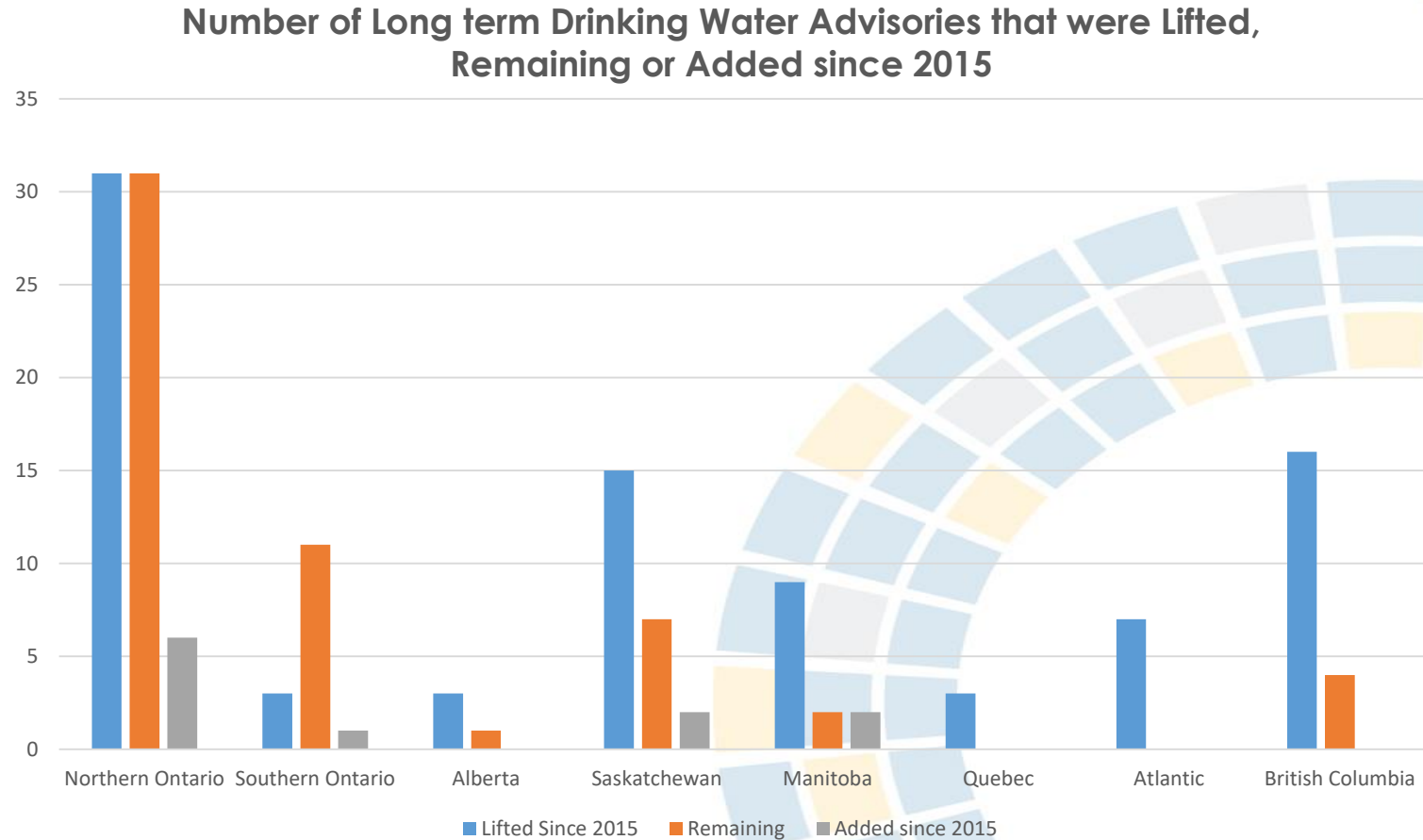
**Economic:** Little growth, but diverse economy, more service than goods based

**Income:** Many northern districts outperform the province



# Drinking Water Advisories

Much higher number of added, lifted, and remaining than other comparable provinces

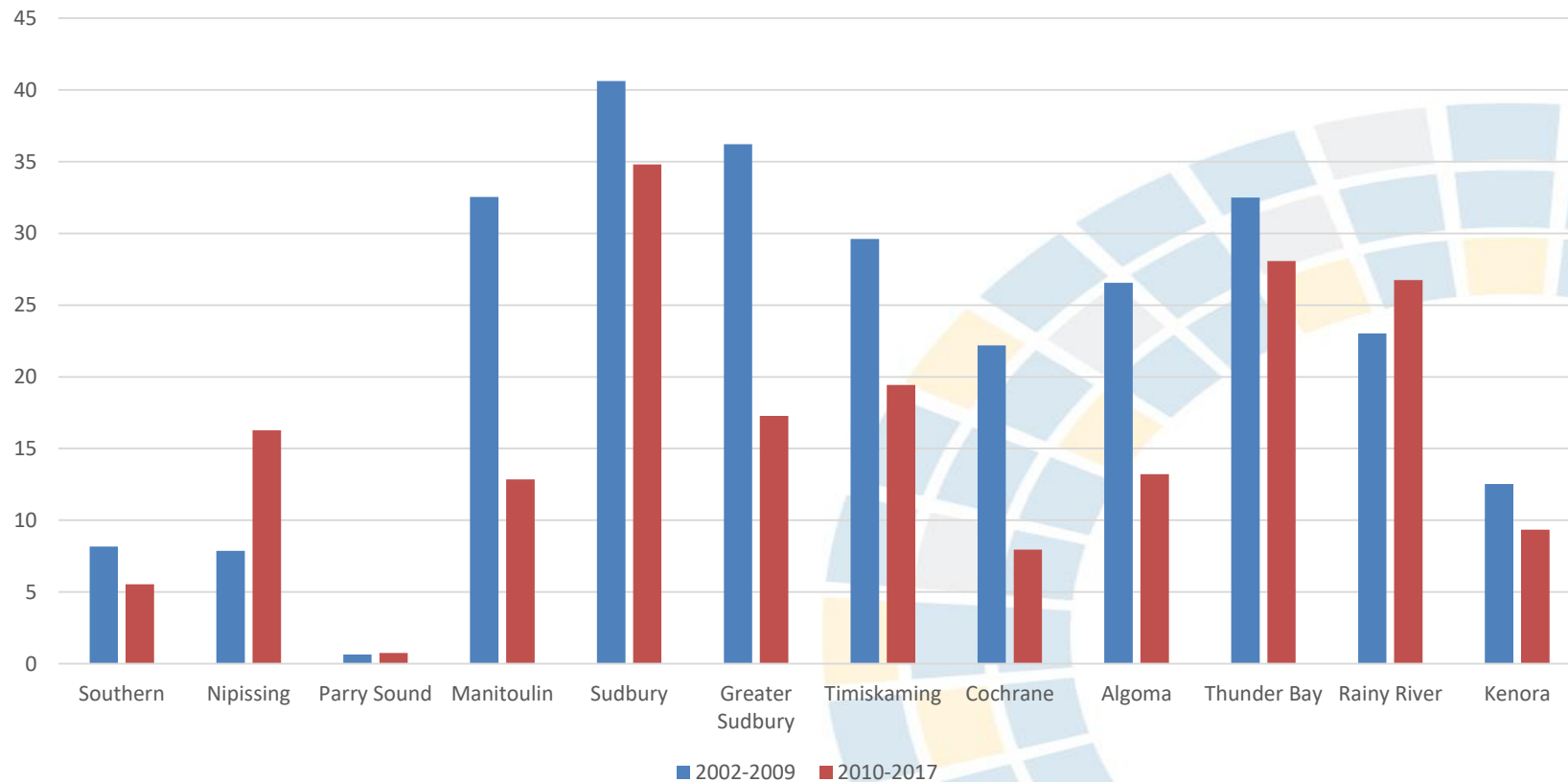


Source: Government of Canada, Ending long-term drinking water advisories,  
<https://www.sac-isc.gc.ca/eng/1506514143353/1533317130660>

# Emissions

Decreases in most census districts in the last 10 years

Average Fine Particulate Matter Emissions Per Facility Per Year (Tonnes)

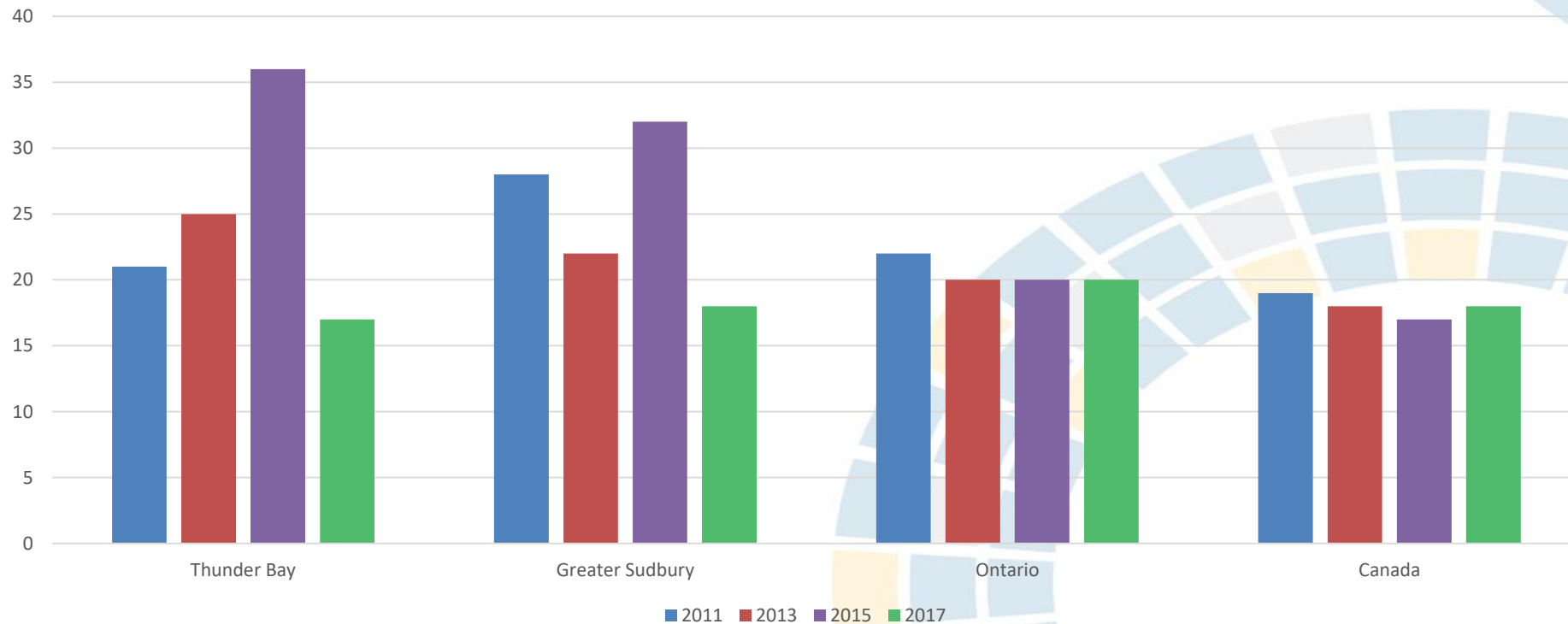


Source: National Pollutant Release Inventory - Substance Release quantities

# Environmental Engagement

Generally Higher in Thunder Bay and Greater Sudbury in 2015

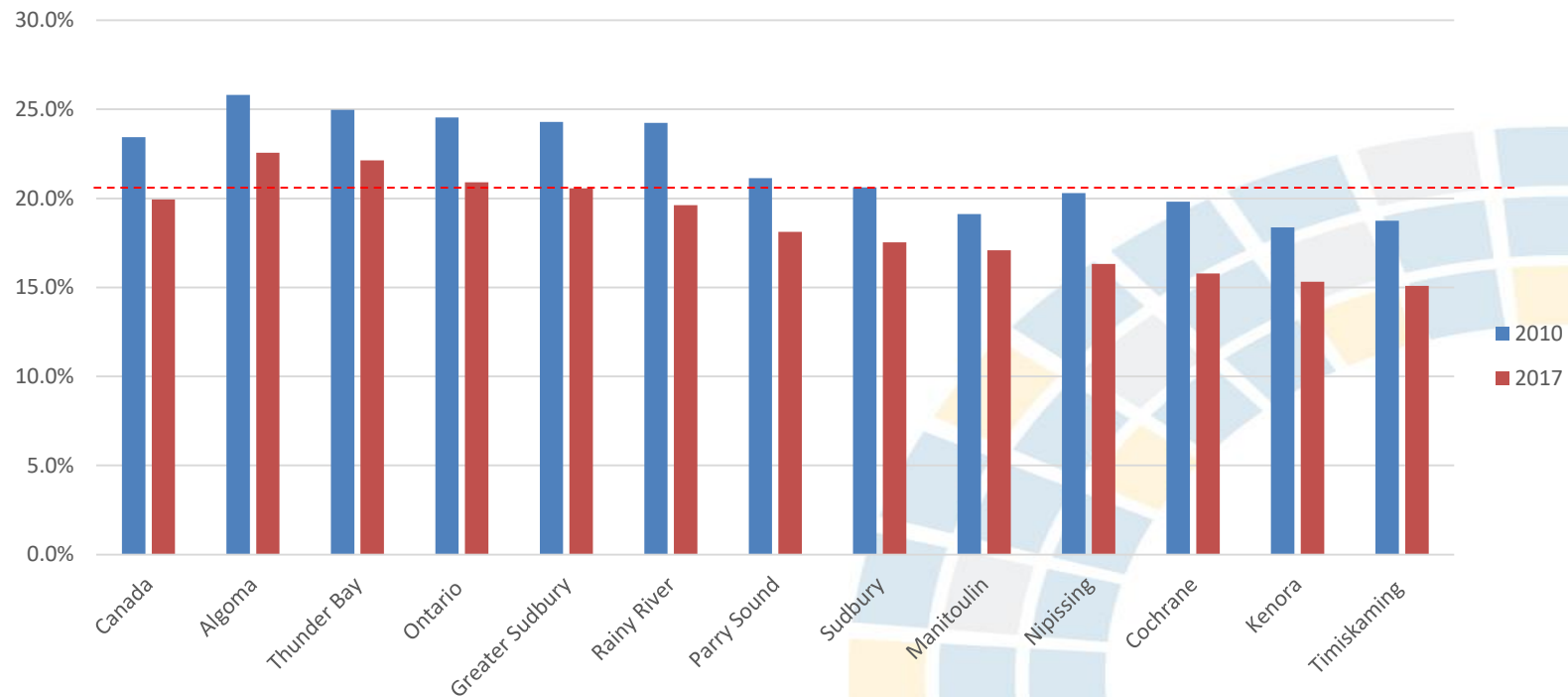
Percentage of Households that Engaged, Without pay,  
in activities aimed at Environmental or Wildlife Conservation by CMA



# Charitable Donations

Higher in ALGOMA and THUNDER BAY DISTRICTS than Ontario and Canada

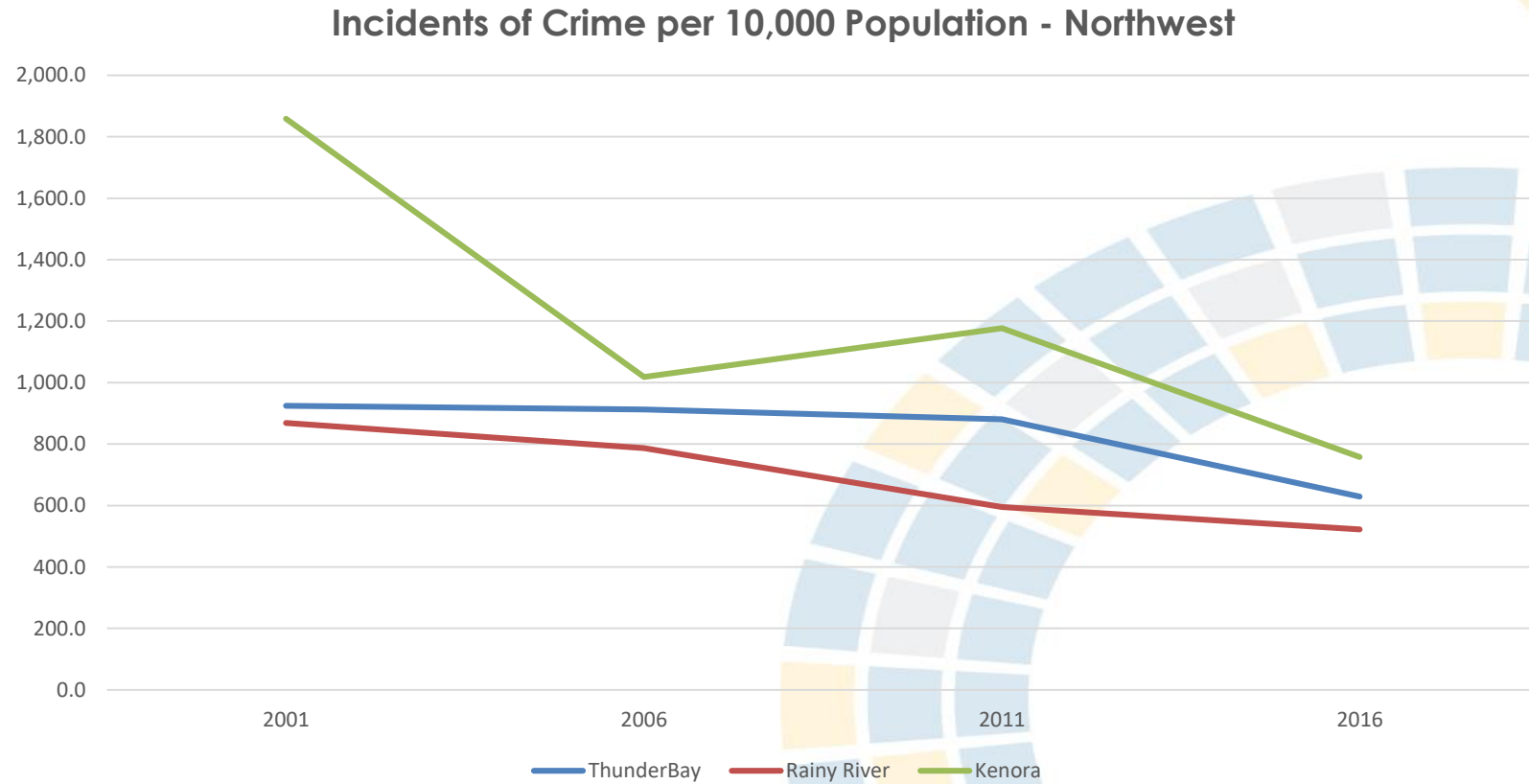
Percentage of the Population who declared Charitable Donations, by Census District, 2010 & 2017



Source: Statistics Canada, Income Statistics Division, 2010 & 2017, Financial Data and Charitable Donations (13C0014), Community Data Program Custom tabulations

# Crime

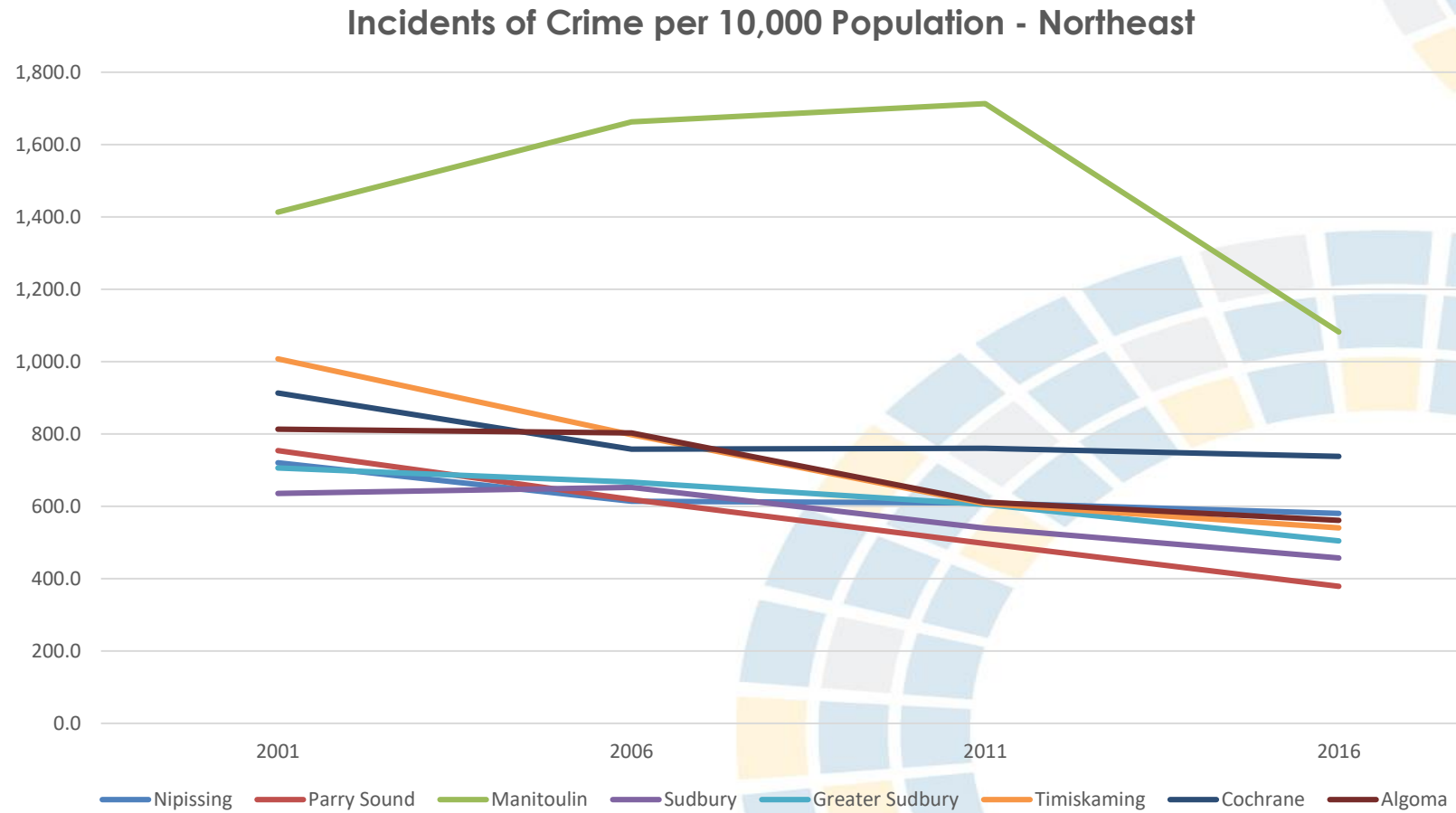
Decreases across all Census Divisions since 2001



Source: Statistics Canada Tables 35-10-0177-01 and 35-10-0180-01, Statistics Canada 2001, 2006, 2011, and 2016 Census Profiles

# Crime

Decreases across all Census Divisions since 2001

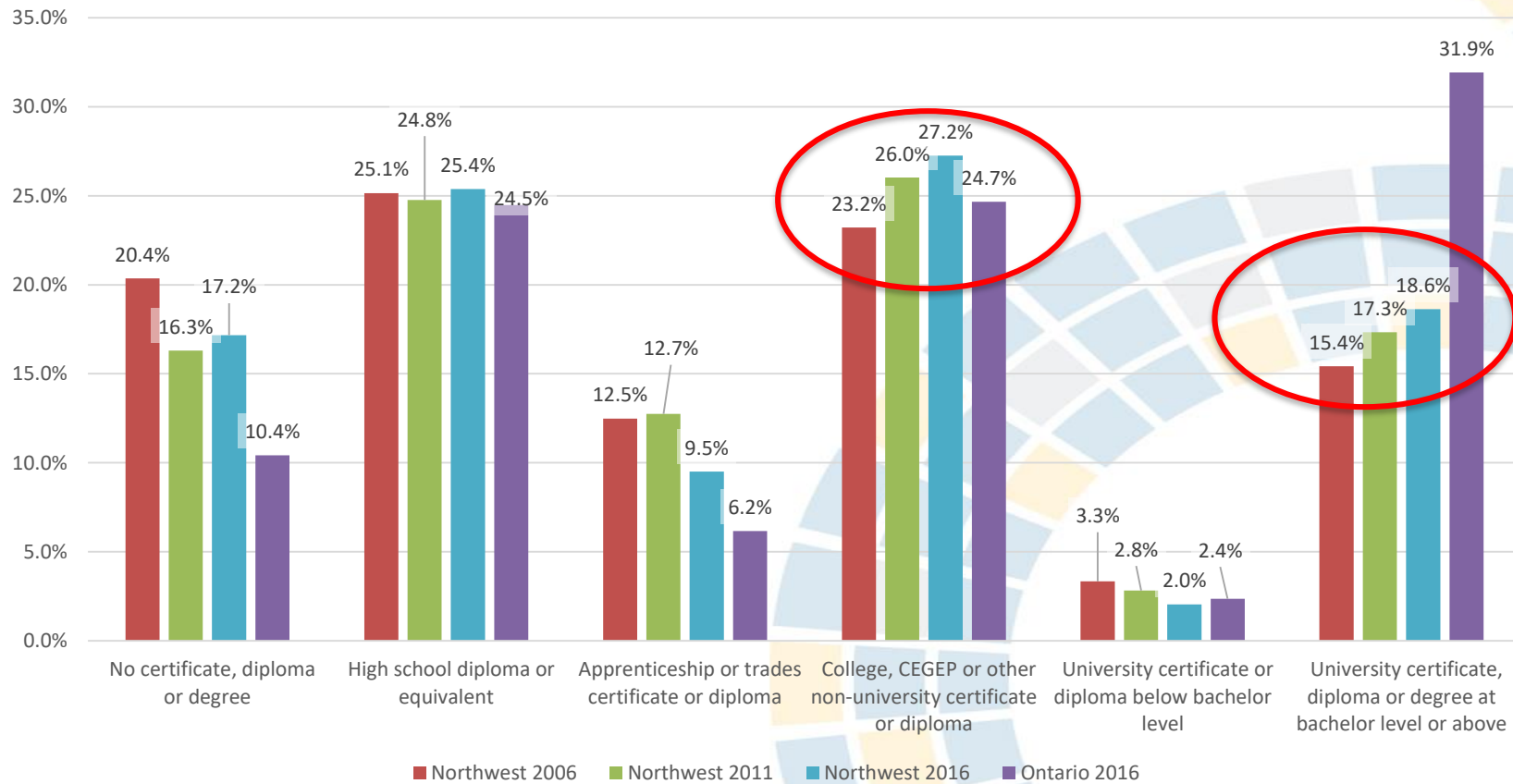


Source: Statistics Canada Tables 35-10-0177-01 and 35-10-0180-01,  
Statistics Canada 2001, 2006, 2011, and 2016 Census Profiles

# Education - Northwest

Increase in college and university attainment

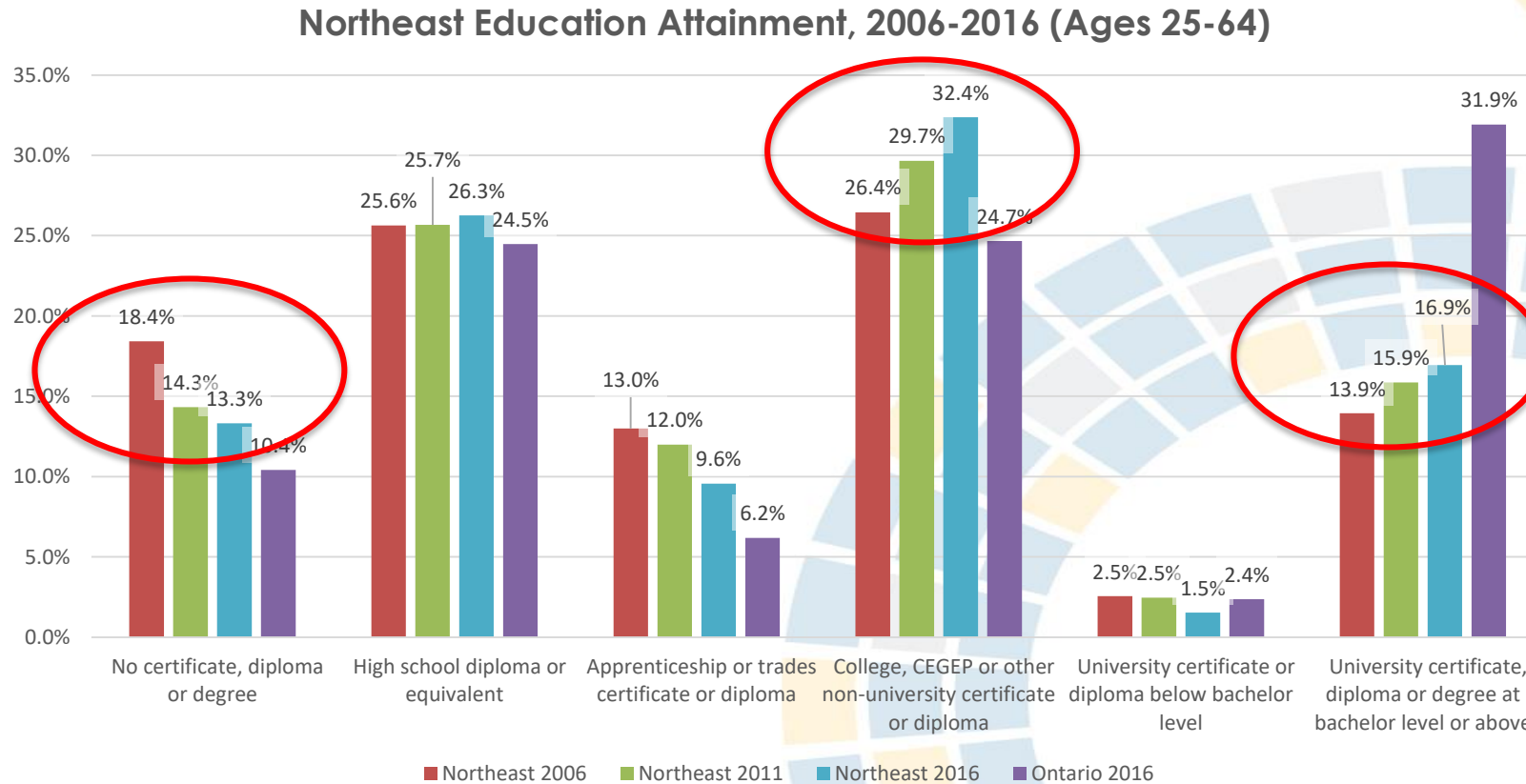
Northwest Education Attainment, 2006-2016 (Ages 25-64)



Source: Author's calculation based on Statistics Canada, Census and National Household Survey

# Education - Northeast

Increase in college and university, decrease in no certificate or degree



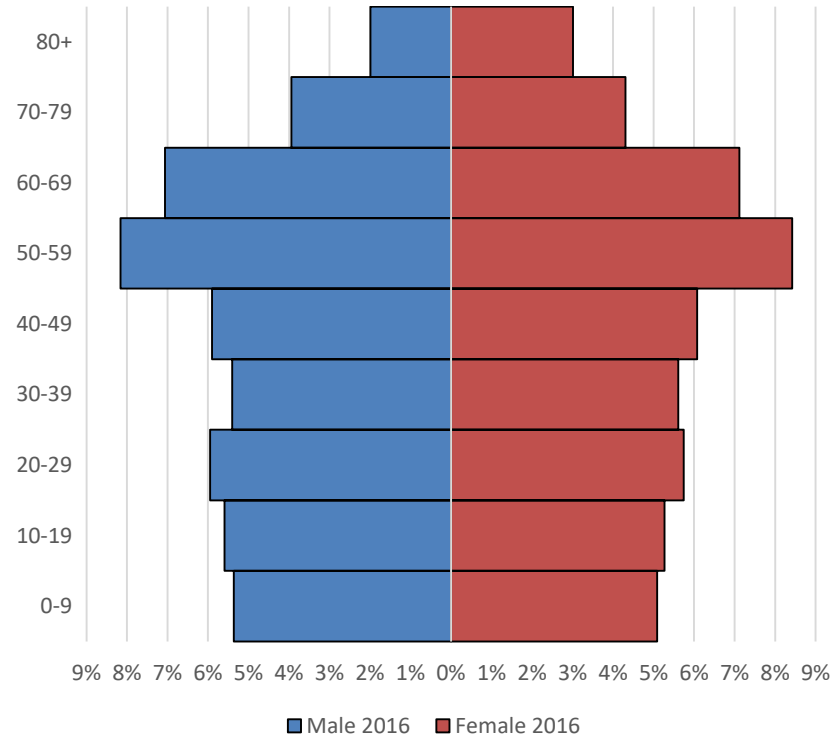
Source: Author's calculation based on Statistics Canada, Census and National Household Survey



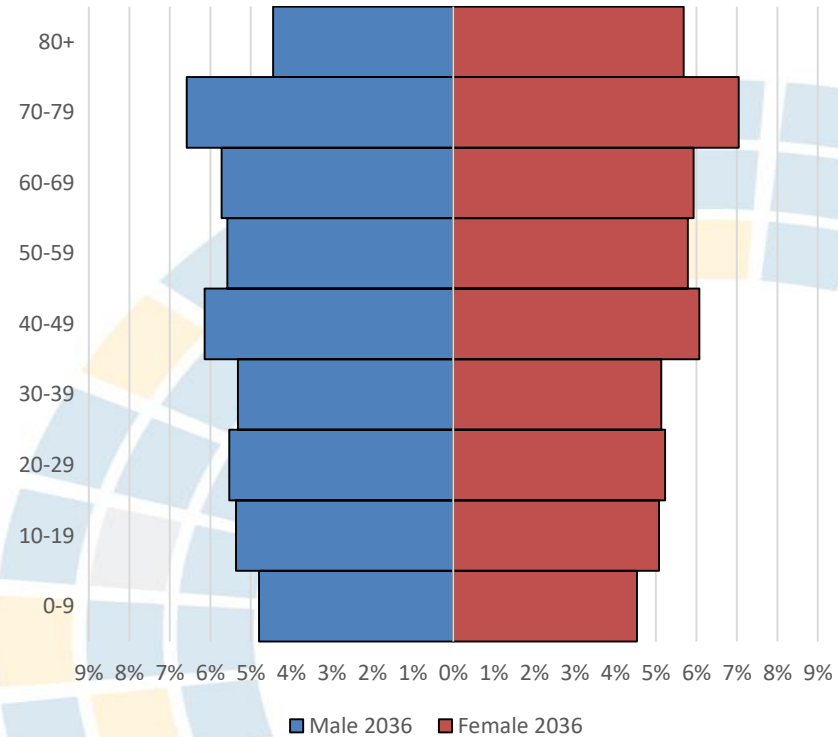
# Age Projections

Higher proportion of Elderly in 2036 – Inverted Pyramid

### Population Distribution in Northern Ontario, 2016



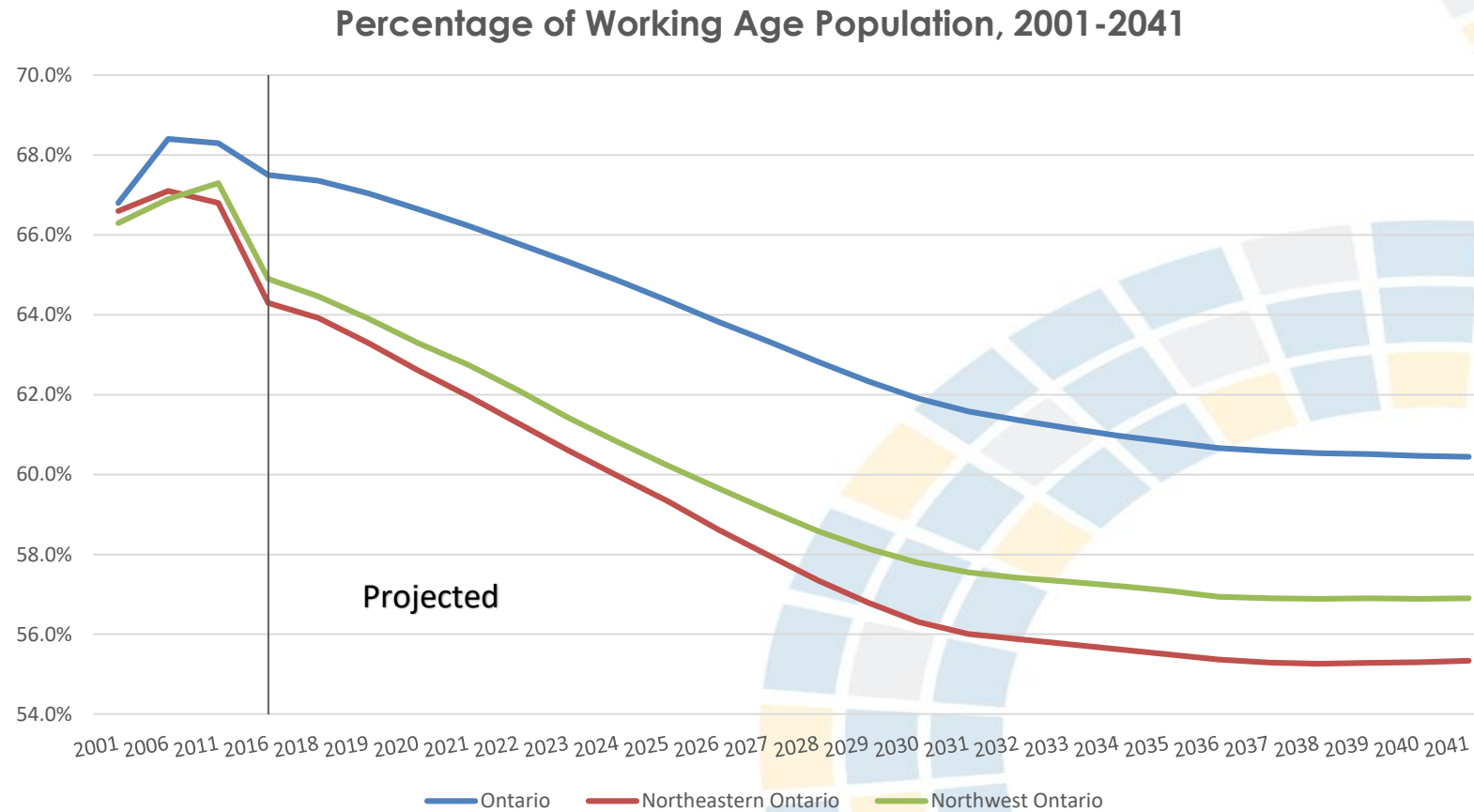
### Projected Population Distribution in Northern Ontario, 2036



Source: Open Data Catalogue Ontario, population projections, Statistics Canada, 2016 Census profile

# Age Projections

Lower proportion of working age population when compared to Ontario

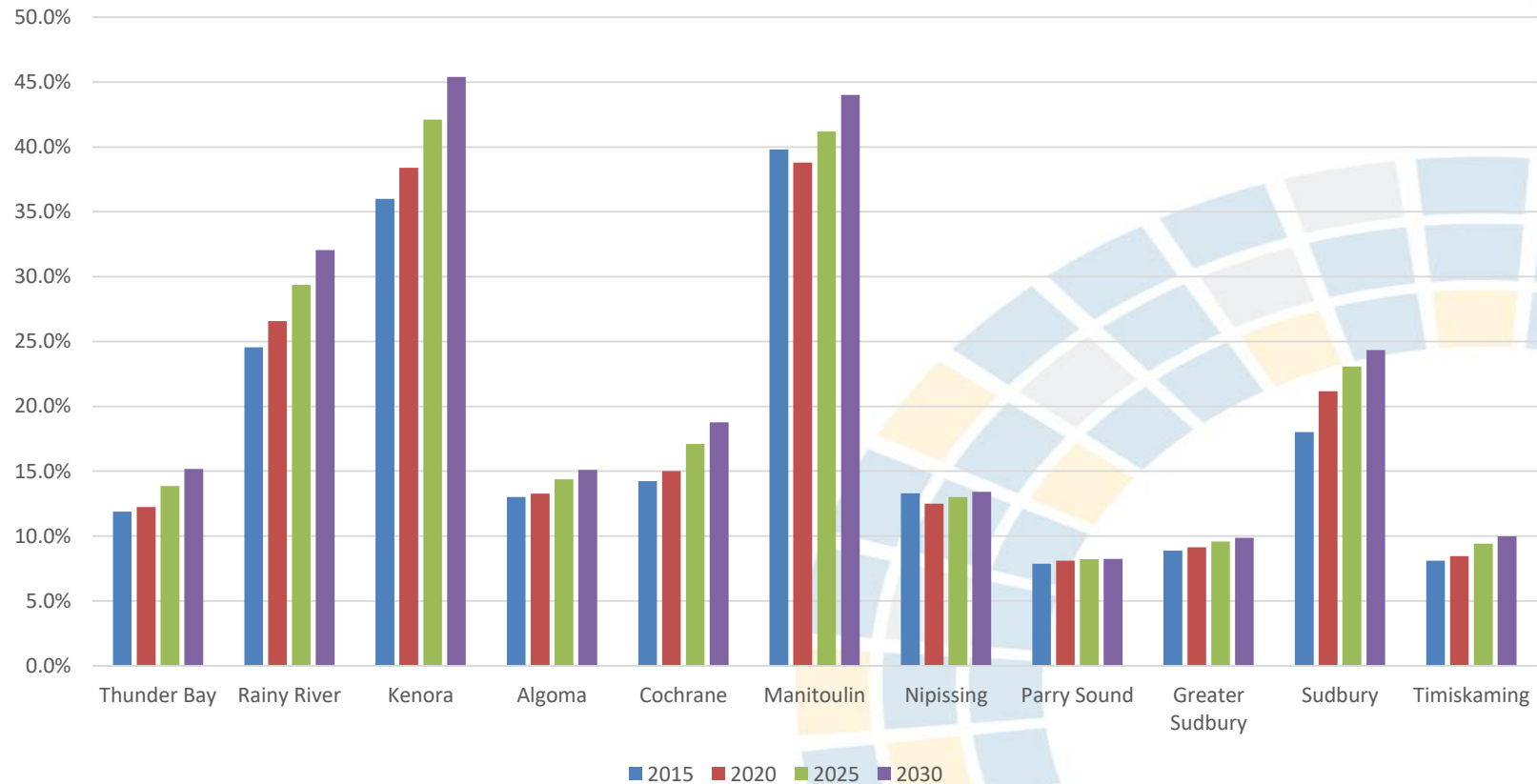


Source: Statistics Canada, 2001, 2006, 2011, 2016 Census profile, Open Data Catalogue Ontario, population projections

# Indigenous Population

Increasing share labour force in almost every district by 2030

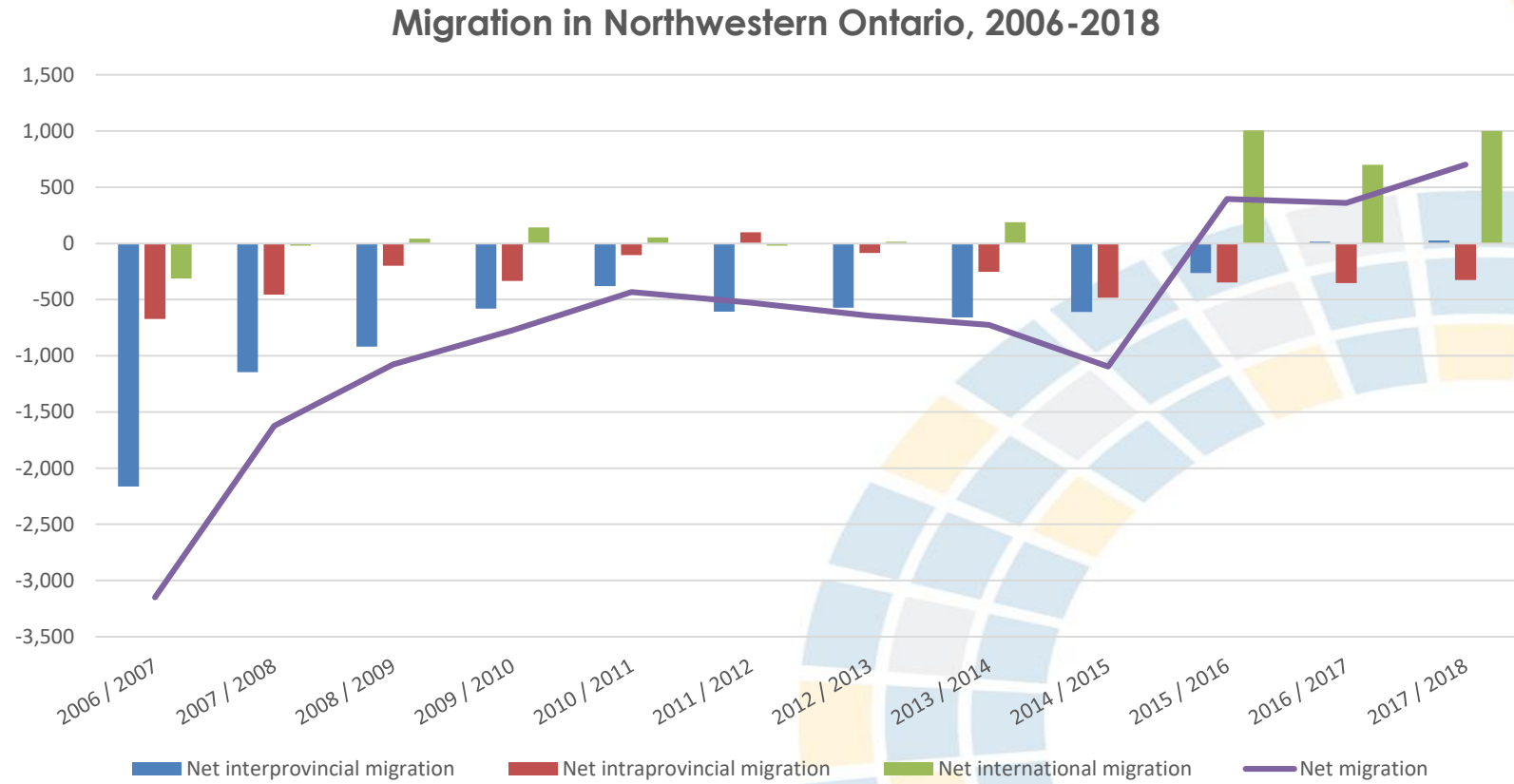
Projected Indigenous Share of Total Labour Force by CD, 2015-2030



Source: Northern Policy Institute, Human Capital Series, 2019

# Migration

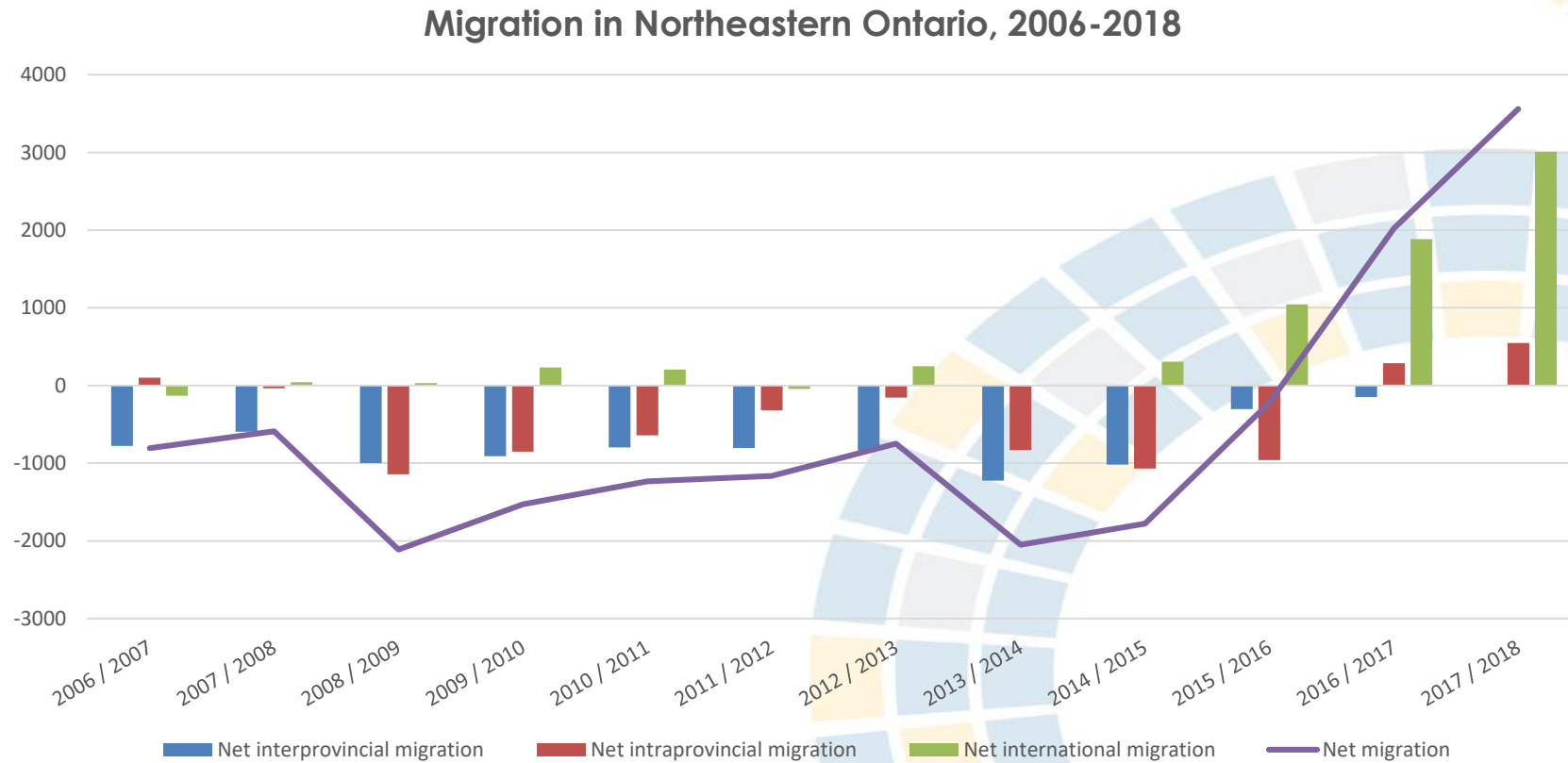
Increase in net migration since 2006 in the Northwest



Source: Statistics Canada. Table 17-10-0138-01  
Components of population change by economic region, 2016 boundaries

# Migration

Steady and significant increase in net migration since 2014 in the Northeast

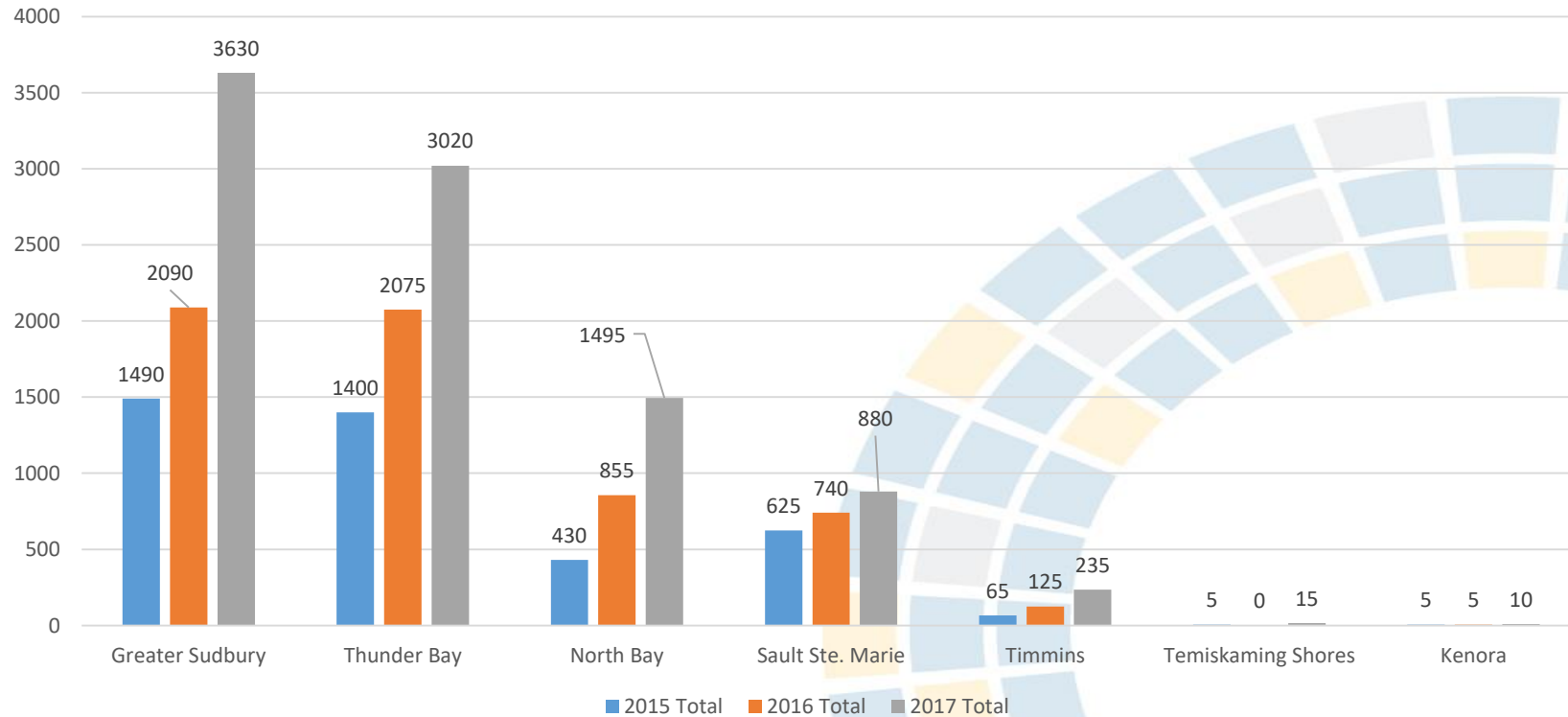


Source: Statistics Canada. Table 17-10-0138-01  
Components of population change by economic region, 2016 boundaries

# Immigration

Increase in study permit holders across all cities since 2015

### Number of Study Permit Holders by City, 2015-2017

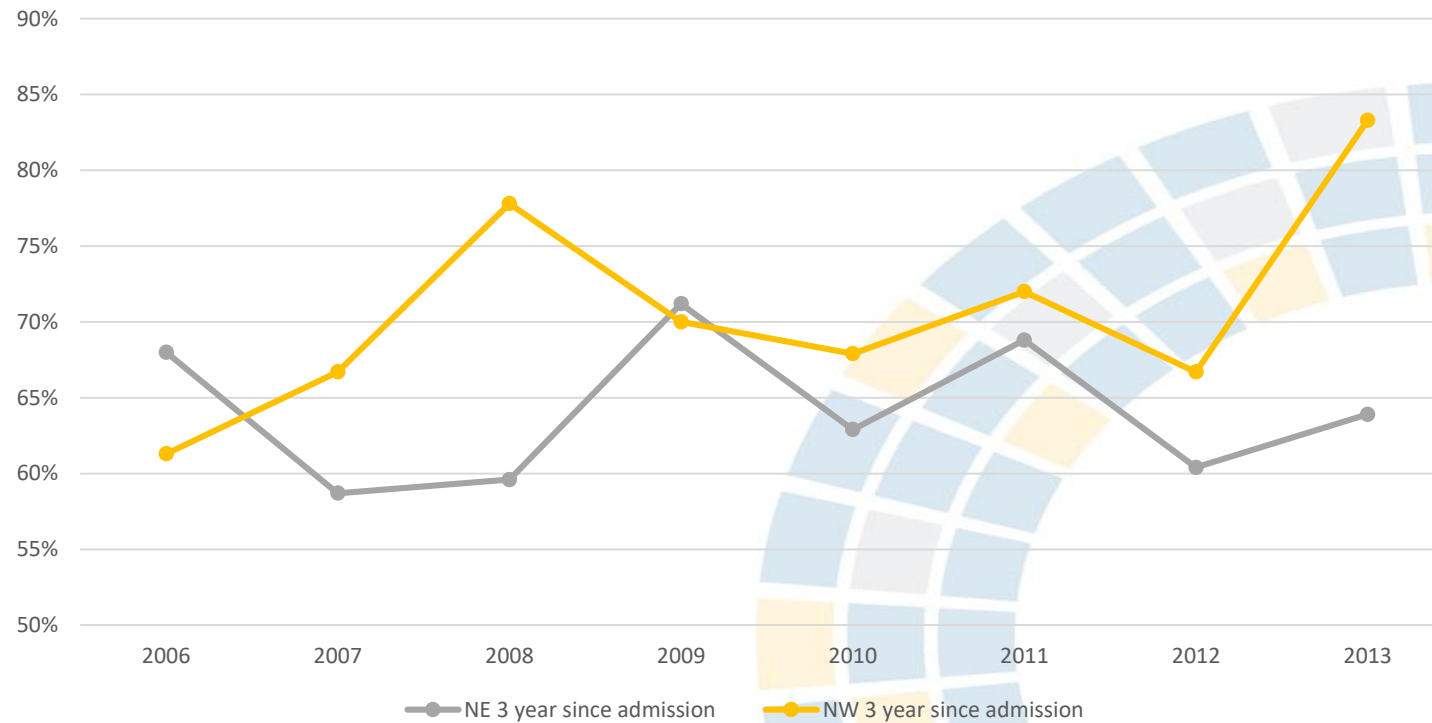


Source: Immigration, Refugees and Citizenship Canada

# Immigration

Longer term retention rates appear to be improving in the Northwest

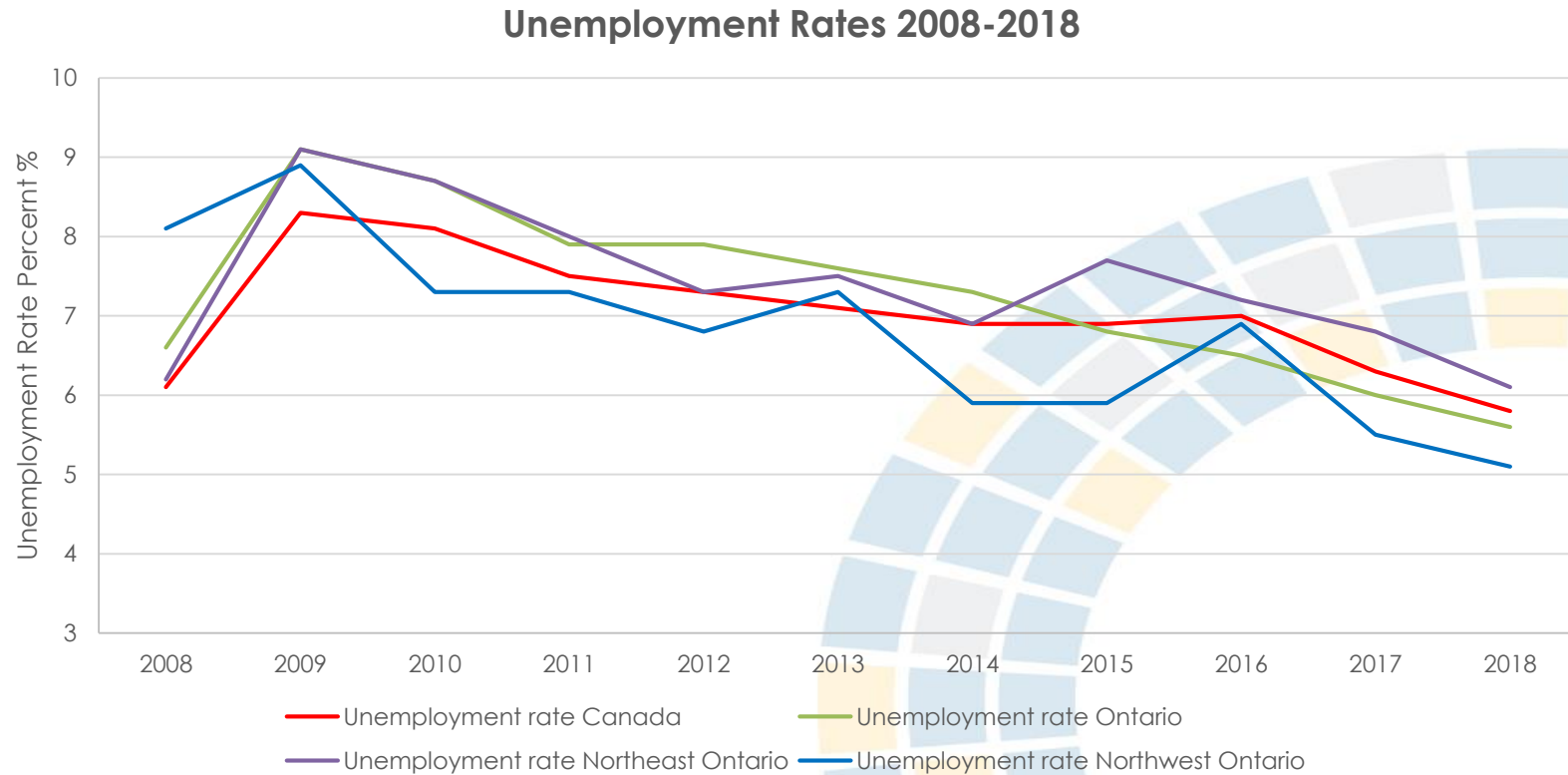
**Retention Rate After 3 Years Since Admission  
in Northeast and Northwest**



Source: Table #43-10-0013-01, Statistics Canada

# Labour Force – Since 2008

Unemployment rates consistently falling in Northwest  
In Northeast – an early spike, but is now returning to 2008 levels

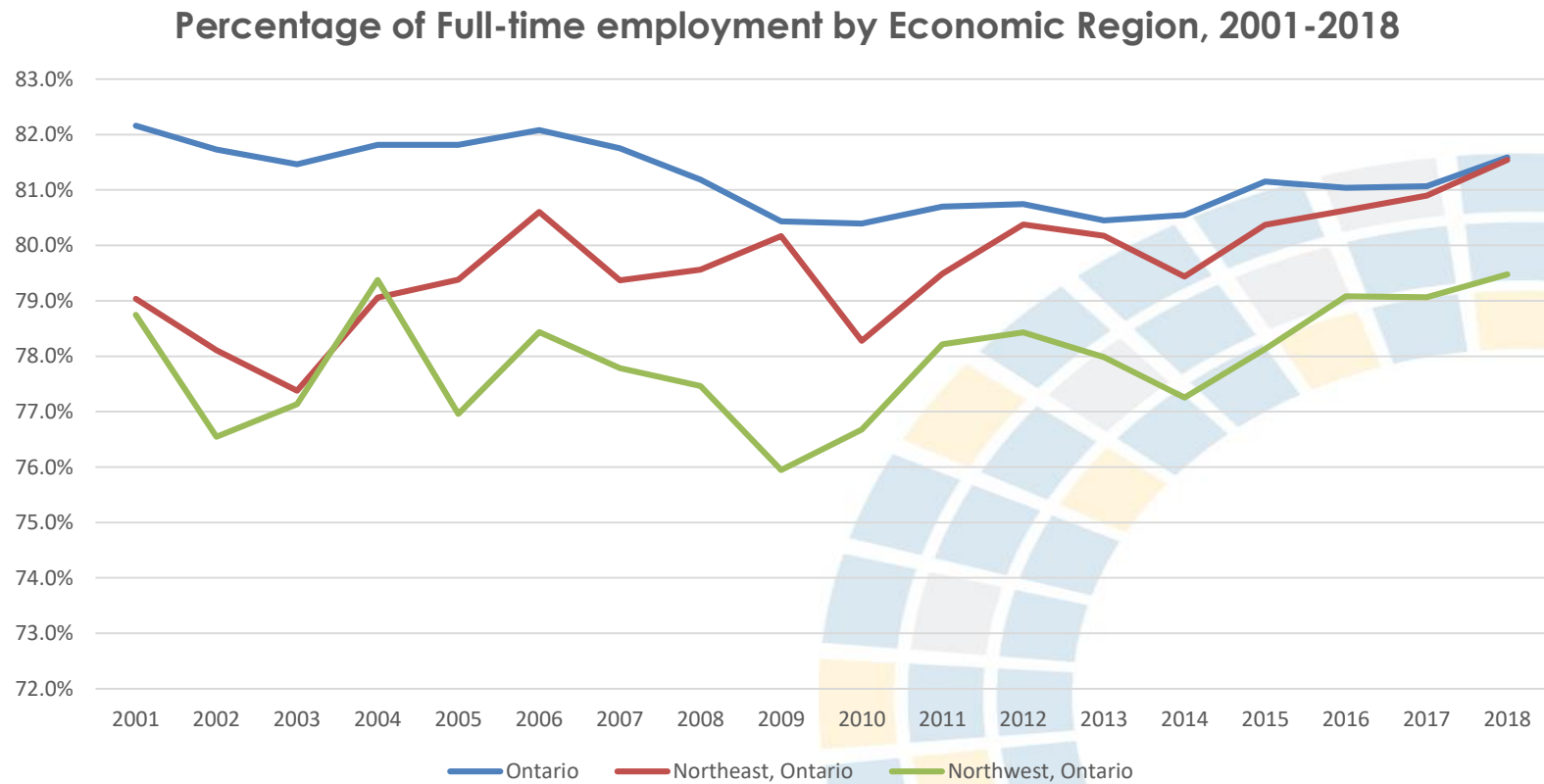


Source: Statistics Canada. Table 14-10-0090-01  
Labour force characteristics by province, territory and economic region, annual



# Labour Force

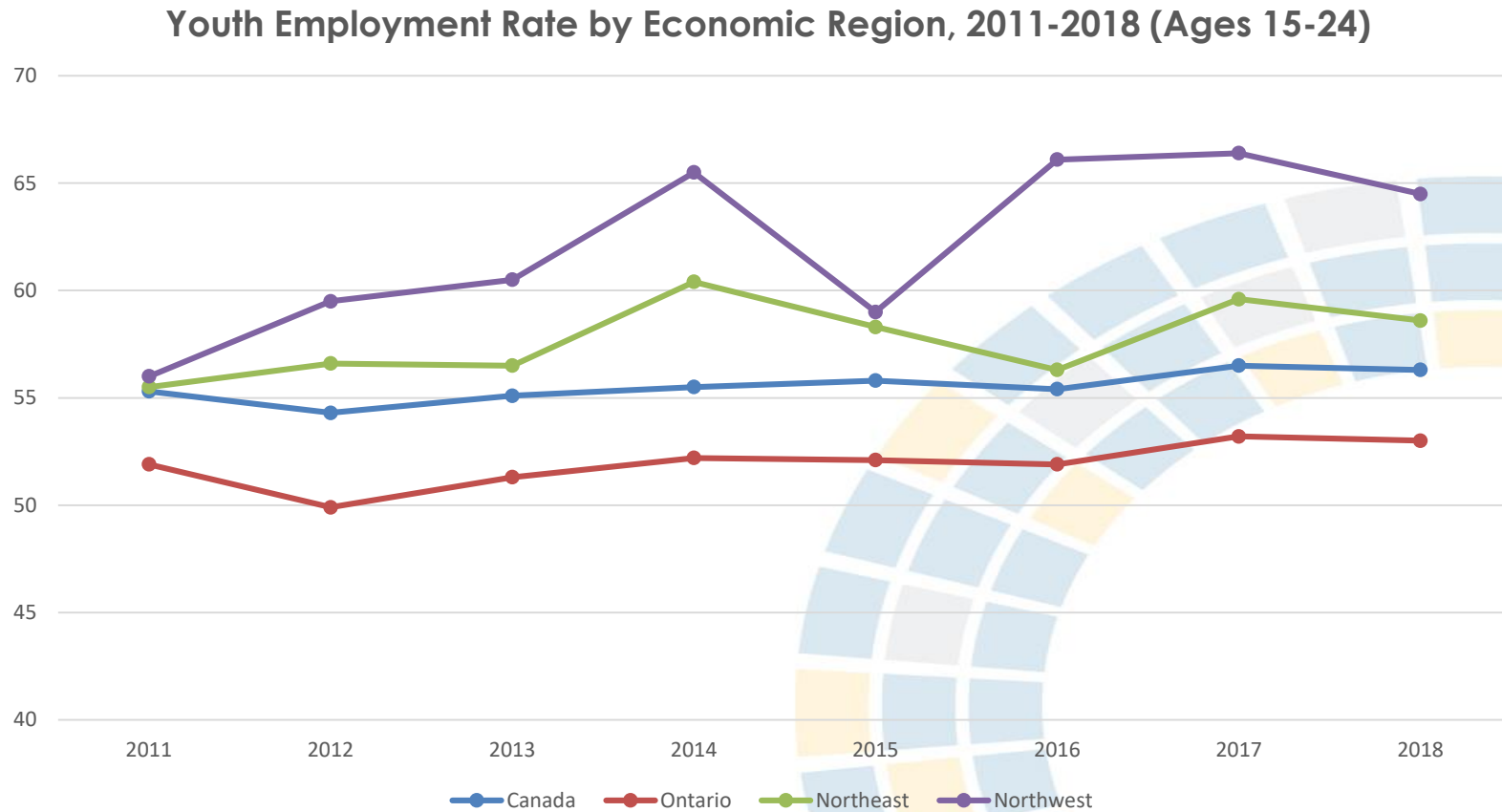
Northeastern Ontario slowly closing the gap - nearly on par with Ontario for full-time employment in 2018



Source: Statistics Canada. Table 14-10-0090-01  
Labour force characteristics by province, territory and economic region, annual

# Labour Force

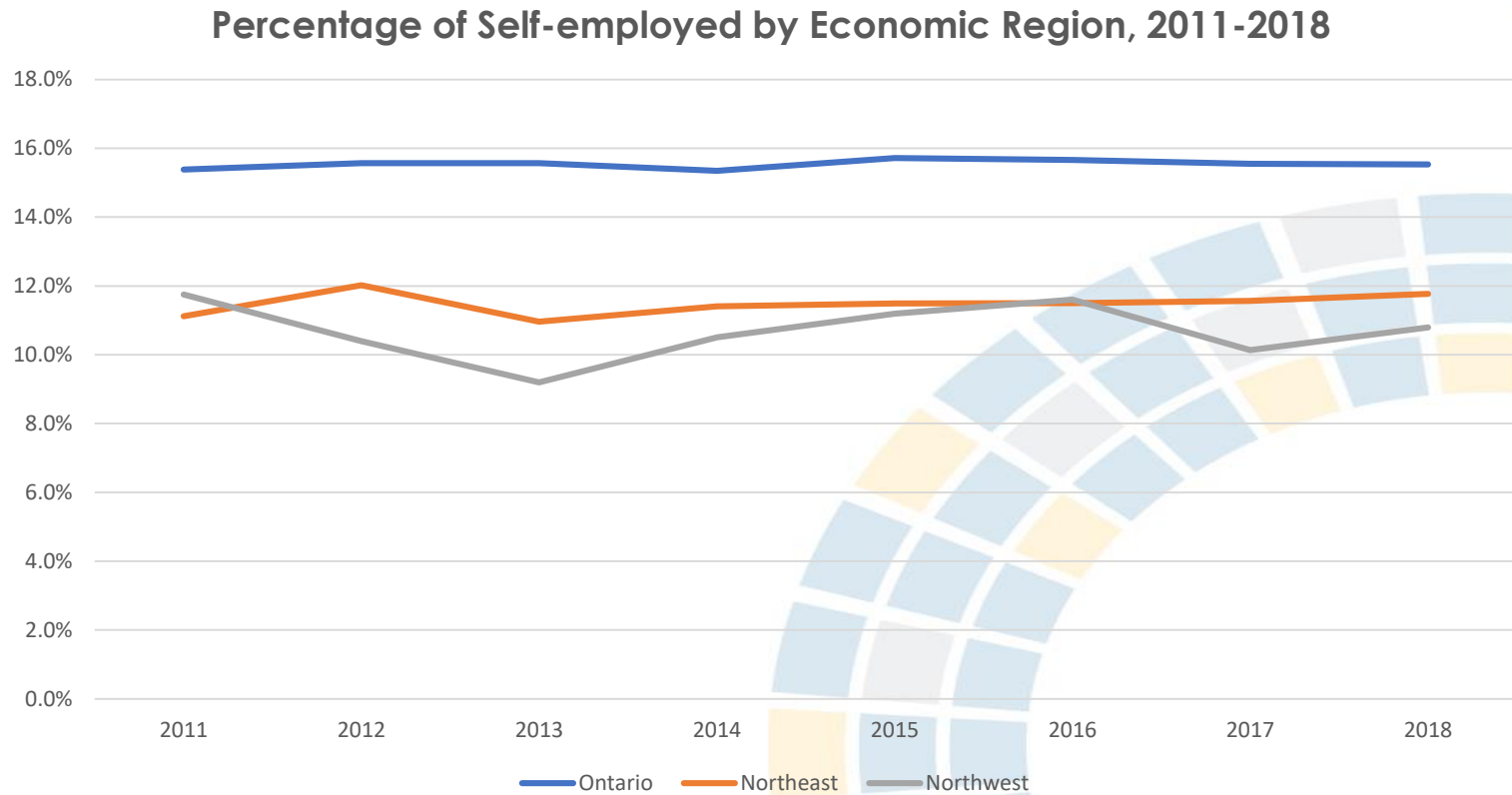
Higher youth employment in Northeast and Northwest, increasing since 2011



Source: Labour force survey estimates (LFS), by sex and age group for Canada, provinces, economic regions and census metropolitan areas, 2006 and 2011 to 2018, annual averages, CDP

# Labour Force

Lower percentage of self-employed in Northern Ontario

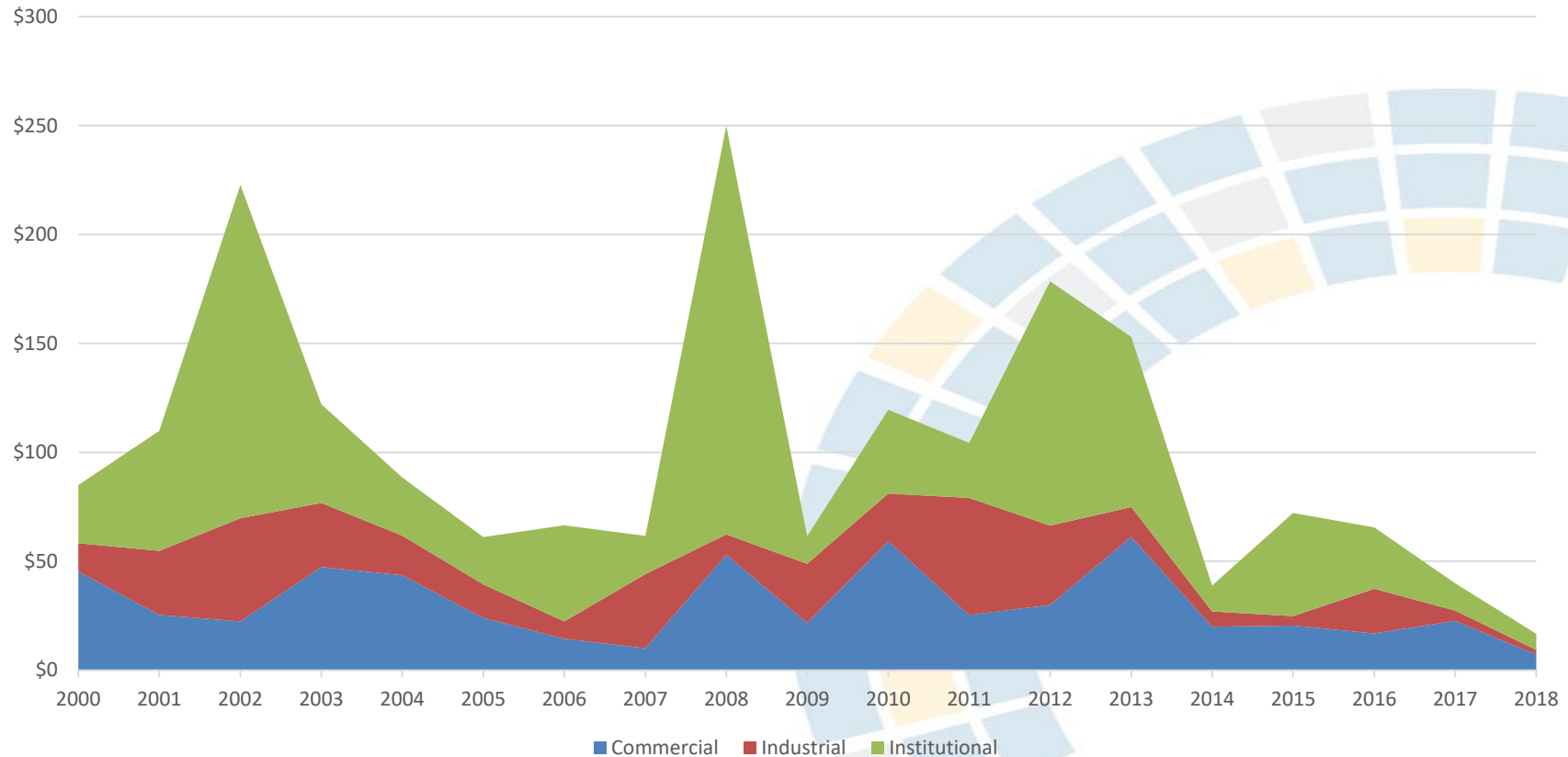


Source: Statistics Canada, Labour force survey estimates (LFS), Community Data Program Custom Tabulation

# Building Permits

Decrease in the Northwest from 2017

**Value of Non-Residential Building Permit by Type in Northwestern Ontario  
(in 2018 Dollars - Millions)**

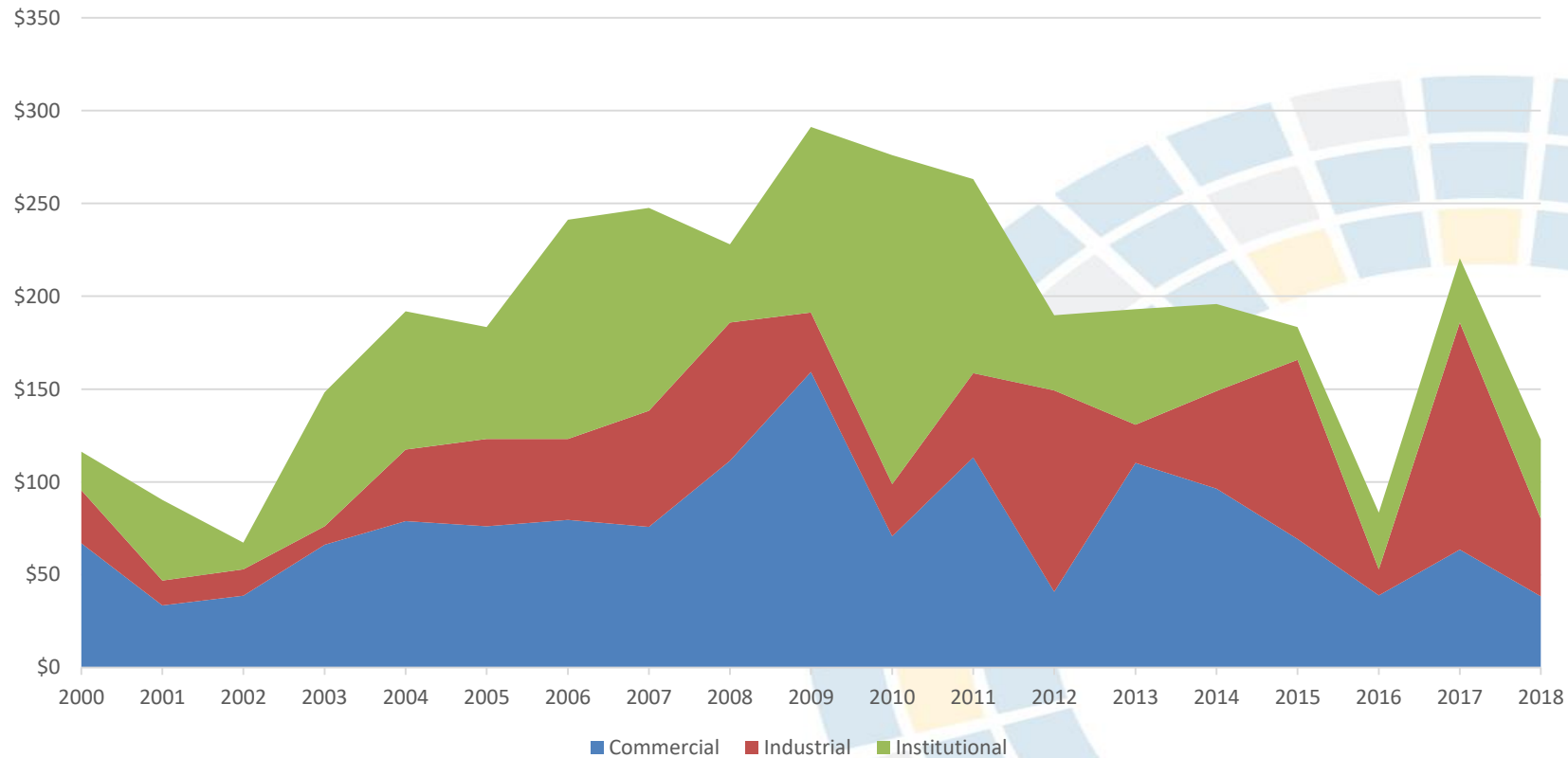


Source: Statistics Canada, Investment and Capital Stock Division, Community Data Program Custom Tabulation

# Building Permits

Decrease in the Northeast from 2017

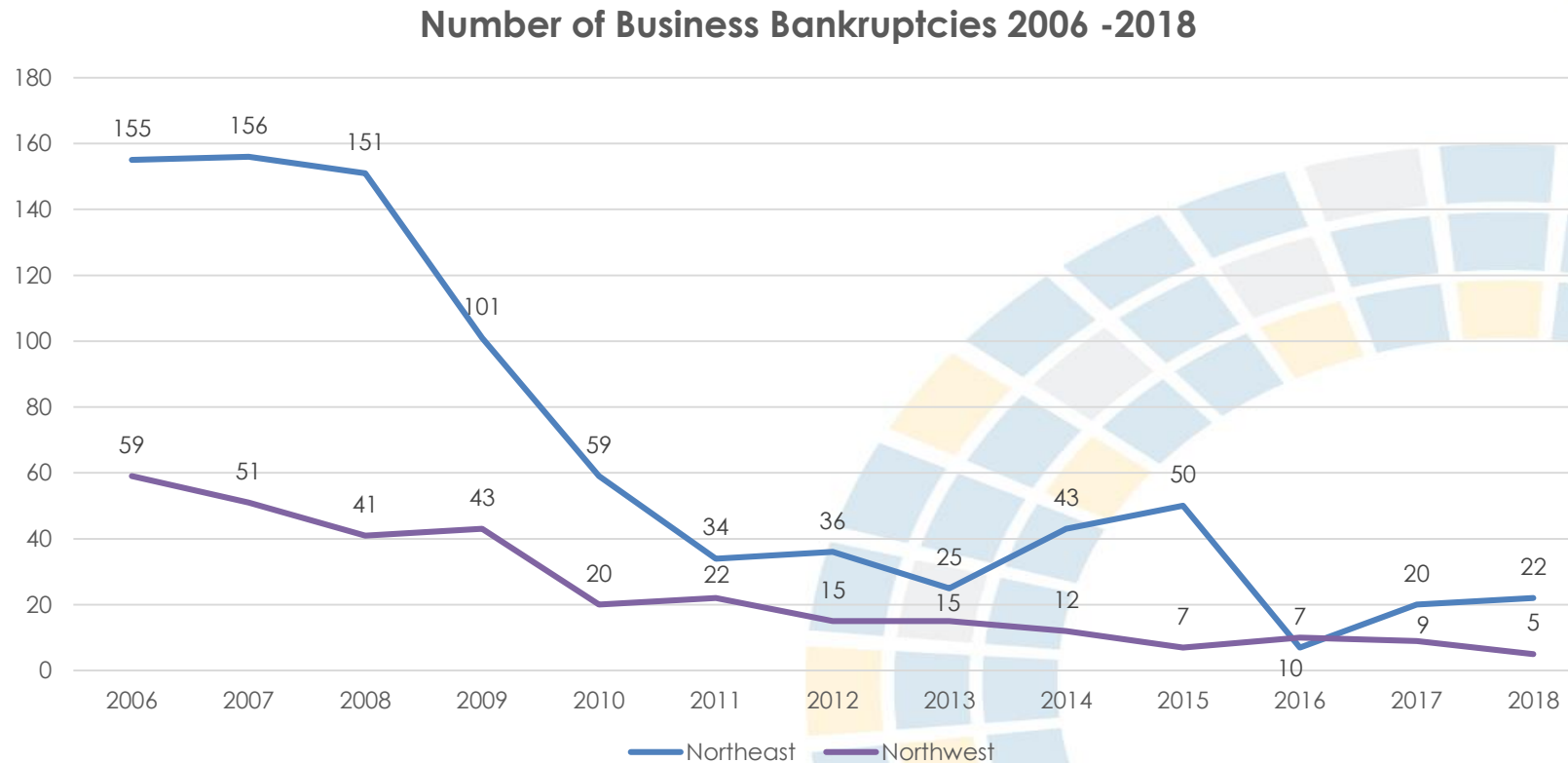
**Value of Non-Residential Building Permit by Type in Northeastern Ontario  
(in 2018 Dollars - Millions)**



Source: Statistics Canada, Investment and Capital Stock Division, Community Data Program Custom Tabulation

# The Economy

Slight increase in business bankruptcies in the Northeast since 2016, slight decrease in the Northwest

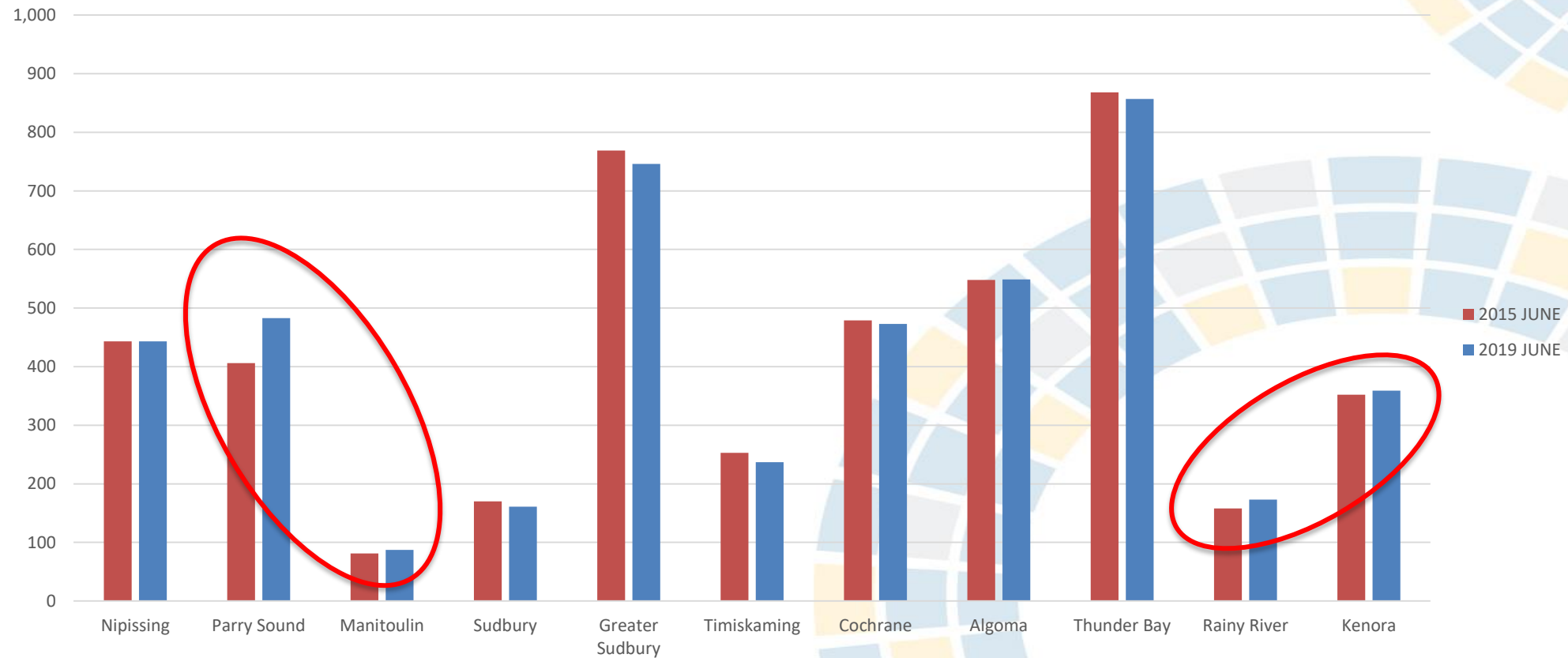


Source: Industry Canada, Office of the Superintendent of Bankruptcy

# Business Counts – Goods Producing

Basically stable, small increases in Parry Sound, Manitoulin, Rainy River and Kenora

**Business Counts (Goods-producing Industries) by Census District, June 2015 & June 2019**



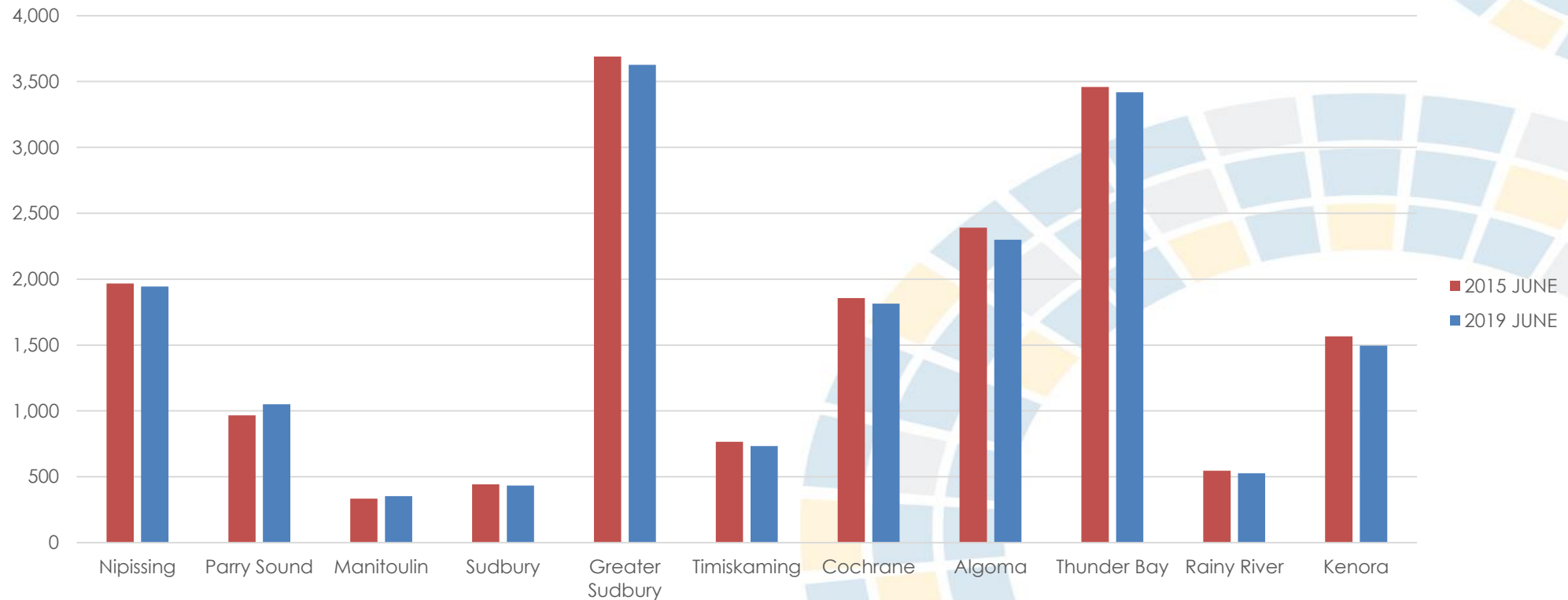
\*Changes to the Business Register's methodology or business industrial classification strategies can bring about increases or decreases in the number of active businesses reported in the Canadian business counts. Data should be used with caution.

Source: Statistics Canada, Canada Business Counts, Community Data Program Custom Tabulation

# Business Counts - Service Producing

Stable across all 11 census districts

**Business Counts (Service-producing Industries) by Census District, June 2015 & June 2019**



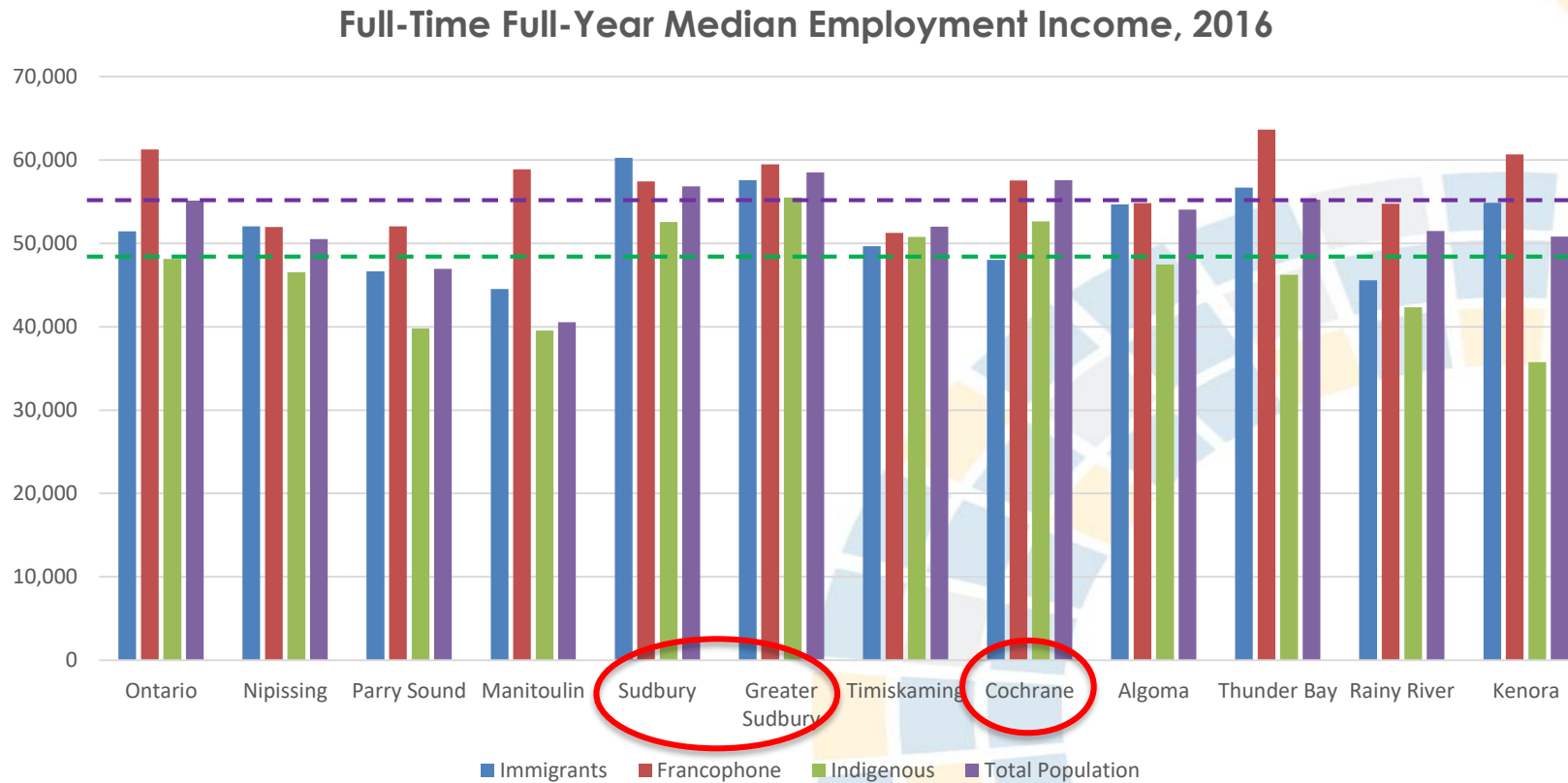
\*Changes to the Business Register's methodology or business industrial classification strategies can bring about increases or decreases in the number of active businesses reported in the Canadian business counts. Data should be used with caution.

Source: Statistics Canada, Canada Business Counts, Community Data Program Custom Tabulation



# Median Income

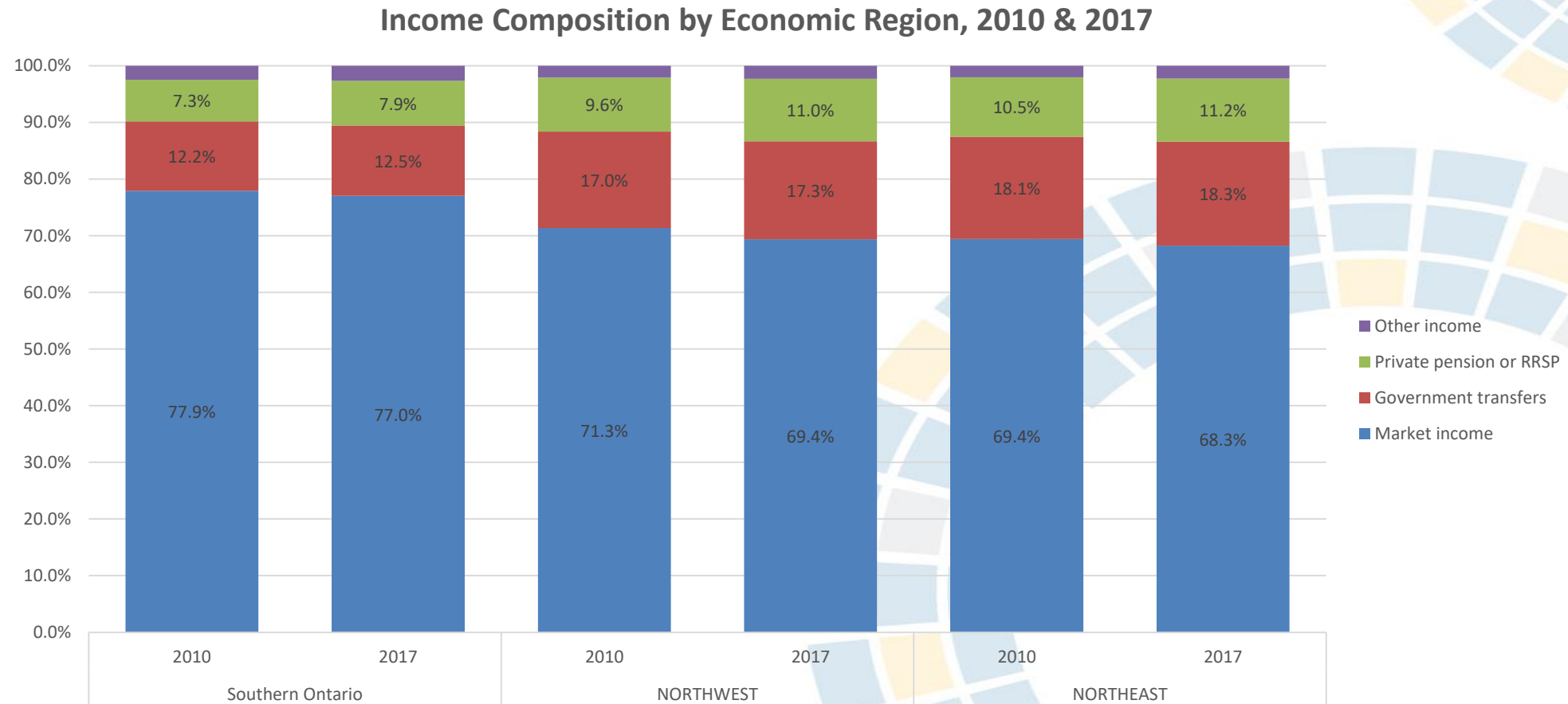
Higher Full-Time, Full-Year median employment income across several Northern districts, compared to Ontario



Source: Statistics Canada, 2016 Census, Community Data Program Custom Tabulations

# Income Composition

Higher Market Income composition in the Northwest than the Northeast, but still lower than Southern Ontario

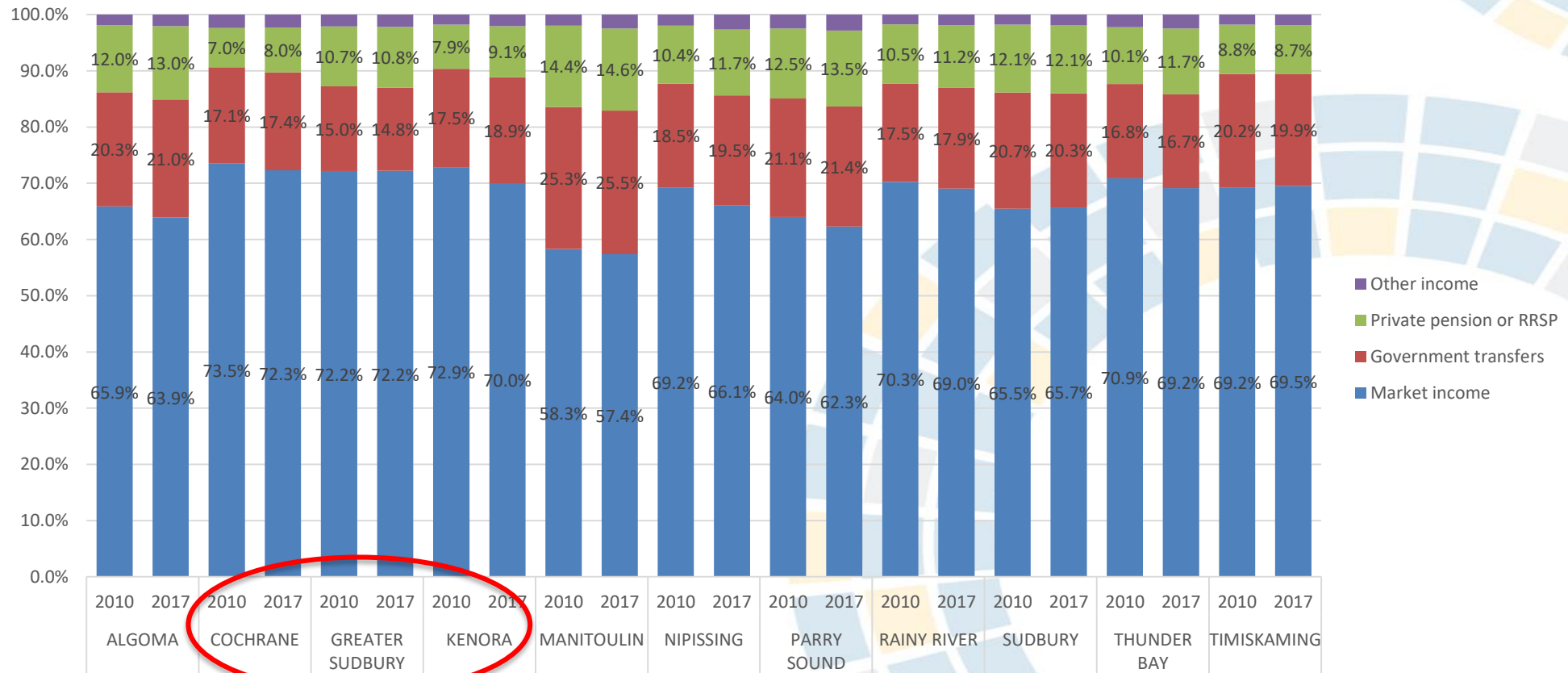


Source: Taxfilers and dependents with income by source of income, 2016, Community Data Program

# Income Composition

Market income makes up highest proportion of income in Cochrane, Greater Sudbury, and Kenora districts

### Income Composition by Census Division, 2010 and 2017

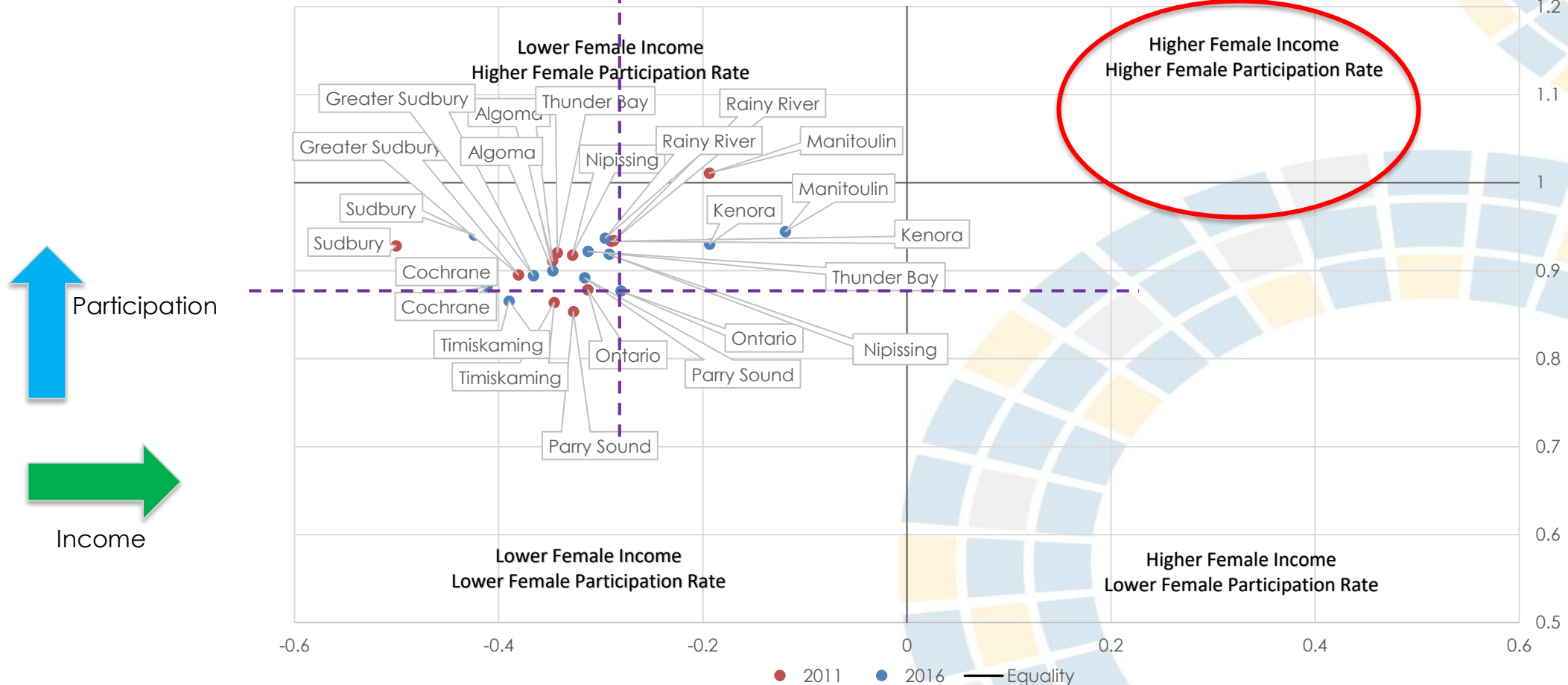


Source: Taxfilers and dependents with income by source of income, 2016, Community Data Program

# Total Gender Earnings Gap

Lowest in Manitoulin & Kenora

Female-Male Participation Ratio and Gender Earnings Gap, 2011 and 2016

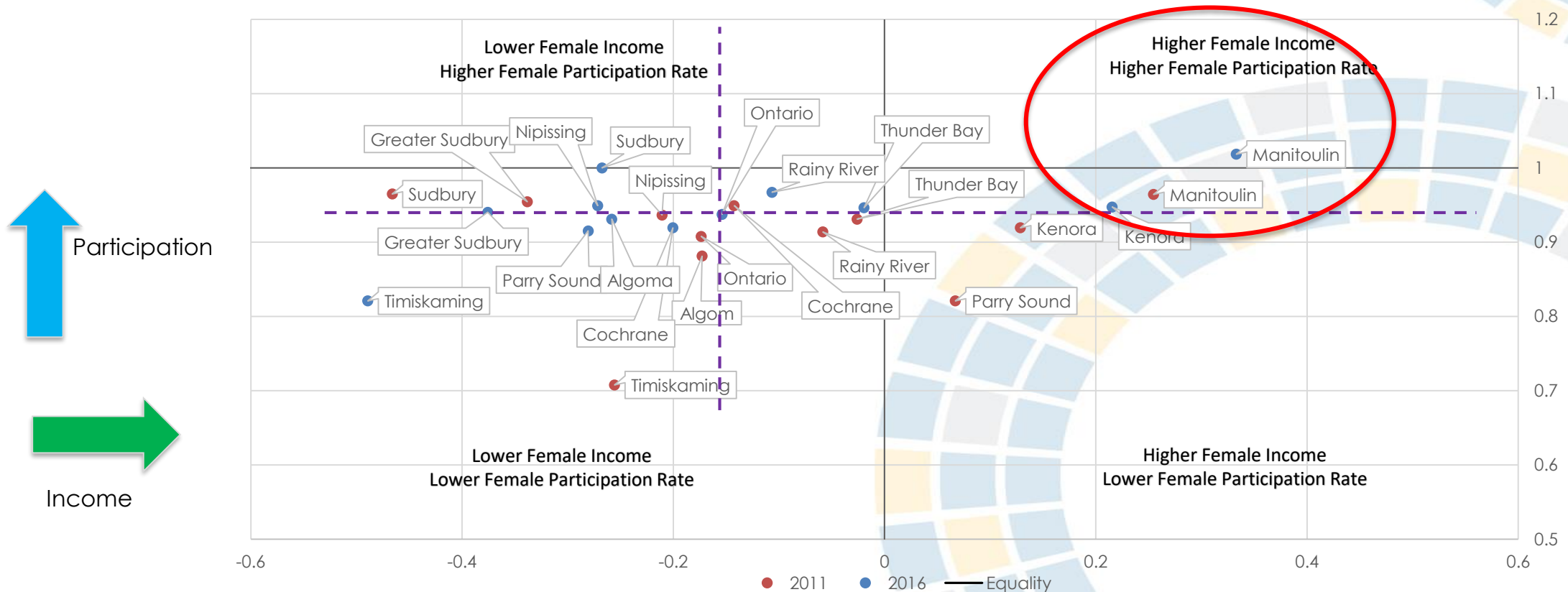


Source: Community Data Program, target group profile, 2011, 2016

# Indigenous Gender Earnings Gap

Manitoulin has a higher female income and participation rate for Indigenous persons

### Female-Male Participation Ratio and Gender Earnings Gap, Indigenous Population, 2011 and 2016



Source: Community Data Program, target group profile, 2011, 2016

# Covid-19 – Where do we go from here

## **NPI analysis underway:**

- Current Impact: Northerners likely to fall through cracks, FN response, Social Networks in the North
- Future Trends: historical recovery patterns and whether they apply, international students – expect a drop, ICT gaps laid bare

## **Suggestions for Trillium Foundation:**

- Short Term:
  - Accelerate decision process
  - NFPs will need extra help in 2020-2021
  - Continue to focus on youth and youth employment/volunteering
- Medium Term:
  - Enhance community remote delivery capacity
  - Economic opportunities in Indigenous communities – small business start ups, urban reserves
  - Urban Indigenous population continue to face significant short falls in service

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Thank you. Marsee. Paq̄n̄d̄n̄p̄  
Merci. Miigwech.

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