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#6 – The Changing Industrial Structure of Northern Ontario

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Prepared for the Local Boards of Northern Ontario

Commission locale de formation et d'adaptation de la main-d'oeuvre
MUSKOKA NIPISSING PARRY SOUND
Local Training and Adjustment Board

Districts of/de Sudbury & Manitoulin
Training and Adjustment Board
Commission de Formation et d'Adaptation

Far Northeast Training Board

AWIC
Algoma Workforce Investment Committee

North Superior Training Board
Comité de formation du Nord Supérieur

NTAB
Northwest Training and Adjustment Board

EXECUTIVE SUMMARY

Background to the Report:

This study has been prepared for the 5 Local Boards in Northern Ontario and the Algoma Workforce Investment Committee. Due to the particular economic conditions in Northern Ontario, it is very important for the Northern Boards to properly understand the demographic trends occurring in their region. This is the sixth research report in a series that examines the current trends in Northern Ontario using data from the 2006 Census. Based on concerns expressed in the Trends, Opportunities, and Priorities (TOP) Reports, this report attempts to examine employment changes for industries in Northern Ontario.

Methodology:

This report is based on newly released data from the 2006 Census as prepared by Statistics Canada. Data is also used from other Census years as compiled by Statistics Canada.

Findings:

The analysis of the 2006 Census data for labour force participation has shown us several important facts about Northern Ontario. They are as follows:

The industrial structure of Northern Ontario differs from that of Ontario
- Northern Ontario continues to have a higher percentage of primary resource industry jobs
- Northern Ontario has a lower percentage of "professional service" industry jobs
- Northern Ontario has a higher dependence on "public sector service" industries
- Northern Ontario continues to have a lower percentage of manufacturing industry jobs

In addition, the period 2001 to 2006 saw some importance fluctuations in employment based on industry.
- Most employment growth was in health care and social assistance and educational services
- Most employment decline was in manufacturing industries and in forestry, agriculture, fishing and hunting industries

Finally, in terms of comparing internal differences, all districts of Northern Ontario, continue to show the same key structural differences from that of Ontario but changes varied
- The greatest internal differences in industry structure are between Aboriginal communities and the rest of Northern Ontario

Section One: Introduction

This study has been prepared for the 5 Local Boards in Northern Ontario and the Algoma Workforce Investment Committee. The Muskoka, Nipissing, Parry Sound Local Training and Adjustment Board (Local Board #20), the Sudbury and Manitoulin Workforce Partnerships Board (Local Board #21), the Far Northeast Training Board (Local Board #23), the North Superior Training Board (Local Board #24) and the Northwest Training and Adjustment Board (Local Board #25) are among the 21 Local Boards established in Ontario in 1994.[1] These Boards were created to assist in assessing the workforce development needs and issues of each area. Each Local Board Area is made up of representatives of the key labour market partner groups; primarily business and labour, but also including educators and trainers, Aboriginal groups, women, persons with disabilities, francophones, racial minorities and youth. The Boards are sponsored by the Ontario Ministry of Training, Colleges and Universities.

The 2001 Census Research Series produced by the Northern Boards from 2002 to 2004 showed that Northern Ontario is a region undergoing important transformations. Economic growth in Northern Ontario has been significantly less then the provincial average since the 1970s. Since workforce development is seen as crucial to economic development by most people in the region, regional Boards are therefore necessarily involved in economic development discussions. Population and demographic trends are an indicator of economic development. These trends also have an important impact on future development decisions. It, therefore, becomes very important for the Local Boards of Northern Ontario to understand what trends exist in their region.

This is the sixth research report in a series that examines the current trends in Northern Ontario using data from the 2006 Census. The first report analyzed the general population trends following release of that data in March, 2007. The second report looked at trends in youth out-migration. The third report looked at the extent to which the population of Northern Ontario is aging. The fourth report examined migration trends and the fifth looked at changes in labour force participation.

Section Two: Background to the Issue in Northern Ontario

2.1 Introduction to Northern Ontario

Northern Ontario comprises more than 88% of the land mass of Ontario but represents only 6.5% of the total population of the province (2006 Census). This percentage represents a decrease from 6.9% in 2001. As the region has no legislated boundaries, the definition of the region varies, especially as concerns its southern border. Currently, for the purpose of programming and statistical analysis, the provincial government has defined Northern Ontario as comprising the City of Greater Sudbury and the following districts: Kenora, Rainy River, Thunder Bay, Algoma, Cochrane, Manitoulin, Sudbury, Timiskaming, Nipissing, and Parry Sound. In 2000, the Ontario government decided to also include the Muskoka District Municipality in its definition of Northern Ontario. This inclusion was somewhat problematic in that the socio-economic characteristics of the Muskoka District Municipality differ from that of the other districts in Northern Ontario. In 2004 the government changed the definition to once again to exclude the Muskoka District Municipality. For the purposes of FedNor programming, the federal government continues to include the Muskoka District Municipality in its operational definition of Northern Ontario. In the 2001 Census Research Series, the Muskoka District Municipality was included in statistics relating to Northern Ontario. Due to the recent change in definition by the provincial government, 2006-based reports will exclude the area from statistics relating to Northern Ontario.[2] Comparisons between the data presented in the previous report need to take this change in definition into account. The Muskoka district will however be included in statistics related to the Muskoka, Nipissing, Parry Sound Local Training and Adjustment Board (Board #20).

The history of continuous settlement by non-Natives in Northern Ontario is relatively recent when compared to the rest of Ontario. Settlement in earnest started with the construction of the Canadian Pacific Railway in the late 1870s and 1880s. This was soon followed by the construction of the Canadian Northern Railway and the Grand Trunk and National Transcontinental Railways. Most non-Aboriginal communities in the region were initially railway towns.

Following the building of the railways, the region’s growth has been driven primarily by the forest industry and by mining. The development of communities was, for the most part, undertaken by large resource extraction corporations based outside the region rather than by local entrepreneurs. This fact has meant that the social and economic structure of this region exhibits several unique characteristics.[3]

The first of these characteristics relates to an overdependence on natural resource exploitation. This has meant a high degree of vulnerability to resource depletion, world commodity prices, corporate policy changes, the boom and bust cycles of the resource industries, changes in the Canadian exchange rate, and changes in government policies regarding Northern Ontario.[4]

The second characteristic is a high degree of dependency on external forces. The fact that most communities were developed by outside interests means that local entrepreneurship has been more limited than in other areas. This has served as a barrier to the cultivation of an entrepreneurial culture in these communities. This dependence is also seen in the area of political decision-making. Unlike most areas of Ontario, Northern Ontario is made up of Districts instead of Counties. Unlike Counties, Districts do not have regional governments. Northern Ontario is unique in Ontario in that unlike the Counties of Southern Ontario there is no regional government serving as an intermediary between the provincial government and municipalities.[5]

While all communities in the region share some common characteristics, Northern Ontario can be divided internally into three different types of communities:

Small and Medium-sized cities - Northern Ontario includes 5 cities with over 40,000 inhabitants. They are, in order of size, Sudbury (157,857), Thunder Bay (109,140), Sault Ste. Marie (74,948), North Bay (53,966), and Timmins (42,997).[6] While these centres are heavily dependent on resource industries they are also relatively diversified in that they tend to be important centres for health, education, and other services for the outlying regions.

Resource Dependent Communities - The vast majority of the remaining non-Aboriginal communities in the region are resource dependent communities, or single industry towns, which share many distinct characteristics.[7] These communities are smaller and less diversified economically than the small and medium-sized cities. They are much more directly dependent on resource industries.

Aboriginal Communities - The region of Northern Ontario is unique in terms of its large number of Aboriginal communities. The Aboriginal population makes up almost 8 percent of the population of the region.[8] The population in the area of the region north of the 50th parallel is almost entirely made up of these communities. Of all the communities in the region, Aboriginal communities face the greatest number of social and economic challenges.

2.2 The History of Industrial Change in Northern Ontario

As was pointed out in the 2001 Census report on the industrial structure of Northern Ontario, jobs in “blue collar” industries have been the largest single group of jobs in the regional economy since the arrival of the railways and the origins of the forest industries and mining industries.[9] The railways, forest and mining industries were the most important industries starting in the 1870s. Historically this has been a factor which differentiated the region from many other regions in Ontario. Northern Ontario still has a substantially higher percentage of these types of industries than for the province as a whole. The industrial structure differed from the province as a whole in that the percentage of manufacturing jobs in the North was less than for the province. This was countered however by a higher percentage of jobs in logging and forestry, mining, construction, and transportation.

Earlier studies have noted that there has been a decline in employment in the traditional blue collar industries.[10] This has been countered by a rise in service sector employment. If the industrial sector lost 30, 915 jobs from 1986 to 1996, the service sector gained 30,365 jobs during this period. In 1986 this sector represented 226,325 jobs, or 60% of all employment in Northern Ontario. By 1996 the number of jobs in this sector had risen to 256,690 or 66.3% of all employment. It should also be pointed out that the number of jobs in this sector actually decreased by 2,265 from 1991 to 1996. Most of this loss came from a 31% decrease in government service employment in Northern Ontario, from 41,440 in 1991 to 28,630 in 1996.

The industrial structure data used in this report does not allow us to easily compare the current industrial structure of Northern Ontario with the industrial structure of past census years. For the 2001 Census, Statistics Canada used a new system of classifying industries: the 1997 North American Industry Classification System. This new system allows the comparison of industrial structures throughout North America but does not allow for historical comparisons. As a result, the data from the 2006 Census will only be compared with the situation in 2001.

Section Three: Methodology

This report attempts to describe the labour force trends in Northern Ontario. This report is based on newly released data from the 2006 Census as prepared by Statistics Canada. Data is also used from other census years as compiled by Statistics Canada.

Data for Northern Ontario from the 1996, 2001, and 2006 Census is from special profiles ordered from Statistics Canada by the researcher. Data from the1991 and 1986 Census was downloaded from the Census Profiles CDs created by Statistics Canada.

3.1 Potential problems with our method

Our method has three potential problems which must be mentioned: sampling error, the “random rounding” technique used by Statistics Canada, and problems with data for Aboriginal communities in Northern Ontario.

Unlike the first three reports in this series, the data used in this report is not from 100% of the population. Statistics Canada has two census forms; a short one that goes to all residences, and a long one, Form 2B, which goes to 20% of residences. The data analyzed here is from Form 2B which went to 20% of homes. This data is therefore a “sample” of total possible responses. It is meant to represent 100% of the population but, being a sample, it often does not. When the responses from the sample differ from what the responses would be from the entire population, we say there is “sampling error”.[11]

Using statistical analyses, we can calculate what the likelihood of sampling error is for a given number of responses. Generally speaking, the larger the number of respondents, the less sampling error is a problem. In our study, the data from smaller communities has a higher possibility of sampling error.

Another potential problem is the use of random rounding by Statistics Canada in its census data.[12] In order to ensure confidentiality, census data is round up or down to the nearest 5 count. This has an insignificant effect on large numbers. On very small numbers however this process can introduce a significant degree of error. This limits our ability to be confident about data for very small communities in Northern Ontario.

The third problem was mentioned in the first report in this series dealing with population change. The population figures for the census divisions in Northern Ontario are not as reliable as the census divisions in most of Ontario. This is due to the large number of Aboriginal communities which, for various reasons, are improperly counted. If Statistics Canada can not properly count a community, the population of that community is not included in the population totals for that census division. As a result, the population figures for almost all the census divisions in Northern Ontario are incomplete. Comparison from census year to census year becomes difficult when a particular community was not counted in one year but counted in another year.

In the report on population change, the statistics were “adjusted” to try and deal with this problem. This was not done for this report. This means that there is a certain degree of error in the statistics used in the report.

Section 4: The Industrial Structure of Northern Ontario

4.1 The Industrial Structure of Northern Ontario Differs from that of Ontario

Figure 1 compares the industrial structure of Northern Ontario with that of Ontario. As was noted in the 2001 Census report on industrial structure, important differences exist between Northern Ontario and Ontario.[13]

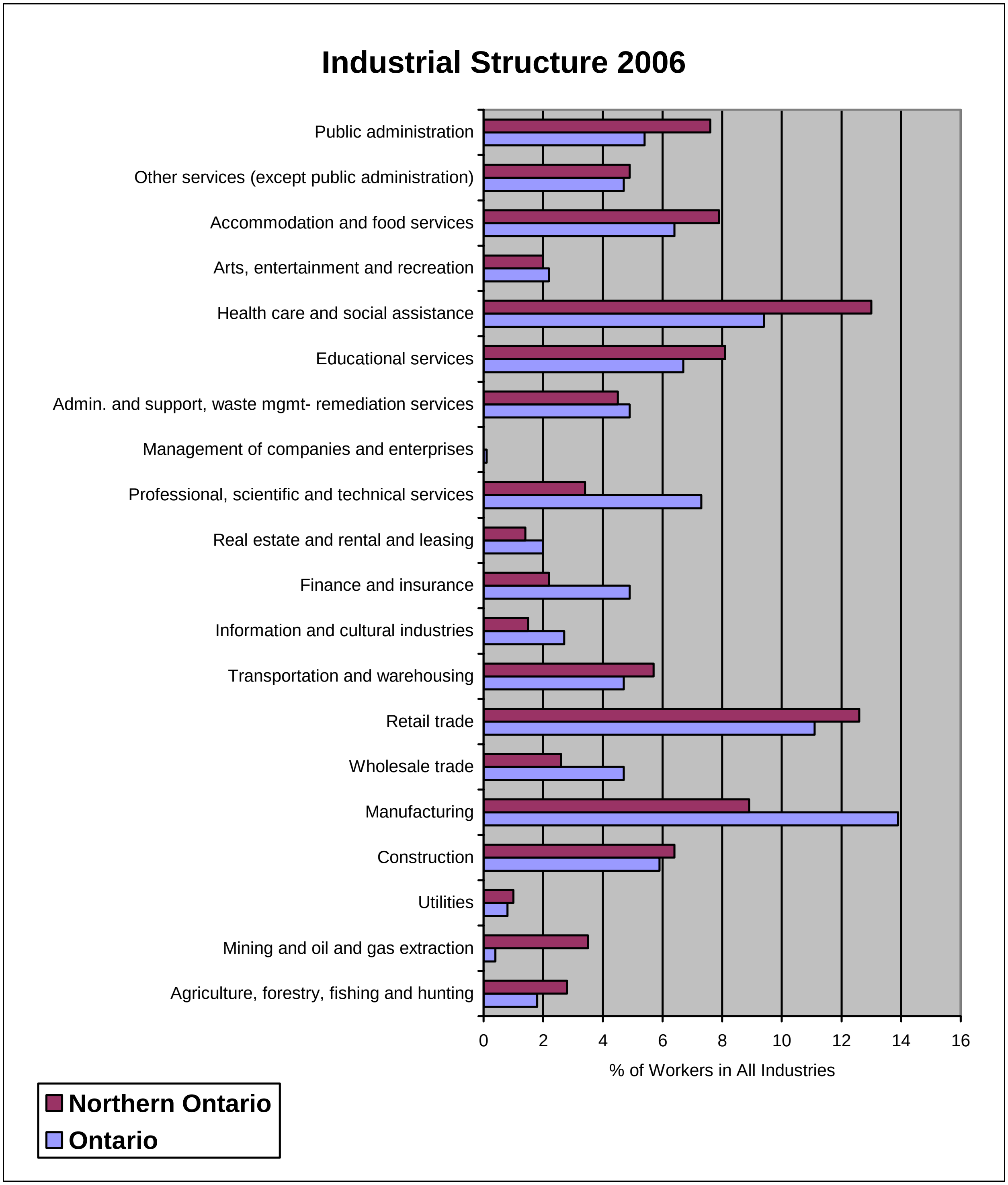

Figure 1: Source: Statistics Canada, Census of Canada, 2006.

4.1.1 Northern Ontario continues to have a higher percentage of primary resource industry jobs[14]

As was noted in the 2001 Census report, Northern Ontario has a higher percentage of what can be called “primary resource” industry jobs. Differences between the North and the province in this sector are the largest in relative terms[15]. When comparing jobs in the “agriculture, forestry, fishing and hunting” industry sector we see that, despite the importance of agriculture in areas of Southern Ontario, in 2006 this sector represents only 1.8% of all industry jobs in Ontario. While Northern Ontario has a relatively small agricultural sector, its percentage of jobs in this category of industries is 2.8%. When comparing the category “Mining and oil and gas extraction” industries, the percentage for Northern Ontario is 3.5%, while the percentage for Ontario as a whole is only 0.4%.

4.1.2 Northern Ontario has a lower percentage of “professional service” industries

The next most important relative difference between the North and the province is the fact that Northern Ontario’s economy has a lower percentage of jobs associated with what some call the “new economy” or the “knowledge economy” but which we will refer to in a more general sense as “professional services” industries.[16] These are the supposedly knowledge-intensive industries that will replace the traditional manufacturing industries as the engine of growth. These industries are often those placed in the following categories of the 1997 North American Industrial Classification System: information and cultural industries, finance and insurance industries, real estate and rental and leasing industries, professional, scientific and technical services industries, industries involved in the management of companies and enterprises, and finally, administrative and support and waste management and remediation services. In each of these categories, Northern Ontario has a percentage of workers inferior to that of Ontario as a whole. Added together, in 2006 these categories of “professional service” industries represented 17% of all jobs in Ontario. They represented only 8.5% of all jobs in Northern Ontario.

4.1.3 Northern Ontario has a higher dependence on “public sector service” industries

Figure 1 clearly shows that Northern Ontario continues to have a higher dependence on “public sector service” industries for jobs. The health, education, social assistance, and public administration sectors all have a greater importance in Northern Ontario than for the province as a whole. Educational services represent 8.1% of the jobs in Northern Ontario whereas they represent only 6.7% of all jobs in the province. Health care and social assistance industry jobs represent 13% of all jobs in Northern Ontario whereas they represent only 9.4% of all jobs in Ontario. Finally, public administration jobs represent 7.6% of all jobs in the North whereas for Ontario they represent 5.4%.

In total, what can be termed “public sector service” jobs equal 28.7% of the jobs in Northern Ontario. In Ontario as a whole, the total is 21.5%.

4.1.4 Northern Ontario continues to have a lower percentage of manufacturing industry jobs

Previous studies using data from 1986 to 1996, pointed out that one of the main characteristics of Northern Ontario's industrial structure was a lower percentage of manufacturing jobs than the provincial average.[17] This continued to be the case in 2001. Data from the 2006 Census confirms that, despite a general lessening of the importance of manufacturing industry employment, there continues to be disparities between the North and the province. In 2006 the percentage of people employed in manufacturing industries was 13.9% of total employment. In Northern Ontario it stood at 8.9%. Related to manufacturing, Northern Ontario also has a lower percentage of employment in industries involved in wholesale trade.

It should also be noted that Figure 1 shows other less extreme differences in the industrial structure of Northern Ontario and Ontario than those noted above. In particular, Northern Ontario is more dependent on employment in utilities industries, accommodation and food service jobs, transportation and warehousing jobs and employment in retail industries.

4.2 Changes in Employment by Industry 2001 to 2006

Unlike the situation with the 2001 Census data, we can now easily compare the new census data with that of the previous census. What then are the industries that had the largest employment growth and which had the largest declines? Table 1 shows these changes for Ontario and Northern Ontario. In Ontario as a whole the biggest changes in total numbers were a loss of 84,655 jobs in the manufacturing industries and a gain of 79,945 jobs in the health care and social assistance industries. Educational services increased employment in Ontario by 62,290 jobs. Professional service industries also experienced substantial employment increases. Other than manufacturing, the only industrial category that showed a decrease in employment from 2001 to 2006 was agriculture, forestry, fishing and hunting. This sector lost 9,330 jobs.

Table 1: Change in Employment by Industries: 2001 to 2006

	Ontario		Northern Ontario	
	Total change in employment	Pct change	Total change in employment	Pct change
All industries	480965	8.0	9280	2.5
Agriculture, forestry, fishing and hunting	-9330	-7.5	-1385	-11.4
Mining and oil and gas extraction	4335	20.5	1175	9.5
Utilities	3985	8.6	95	2.6
Construction	52530	15.8	555	2.3
Manufacturing	-84655	-8.6	-5685	-14.2
Wholesale trade	28600	10.3	815	8.7
Retail trade	48360	7.2	500	1.0
Transportation and warehousing	27330	9.8	-550	-2.5
Information and cultural industries	1045	0.6	-615	-9.8
Finance and insurance	23620	8.1	-325	-3.6
Real estate and rental and leasing	17550	16.1	225	4.5
Professional, scientific and technical services	42520	9.9	1305	10.9

Management of companies and enterprises	545	6.9	-20	-12.5
Admin. and support, waste mgmt-remediation services	56980	22.2	2615	17.9
Educational services	62290	16.8	3055	10.8
Health care and social assistance	79945	15.0	5435	12.2
Arts, entertainment and recreation	18880	15.5	545	7.7
Accommodation and food services	34915	9.2	-755	-2.4
Other services (except public administration)	30395	11.1	1045	5.8
Public administration	41115	13.3	1185	4.2

Source: Statistics Canada, Census of Canada, 2001 and 2006

4.2.1 Most employment growth was in health care and social assistance and educational services

For Northern Ontario, those industries that created the most new jobs were in heath care and social assistance, with 5,435 new positions created between 2001 and 2006, and educational services, with 3,055 new positions. Administration and support, waste management and remediation services had the highest percentage increase in jobs from 2001. Employment in these industries increased by 17.9%, or by 2,615 positions. Public administration jobs increased by 1,185. Table 1 also confirms the opinion put forward in earlier 2006 Census Research Reports that the commodities boom has had a positive impact on employment in the mining sector. Employment in these industries increased by 9.5% or by 1,175.

4.2.2 Most employment decline was in manufacturing and in forestry, agriculture, forestry, fishing and hunting

By far the largest decline in employment was in the manufacturing sector. As has already been pointed out, the manufacturing sector in Northern Ontario is dominated by forest-based industries such as pulp and paper mills and sawmills. Jobs in this sector declined by 5,685. This represents a decrease of 14.2% from 2001. This confirms earlier observations of a crisis in the forest industry of Northern Ontario, a situation that has only gotten worse following the 2006 Census taking period. The problems of the forest industry are also seen in the next largest job loss category; that of agriculture, forestry, fishing and hunting. In Northern Ontario, most jobs in this category are represented by woodlands operations of the forest industry. It is no surprise therefore that jobs in this category decreased by 1,385, or by 11.4%.

4.3 All Districts of Northern Ontario, Continue to Show the Same Key Structural Differences from that of Ontario but Changes Varied

Table 2: Districts by Industrial Structure: Percentage of Workers 2006

	Primary Resource 1	Public Sector Service 2	Professional Service 3	Manufacturing
Ontario	2.2	21.6	21.8	13.9
Northern Ontario	6.3	28.7	13.0	8.9

Nipissing District	3.1	29.2	15.0	7.2
Parry Sound District	2.4	23.7	13.0	9.7
Manitoulin District	7.4	33.3	8.9	4.2
Sudbury District	7.9	23.3	8.3	14.4
Greater Sudbury Division	7.5	29.0	14.9	6.0
Timiskaming District	11.9	25.6	10.8	8.6
Cochrane District	11.0	25.4	11.3	10.1
Algoma District	3.2	27.4	14.8	12.2
Thunder Bay District	5.3	30.0	13.5	9.4
Rainy River District	7.5	30.5	8.0	13.5
Kenora District	7.6	35.1	8.5	7.5

Source: Statistics Canada, Census of Canada, 2006. 1. Primary Resource industries are those contained in the categories: Agriculture, forestry, fishing and hunting and Mining and oil and gas extraction. 2. Public Sector Service industries are those contained in the categories: Educational services, Health care and social assistance, and Public administration. 3. Professional Service industries are those contained in the categories: : information and cultural industries, finance and insurance industries, real estate and rental and leasing industries, professional, scientific and technical services industries, industries involved in the management of companies and enterprises, and finally, administrative and support and waste management and remediation services.

Table 2 shows that, as was noted in the 2001 Census report on industry, all districts of Northern Ontario, show the same key structural differences with that of Ontario discussed above. Looking at primary resource industries, all districts in the region have a higher dependence on these industries than the province. There are some important internal differences however. The districts of Parry Sound, Nipissing, and Algoma have the lowest percentage of jobs in these industries. Rates are only slightly above the provincial average. The districts of Timiskaming and Cochrane have the highest percentages of employment in primary resource industries with rates in excess of five times that of Ontario as a whole. The rest of the districts are close to the regional percentage of 6.3%.

All districts in Northern Ontario also have a higher dependence on public sector service industries than the provincial average. Indeed the variations between the districts for these industries are not as extreme as was the case with primary resource industries. The districts of Sudbury and Parry Sound are closest to the provincial average while the districts of Kenora and Manitoulin have the highest dependence on these types of jobs.

Professional service industry employment is lower than the provincial norm in all districts of the region. This is one category of employment where important differences with the provincial average are seen in all the districts. The Nipissing District, Greater Sudbury, and the Algoma District all have the highest percentages of jobs in these industries but at around 15% their averages are much less than that of Ontario. The districts with the lowest percentages of jobs in these industries are Rainy River, Sudbury, Kenora, and Manitoulin.

It is among manufacturing industries that the districts in Northern Ontario show the least number of commonalities when compared to the provincial averages. Table 2 shows us that the Sudbury District has a higher dependence on manufacturing industries that that of Ontario as a whole. In addition, the districts of Rainy River and Algoma are close to the provincial average. Those districts with the least dependence on manufacturing industries are the District of Manitoulin and Greater Sudbury.

Table 3: Change in Employment by Industry for the District of Nipissing

The District of Nipissing	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	38845	41085	2240	5.8
Agriculture, forestry, fishing and hunting	745	735	-10	-1.3
Mining and oil and gas extraction	335	535	200	59.7
Utilities	450	395	-55	-12.2
Construction	2555	2605	50	2.0
Manufacturing	3290	2960	-330	-10.0
Wholesale trade	1000	1270	270	27.0
Retail trade	5555	5425	-130	-2.3
Transportation and warehousing	2585	2700	115	4.4
Information and cultural industries	660	640	-20	-3.0
Finance and insurance	1235	990	-245	-19.8
Real estate and rental and leasing	585	700	115	19.7
Professional, scientific and technical services	1395	1650	255	18.3
Management of companies and enterprises	60	15	-45	-75.0
Administrative and support, waste management and remediation services	1455	2160	705	48.5
Educational services	3160	3345	185	5.9
Health care and social assistance	4870	5335	465	9.5
Arts, entertainment and recreation	620	610	-10	-1.6
Accommodation and food services	3295	3645	350	10.6
Other services (except public administration)	1655	2030	375	22.7
Public administration	3340	3335	-5	-0.1

Source: Statistics Canada, Census of Canada, 2001 and 2006

The 2001 Census showed us that the industrial structure of the District of Nipissing differs from that of Northern Ontario in that the District of Nipissing has a higher percentage of jobs in retail trade and public administration and a lower percentage of jobs in mining and manufacturing.

From 2001 to 2006 the sector with the largest percentage increase was that of mining. This sector increased by almost 60%, or by 200 jobs. The largest increase in total numbers of jobs was in administrative and support services which added 705 new jobs, an increase of 48.5%. The largest percentage decrease in jobs was in finance and insurance industries which declined by almost 20%, or by 245 jobs. The largest decline in total number of jobs was in manufacturing which lost 330 jobs, a decline of 10%.

Table 4: Change in Employment by Industry for the District of Parry Sound

The District of Parry Sound	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	18770	19690	920	4.9
Agriculture, forestry, fishing and hunting	650	400	-250	-38.5
Mining and oil and gas extraction	95	75	-20	-21.1
Utilities	150	190	40	26.7
Construction	2125	2260	135	6.4
Manufacturing	1900	1905	5	0.3
Wholesale trade	415	585	170	41.0
Retail trade	2715	2670	-45	-1.7
Transportation and warehousing	1065	1110	45	4.2
Information and cultural industries	215	335	120	55.8
Finance and insurance	290	315	25	8.6
Real estate and rental and leasing	315	465	150	47.6
Professional, scientific and technical services	520	600	80	15.4
Management of companies and enterprises	10	15	5	50.0
Administrative and support, waste management and remediation services	585	820	235	40.2
Educational services	1145	1325	180	15.7
Health care and social assistance	2215	2320	105	4.7
Arts, entertainment and recreation	455	665	210	46.2
Accommodation and food services	2020	1765	-255	-12.6
Other services (except public administration)	905	845	-60	-6.6
Public administration	990	1020	30	3.0

Source: Statistics Canada, Census of Canada, 2001 and 2006

In our 2001 Census report on industry we noted that the industrial structure of the District of Parry Sound was similar in many ways to that of the Muskoka District Municipality. It had a higher percentage of jobs in construction and accommodation and food services and a lower percentage of jobs in mining. Still, we noted that the industrial structure of the District of Parry

Sound was much closer to that of Northern Ontario as a whole than was the case with the Muskoka District Municipality.

From 2001 to 2006 the largest percentage increase in employment was in information and cultural industries. Employment in this sector increased by 55.8%, or by 120 jobs. The sector with the largest total increase in employment was administrative and support services. This sector produced 235 new jobs, an increase of 40.2%. The biggest job losses in percentage terms were in agriculture, forestry, fishing and hunting. Employment in this sector decreased by 38.5%, or by 250 jobs. The sector with the largest total losses in jobs was accommodation and food services which lost 255 jobs between 2001 and 2006, a decrease of 12.6%.

Table 5: Change in Employment by Industry for the District of Manitoulin

The District of Manitoulin	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	5655	5765	110	1.9
Agriculture, forestry, fishing and hunting	370	310	-60	-16.2
Mining and oil and gas extraction	130	115	-15	-11.5
Utilities	40	55	15	37.5
Construction	465	510	45	9.7
Manufacturing	200	240	40	20.0
Wholesale trade	125	65	-60	-48.0
Retail trade	740	640	-100	-13.5
Transportation and warehousing	380	485	105	27.6
Information and cultural industries	50	70	20	40.0
Finance and insurance	145	85	-60	-41.4
Real estate and rental and leasing	30	25	-5	-16.7
Professional, scientific and technical services	150	165	15	10.0
Management of companies and enterprises	0	15	15	ERR
Administrative and support, waste management and remediation services	120	155	35	29.2
Educational services	370	365	-5	-1.4
Health care and social assistance	875	945	70	8.0
Arts, entertainment and recreation	140	140	0	0.0
Accommodation and food services	515	525	10	1.9
Other services (except public administration)	245	230	-15	-6.1
Public administration	575	610	35	6.1

Source: Statistics Canada, Census of Canada, 2001 and 2006

In 2001 we saw that the District of Manitoulin had an industrial structure that varied considerably from that of Northern Ontario but to a slightly lesser extent than the Muskoka District Municipality. The most important differences were that the District of Manitoulin had a higher percentage of jobs in health care and social assistance and agriculture and forestry. The district had a lower percentage of jobs in manufacturing. They also had a higher percentage of jobs in public administration.

From 2001 to 2006 the largest percentage increase in jobs was found in the information and cultural sector. Employment in these industries increased by 40% but in real terms it represents only 20 new jobs. The sector that had the highest number of new jobs was transportation and warehousing. This sector added 105 new jobs to the district economy, an increase of 27.6%. The largest percentage decrease in jobs was in wholesale trade which declined by 48%, or by 60 jobs. The largest total decline in employment was in retail trade. This sector lost 100 jobs.

Table 6: Change in Employment by Industry for the District of Sudbury

The District of Sudbury	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	10335	9905	-430	-4.2
Agriculture, forestry, fishing and hunting	510	460	-50	-9.8
Mining and oil and gas extraction	310	325	15	4.8
Utilities	85	50	-35	-41.2
Construction	695	720	25	3.6
Manufacturing	1610	1425	-185	-11.5
Wholesale trade	200	260	60	30.0
Retail trade	1230	1425	195	15.9
Transportation and warehousing	1040	770	-270	-26.0
Information and cultural industries	55	60	5	9.1
Finance and insurance	220	200	-20	-9.1
Real estate and rental and leasing	75	45	-30	-40.0
Professional, scientific and technical services	170	225	55	32.4
Management of companies and enterprises	0	0	0	ERR
Administrative and support, waste management and remediation services	275	295	20	7.3
Educational services	690	540	-150	-21.7
Health care and social assistance	765	1050	285	37.3
Arts, entertainment and recreation	135	115	-20	-14.8
Accommodation and food services	1090	840	-250	-22.9
Other services (except public administration)	490	375	-115	-23.5
Public administration	690	720	30	4.3

Source: Statistics Canada, Census of Canada, 2001 and 2006

The main differences between the industrial structure of the District of Sudbury and that of Northern Ontario in 2001 were a higher percentage of jobs in manufacturing and transportation and a lower percentage of jobs in health care and social assistance. The larger dependence on manufacturing was due to the presence of several sawmills and pulp and paper mills in the district. The larger number of transportation workers was also due to these types of forest industries. The District of Sudbury had fewer employees in health care and social assistance due to the importance of Greater Sudbury as a service center for the district.

Job grow between 2001 and 2006 was highest on both a percentage and number of jobs basis in the health care and social services industries. Employment in these industries increased by 37.3%, or by 285 jobs. In terms of job losses, the sector with the largest percentage decrease was that of utilities. Jobs in this sector decreased by 41.2%, or by 35 jobs. The sector which lost the most total jobs was transportation and warehousing. This sector lost 270 jobs between 2001 and 2006.

Table 7: Change in Employment by Industry for Greater Sudbury

Greater Sudbury	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	75815	79825	4010	5.3
Agriculture, forestry, fishing and hunting	535	290	-245	-45.8
Mining and oil and gas extraction	4835	5725	890	18.4
Utilities	515	510	-5	-1.0
Construction	4410	5145	735	16.7
Manufacturing	4865	4770	-95	-2.0
Wholesale trade	2470	3020	550	22.3
Retail trade	10110	10270	160	1.6
Transportation and warehousing	3840	3645	-195	-5.1
Information and cultural industries	1535	1220	-315	-20.5
Finance and insurance	2040	2195	155	7.6
Real estate and rental and leasing	1075	1135	60	5.6
Professional, scientific and technical services	2865	3530	665	23.2
Management of companies and enterprises	10	20	10	100.0
Administrative and support, waste management and remediation services	4955	3800	-1155	-23.3
Educational services	5905	7040	1135	19.2
Health care and social assistance	8680	9915	1235	14.2
Arts, entertainment and recreation	1585	1555	-30	-1.9
Accommodation and food services	5400	5615	215	4.0
Other services (except public	4000	4230	230	5.8

administration)				
Public administration	6185	6190	5	0.1

Source: Statistics Canada, Census of Canada, 2001 and 2006

The Greater Sudbury Division is the most urbanized census division in Northern Ontario. One would expect therefore that its industrial structure would vary considerably from a region that has a large non-urban population. Surprisingly the 2001 Census showed that the industrial structure of Greater Sudbury was relatively similar to that of Northern Ontario as a whole. The most important differences were that Greater Sudbury had a higher percentage of jobs in mining and administrative services and a lower percentage of jobs in manufacturing and agriculture and forestry.

The Sudbury economy has certainly benefited from the commodities boom of the past 5 years. Mining employment added 890 jobs to the local economy, an increase of 18.4%. Still, the largest percentage increase in employment was in professional, scientific and technical services. Jobs in these industries increased by 23.2%, a total of 665 new positions. The sector which added the most new jobs was health care and social assistance which added 1,235 new jobs, an increase of 14.2%. The biggest job losses occurred on a percentage basis in agriculture and forestry. Jobs in these industries declined by 45.8%. The sector which lost the largest number of total positions was administrative and support services. This sector lost 1,155 jobs.

Table 8: Change in Employment by Industry for the District of Timiskaming

The District of Timiskaming	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	15735	15820	85	0.5
Agriculture, forestry, fishing and hunting	980	1110	130	13.3
Mining and oil and gas extraction	555	770	215	38.7
Utilities	175	150	-25	-14.3
Construction	1180	1085	-95	-8.1
Manufacturing	1405	1355	-50	-3.6
Wholesale trade	430	375	-55	-12.8
Retail trade	1960	1935	-25	-1.3
Transportation and warehousing	1120	1065	-55	-4.9
Information and cultural industries	420	295	-125	-29.8
Finance and insurance	330	260	-70	-21.2
Real estate and rental and leasing	180	145	-35	-19.4
Professional, scientific and technical services	500	510	10	2.0
Management of companies and enterprises	10	0	-10	-100.0
Administrative and support, waste management and remediation services	405	500	95	23.5

Educational services	1295	1165	-130	-10.0
Health care and social assistance	1795	2050	255	14.2
Arts, entertainment and recreation	215	155	-60	-27.9
Accommodation and food services	1105	1175	70	6.3
Other services (except public administration)	765	895	130	17.0
Public administration	895	835	-60	-6.7

Source: Statistics Canada, Census of Canada, 2001 and 2006

The industrial structure of the District of Timiskaming is quite close to that of Northern Ontario. Since this district has the most active agricultural sector of all Northern Ontario, the 2001 Census showed that it has a higher percentage of jobs in agriculture and forestry. The fact that it lacks a major urban service centre accounts for a lower percentage of jobs in public administration.

From 2001 to 2006 the largest percentage increase in employment was found in mining. Jobs in this sector increased by 38.7%, or by 215 positions. The largest increase in the total number of jobs was health care and social assistance which added 255 new positions. The most significant employment decrease occurred on a percentage basis among information and cultural industries. This sector decreased by 29.8% or by 125 jobs. The educational services sector lost 130 positions. This sector lost the largest total number of jobs.

Table 9: Change in Employment by Industry for the District of Cochrane

The District of Cochrane	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	40680	40535	-145	-0.4
Agriculture, forestry, fishing and hunting	1760	1625	-135	-7.7
Mining and oil and gas extraction	2915	2830	-85	-2.9
Utilities	530	630	100	18.9
Construction	2640	2615	-25	-0.9
Manufacturing	4805	4075	-730	-15.2
Wholesale trade	1020	980	-40	-3.9
Retail trade	5405	5315	-90	-1.7
Transportation and warehousing	2340	2485	145	6.2
Information and cultural industries	685	510	-175	-25.5
Finance and insurance	920	835	-85	-9.2
Real estate and rental and leasing	400	405	5	1.3
Professional, scientific and technical services	1125	1065	-60	-5.3
Management of companies and enterprises	10	10	0	0.0
Administrative and support, waste management and remediation services	1180	1765	585	49.6

Educational services	3050	3125	75	2.5
Health care and social assistance	4545	4840	295	6.5
Arts, entertainment and recreation	370	430	60	16.2
Accommodation and food services	2940	2690	-250	-8.5
Other services (except public administration)	1880	1935	55	2.9
Public administration	2165	2350	185	8.5

Source: Statistics Canada, Census of Canada, 2001 and 2006

As was the case with the District of Timiskaming, the District of Cochrane has an industrial structure similar to that of Northern Ontario as a whole. In 2001, the two biggest differences were a higher percentage of jobs in mining and, despite the presence of the City of Timmins, a lower percentage of jobs in public administration.

The sector with the most employment growth in both percentage and total new jobs was that of administrative and support services. Employment in this sector increased by 48.6% or by 585 jobs. The most job losses on a percentage basis occurred in information and cultural industries. Employment in this sector declined by 25.5% or by 175 positions. Manufacturing industries lost the largest total number of jobs at 730.

Table 10: Change in Employment by Industry for the District of Algoma

The District of Algoma	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	53915	55210	1295	2.4
Agriculture, forestry, fishing and hunting	1575	1345	-230	-14.6
Mining and oil and gas extraction	485	445	-40	-8.2
Utilities	385	360	-25	-6.5
Construction	2925	3045	120	4.1
Manufacturing	7840	6745	-1095	-14.0
Wholesale trade	980	915	-65	-6.6
Retail trade	6890	6850	-40	-0.6
Transportation and warehousing	2570	2695	125	4.9
Information and cultural industries	755	790	35	4.6
Finance and insurance	1280	1085	-195	-15.2
Real estate and rental and leasing	770	825	55	7.1
Professional, scientific and technical services	1795	1765	-30	-1.7
Management of companies and enterprises	40	35	-5	-12.5
Administrative and support, waste management and remediation services	2175	3675	1500	69.0
Educational services	4005	4275	270	6.7
Health care and social assistance	6260	6900	640	10.2

Arts, entertainment and recreation	1480	1705	225	15.2
Accommodation and food services	5075	4550	-525	-10.3
Other services (except public administration)	3005	3205	200	6.7
Public administration	3630	3980	350	9.6

Source: Statistics Canada, Census of Canada, 2001 and 2006

The 2001 Census showed very few differences between the industrial structure of the District of Algoma and that of Northern Ontario. Of the differences that existed previously the biggest was a higher percentage of jobs in manufacturing, due in large part to the Algoma Steel mill in the city of Sault Ste. Marie. As well, the District of Algoma had fewer jobs in mining than the norm for Northern Ontario, especially after the closure of mining operations in the community of Wawa.

The largest growth in employment on a percentage basis and in total numbers of jobs occurred in the administrative and support industries. This sector saw a 69% increase in employment. This resulted in 1,500 new jobs. The biggest percentage decline occurred in the finance and insurance sector as these industries lost 15.2% of its 2001 labour force, or 195 jobs. The sector which lost the most total positions was manufacturing which lost 1,095 jobs, or 14% of its 2001 workforce.

Table 11: Change in Employment by Industry for the District of Thunder Bay

The District of Thunder Bay	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	76305	76405	100	0.1
Agriculture, forestry, fishing and hunting	2800	2525	-275	-9.8
Mining and oil and gas extraction	1785	1505	-280	-15.7
Utilities	820	850	30	3.7
Construction	4220	4030	-190	-4.5
Manufacturing	9545	7205	-2340	-24.5
Wholesale trade	2075	2045	-30	-1.4
Retail trade	8685	9220	535	6.2
Transportation and warehousing	5075	4630	-445	-8.8
Information and cultural industries	1470	1300	-170	-11.6
Finance and insurance	1750	1805	55	3.1
Real estate and rental and leasing	1190	1075	-115	-9.7
Professional, scientific and technical services	2670	2985	315	11.8
Management of companies and enterprises	20	10	-10	-50.0
Administrative and support, waste management and remediation services	2495	3125	630	25.3
Educational services	5785	6710	925	16.0
Health care and social assistance	9560	10655	1095	11.5

Arts, entertainment and recreation	1435	1680	245	17.1
Accommodation and food services	5985	6115	130	2.2
Other services (except public administration)	3570	3425	-145	-4.1
Public administration	5360	5525	165	3.1

Source: Statistics Canada, Census of Canada, 2001 and 2006

Of all the districts in Northern Ontario, the one with an industrial structure closest to that of Northern Ontario as a whole in 2001 was the District of Thunder Bay. The only significant differences were a slightly higher percentage of workers in manufacturing industries, and a slightly lower percentage of workers in retail trade industries.

In terms of employment growth, those industries which saw the largest percentage increase were administrative and support industries. Jobs in this sector increased by 25.3%, or 630 positions. The largest total number of new jobs was found in the health care and social assistance sector. These industries saw an increase of 1,095 jobs. Manufacturing industries lost the highest number of jobs on both a percentage basis and in total numbers of jobs. Jobs in this sector decreased by 24.5%, or by 2,340.

Table 12: Change in Employment by Industry for the District of Rainy River

The District of Rainy River	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	10720	10795	75	0.7
Agriculture, forestry, fishing and hunting	700	735	35	5.0
Mining and oil and gas extraction	80	75	-5	-6.3
Utilities	160	115	-45	-28.1
Construction	845	790	-55	-6.5
Manufacturing	1730	1455	-275	-15.9
Wholesale trade	240	200	-40	-16.7
Retail trade	1370	1060	-310	-22.6
Transportation and warehousing	540	505	-35	-6.5
Information and cultural industries	150	105	-45	-30.0
Finance and insurance	205	275	70	34.1
Real estate and rental and leasing	130	105	-25	-19.2
Professional, scientific and technical services	200	155	-45	-22.5
Management of companies and enterprises	0	10	10	ERR
Administrative and support, waste management and remediation services	270	215	-55	-20.4
Educational services	730	875	145	19.9
Health care and social assistance	1265	1460	195	15.4
Arts, entertainment and recreation	140	150	10	7.1

Accommodation and food services	795	1030	235	29.6
Other services (except public administration)	370	520	150	40.5
Public administration	795	960	165	20.8

Source: Statistics Canada, Census of Canada, 2001 and 2006

The District of Rainy River has an industrial structure which is somewhat different from that of Northern Ontario. In 2001, the most important difference was the higher percentage of jobs in the manufacturing sector. This was due to the relatively large number of sawmills in the district and the Abitibi Consolidated pulp and paper mill in Fort Frances. The district also had a higher percentage of jobs in agriculture and forestry. The Rainy River valley still was an important agricultural area and forestry jobs served the forest manufacturing operations in the district. Despite the past importance of the former mining town of Atikokan, the district also had fewer jobs in mining industries.

From 2001 to 2006 the most significant employment growth on a percentage basis was found in the category “Other services”. Employment in these industries grew by 40.5%, or by 150 positions. The largest total number of positions added was in accommodation and food service industries which saw 235 new positions. Decline on a percentage basis was highest among information and cultural industries. Employment in this sector decreased by 30%. The industry that lost the most jobs was retail trade where employment decreased by 310 positions.

Table 13: Change in Employment by Industry for the District of Kenora

The District of Kenora	Employment in 2001	Employment in 2006	Change in Empl.	Pct change in Empl.
All industries	29640	30660	1020	3.4
Agriculture, forestry, fishing and hunting	1545	1250	-295	-19.1
Mining and oil and gas extraction	780	1080	300	38.5
Utilities	290	390	100	34.5
Construction	1920	1730	-190	-9.9
Manufacturing	2915	2285	-630	-21.6
Wholesale trade	400	455	55	13.8
Retail trade	3630	3980	350	9.6
Transportation and warehousing	1865	1780	-85	-4.6
Information and cultural industries	280	335	55	19.6
Finance and insurance	565	610	45	8.0
Real estate and rental and leasing	265	315	50	18.9
Professional, scientific and technical services	605	650	45	7.4
Management of companies and enterprises	0	10	10	ERR
Administrative and support, waste management and remediation services	675	695	20	3.0

Educational services	2165	2590	425	19.6
Health care and social assistance	3705	4500	795	21.5
Arts, entertainment and recreation	460	375	-85	-18.5
Accommodation and food services	3145	2660	-485	-15.4
Other services (except public administration)	1050	1290	240	22.9
Public administration	3375	3660	285	8.4

Source: Statistics Canada, Census of Canada, 2001 and 2006

While the differences between the industrial structure of the District of Kenora and that of Northern Ontario were slightly less than that of the District of Rainy River in 2001, there were several significant variations. The District of Kenora had a higher percentage of jobs in public administration. This was probably due to the workers engaged in providing services to the large number of Aboriginal communities in the district. There were also a large number of workers involved in agricultural, forestry, fishing and hunting industries. This was most likely a result of the presence of a large number of Aboriginal communities and the continued importance of hunting and fishing in these communities. The importance of tourism was shown in the higher percentage of jobs in accommodation and food services.

Important changes in employment by industry between 2001 and 2006 were seen in several sectors. Growth on a percentage basis was strongest among mining industries. Employment in this sector increased by 38.5%. In terms of the total number of new jobs, growth was strongest in health care and social assistance. This sector added 795 new jobs to the district economy. On a percentage basis and in terms of total numbers of jobs, the most important decline occurred in manufacturing where employment decreased by 21.6%. This represents a loss of 630 positions.

4.4 The Industrial Structure of Aboriginal Communities in Northern Ontario continue to differs considerably from that of Northern Ontario

While there are few major differences in industrial structure among the individual districts of Northern Ontario, there are very important differences between the industrial structures of Aboriginal communities in the region and Northern Ontario as a whole. Figure 2 compares the combined statistics for all Reserves listed by Statistics Canada for Northern Ontario with that of the industrial structure of Northern Ontario as a whole.[18] The most notable difference is the importance of public administration service employment in these communities. At 26.2 % of all employment, compared to 7.6% for Northern Ontario, it is by far the largest category of employer. The second most important sector in these communities are health and social assistance services, followed by education and construction.

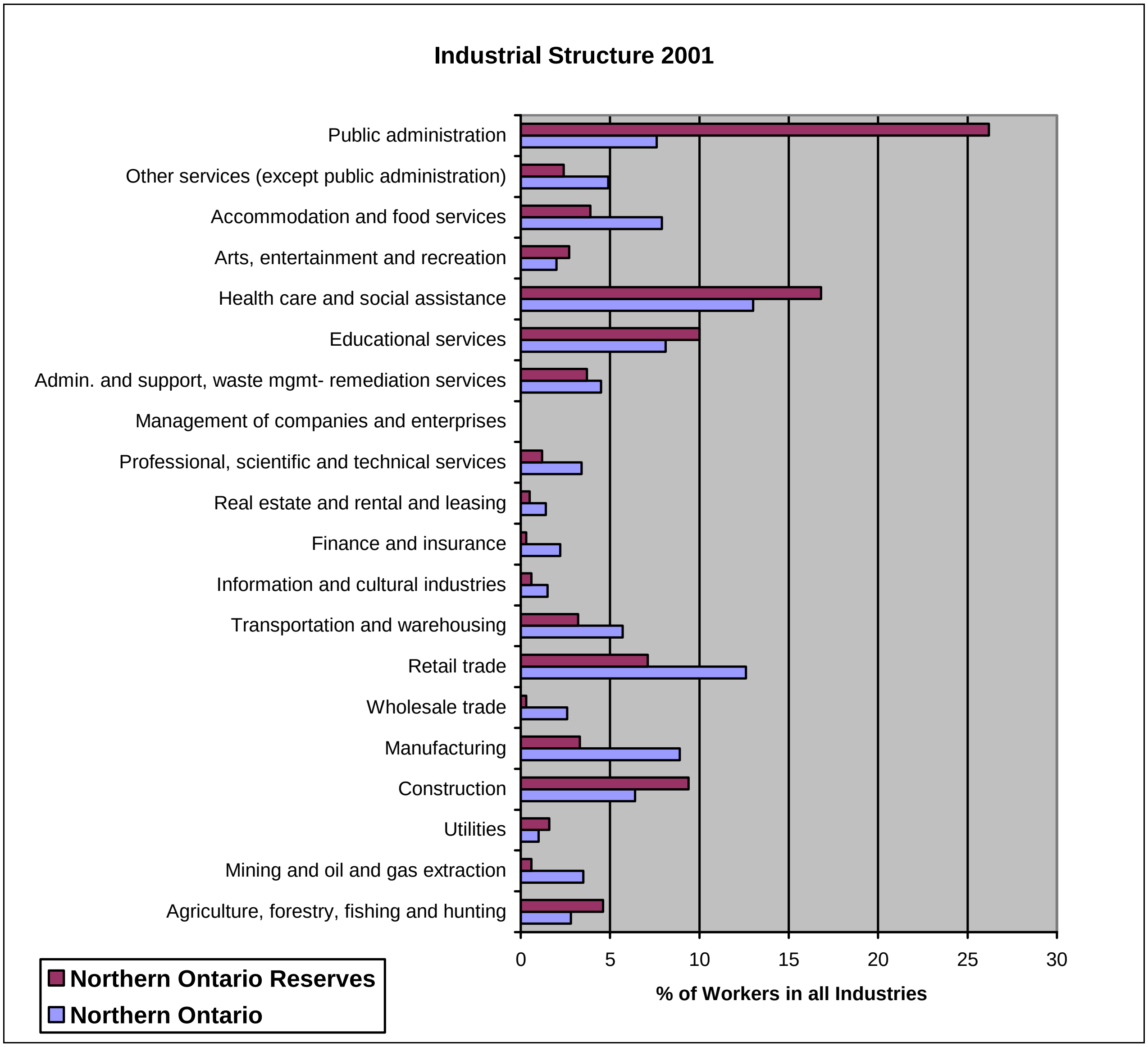

Figure 2: Source: Statistics Canada, Census of Canada, 2006. The figures for Northern Ontario Reserves represent the combined statistics for all Reserves listed by Statistics Canada for Northern Ontario.

Section Five: Comparing the Training Board Areas of Northern Ontario

Table 14: Districts by Industrial Structure: Percentage of Workers 2006

	Primary Resource 1	Manufacturing	Professional Services 2	Public Sector 3	Other 4
Northern Ontario	6.3	8.9	13	28.7	43.1
Local Board #20	2.3	8.6	14.5	24.5	50.0

Local Board #21	7.6	6.6	14.0	28.6	43.1
Local Board #22	3.3	12.2	14.9	27.4	42.2
Local Board #23	11.0	9.9	10.9	25.7	42.4
Local Board #24	5.3	9.4	13.4	30.1	41.8
Local Board #25	7.6	9.1	8.4	33.5	41.3

Source: Statistics Canada, Census of Canada, 2006. 1. Primary Resource industries are those contained in the categories: Agriculture, forestry, fishing and hunting and Mining and oil and gas extraction. 2. Public Sector Service industries are those contained in the categories: Educational services, Health care and social assistance, and Public administration. 3. Professional Service industries are those contained in the categories: : information and cultural industries, finance and insurance industries, real estate and rental and leasing industries, professional, scientific and technical services industries, industries involved in the management of companies and enterprises, and finally, administrative and support and waste management and remediation services. 4. Other industries are those contained in the categories: Utilities, Construction, Wholesale trade, Retail trade, Transportation and warehousing, Arts, entertainment and recreation, Accommodation and food services, and Other services (except public administration).

5.1 The Muskoka, Nipissing, Parry Sound Local Training and Adjustment Board (Board #20)

Table 14 shows the 2006 industrial structure for each of the Local Boards in Northern Ontario. The Board with the highest percentage of jobs in the “Other” industry category is Local Board #20 which includes the District Municipality of Muskoka and the Districts of Parry Sound and Nipissing. The communities in this area are characterized by their relative proximity to the major urban areas of Southern Ontario and by the presence in the area of a large number of seasonal residences.

In terms of its industrial structure, compared to the averages for Northern Ontario this area has less of a dependence on primary resource industries and on public sector industries. In terms of changes from 2001 to 2006, the relative importance of professional service industries has increased by 13.5% over this period. Dependence on manufacturing has decreased by 11.8% and dependence on primary resources has decreased by 10.6%.

Table 15: The Industrial Structure of Communities in Local Board #20: Number of Workers 2006

	Type of Community	Primary Resource	Manufacturing	Prof. Services	Public Sector	Other
Board 20		2115	7865	13215	22305	45440
South Algonquin	TP	100	80	45	90	270
Papineau-Cameron	TP	55	100	35	90	200
Mattawan	TP	0	35	15	35	10
Mattawa	T	100	120	65	180	320
Calvin	TP	35	50	10	50	90
Bonfield	TP	115	120	175	320	310
Chisholm	TP	80	75	85	180	235
East Ferris	TP	50	175	230	615	1105
North Bay	CY	365	1530	4710	7975	12080
West Nipissing / Nipissing Ouest	M	290	390	555	1905	2760

Temagami	MU	0	25	45	65	305
Nipissing 10	R	25	25	55	240	245
Nipissing, Unorganized, North Part	UNO	30	210	95	240	290
Seguin	TP	20	190	320	485	1155
The Archipelago	TP	0	15	30	25	245
McMurrich/Monteith	TP	25	65	55	40	270
Perry	TP	15	195	120	170	515
Kearney	T	10	75	40	45	190
Armour	TP	10	40	85	125	295
Burk's Falls	VL	15	85	55	70	145
Ryerson	TP	0	75	55	40	165
McKellar	TP	10	30	45	150	215
McDougall	MU	0	85	215	400	815
Parry Sound	T	20	225	400	710	1435
Carling	TP	10	30	135	175	230
Whitestone	MU	10	25	10	115	285
Magnetawan	MU	10	65	90	130	410
Strong	TP	30	90	55	155	315
Sundridge	VL	0	20	30	160	165
Joly	TP	10	10	15	20	55
Machar	TP	15	30	75	105	180
South River	VL	0	65	30	115	180
Powassan	MU	110	125	180	485	625
Callander	MU	25	180	205	470	835
Nipissing	TP	40	70	125	180	435
Shawanaga 17	R	10	10	10	50	45
Parry Island First Nation	R	10	0	20	75	110
French River 13	R	0	10	10	10	20
Dokis 9	R	10	0	0	45	45
Magnetewan 1	R	0	0	0	15	0
Parry Sound, Unorganized, North East Part	UNO	0	20	0	35	75
Parry Sound, Unorganized, Centre	UNO	50	75	95	80	580

Part						
Gravenhurst	T	60	535	670	880	3215
Bracebridge	T	50	775	1385	1915	4330
Lake of Bays	TP	30	130	300	365	1085
Huntsville	T	145	1205	1405	1765	5275
Muskoka Lakes	TP	75	225	640	590	2055
Georgian Bay	TP	10	120	105	80	645
Moose Point 79	R	0	10	10	10	60

Source: Statistics Canada, Census of Canada, 2006. For a description of the industrial categories see the notes under table 14.

5.2 The Sudbury and Manitoulin Workforce Partnerships Board Area (Board #21)

Local Board #21, also known as the Sudbury and Manitoulin Workforce Partnerships Board (Board #21), includes the District of Manitoulin, the Greater Sudbury Division, and most of the District of Sudbury. In 2001 this Board area has the lowest percentage of workers employed in manufacturing industries and the highest percentage employed in “professional service” industries.

In 2006 this Board still has the lowest percentage of workers employed in manufacturing but it is now in third place of all the boards in terms of professional service industry employment. It now has the highest percentage of workers employed in primary resource industries. Further comparison with 2001 show that the importance of jobs in public sector services increased by 6.1% while those in primary resource industries increased by 3.5%. The importance of jobs in professional service industries decreased by 7.7% and those in manufacturing decreased by 7.3%.

Table 16: The Industrial Structure of Communities in Local Board #21: Number of Workers 2006

	Type of Communty	Primary Resource	Manufacturing	Professional Services	Public Sector	Other
Board 21		7110	6195	13200	26960	40615
Tehkummah	TP	15	10	20	30	85
Central Manitoulin	TP	25	65	135	240	425
Assiginack	TP	15	20	25	130	205
Northeastern Manitoulin and the Islands	T	85	60	140	345	580
Billings	TP	25	0	35	70	135
Gordon	TP	20	0	10	30	105

Gore Bay	T	30	25	10	115	265
Burpee and Mills	TP	45	10	10	20	40
Barrie Island	TP	10	0	0	10	10
Killarney	MU	20	10	10	45	130
Whitefish River (Part) 4	R	10	10	0	80	50
Sucker Creek 23	R	10	0	10	60	45
Sheguiandah 24	R	0	0	0	35	10
Wikwemikong Unceded	R	65	30	50	460	285
Sheshegwaning 20	R	0	0	0	25	20
M'Chigeeng 22 (West Bay 22)	R	15	10	20	170	150
Manitoulin, Unorganized, West Part		0	-	0	0	0
Zhiibaahaasing 19A (Cockburn Island 19A)	R	0	0	0	10	0
French River / Rivière des Français	MU	120	185	75	205	580
St.-Charles	MU	50	35	55	160	185
Markstay-Warren	MU	120	100	160	235	480
Sables-Spanish Rivers	TP	160	175	120	315	680
Espanola	T	80	495	220	545	1160
Baldwin	TP	10	50	25	35	125
Nairn and Hyman	TP	40	35	10	40	120
Whitefish Lake 6	R	0	0	25	50	55
Sudbury, Unorganized, North Part	UNO	90	110	95	290	580
Duck Lake 76B	R	0	0	0	10	10
Wahnapitei 11	R	0	0	0	0	10
Greater Sudbury / Grand Sudbury	CY	6005	4770	11895	23145	33970

Source: Statistics Canada, Census of Canada, 2006. For a description of the industrial categories see the notes under table 14.

5.3 The Algoma Workforce Investment Committee Area (Local Board Area#22)

Local Board #22 is comprised of most of the District of Algoma. In 2001 the most unique aspects of the industrial structure of this Board area was the fact that it had the highest percentage of workers employed in manufacturing industries and the lowest percentage employed in primary resource industries. This continues to be the case in 2006. In addition, Board 22 now has the highest percentage employed in professional service industries.

When looking at changes between 2001 and 2006 the most significant is a 17.6% increase in the importance of jobs in the professional service industries. The importance of jobs in public sector industries increased by 6.2%. The importance of jobs in manufacturing industries decreased by 16.6% while those in primary resource industries decreased by 14.3%.

Table 17: The Industrial Structure of Communities in Local Board #22: Number of Workers 2006

	Type of Community	Primary Resource	Manufacturing	Prof. Services	Public Sector	Other
Board 22		1775	6635	8140	14945	23010
Jocelyn	TP	0	10	10	30	30
Hilton	TP	0	10	20	10	0
Hilton Beach	VL	0	0	0	20	30
St. Joseph	TP	50	95	40	140	185
Laird	TP	20	80	80	180	265
Tarbutt and Tarbutt Additional	TP	10	20	25	55	50
Johnson	TP	60	20	40	60	70
Plummer Additional	TP	35	30	10	45	145
Bruce Mines	T	10	35	30	55	150
Thessalon 12	R	0	0	0	25	20
Thessalon	T	25	85	70	185	185
Huron Shores	MU	75	105	120	150	340
Blind River	T	90	235	140	555	845
Spanish	T	30	20	30	45	75
North Shore	TP	40	25	40	50	120
Elliot Lake	CY	270	135	470	1125	1755
Macdonald, Meredith and Aberdeen Additional	TP	60	140	75	210	335
Sault Ste. Marie	CY	310	4560	6210	10080	15240
Prince	TP	35	65	95	150	260
Sagamok	R	45	10	35	175	70
Serpent River 7	R	20	0	0	80	25
Mississagi River 8	R	10	15	10	105	50
Garden River 14	R	25	30	35	160	185
Rankin Location 15D	R	10	20	45	85	110
Michipicoten	TP	125	230	145	530	630

Goulais Bay 15A	R	10	0	0	0	20
Gros Cap 49	R	0	0	0	10	0
Dubreuilville	TP	85	190	10	40	135
White River	TP	60	205	30	70	205
Algoma, Unorganized, North Part		240	240	305	480	1385

Source: Statistics Canada, Census of Canada, 2006. For a description of the industrial categories see the notes under table 14.

5.4 The Far Northeast Training Board Area (Board #23)

Local Board #23, also known as the Far Northeast Training Board, comprises the Districts of Cochrane and Timiskaming and small parts of several neighbouring districts. In 2001 the industrial structure of this area was unique in that it had the highest percentage of workers employed in “primary resource” industries of all the Boards in Northern Ontario. It also had the lowest percentage of workers employed in “public sector” service industries.

In 2006 it continues to have the highest percentage of workers employed in “primary resource” industries but it no longer has the lowest percentage of workers employed in “public sector” service industries. In terms of changes since 2001, the importance of jobs in public sector services increased by 5% while those in primary resource industries increased by 2.1%. The importance of employment in manufacturing industries decreased by 11.1%.

Table 18: The Industrial Structure of Communities in Local Board #23: Number of Workers 2006

	Type of Community	Primary Resource	Manufacturing	Prof. Services	Public Sector	Other
Board 23		6450	5770	6385	15040	24795
Mattagami 71	R	10	0	0	35	15
Chapleau 75	R	0	0	0	20	0
Chapleau	TP	90	230	40	360	540
Coleman	TP	20	10	20	10	135
Latchford	T	0	10	10	45	105
Cobalt	T	20	55	35	90	240
Harris	TP	25	40	65	75	125
Temiskaming Shores	CY	225	495	735	1225	2705
Hudson	TP	55	20	20	30	75
Kerns	TP	60	10	10	50	40
Harley	TP	30	25	40	35	190
Casey	TP	55	10	0	105	50
Brethour	TP	15	10	0	0	10
Hilliard	TP	40	15	10	20	40
Armstrong	TP	115	95	30	90	205
Thornloe	VL	0	10	0	0	60
James	TP	35	55	10	20	75
Charlton and Dack	MU	35	30	35	65	140

Evanturel	TP	45	0	35	55	110
Englehart	T	35	65	50	185	265
Chamberlain	TP	50	30	0	30	70
Matachewan 72	R	10	0	0	25	10
McGarry	TP	50	0	25	35	75
Larder Lake	TP	60	0	40	95	80
Gauthier	TP	10	0	0	10	20
Kirkland Lake	T	500	135	325	1380	1260
Timiskaming, Unorganized, West Part	UNO	310	205	140	345	605
Black River-Matheson	TP	215	55	115	340	430
Timmins	CY	2900	1145	3145	5470	9660
Iroquois Falls	T	155	475	170	625	600
Abitibi 70	R	15	0	20	25	10
Cochrane	T	180	440	230	725	1170
Smooth Rock Falls	T	0	195	80	160	215
Fauquier-Strickland	TP	25	40	0	50	160
Moonbeam	TP	65	135	50	135	230
Kapuskasing	T	300	625	305	1000	1790
Val Rita-Harty	TP	45	55	40	140	150
Opasatika	TP	35	10	0	30	70
Hearst	T	235	580	245	605	1345
Mattice-Val Côté	TP	55	85	40	75	125
Cochrane, Unorganized, North Part	UNO	175	180	90	255	530
Constance Lake 92	R	30	40	10	90	50
New Post 69A	R	0	0	0	25	20
Hornepayne	TP	15	110	35	210	315
Peawanuck	S	0	0	10	50	10

Source: Statistics Canada, Census of Canada, 2006. For a description of the industrial categories see the notes under table 14.

5.5 The North Superior Training Board Area (Board #24)

Local Board #24 is also known as the North Superior Training Board. It comprises the District of Thunder Bay and several Aboriginal communities just north of the boundaries of the District of Thunder Bay. In 2001 the industrial structure of this area was very similar to the industrial structure of Northern Ontario as a whole. Its unique characteristic was that it had the lowest percentage of workers in “Other” industries.

In 2006 it continues to have characteristics close to that of the norm for the region. It no longer has the lowest percentage of workers in “Other” industries. The most significant changes in the industrial structure of Board 24 between 2001 and 2006 was that jobs in manufacturing industries decreased by 24.4% while those of primary resource industries decreased by 12.4%.

Jobs in public sector industries increased by 10.4% while those of professional service industries increased by 7.4%.

Table 19: The Industrial Structure of Communities in Local Board #24: Number of Workers 2006

	Type of Community	Primary Resource	Manufacturing	Prof. Services	Public Sector	Other
Board 24		4040	7205	10320	23170	32115
Neebing	MU	100	125	155	295	395
Fort William 52	R	15	20	30	120	160
Thunder Bay	CY	1405	4305	8385	17405	24135
Oliver Paipoonge	MU	380	285	420	770	1485
Gillies	TP	25	25	30	80	145
O'Connor	TP	40	45	50	90	170
Conmee	TP	45	60	30	100	120
Shuniah	TP	55	130	200	370	695
Dorion	TP	60	55	10	70	60
Red Rock	TP	35	170	0	140	100
Nipigon	TP	35	200	60	210	280
Schreiber	TP	0	65	20	105	190
Terrace Bay	TP	55	255	20	215	235
Marathon	T	555	250	200	560	765
Pic Mobert North	R	10	10	0	25	0
Pic Mobert South	R	10	0	0	30	0
Pic River 50	R	30	10	10	80	85
Pays Plat 51	R	0	0	10	0	10
Lake Helen 53A	R	15	15	10	30	50
Manitouwadge	TP	415	45	85	270	415
Ginoogaming First Nation	R	10	25	0	30	20
Long Lake 58	R	0	25	0	70	10
Rocky Bay 1	R	10	10	0	50	10
Greenstone	MU	235	705	165	710	870
Aroland 83	R	20	15	0	60	25
Osnaburgh 63A	R	0	0	10	20	10
Thunder Bay, Unorganized	UNO	420	365	365	885	1485
Whitesand	R	20	0	0	35	20
Fort Hope 64	R	10	0	0	125	60
Webequie	R	0	0	20	90	25
Summer Beaver	S	0	0	0	65	35

Source: Statistics Canada, Census of Canada, 2006. For a description of the industrial categories see the notes under table 14.

5.6 The Northwest Training and Adjustment Board (Board #25)

Local Board #25 is also known as the Northwest Training and Adjustment Board. It is comprised of the District of Rainy River and most of the District of Kenora. In 2006 the distinguishing characteristic of this area's industrial structure was that it had the lowest percentage of employees in the "professional service" industries and the highest percentage of workers in the "public sector" service industries.

In 2006 it continues to have the lowest percentage of employees in professional service industries and the highest percentage of workers in public sector industries. In addition it now has the lowest percentage of employees in "Other" industries and almost the highest percentage of workers in primary resource industries. In terms of changes since 2001, the importance of jobs in public sector services increased by 14.4%. The importance of employment in manufacturing industries decreased by 22.5%.

Table 20: The Industrial Structure of Communities in Local Board #25: Number of Workers 2006

	Type of Community	Primary Resource	Manufacturing	Professional Services	Public Sector	Other
Board 25		3130	3740	3450	13715	16900
Atikokan	TP	115	375	110	480	570
Alberton	TP	10	105	70	135	260
Fort Frances	T	180	550	415	1275	1665
La Vallee	TP	40	120	55	110	280
Emo	TP	45	45	15	190	340
Chapple	TP	110	65	0	75	160
Manitou Rapids 11	R	0	15	10	55	10
Morley	TP	60	15	15	80	110
Dawson	TP	50	20	10	60	135
Rainy River	T	10	20	20	135	195
Lake of the Woods	TP	25	15	0	30	90
Big Grassy River 35G	R	0	0	10	30	10
Saug-a-Gaw-Sing 1	R	0	0	0	10	10
Neguaguon Lake 25D	R	10	0	10	75	20
Rainy Lake 18C	R	0	0	0	20	0
Couchiching 16A	R	0	10	20	180	95
Rainy Lake 26A	R	0	0	0	40	0
Seine River 23A	R	15	0	0	50	30
Rainy Lake 17A	R	0	10	0	50	0
Rainy River, Unorganized	UNO	95	90	55	145	330
Ignace	TP	190	65	75	140	305

Whitefish Bay 32A	R	0	10	30	115	75
Whitefish Bay 33A	R	0	0	10	10	0
Sioux Narrows - Nestor Falls	TP	25	10	40	65	295
Kenora	CY	175	565	880	2710	3815
Machin	TP	60	60	40	100	300
Eagle Lake 27	R	10	0	0	50	30
Dryden	CY	210	595	350	1090	1980
Ear Falls	TP	130	125	35	150	260
Sioux Lookout	MU	105	305	320	1305	1115
Red Lake	MU	915	75	235	580	920
Slate Falls	S	10	0	0	45	0
Pickle Lake	TP	0	0	10	95	165
Marten Falls 65	R	0	0	0	55	10
Cat Lake 63C	R	0	0	0	85	50
Osnaburgh 63B	R	0	0	0	45	30
Lac Seul 28	R	15	10	40	160	140
Wabigoon Lake 27	R	20	10	0	20	10
English River 21	R	10	0	10	140	50
Weagamow Lake 87	R	25	0	25	145	90
Wabaseemoong	R	0	0	20	160	70
Sabaskong Bay 35D	R	10	0	20	80	35
Shoal Lake 34B2	R	0	0	0	35	10
Lake Of The Woods 37	R	0	0	0	0	10
Kenora 38B	R	10	0	0	75	30
Poplar Hill	R	0	0	0	80	30
Shoal Lake (Part) 39A	R	0	0	10	85	35
Deer Lake	R	0	0	10	120	45
Sandy Lake 88	R	10	0	20	280	150
Kitchenuhmaykoosib Aaki 84 (Big Trout Lake)	R	0	0	40	160	110
Sachigo Lake 1	R	0	0	0	100	40
North Spirit Lake	R	0	0	0	85	30
Shoal Lake (Part) 40	R	0	0	0	30	0
Whitefish Bay 34A	R	0	0	0	10	10
Wabauskang 21	R	0	0	0	30	0
Wunnumin 1	R	0	10	10	125	60
Wapekeka 2	R	0	0	10	95	20
The Dalles 38C	R	0	0	0	40	10
Kenora, Unorganized	UNO	345	460	315	965	1780
Neskantaga	R	0	0	0	40	10
Bearskin Lake	R	0	0	10	135	45
Kasabonika Lake	R	0	0	20	135	70

Muskrat Dam Lake	R	0	0	0	75	45
Kingfisher Lake 1	R	10	0	0	100	35
Kee-Way-Win	R	0	0	0	80	30

Source: Statistics Canada, Census of Canada, 2006. For a description of the industrial categories see the notes under table 14.

Section Six: Observations

Trends in 2001	Trends in 2006
The industrial structure of Northern Ontario differs from that of Ontario	The industrial structure of Northern Ontario continues to differs from that of Ontario
Northern Ontario has a higher percentage of primary resource industry jobs	Northern Ontario continues to have a higher percentage of primary resource industry jobs
Northern Ontario has a lower percentage of manufacturing industry jobs	Northern Ontario continues to have a lower percentage of manufacturing industry jobs
Northern Ontario has a higher dependence on "public sector" industries	Northern Ontario continues to have a higher dependence on "public sector" industries
Northern Ontario has a lower percentage of "professional service" industries	Northern Ontario continues to have a lower percentage of "professional service" industries jobs
All districts of Northern Ontario show the same key structural differences from that of Ontario	All districts of Northern Ontario continue to show the same key structural differences from that of Ontario
The industrial structure of Aboriginal communities in Northern Ontario differs considerably from that of Northern Ontario	The industrial structure of Aboriginal communities in Northern Ontario continues to differ from that of Northern Ontario
	Most employment growth was in health care and social assistance and educational services
	Most employment decline was in manufacturing industries and in forestry, agriculture, forestry, fishing and hunting industries

The analysis of the 2006 Census data for labour force participation has shown us several important facts about Northern Ontario. They are as follows:

The Industrial Structure of Northern Ontario differs from that of Ontario

- Northern Ontario continues to have a higher percentage of primary resource industry jobs
- Northern Ontario has a lower percentage of "professional service" industries jobs
- Northern Ontario has a higher dependence on "public sector service" industries
- Northern Ontario continues to have a lower percentage of manufacturing industry jobs

In addition, the period saw some importance fluctuations in employment based on industry.

- Most employment growth was in health care and social assistance and educational services
- Most employment decline was in manufacturing industries and in forestry, agriculture, forestry, fishing and hunting industries

Finally, in terms of comparing internal differences, all districts of Northern Ontario, continue to show the same key structural differences from that of Ontario but changes varied

- The greatest internal differences in industry structure are between Aboriginal communities and the rest of Northern Ontario

Notes

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[1] As this report is being written, the Board #22 area, covering most of the Algoma District, is being represented by the recently established Algoma Workforce Investment Committee.

[2] While most of the statistics will exclude the Muskoka District Municipality, historical data prior to 2006 will sometimes include this region. It should be pointed out that while this inclusion will have a slight effect on the precise calculations, Muskoka's relative small size as a percentage of Northern Ontario's population means that it will have little effect on isolating overall trends.

[3] This has been pointed out by several government studies undertaken over the past 30 years including the Royal Commission on the Northern Environment (Fahlgren Commission). Final Report, Toronto, 1985 and the Task Force on Resource Dependent Communities in Northern Ontario, (the Rosehart Report) Final Report, 1986.

[4] For an elaboration on these points see Dadgostar, B., Jankowski, W.B., and Moazzami, B. The Economy of Northwestern Ontario: Structure, Performance and Future Challenges, Thunder Bay: Centre for Northern Studies, Lakehead University, 1992.

[5] For a detailed discussion of this aspect of Northern Ontario see McBride, Stephen, McKay, Sharon, and Hill, Mary Ellen. "Unemployment in a Northern Hinterland: The Social Impact of Political Neglect" in Chris Southcott (ed.) A Provincial Hinterland: Social Inequality in Northwestern Ontario, Halifax: Fernwood, 1993.

[6] Canada, 2006 Census.

[7]An elaboration on these unique characteristics can be found in Randall, James and R. G. Ironside "Communities on the Edge: An Economic Geography of Resource-Dependent Communities in Canada" The Canadian Geographer 40(10):17-35, 1996.

[8] Census population statistics for Aboriginal communities tend to be less reliable than those for non-Native communities. These statistics are based on 2001 Census data as 2006 data was not available at the time this report was prepared.

[9] Southcott, Chris. The Industrial Structure of Northern Ontario 2001 Census Research Paper Series: Report #6 North Bay: Training Boards of Northern Ontario, 2003. See also Southcott, Chris. A Regional Outlook for Northern Boards: A Northern Approach to Regional Labour Force Development, Dryden: Training Boards of Northern Ontario, 2000, p.5, 6. Blue collar industrial employment includes the following census categories as contained in the 1980 Standard Industrial Categories: Logging and Forestry, Mining and Quarrying, Manufacturing, Construction, Transportation and Storage, Communication and Utilities. Longitudinal consistency requires that the categories of Agriculture and Trapping and Fishing also be included in this definition as the 1986 public profile categories did not separate these categories from Mining and Primary Forestry employment.

[10] Southcott, Chris. A Regional Outlook for Northern Boards: A Northern Approach to Regional Labour Force Development, Dryden: Training Boards of Northern Ontario, 2000, p.6.

[11] See the explanation of sampling error found in the 2001 Census Dictionary. Statistics Canada, 2001 Census Dictionary, Ottawa: Ministry of Industry, 2002, p. 295,296.

[12] See the explanation of random rounding found in the 2001 Census Dictionary. Statistics Canada, 2001 Census Dictionary, Ottawa: Ministry of Industry, 2002, p. 296.

[13] Southcott, Chris. The Industrial Structure of Northern Ontario, 2001 Census Research Paper Series: Report #6, North Bay: Northern Ontario Training Boards, 2003.

[14] Primary Resource industries are those contained in the categories: Agriculture, forestry, fishing and hunting and Mining and oil and gas extraction.

[15] By relative we mean the greatest variation from the provincial norm based on the percentage difference from the norm for that particular category.

[16] See Task Force to Review the Ontario Technology Fund in the Context of an Innovation-Based Society, *Ontario 2002,* Premier's Council on Economic Renewal, 1993, Toronto, p.54-55. The concept is also noted in other popular economic works such as Carnevale, Anthony, *America and the New Economy,* Jossey-Bass, San Francisco, 1991 and Drucker, Peter F., *Post-Capitalist Society,* Harper Business, NewYork, 1993.

[17] Southcott, Chris. A Regional Outlook for Northern Boards: A Northern Approach to Regional Labour Force Development, Dryden: Training Boards of Northern Ontario, 2000, p.6.

[18] Only communities identified as a reserve or Aboriginal settlement (classified as IRI or S-E) are included in these totals. The totals represent the combined statistics for 89 communities.