![Municipality of Trent Lakes logo]

# SITUATIONAL ANALYSIS

for the **Municipality of Trent Lakes**

**McSWEENEY**
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# Situational Analysis

## For the Municipality of Trent Lakes

**July 2022**

**McSWEENEY**
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*Municipality of*
## Trent Lakes

## Population Profile

| Year | Population |
|---|---|
| 2001 | 4,372 |
| 2006 | 5,284 |
| 2011 | 5,100 |
| 2016 | 5,397 |
| 2021 | 6,439 |

**58**
ONTARIO MEDIAN AGE: 41

**52**
ONTARIO AVERAGE AGE: 42

## Highest Education
### Population ages 25-64

| Education | % |
|---|---|
| No certificate, diploma/degree | 12% |
| University diploma/degree - bachelor or above | 14% |
| Apprenticeship/trades certificate/diploma | 15% |
| High school certificate or equivalent | 27% |
| College or other non-university certificate | 29% |

**27%** Secondary | **60%** Post-secondary

## Household & Earnings

**21%** — ONTARIO 28%

of Trent Lakes' populations spend 30% or more of household total income on shelter costs.

Average Dwelling Value **$926,358**
Median Dwelling Value **$800,148**

**99%** Single detached house

**0%** Apartment / detached duplex
**0%** Rowhouse
**0%** Semi-detached house

Total number of households
**3,087**

# Municipality of Trent Lakes
# Economic SNAPSHOT

**Municipality of Trent Lakes**

## Labour Force & Local Economy

### Median Employment Income
## $40,719

### Average Employment Income
## $52,632

**ONTARIO MEDIAN** $37,844
**ONTARIO AVERAGE** $54,047

### PARTICIPATION RATE
**ONTARIO 65.1%** — **52.3%**

### EMPLOYMENT RATE
**ONTARIO 59.2%** — **48.2%**

### UNEMPLOYMENT RATE
**ONTARIO 9.1%** — **7.8%**

## Top 5 Sectors by Industry**

- **Construction**
- **Retail Trade**
- **Health Care & Social Assistance**
- **Professional, Scientific & Technical Services**
- **Educational Services**
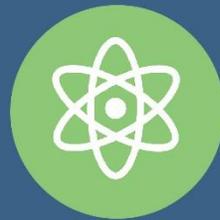
## Top 5 Sectors by Occupation**

- **Trades, Transport & Equipment Operators**
- **Sales & Service**
- **Management**
- **Business, Finance & Administration**
- **Education, Law & Social, Community & Government Services**

** by labour force employment for people living in Trent Lakes.

All data sourced from Manifold SuperDemographics 2022, unless otherwise specified.

# DATA SOURCES

Please note that every effort has been made to use the most current data available. There are four major sources of information for the remainder of this document:

- The 2001 to 2021 Census from Statistics Canada.
- Canadian Business Registry (CBR) – December 2021
- SuperDemographics 2022 from Manifold Data Mining Inc.
- EMSI Analyst 2022.Q1

## Canadian Business Registry (CBR)

The major sources of information for the business registry are updated from the Statistics Canada survey program and Canada Revenue Agency's (CRA) Business Number account files. This CRA administrative data source allows for the creation of a complete set of all business entities.

## Manifold Projection Method

Production of 2022 Demographic data estimates is partially based on population statistics collected by the Statistics Canada Census Program. Manifold estimates demographic data annually, including population projections for 5 and 10 years in the future. Manifold methodologies are based on the following techniques:

- Enhanced cohort survival methods;
- Nearest neighbourhood and regression techniques; and
- Structural coherence techniques.

| Manifold Data Sources include: | |
|---|---|
| Statistics Canada | Real Estate Boards/Companies |
| Health Canada | Canadian Bankers Association |
| Regional Health Ministries | Bank of Canada |
| Citizenship and Immigration Canada | Canada Post Corporation |
| Regional School Boards | Consumer and business directories books |
| Flyer Distribution Association | Proprietary survey and research |
| Publication of hospitals, CMHC, BBM and partners | |

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## EMSI Analyst

EMSI data brings the various snapshots of the Canadian economy together in a single picture. First, it aligns the geographies of the data from 2001 to the present, which means the Municipality of Trent Lakes of 2001 is the same as the Municipality of Trent Lakes (Hereafter referred to as Trent Lakes) of 2021. This results in geographically detailed data (down to the Census Subdivision level) that apply to today's economy.

The data is remarkably detailed, providing information on 305 industry classifications using the North American International Classification System (NAICS) system and 522 occupations from Statistics Canada's National Occupational Classification (NOCs) classification system in over 4,300 integrated geographical areas. The data is updated twice a year, so users have the most current information possible. And to top it all off, it adds 10-year projections based on the CBR data so that it provides an idea of the future alongside the past and present.

| EMSI Data Sources include: |
| --- |
| Canadian Business Registry (CBR) |
| 2001, 2006, and 2011, 2016 Census data |
| Survey of Employment, Payroll and Hours (SEPH) |
| Labour Force Surveys (LFS) |
| Canadian Occupational Projection System (COPS) |
| CANSIM Demographics |
| Post-secondary Student Information System (PSIS) Education Data |

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# 1.  DEMOGRAPHIC ANALYSIS

## 1.1.    Population Growth

This subsection illustrates population characteristics for the Municipality of Trent Lakes. The wider economic landscape relevant to the region is explored by using **Ontario as a benchmark.**

Table 1 illustrates population changes in Trent Lakes from 2011 to 2036, with Census years compared to Ontario. The census population in Trent Lakes declined slightly from 2006 to 2011 (-3.48%) but subsequently grew by 26.3% over the ensuing decade, from 5,100 residents to 6,439. Over the fifteen years, Trent Lakes' population is projected to grow at a slower pace, but still cross over 7,000 residents by 2031.[1]

Table 1: Population Change, Trent Lakes and Ontario, 2011-2036

|  | 2011 | 2016 | 2021 | 2026 | 2031 | 2036 |
|---|---|---|---|---|---|---|
| Trent Lakes Population Count | 5,100 | 5,397 | 6,439 | 6,820 | 7,000 | 7,050 |
| % Change | -3.48% | 5.82% | 19.31% | 5.92% | 2.64% | 0.71% |
| Ontario Population Count | 12,851,821 | 13,448,494 | 14,223,942 | N/A[2] | N/A | N/A |
| % Change | 5.70% | 4.60% | 5.77% | ---- | ---- | ---- |

Source: Statistics Canada Census Profiles 2011-2021; 2021-2036 Growth: Peterborough County Official Plan (Growth Analysis Report)

# The population in Trent Lakes is projected to grow by 9.5% between 2021 and 2036

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[1] Data for Table 1 projections rely on the Official Plan for Peterborough County and the population projections used therein regarding the Municipality of Trent Lakes. Population snapshots and breakdowns throughout the remainder of the document rely on Manifold estimates and should not be directly compared with these population figures.

[2] Please note Ontario projection figures are not comparable to Trent Lakes projection figures due to differing methodologies and datasets.

Figure 1 contrasts the age profile of residents in Trent Lakes and Ontario, in 2022. Trent Lakes has a lower percentage of youth and young adults (those under 50), compared to Ontario, compared to a much larger older population (50+ individuals).

Figure 1: Percent Population by Age, Trent Lakes vs. Ontario, 2022
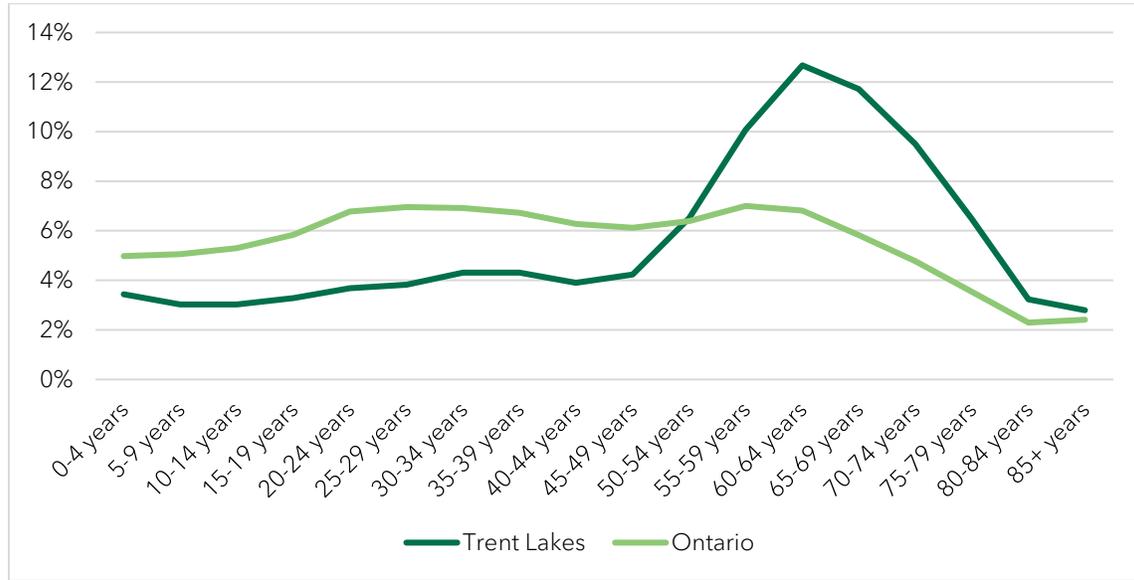


Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022

Overall, Trent Lakes' working-age population (ages 15-64, 56.8%) is slightly lower than Ontario's (65.8%). However, Trent Lakes' median (58, compared to 41 for Ontario) and average (52, compared to 42 for Ontario) ages are significantly higher than Ontario's.

| 2022 Age Profile Snapshot[3] | | |
|---|---|---|
| Age Group | Trent Lakes | Ontario |
| 0-14 | 9.5% | 15.3% |
| 15-64 | 56.8% | 65.8% |
| 65+ | 33.7% | 18.8% |

Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022

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[3] Please note, throughout the document various totals may not add up to 100%, and subtotals may not add up to broader totals. These discrepancies are due to methodological rounding.

The median age of Trent Lakes' male population is identical to the female population, 58.2.

| 2022 Trent Lakes Age Profile Snapshot | | |
|---|---|---|
| Age Group | Male | Female |
| 0-14 | 9.6% | 9.3% |
| 15-64 | 56.6% | 57.0% |
| 65+ | 33.8% | 33.7% |

Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022

## 1.2.   Income, Households and Attainability

This subsection describes income, households and housing costs of the population. This information is relevant within the context of economic development planning because it provides an understanding of whether a region has attainable housing for resident labour – a key factor in residential and labour force attraction and retention. With regards to employment income, the following observations can be made[4]:

■ In 2021, Trent Lakes' median employment income was $40,719, 8% higher than in Ontario ($37,844).

■ In 2020, the average employment income for Trent Lakes residents was $52,632, 3% lower than in Ontario ($54,047).

Figure 2 illustrates the distribution of household incomes. Approximately 66.6% of households in Trent Lakes earn less than $100,000, compared to 62.9% in Ontario.

■ Median household total income in Trent Lakes: $77,755 vs. $84,052 in Ontario.

■ Average household total income in Trent Lakes: $102,979 vs. $109,992 in Ontario.

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[4] As noted previously, all income data uses the year previous; therefore 2022 data uses 2021 incomes.

Figure 2: Household Income Levels by Percentage of the Population, 2021
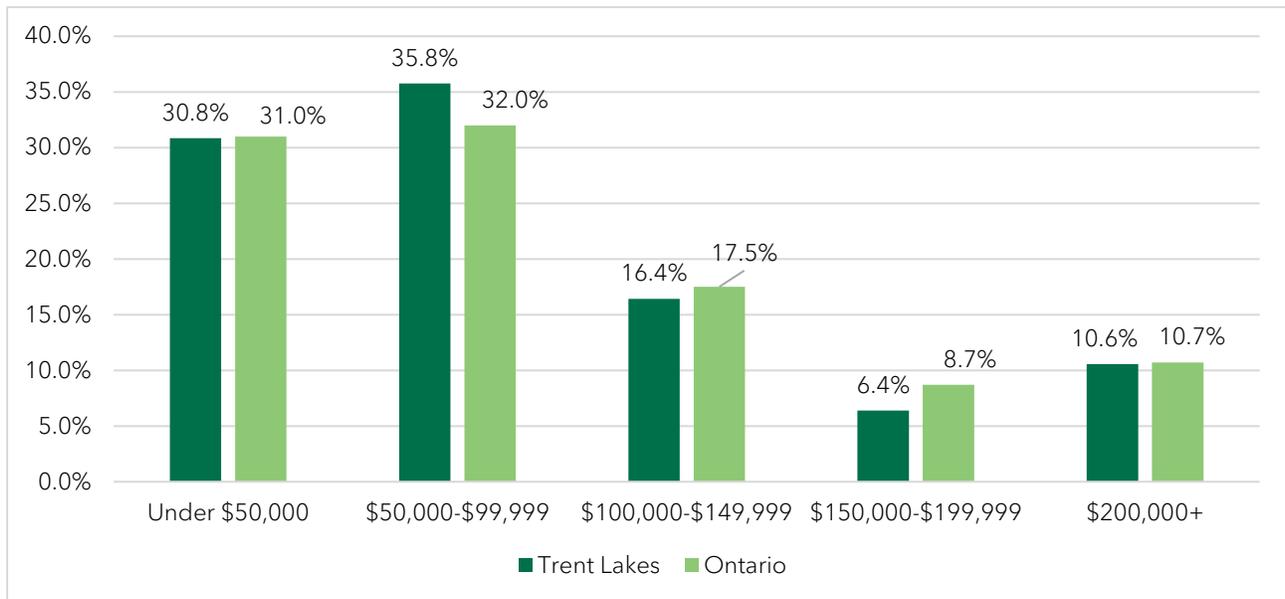


Source: Manifold Data Mining Inc. 2022 (2021 incomes).

On average, the residents in Trent Lakes have slightly lower levels of employment and household income compared to Ontario. These communities, though, offer more favourable costs of housing. Table 2 and Figure 3 highlight key housing characteristics. Compared to Ontario, Trent Lakes has a lower cost of housing (except for median rented dwelling costs) and fewer residents spend over 30% of their total income on shelter costs. At the same time, Trent Lakes sees significantly less variety in housing stock, with essentially all housing options being single detached homes (see Figure 3).

Table 2: Households and Dwelling Attainability, 2022

| Housing Characteristics | Trent Lakes | Ontario |
|---|---|---|
| Total Number of Households | 3,087 | 5,745,955 |
| Average value of dwelling ($) | $926,358 | $1,021,430 |
| Median value of dwellings ($) | $800,148 | $860,457 |
| Median monthly shelter costs for rented dwellings ($) | $1,218 | $1,108 |
| Average monthly shelter costs for rented dwellings ($) | $1,174 | $1,220 |
| % of households owned | 95% | 70% |
| % of households rented | 5% | 30% |
| Average number of persons in private households | 2.18 | 2.57 |
| Population spending 30% or more of household total income on shelter costs | 21% | 28% |

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics. 2022

Figure 3: Occupied Dwellings by Structure Type, 2022
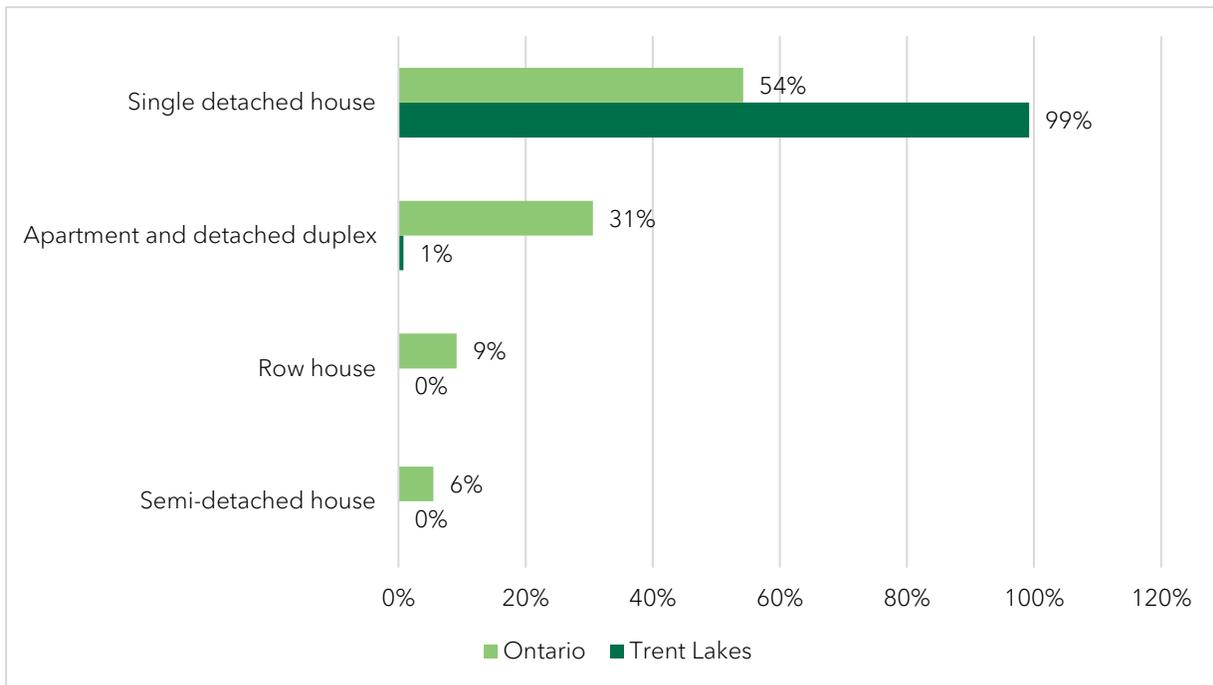


Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics. 2022

## 1.3.    Education, Skills and Training

This subsection reviews the level of education and major fields of study for residents of Trent Lakes and Ontario. Figures 4 and 5 outline the education levels obtained by Trent Lakes residents ages 25-64, as compared to Ontario. Definitions may be found in the footnote.

**Figure 4: Educational Attainment Breakdown, Residents Ages 25 to 64, 2022[5]**



| Category | Ontario | Trent Lakes |
|---|---|---|
| No certificate, diploma or degree | 11% | 12% |
| High school certificate or equivalent | 25% | 27% |
| Apprenticeship or trades certificate or diploma | 6% | 15% |
| College or other non-university certificate or degree | 24% | 29% |
| University certificate, diploma or degree | 32% | 16% |
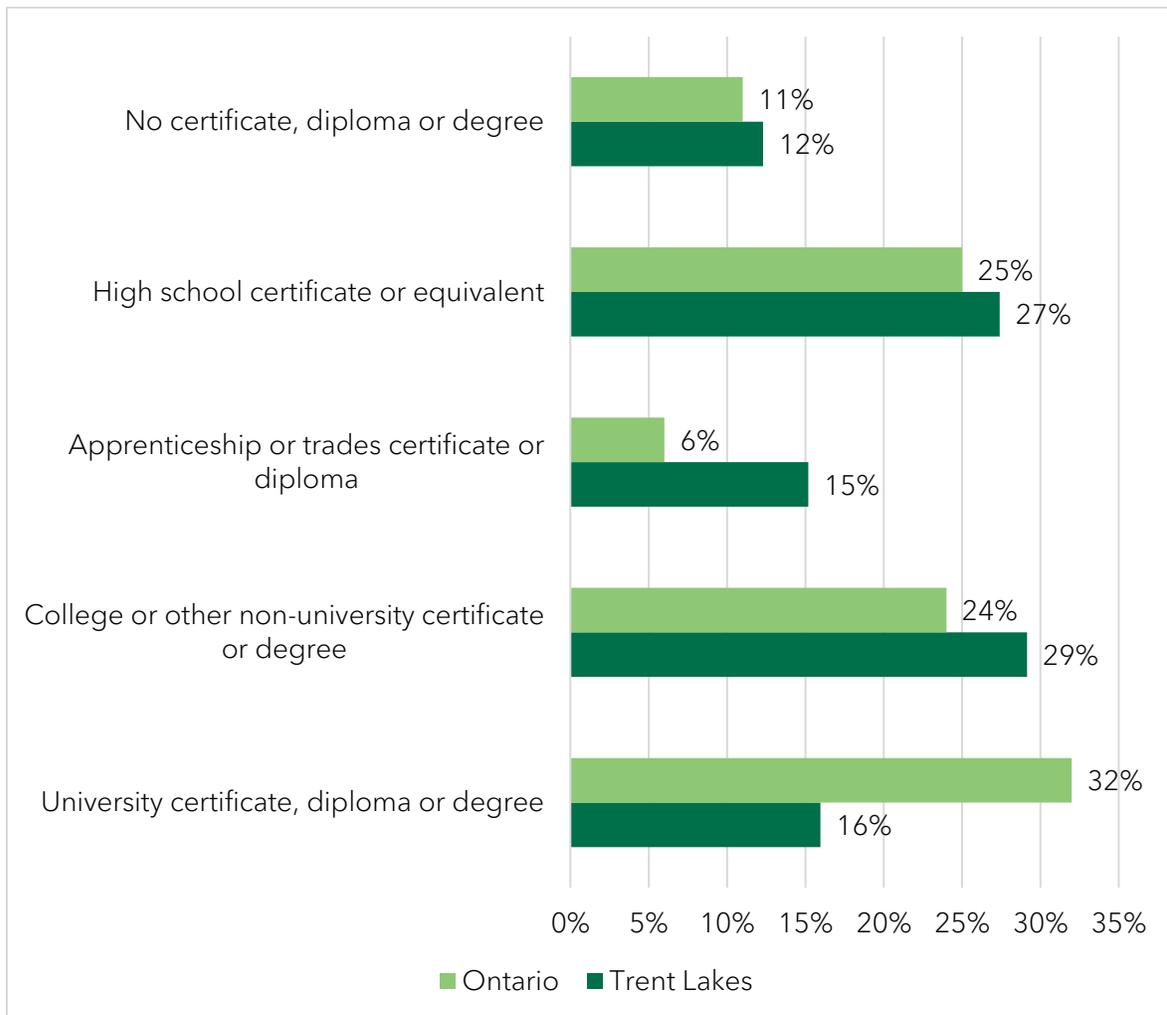
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2022

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[5] 'High school diploma or equivalent' includes persons who have graduated from a secondary school or equivalent. It excludes persons with a post-secondary certificate diploma or degree.

'Post-secondary certificate diploma or degree' includes 'apprenticeship or trades certificates or diplomas' 'college CEGEP or other non-university certificates or diplomas' and university certificates diplomas and degrees.

'Apprenticeship or trades certificate or diploma' includes Registered Apprenticeship certificates

'University certificate diploma or degree includes the categories 'University certificate or diploma above bachelor level' 'Degree in medicine dentistry veterinary medicine or optometry' 'Master's degree' and 'Earned doctorate.'

Figure 5 illustrates the post-secondary educational attainment of Trent Lakes residents ages 25 to 64. Based on Figure 5, it can be concluded that:

- A total of 2,044 residents aged 25 to 64 have post-secondary education.
- A college degree is the most common type of education; attained by 48% (attained by 988 residents) of residents with a post-secondary education, aged 25 to 64.

Figure 5: Percentage of Residents aged 24- 65 with Post-Secondary Attainment, 2022
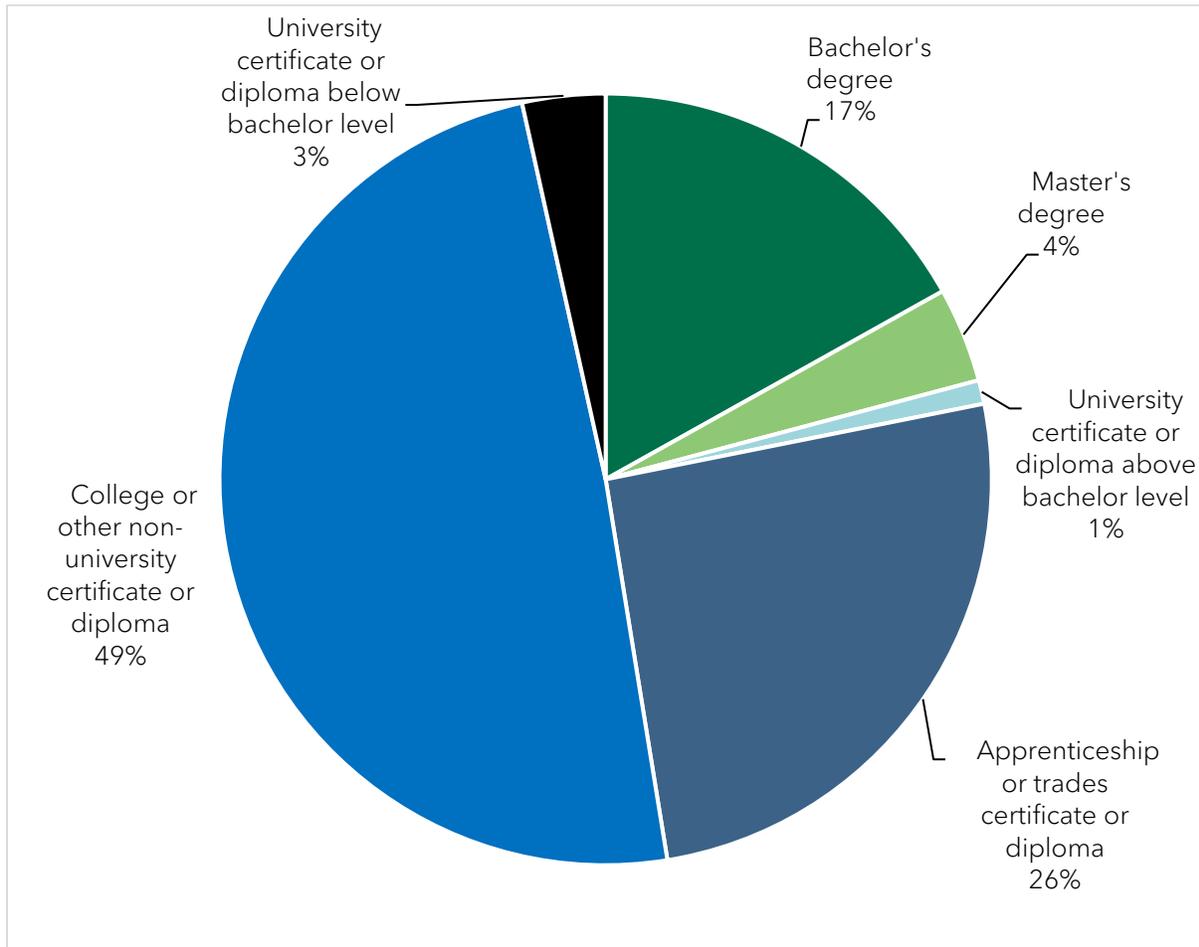


Source: McSweeney & Associates from Manifold SuperDemographics 2022

Table 3 illustrates the major fields of study[6] for all residents 15 years and older. It is collected for the highest certificate, diploma or degree above the secondary school level. The largest field of study in the population is 'Business, management, marketing and related support'; and 'Health professions and related programs'.

Table 3: Post-Secondary Major Field of Study, Trent Lakes, 2022

| Classification of Instructional Programs (CIP) | Total | Female | Male |
|---|---|---|---|
| Total | 6,156 | 3,031 | 3,124 |
| No postsecondary certificate, diploma or degree | 2,739 | 1,328 | 1,411 |
| 52. Business, management, marketing and related support services | 485 | 310 | 176 |
| 51. Health professions and related programs | 447 | 410 | 37 |
| 47. Mechanic and repair technologies/technicians | 298 | 12 | 286 |
| 46. Construction trades | 237 | 2 | 235 |
| 13. Education | 235 | 194 | 41 |
| 15. Engineering technologies and engineering-related fields | 153 | 12 | 141 |
| 12. Personal and culinary services | 145 | 122 | 23 |
| 50. Visual and performing arts | 136 | 82 | 54 |
| 45. Social sciences | 108 | 57 | 51 |
| 43. Security and protective services | 98 | 33 | 66 |
| 49. Transportation and materials moving | 90 | 4 | 86 |
| 11. Computer and information sciences and support services | 84 | 42 | 42 |
| 48. Precision production | 83 | 1 | 82 |
| 01. Agriculture, agriculture operations and related sciences | 78 | 16 | 62 |
| 22. Legal professions and studies | 73 | 57 | 16 |
| 14. Engineering | 67 | 7 | 61 |
| 44. Public administration and social service professions | 67 | 60 | 8 |
| 19. Family and consumer sciences/human sciences | 59 | 58 | 1 |
| 42. Psychology | 57 | 40 | 17 |
| 03. Natural resources and conservation | 51 | 16 | 35 |
| 26. Biological and biomedical sciences | 48 | 24 | 24 |
| 23. English language and literature/letters | 45 | 34 | 11 |
| 31. Parks, recreation, leisure and fitness studies | 38 | 9 | 30 |
| 24. Liberal arts and sciences, general studies and humanities | 35 | 20 | 15 |
| 40. Physical sciences | 33 | 8 | 25 |
| 39. Theology and religious vocations | 29 | 15 | 15 |
| 54. History | 28 | 22 | 6 |
| 09. Communication, journalism and related programs | 24 | 8 | 15 |
| 10. Communications technologies/technicians and support services | 20 | 6 | 14 |
| 27. Mathematics and statistics | 13 | 0 | 13 |
| 05. Area, ethnic, cultural, gender, and group studies | 13 | 13 | 0 |
| 04. Architecture and related services | 11 | 0 | 11 |

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2022

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[6] 'Major Field of study' is defined by Classification of Instructional Programs (CIP) 2016 for the population aged 15 years and over in private households. It is collected for the highest certificate, diploma or degree above the high school or secondary school level: www.statcan.gc.ca/concepts/classification-eng.htm.

# 2. LABOUR FORCE PROFILING & ANALYSIS

## 2.1. Key Indicators

**Trent Lakes has a labour force of 3,224 individuals.** Trent Lakes has lower participation, employment, and unemployment rates relative to Ontario.

This is to be expected given the general older population in Trent Lakes, as it suggests that many residents are outside the labour force and uninterested in pursuing employment.

Table 4: Key Labour Force Statistics by Gender, Trent Lakes, 2022

| Labour Force Activity | Trent Lakes | | | Ontario | | |
|---|---|---|---|---|---|---|
| | Total | Male | Female | Total | Male | Female |
| Total population 15 years and over | 6,156 | 3,124 | 3,031 | 12,701,375 | 6,183,030 | 6,518,345 |
| In the labour force | 3,224 | 1,728 | 1,496 | 8,275,729 | 4,284,717 | 3,991,011 |
| Employed | 2,970 | 1,644 | 1,326 | 7,521,911 | 3,912,075 | 3,609,836 |
| Unemployed | 254 | 83 | 170 | 753,818 | 372,643 | 381,175 |
| Not in the labour force | 2,932 | 1,397 | 1,535 | 4,425,647 | 1,898,313 | 2,527,334 |
| Participation rate % | 52.4 | 55.3 | 49.4 | 65.2 | 69.3 | 61.2 |
| Employment rate % | 48.3 | 52.6 | 43.7 | 59.2 | 63.3 | 55.4 |
| Unemployment rate % | 7.9 | 4.8 | 11.4 | 9.1 | 8.7 | 9.6 |

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2021

# Trent Lakes has a significantly smaller participation rate than Ontario.

Key labour force indicators can be further broken down by age and sex and used to highlight underemployed/underutilized labour groups. Trent Lakes has a low youth unemployment rate, being nearly 10 percent lower than the provincial rate (19.5% provincially compared to 10.1% locally). The gap is wider for males (13.1% lower than the provincial rate) than for females (only 3.9% lower). These data suggest that the majority of young residents who are looking for work can find suitable employment.

Figure 6 illustrates that youth (ages 15 to 24) in Trent Lakes are actively engaged in the labour force compared to youth in Ontario, evidenced by a participation rate (76.0% locally) that is 14% higher than the provincial mark.

**Figure 6: Labour Force Statistics by Gender, Population 15 to 24, 2022**
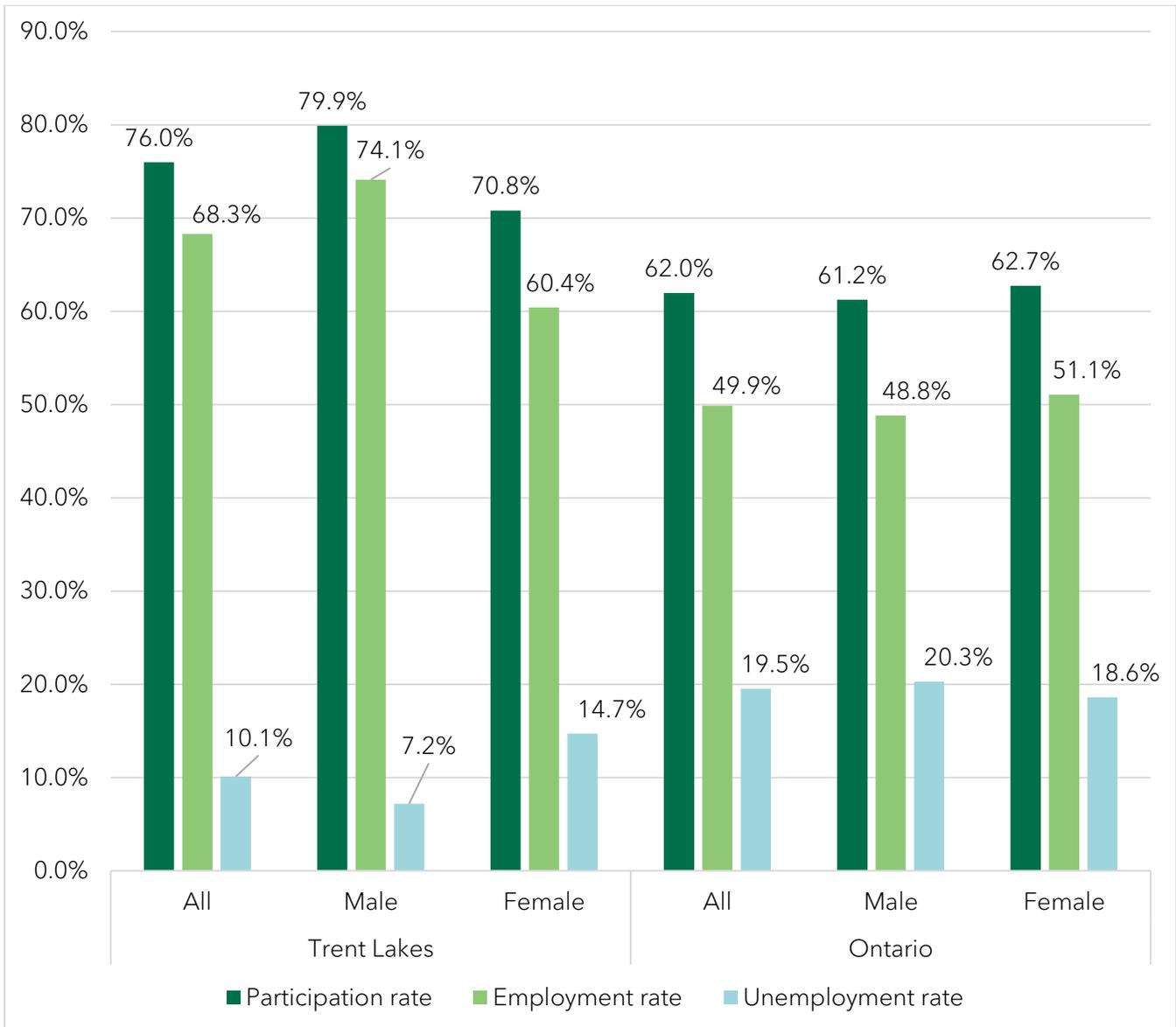


Source: Manifold SuperDemographics 2022

The following table illustrates labour force characteristics for youth (15 to 24) and mature adults (25 and older) in Trent Lakes, benchmarked against Ontario data.

Table 5: Labour Force Characteristics by Age and Sex, 2022

| | Population 15 to 24 years old: | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| | Trent Lakes | | | Ontario | | |
| | Total | Male | Female | Total | Male | Female |
| Participation rate (%) | 76.0 | 79.9 | 70.8 | 62.0 | 61.2 | 62.7 |
| Employment rate (%) | 68.3 | 74.1 | 60.4 | 49.9 | 48.8 | 51.1 |
| Unemployment rate (%) | 10.1 | 7.2 | 14.7 | 19.5 | 20.3 | 18.6 |
| | Population 25 years and over: | | | | | |
| | Trent Lakes | | | Ontario | | |
| | Total | Male | Female | Total | Male | Female |
| Participation rate (%) | 50.4 | 52.9 | 47.9 | 65.7 | 70.8 | 61.0 |
| Employment rate (%) | 46.6 | 50.6 | 42.6 | 60.9 | 66.0 | 56.1 |
| Unemployment rate (%) | 7.6 | 4.5 | 11.0 | 7.4 | 6.8 | 8.0 |

Source: Manifold SuperDemographics, 2022

## 2.2. Labour Supply in Trent Lakes

Persons in the labour force can be classified using the National Occupational Classification (NOCs) codes; a four-tiered hierarchical arrangement of occupational groups with successive levels of disaggregation. It contains broad occupational categories (1-digit), major (2-digit code), minor (3-digit code) and unit groups (4-digit code).
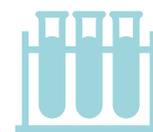
Figure 7 shows that Trent Lakes residents most commonly work in:

- Trades, transport and equipment operators and related occupations
- Sales and service occupations
- Management occupations
- Business, finance and administration occupations

Figure 7: Resident Labour Force by Occupation, 1-digit NOCs, 2022
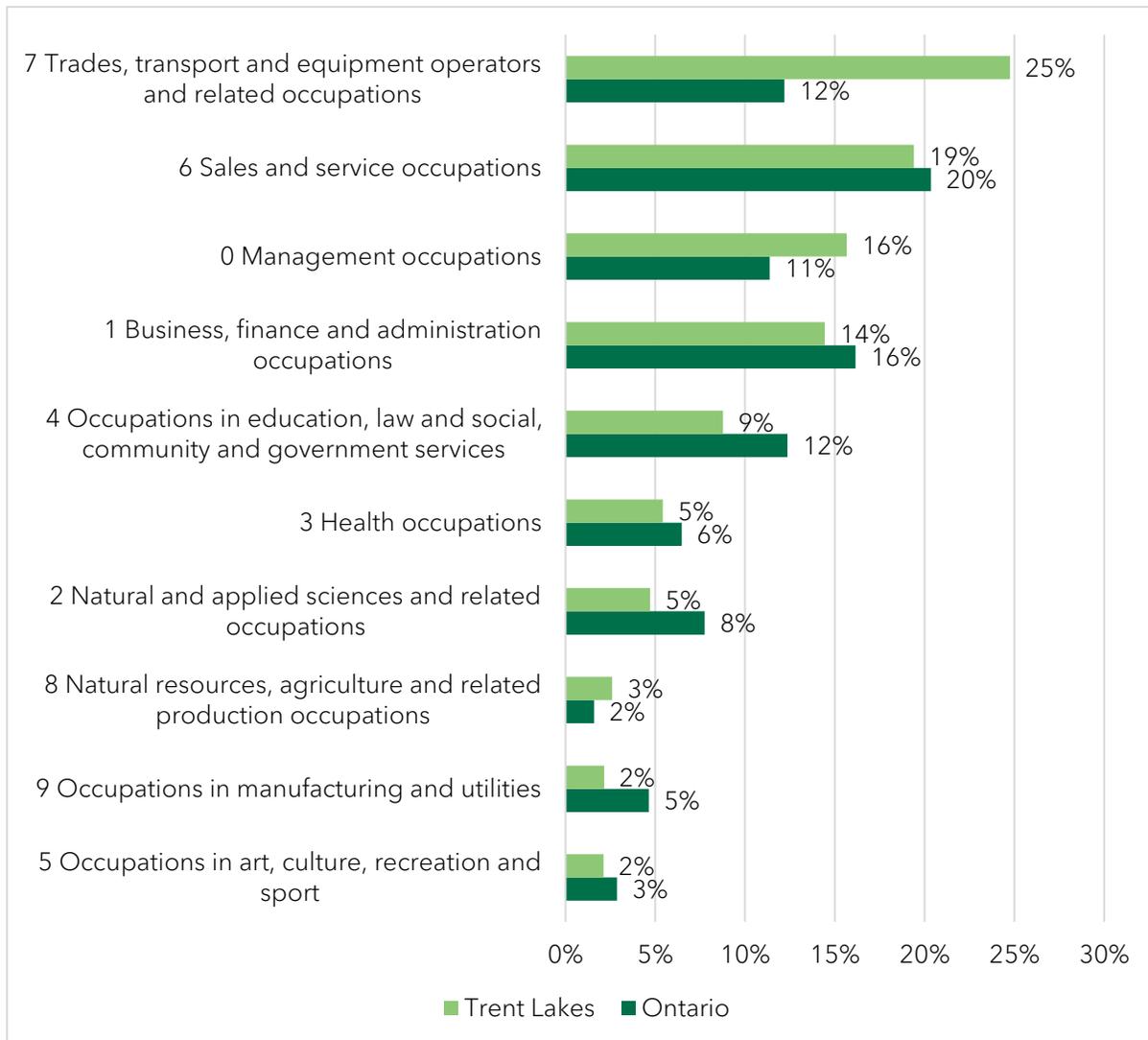


Source: Manifold SuperDemographics 2022

The number of part-time and full-time workers also helps identify potential labour force engagement and supply. In Trent Lakes, 49.8% of employed individuals typically worked full-time while 50.2% worked part-time. This is slightly less than all of Ontario where 52.5% of individuals typically worked full-time and 47.4% worked part-time.

Table 6: Percentage of Employed Individuals by Full-Time or Part-Time Status, 2022

| Status | Trent Lakes | Trent Lakes % | Ontario % |
|---|---|---|---|
| Full-Time | 1,730 | 49.8% | 52.5% |
| Part-Time | 1,743 | 50.2% | 47.5% |

Source: Manifold SuperDemographics 2022

The following figure illustrates the supply of labour that Trent Lakes residents provide for specific sectors. Trent Lakes has larger labour concentrations relative to Ontario in several sectors, but most prominently in construction and retail trade. Concentrations are explored in-depth in section 3.4.

**Figure 8: Labour Force by Industry, 2022**

| Industry | Trent Lakes | Ontario |
|---|---|---|
| 23 Construction | 13.9% | 6.6% |
| 44-45 Retail trade | 13.2% | 11.2% |
| 62 Health care and social assistance | 8.7% | 10.8% |
| 54 Professional, scientific and technical services | 6.7% | 8.6% |
| 61 Educational services | 6.3% | 8.0% |
| 31-33 Manufacturing | 6.2% | 9.7% |
| 56 Administrative and support, waste management and remediation services | 5.3% | 4.6% |
| 72 Accommodation and food services | 5.1% | 5.6% |
| 91 Public administration | 4.9% | 6.2% |
| 81 Other services (except public administration) | 4.9% | 4.1% |
| 48-49 Transportation and warehousing | 4.9% | 4.6% |
| 52 Finance and insurance | 4.2% | 6.0% |
| 41 Wholesale trade | 3.5% | 4.1% |
| 71 Arts, entertainment and recreation | 3.2% | 2.1% |
| 11 Agriculture, forestry, fishing and hunting | 2.6% | 1.5% |
| 21 Mining, quarrying, and oil and gas extraction | 2.4% | 0.5% |
| 53 Real estate and rental and leasing | 2.0% | 2.4% |
| 22 Utilities | 1.1% | 0.9% |
| 51 Information and cultural industries | 0.9% | 2.4% |
| 55 Management of companies and enterprises | 0.0% | 0.2% |

■ Trent Lakes   ■ Ontario

Source: Manifold SuperDemographics 2022

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## 2.3.  Labour Market Gaps/Surpluses

Labour market gaps/surpluses are a measure of how well local labour supply meets local demand. Total occupational demand is difficult to map, as businesses change and alter demand based on a variety of factors (i.e., season, economic/financial outlook, technology, resource availability, etc.). The total number of jobs is used as a proxy for current occupational demand. Similarly, labour supply for a given occupation can be difficult to calculate since skills could be considered adaptable and could supply several occupations. Here, the resident labour force that has worked in an occupation (it is their current position or the position of the longest duration in the past year), is used as a proxy for local occupational supply.

The labour market gap/surplus is defined as the difference between the number of jobs (i.e., demand by occupation) in Trent Lakes and the number of workers living in Trent Lakes that worked/work in that occupation (i.e., local supply). There are more workers than jobs in Trent Lakes, making the area a net exporter of labour. In Trent Lakes, there is a net deficit of approximately 2,234 jobs.

An occupation where the number of jobs in the local economy is less than the number of workers is considered to have a labour surplus. In Trent Lakes, two sectors have labour surpluses of over 400 individuals:

- 7 Trades, transport and equipment operators and related occupations (573 more residents working in the sector, compared to the number of jobs)

- 0 Management occupations (404)

In Trent Lakes, there are no occupations with labour market gaps – where there are more jobs than workers available in the local economy:

These surpluses are only an approximation since local demand could be higher than the total number of jobs (i.e., there may be unfilled positions), and supply could be higher if we account for persons who have transferable skills and could potentially fill other occupations. Nevertheless, the results in the table below indicate the direction and magnitude of local labour market imbalances.

Table 7: Labour Market Gaps/Surpluses by Occupation, 1-digit NOCs, 2022[7]

| Occupation Group (1-digit NOCs code) | Trent Lakes Residents Working in Occupation | Jobs in Trent Lakes | Gap (-)/ Surplus (+) |
|---|---|---|---|
| 0 Management occupations | 489 | 85 | 404 |
| 1 Business, finance and administration occupations | 451 | 102 | 349 |
| 2 Natural and applied sciences and related occupations | 147 | 78 | 69 |
| 3 Health occupations | 169 | <10 | N/A |
| 4 Occupations in education, law and social, community and government services | 274 | 81 | 193 |
| 5 Occupations in art, culture, recreation and sport | 66 | 42 | 24 |
| 6 Sales and service occupations | 606 | 286 | 320 |
| 7 Trades, transport and equipment operators and related occupations | 773 | 200 | 573 |
| 8 Natural resources, agriculture and related production occupations | 81 | 74 | 7 |
| 9 Occupations in manufacturing and utilities | 67 | 27 | 40 |
| N/A or Unclassified | 101 | <10 | N/A |
| Total Labour Force 15 years and older | 3,224 | 990 | 2,234 |

Source: EMSI Analyst 2022.1 and Manifold SuperDemographics 2022

The same type of analysis can be done for labour supply and demand for local industries. The industries with the largest labour surpluses (Table 8) are:

- Retail trade (314 additional workers than positions)
- Manufacturing (293)
- Health care and social assistance (233)

These are industries that could be further attracted into the local economy, as they can be well supported by the local workforce. Conversely, where the municipality has a labour shortage (i.e., administrative and support, waste management and remediation services) it could present a challenge in terms of developing these industries further, as Trent Lakes will be competing with surrounding economic areas to attract this labour.

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[7] Due to privacy protocols, for occupations with fewer than 10 positions, a specific number is not presented and is instead presented as "<10".

Table 8: Labour Market Surplus by Sector, 2022

| Sectors | Trent Lakes Residents Working in industry | Jobs in Trent Lakes | Gaps (-) / Surpluses (+) |
|---|---|---|---|
| 11 Agriculture, forestry, fishing and hunting | 80 | 21 | 59 |
| 21 Mining, quarrying, and oil and gas extraction | 74 | 28 | 46 |
| 22 Utilities | 34 | 2 | N/A |
| 23 Construction | 433 | 140 | 293 |
| 31-33 Manufacturing | 193 | 39 | 154 |
| 41 Wholesale trade | 109 | 6 | N/A |
| 44-45 Retail trade | 413 | 99 | 314 |
| 48-49 Transportation and warehousing | 153 | 0 | 153 |
| 51 Information and cultural industries | 29 | 0 | 29 |
| 52 Finance and insurance | 132 | 6 | N/A |
| 53 Real estate and rental and leasing | 63 | 18 | 45 |
| 54 Professional, scientific and technical services | 210 | 148 | 62 |
| 55 Management of companies and enterprises | 0 | 0 | 0 |
| 56 Administrative and support, waste management and remediation services | 167 | 220 | -53 |
| 61 Educational services | 196 | 30 | 166 |
| 62 Health care and social assistance | 271 | 38 | 233 |
| 71 Arts, entertainment and recreation | 99 | 73 | 26 |
| 72 Accommodation and food services | 160 | 64 | 96 |
| 81 Other services (except public administration) | 153 | 32 | 121 |
| 91 Public administration | 154 | 17 | 137 |
| N/A or unclassified | 101 | 9 | N/A |
| Total Labour Force 15 years and older | 3,224 | 990 | 2,234 |

Source: EMSI Analyst 2022.1 and Manifold SuperDemographics 2022

## 2.4. Workforce Commuting Flow

This subsection aims to identify the most probable labour force recruitment area for Trent Lakes using commuting patterns. Tables 9 and 10 show commuting flows for persons reporting a **"usual place of work"** or **"place of residence"** in Trent Lakes, and reveal the following trends regarding labour force commuting:

- The top three areas that Trent Lakes supplies labour to are: Kawartha Lakes, Peterborough, and Selwyn.

- Trent Lakes exports approximately 88% of its resident labour with a usual place of work.

- Top recruitment areas for Trent Lakes are Trent Lakes, Selwyn, Kawartha, and Peterborough

- Trent Lakes imports 53% of its total workforce with a usual place of work.

Table 9: Top Places to Work for Trent Lakes Residents, 2016

| Place of Work | Total | Male | Female |
|---|---|---|---|
| Kawartha Lakes, CY | 455 | 185 | 270 |
| Peterborough, CY | 355 | 145 | 205 |
| Selwyn, TP | 170 | 85 | 80 |
| Trent Lakes, MU | 165 | 90 | 75 |
| Toronto, C | 110 | 65 | 50 |
| Mississauga, CY | 30 | 20 | 10 |
| Oshawa, CY | 25 | 15 | 10 |
| North Kawartha, TP | 20 | 10 | 15 |
| Clarington, MU | 20 | 20 | 0 |
| Vaughan, CY | 20 | 15 | 0 |
| Caledon, T | 20 | 15 | 0 |
| Total residents with a usual place of work | 1,390 | 665 | 715 |
| # of residents working outside of Trent Lakes | 1,225 | 575 | 640 |
| % of residents working outside of Trent Lakes | 88% | 86% | 90% |

Source: Statistics Canada, Commuting Flows Tables 2016.

Table 10: Top Labour Recruitment Areas for Trent Lakes, 2016

| Place of Residence | Total | Male | Female |
|---|---|---|---|
| Trent Lakes, MU | 165 | 90 | 75 |
| Selwyn, TP | 85 | 45 | 40 |
| Kawartha Lakes, CY | 55 | 35 | 10 |
| Peterborough, CY | 45 | 35 | 15 |
| Individuals With a Place of Work in Trent Lakes | 350 | 205 | 140 |
| # of people working inside Trent Lakes who live outside of Trent Lakes | 185 | 115 | 65 |
| % of people working inside Trent Lakes who live outside of Trent Lakes | 53% | 56% | 46% |

Source: Statistics Canada, Commuting Flows Tables 2016

## 2.5.    Labour Recruiting Area: Emerging and in-Demand Occupations

This subsection outlines trends about the occupations employed within Trent Lakes' labour recruiting area, regardless of where workers live. The objective is to understand which occupations are concentrated, growing, and emerging, and could possibly be leveraged to drive local growth. For the purposes of this report, Trent Lakes' possible recruiting area consists of the Counties of Kawartha Lakes, Northumberland, and Peterborough, as these are within a hypothetical commuting distance to Trent Lakes.

Examining occupation by location will help discern whether there is a concentration of talent/skills and that, in turn, will help identify the industries that are potentially likely to flourish as a result of those skills being available. The occupations are analyzed at the four-digit National Occupation Classification[8]; the most disaggregated level. The following tables and charts illustrate the following:

- ■ Occupations with a large number of jobs in 2021

- ■ Occupations with a large percentage of job growth between 2016-2021

- ■ Occupations with a large projected job growth between 2021-2028

- ■ Occupations that are concentrated in labour shed relative to the rest of Canada.

## The objective is to understand which occupations are concentrated, growing and emerging in the labour recruiting area

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[8] National Occupation Classification: https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada/express-entry/eligibility/find-national-occupation-code.html

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Table 11: Occupations with Highest Level of Employment in the Labour Recruitment Area

| Description | 2016 Jobs | 2021 Jobs | 2016-2021 Change | 2016-2021 % Change | 2021 Median Wages |
|---|---|---|---|---|---|
| Retail salespersons | 4,782 | 4,044 | -738 | -15% | $31,648 |
| Food counter attendants, kitchen helpers and related support occupations | 3,072 | 2,660 | -412 | -13% | $30,022 |
| Nurse aides, orderlies and patient service associates | 2,040 | 2,385 | 345 | 17% | $41,074 |
| Cashiers | 2,955 | 2,273 | -682 | -23% | $28,842 |
| Retail sales supervisors | 1,532 | 2,119 | 587 | 38% | $38,252 |
| Transport truck drivers | 1,985 | 2,103 | 118 | 6% | $48,390 |
| Sales and account representatives - wholesale trade (non-technical) | 1,281 | 1,815 | 533 | 42% | $53,134 |
| Registered nurses and registered psychiatric nurses | 2,479 | 1,810 | -669 | -27% | $79,128 |
| Secondary and elementary school teachers and educational counsellors | 1,593 | 1,781 | 188 | 12% | $95,070 |
| Store shelf stockers, clerks and order fillers | 1,429 | 1,589 | 160 | 11% | $30,204 |
| Accounting and related clerks | 790 | 1,469 | 679 | 86% | $46,379 |
| Cooks | 1,440 | 1,439 | -1 | 0% | $28,270 |
| Receptionists | 1,282 | 1,429 | 147 | 11% | $36,344 |
| Light duty cleaners | 1,280 | 1,416 | 136 | 11% | $35,845 |
| Administrative officers | 1,604 | 1,379 | -225 | -14% | $53,876 |
| Social and community service workers | 1,380 | 1,359 | -21 | -2% | $53,709 |
| Janitors, caretakers and building superintendents | 1,363 | 1,345 | -18 | -1% | $41,382 |
| Other customer and information services representatives | 1,191 | 1,274 | 83 | 7% | $35,556 |
| Plastics processing machine operators | 323 | 1,261 | 938 | 290% | $43,982 |
| Administrative assistants | 803 | 1,261 | 458 | 57% | $52,688 |
| Food and beverage servers | 1,124 | 1,170 | 45 | 4% | $29,677 |

Source: EMSI Analyst 2022.1

Figure 9 illustrates occupations that added the largest total number of jobs to the economy of the labour recruitment area between 2016 and 2021.

**Figure 9: Largest Absolute Job Growth in the Labour Recruitment Area, 2016-2021**



| Occupation | Jobs |
|---|---|
| Plastics processing machine operators | 938 |
| Accounting and related clerks | 679 |
| Retail sales supervisors | 587 |
| Sales and account representatives - wholesale trade (non-technical) | 533 |
| Administrative assistants | 458 |
| Public works maintenance equipment operators and related workers | 445 |
| Nursing co-ordinators and supervisors | 355 |
| Nurse aides, orderlies and patient service associates | 345 |
| Bus drivers, subway operators and other transit operators | 345 |
| Shippers and receivers | 307 |
| Mechanical engineers | 274 |
| Professional occupations in advertising, marketing and public relations | 271 |
| Contractors and supervisors, mechanic trades | 269 |
| Maîtres d'hôtel and hosts/hostesses | 252 |
| Civil engineers | 252 |
| Electrical power line and cable workers | 250 |
| Construction managers | 238 |
| Program leaders and instructors in recreation, sport and fitness | 234 |
| Contractors and supervisors, heavy equipment operator crews | 226 |
| Medical administrative assistants | 216 |
| Senior managers - financial, communications and other business services | 200 |

Source: EMSI Analyst 2022.1

Figure 10 illustrates occupations that had the most intense growth in jobs, and also had a relevant impact on the economy as they added a minimum of 15 jobs to the labour recruitment area. Figure 10 presents relative (%) job growth and 2021 job count figures.

### Figure 10: Largest (%) Growth Occupations in the Labour Recruiting Area, 2016-2021



Source: EMSI Analyst 2022.1

Location Quotient is used to measure the relative concentration of an occupation; that is, it compares the percentage of jobs per occupation in the labour shed, relative to the total percentage of jobs in the same occupation across Canada. A location quotient above 2 means the labour recruiting area employs twice as many jobs in that occupation than is typical in the province or nation. Such a high concentration shows that there is some momentum in growing or attracting these jobs unique to the region.

Table 12 illustrates occupations that are most heavily concentrated in the labour recruitment area, relative to the rest of Canada—using location quotient. Occupations are considered concentrated if they have a location quotient above 1.25.

Table 12: Concentrated Occupations in the Labour Recruitment Area, 2021

| Occupation | 2021 Jobs in the local labour recruiting area | Location Quotient |
|---|---|---|
| Plastics processing machine operators | 1261 | 8.96 |
| Electrical power line and cable workers | 399 | 4.15 |
| Public works maintenance equipment operators and related workers | 707 | 3.65 |
| Optometrists | 37 | 3.14 |
| Chiropractors | 19 | 2.90 |
| By-law enforcement and other regulatory officers, n.e.c. | 137 | 2.80 |
| Image, social and other personal consultants | 22 | 2.69 |
| Supervisors, motor transport and other ground transit operators | 306 | 2.67 |
| Nursing co-ordinators and supervisors | 545 | 2.61 |
| Power system electricians | 100 | 2.61 |
| Labourers in mineral and metal processing | 117 | 2.61 |
| Underground mine service and support workers | 62 | 2.60 |
| Harvesting labourers | 95 | 2.55 |
| Machining tool operators | 147 | 2.54 |
| Silviculture and forestry workers | 47 | 2.53 |
| Casino occupations | 139 | 2.47 |
| Cleaning supervisors | 447 | 2.40 |
| Funeral directors and embalmers | 98 | 2.29 |
| Textile fibre and yarn, hide and pelt processing machine operators and workers | 46 | 2.27 |
| Plastic products assemblers, finishers and inspectors | 146 | 2.24 |

Source: EMSI Analyst 2022.1

## 2.6. Key Occupations for Labour-Based Investment Attraction

Some key occupations stand out in the labour recruitment area, as they are growing, projected to grow and/or are concentrated. The following list represents occupations that have performed well in the labour recruitment area analysis and represent a strong possibility for labour-based investment attraction. Occupations related to publicly funded industries and retail-related occupations are not considered here.

The following are key existing occupations: they are large (300+ jobs), growing (by at least 25% of total jobs), concentrated (with a national LQ greater than 1.50), and pay well (2020 median wage of $50,000 or higher):

1.  Nursing co-ordinators and supervisors
2.  Contractors and supervisors, mechanic trades
3.  Public works maintenance equipment operators and related workers
4.  Mechanical engineers
5.  Electrical power line and cable workers
6.  Supervisors, motor transport and other ground transit operators

The following are key emerging occupations; those that are not yet concentrated (LQ less than 1.25) and had the largest percentage growth over the past 5 years (over 50% of total jobs), while at the same time being well-paying occupations wages (2021 median wage of $50,000 or higher):

1.  Professional occupations in advertising, marketing and public relations
2.  Architects
3.  Database analysts and data administrators
4.  Specialist physicians
5.  General practitioners and family physicians
6.  Supervisors, other mechanical and metal products manufacturing
7.  Recreation, sports and fitness policy researchers, consultants and program officers
8.  Journalists
9.  Translators, terminologists and interpreters
10. Producers, directors, choreographers and related occupations

The above occupations form a group of what will be referred to as **"key occupations"**, which are widely employed and/or increasingly in demand within the municipality. They represent the best opportunity in terms of attracting industry to Trent Lakes based on labour market patterns. In what follows, the industries that most commonly hire these key occupations are revealed using inverse staffing patterns.

Table 13 shows which industries in the labour recruitment area most commonly employ (by largest number of jobs) all of the identified key occupations. From the list of industries identified to most commonly hire the "key occupations" in the region, the following have seen the fastest growth (10% or above) in the labour recruitment area over the previous 5 years:

- Remediation and other waste management services
- Other federal services[9]
- Home health care services
- General medical and surgical hospitals
- Provincial and territorial public administration
- Offices of physicians

Table 13: Key Staffing Patterns, 2016-2021

| Industry | Key Occupations Group Jobs in Industry (2016) | Key Occupations Group Jobs in Industry (2021) | % Change (2016-2021) | % of Total Jobs in Industry (2021) |
|---|---|---|---|---|
| Local, municipal and regional public administration | 194 | 440 | 126% | 12.99% |
| Electric power generation, transmission and distribution | 125 | 299 | 140% | 45.11% |
| General medical and surgical hospitals | 79 | 266 | 236% | 5.21% |
| Architectural, engineering and related services | 68 | 169 | 147% | 18.26% |
| Home health care services | 47 | 161 | 241% | 12.72% |
| Provincial and territorial public administration | 39 | 132 | 234% | 4.60% |
| Waste collection | 59 | 117 | 98% | 81.11% |

[9] This industry group comprises establishments of the federal government, not classified to any other industry group, primarily engaged in executive and legislative activities; fiscal and related policies and the administration of the public debt; assessing, levying and collecting taxes; conducting relations with other governments; and the administration of federal programs.

| | | | | |
|---|---|---|---|---|
| Nursing care facilities | 36 | 99 | 175% | 3.17% |
| Support activities for road transportation | 32 | 98 | 205% | 44.20% |
| Building equipment contractors | 31 | 95 | 206% | 6.73% |
| Automobile dealers | 41 | 92 | 122% | 7.84% |
| Automotive repair and maintenance | 34 | 74 | 119% | 9.60% |
| Offices of physicians | 23 | 72 | 219% | 6.91% |
| Other professional, scientific and technical services | 28 | 70 | 148% | 9.75% |
| Other federal services (9112-9119) | 17 | 65 | 296% | 4.09% |
| General freight trucking | 31 | 60 | 92% | 10.07% |
| Grant-making and giving services | 23 | 57 | 151% | 27.88% |
| Services to buildings and dwellings | 18 | 56 | 216% | 3.84% |
| Remediation and other waste management services | 11 | 55 | 407% | 16.97% |
| Other general-purpose machinery manufacturing | 19 | 53 | 175% | 14.08% |
| Motor vehicle parts manufacturing | 19 | 50 | 161% | 7.23% |
| Utility system construction | 18 | 50 | 172% | 26.89% |
| Out-patient care centres | 17 | 48 | 183% | 6.52% |

Source: EMSI Analyst 2022.1

# 3. ECONOMIC BASE ANALYSIS

The list of industries in Table 13 (previous page) is an indication of industries that could be successful to Trent Lakes given the labour force supply or could be further developed alongside supporting industries.

This section investigates the local economy pertinent for Trent Lakes; that is, the jobs and businesses that drive the local economy. As such, the central focus of this section will be Trent Lakes, benchmarked by Ontario.

This section reports industry statistics related to exports, employment, and business growth for the local economy with the aim of uncovering key industries that either exist or are emerging in the region today.

The "North American Industry Classification System" (NAICS) of classifying industries is used for this report. The largest groupings or aggregations of industries categories are called sectors, which are broken down into sub-sectors, which are then further broken down into Industries. An example of this breakdown follows:

| Sector Level | 54 Professional, scientific and technical services |
| --- | --- |
| **Sub-sector Level** | 541 - Professional, scientific and technical services |
| **Industry Level** | 5418 - Advertising, public relations, and related services |

## 3.1. Employment Profile

The primary employment sectors in Trent Lakes are administrative and support, waste management and remediation services; professional, scientific and technical services; construction; and retail trade. Between 2016 and 2021, the local economy receded by **141 jobs (-12.5%) to a total of 990 jobs**. Percentage job growth in Trent Lakes lagged relative to the province, where job totals increased by 0.8% between 2016-2021. Table 144 indicates the percentage of job growth, by sector, for each of these economies. Note that negative numbers are indicated by red text in parenthesis.
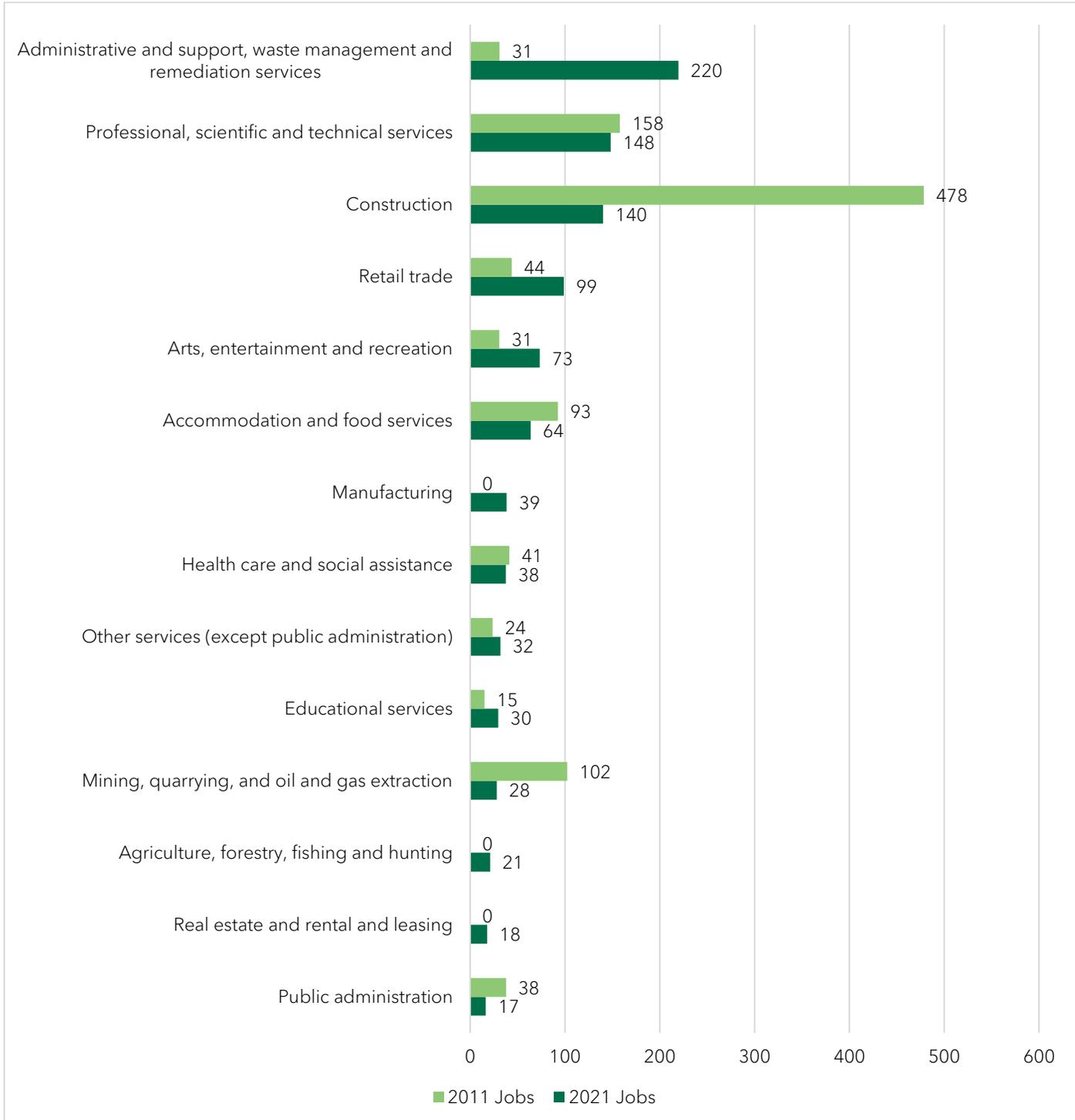
Table 14: Employment Growth by Sector, Trent Lakes, vs Ontario, 2016-2021

| NAICS | Description | 2021 Jobs | 2011-2021 Change | Trent Lakes % Change | Ontario % Jobs Change |
|-------|-------------|-----------|------------------|----------------------|------------------------|
| 11 | Agriculture, forestry, fishing and hunting | 21 | N/A | N/A | -7.9% |
| 21 | Mining, quarrying, and oil and gas extraction | 28 | -74 | -72.5% | 4.2% |
| 22 | Utilities | <10 | N/A | N/A | 5.8% |
| 23 | Construction | 140 | -338 | -70.7% | 6.4% |
| 31-33 | Manufacturing | 39 | 39 | N/A | -2.2% |
| 41 | Wholesale trade | <10 | N/A | N/A | -2.1% |
| 44-45 | Retail trade | 99 | 55 | 125.6% | -2.2% |
| 48-49 | Transportation and warehousing | 0 | 0 | 0.0% | 16.0% |
| 51 | Information and cultural industries | 0 | 0 | 0.0% | -6.3% |
| 52 | Finance and insurance | <10 | N/A | N/A | 6.2% |
| 53 | Real estate and rental and leasing | 18 | N/A | N/A | -3.6% |
| 54 | Professional, scientific and technical services | 148 | -10 | -6.1% | 13.0% |
| 55 | Management of companies and enterprises | 0 | -16 | -100.0% | 22.8% |
| 56 | Administrative and support, waste management and remediation services | 220 | 189 | 607.8% | 2.7% |
| 61 | Educational services | 30 | 14 | 94.7% | 4.1% |
| 62 | Health care and social assistance | 38 | -3 | -8.4% | 8.2% |
| 71 | Arts, entertainment and recreation | 73 | 43 | 139.4% | -24.1% |
| 72 | Accommodation and food services | 64 | -29 | -31.1% | -25.5% |
| 81 | Other services (except public administration) | 32 | 8 | 34.8% | -4.7% |
| 91 | Public administration | 17 | -21 | -56.3% | 6.0% |
| X0 | Unclassified | <10 | N/A | N/A | -5.3% |
| All | Total | 990 | -141 | -12.5% | 0.8% |

Source: EMSI Analyst 2022.1

To better understand how each sector supports jobs, Figure 11 shows job count data for industries with at least 10 employed or self-employed positions in Trent Lakes by number of jobs in 2021. Jobs in 2011 are also shown to illustrate employment change.

Figure 11: Largest Industries by Number of Jobs, 2011 and 2021

| Industry | 2011 Jobs | 2021 Jobs |
|---|---|---|
| Administrative and support, waste management and remediation services | 31 | 220 |
| Professional, scientific and technical services | 158 | 148 |
| Construction | 478 | 140 |
| Retail trade | 44 | 99 |
| Arts, entertainment and recreation | 31 | 73 |
| Accommodation and food services | 93 | 64 |
| Manufacturing | 0 | 39 |
| Health care and social assistance | 41 | 38 |
| Other services (except public administration) | 24 | 32 |
| Educational services | 15 | 30 |
| Mining, quarrying, and oil and gas extraction | 102 | 28 |
| Agriculture, forestry, fishing and hunting | 0 | 21 |
| Real estate and rental and leasing | 0 | 18 |
| Public administration | 38 | 17 |

■ 2011 Jobs   ■ 2021 Jobs

Source: EMSI Analyst 2022.1

Figure 12 illustrates potential areas for investment attraction as they are having a significant economic impact in terms of job creation–publicly funded industries (i.e., education and healthcare), retail and wholesale trade, as well as those related to residential construction are excluded as they are not pertinent to investment attraction since they are dependent on population growth.

Figure 12: Growth Sectors and Industries by Employment Level, 2016 -2021

| Professional, Scientific and Technical Services | Construction |
|---|---|
| • Advertising, public relations, and related services<br><br>• Accounting, tax preparation, bookkeeping and payroll services<br><br>• Management, scientific and technical consulting services<br><br>• Computer systems design and related services | • Building finishing contractors<br><br>• Other specialty trade contractors<br>•This industry group comprises establishments, not classified to any other industry group, primarily engaged in site preparation activities and other specialized trade activities such as crane rental with operator, fence installation, sandblasting building exteriors and steeplejack work. The work performed may include new work, additions, alterations, maintenance, and repairs.<br><br>• Services to buildings and dwellings |

Source: EMSI Analyst 2022.1

## 3.2. Economic Output

This subsection highlights industries with the largest economic impact. The following table illustrates industries with the highest level of economic output as measured by total sales. Average wages by industry are also illustrated. Four industries each account for over $10 million in total sales within Trent Lakes:

- Construction;

- Mining quarrying, and oil and gas extraction;

- Accommodation and food services; and

- Manufacturing.

Both of the top two industries by economic output provide strong wages for employees, as both industries have average wages over $50,000.

Table 15: Economic Output by Industry, 2019

| Industry | Sales | Average Wages |
|---|---|---|
| Construction | $18,837,871 | $54,539 |
| Mining, quarrying, and oil and gas extraction | $15,587,966 | $88,505 |
| Accommodation and food services | $10,383,815 | $25,786 |
| Manufacturing | $10,166,893 | $47,576 |
| Professional, scientific and technical services | $9,241,986 | $49,641 |
| Retail trade | $8,880,841 | $33,077 |
| Real estate and rental and leasing | $8,385,655 | $35,306 |
| Arts, entertainment and recreation | $5,861,460 | $22,356 |
| Educational services | $4,150,894 | $63,910 |
| Public administration | $4,072,407 | $59,000 |
| Administrative and support, waste management and remediation services | $3,386,723 | $30,196 |
| Utilities | $1,043,457 | $89,865 |
| Finance and insurance | $990,092 | $55,893 |
| Other services (except public administration) | $933,400 | $16,731 |
| Wholesale trade | $852,105 | $48,873 |
| Health care and social assistance | $817,066 | $31,288 |
| All industries | $103,592,630 | $41,271 |

Source: 2022.1 EMSI Analyst, based on 2019 National Input-Output Tables by StatsCan

## 3.3. Export Sales

This subsection investigates export sales by industry. Exports show the amount of money that is spent by industries located outside the region (domestically and internationally) in exchange for goods or services produced by an industry located in Trent Lakes. In 2019, the most recent data available, total export sales amounted to $79,162,469. Below are the largest drivers of external revenues into Trent Lakes.

Table 16: Top Export Dollars Flowing into Trent Lakes by Industry, 2019

| Industry | Total Export Sales |
|---|---|
| Mining, quarrying, and oil and gas extraction | $15,380,433 |
| Construction | $10,929,110 |
| Accommodation and food services | $8,672,892 |
| Manufacturing | $7,876,759 |
| Professional, scientific and technical services | $7,065,859 |
| Retail trade | $5,765,585 |
| Arts, entertainment and recreation | $5,137,069 |
| Real estate and rental and leasing | $4,920,676 |
| Public administration | $3,585,506 |
| Educational services | $3,521,263 |
| Administrative and support, waste management and remediation services | $2,644,738 |
| Finance and insurance | $974,436 |
| Wholesale trade | $716,106 |
| Utilities | $703,983 |
| Health care and social assistance | $698,105 |
| Other services (except public administration) | $569,949 |

Source: 2022.1 EMSI Analyst, based on 2019 National Input-Output Tables by StatsCan

## 3.4. Industry Supply Chain Analysis

An economic base analysis analyzes how the local economy functions. It does not provide solutions to economic problems but instead provides useful information required for decision-making about economic strategies.

The economic base analysis helps determine which economic activities "bring money in", and where money might be "leaking out". Another way to assess this metric is to assess the in-region and imported purchases made by each subsector within Trent Lakes. Table 17 presents the top 15 industries in terms of total purchases made, as well as the percentage of those purchases that are made in-region and out-of-region.

Table 17: Top Industries by Purchasing Power, Trent Lakes, 2019

| Industry | Total Purchases from Sector | Percentage Purchased in Region | Percentage Purchased Out of Region |
|---|---|---|---|
| Petroleum and coal product manufacturing | $1,327,348 | 0% | 100% |
| Architectural, engineering and related services | $1,288,646 | 8.1% | 91.9% |
| Lessors of real estate | $1,155,194 | 31.3% | 68.7% |
| Support activities for mining, and oil and gas extraction | $1,150,034 | 0% | 100% |
| Electric power generation, transmission and distribution | $1,067,039 | 8.5% | 91.5% |
| Depository credit intermediation | $944,093 | 0% | 100% |
| Computer systems design and related services | $794,867 | 71.2% | 28.8% |
| Services to buildings and dwellings | $758,049 | 76.4% | 23.6% |
| Plastic product manufacturing | $727,334 | 0% | 100% |
| Architectural and structural metals manufacturing | $722,292 | 0% | 100% |
| Insurance carriers | $683,640 | 0% | 100% |
| Management, scientific and technical consulting services | $506,938 | 0% | 100% |
| Accounting, tax preparation, bookkeeping and payroll services | $474,287 | 64.2% | 35.8% |
| Other electrical equipment and component manufacturing | $461,975 | 0% | 100% |
| Cement and concrete product manufacturing | $456,094 | 0% | 100% |

Source: 2022.1 EMSI Analyst, based on 2019 National Input-Output Tables by StatsCan

## 3.5.    Location Quotient Analysis

Location quotient (LQ) analysis compares the level of employment concentration (or specialization) in a local economy (i.e., Trent Lakes) to the level of employment concentration in one or more benchmark areas. In other words, does the local economy have proportionately more or fewer employees in specific industries than the benchmark area?

### 3.5.1.   Location Quotient Analysis by Sector

LQ helps to identify the strengths of the community. The location quotient at the broadest industry classification level indicates that Trent Lakes has the strongest specializations relative to the rest of the province and nation in the following sectors:

- Mining, quarrying, and oil and gas extraction

- Arts, entertainment and recreation

- Administrative and support, waste management and remediation services

Table 18: Location Quotient Analysis by Sector

| Description | 2021 Provincial Location Quotient | 2021 National Location Quotient |
|---|---|---|
| Mining, quarrying, and oil and gas extraction | 7.66 | 2.69 |
| Arts, entertainment and recreation | 4.71 | 4.51 |
| Administrative and support, waste management and remediation services | 3.84 | 4.46 |
| Construction | 2.05 | 1.94 |
| Agriculture, forestry, fishing and hunting | 1.92 | 1.14 |
| Professional, scientific and technical services | 1.76 | 1.96 |
| Accommodation and food services | 1.20 | 1.12 |
| Retail trade | 0.98 | 0.92 |
| Other services (except public administration) | 0.82 | 0.77 |
| Real estate and rental and leasing | 0.79 | 0.88 |
| Unclassified | 0.69 | 0.67 |
| Manufacturing | 0.43 | 0.48 |
| Educational services | 0.42 | 0.41 |
| Health care and social assistance | 0.33 | 0.30 |
| Utilities | 0.31 | 0.30 |
| Public administration | 0.27 | 0.26 |
| Wholesale trade | 0.12 | 0.13 |
| Finance and insurance | 0.12 | 0.16 |
| Transportation and warehousing | 0.00 | 0.00 |
| Information and cultural industries | 0.00 | 0.00 |
| Management of companies and enterprises | 0.00 | 0.00 |

Source: EMSI Analyst 2022.1

### 3.5.2. Location Quotient Analysis by Industry

The following tables list the **industries** that are concentrated in Trent Lakes' local economy

Table 19: Concentrated Industries, Relative to the Rest of Canada, 2022

| Description | 2021 Jobs | 2021 National Location Quotient |
|---|---|---|
| Recreational vehicle (RV) parks and recreational camps | 17 | 36.74 |
| Non-metallic mineral mining and quarrying | 28 | 33.00 |
| Other amusement and recreation industries | 57 | 13.50 |
| Other specialty trade contractors | 49 | 12.44 |
| Beer, wine and liquor stores | 19 | 11.91 |
| Beverage manufacturing | 14 | 9.02 |
| Automotive parts, accessories and tire stores | 11 | 8.49 |
| Religious organizations | 17 | 8.28 |
| Personal and household goods repair and maintenance | <10 | 8.11 |

Source: EMSI Analyst 2022.1

Table 20: Concentrated Industries, Relative to the Rest of Ontario, 2022

| Description | 2021 Jobs | 2021 Provincial Location Quotient |
|---|---|---|
| Non-metallic mineral mining and quarrying | 28 | 65.74 |
| Recreational vehicle (RV) parks and recreational camps | 17 | 44.44 |
| Other specialty trade contractors | 49 | 16.86 |
| Beer, wine and liquor stores | 19 | 16.00 |
| Other amusement and recreation industries | 57 | 13.06 |
| Automotive parts, accessories and tire stores | 11 | 11.44 |
| Sporting goods, hobby and musical instrument stores | 16 | 9.33 |
| Beverage manufacturing | 14 | 9.18 |
| Religious organizations | 17 | 8.62 |
| Scientific research and development services | 14 | 7.12 |

Source: EMSI Analyst 2022.1

## 3.6.    Shift-Share Analysis

Shift-share analysis compares the local employment growth/decline of regional jobs by industry to the employment growth/decline of that industry, as well as the job growth overall for Canada. More specifically, this analytical tool examines job growth/decline by attributing growth, stability, or decline in industries over time to three forces:

■ National economic growth: regional job growth/decline that is attributable to the growth, stability, or decline of the entire Canadian economy. Industries will be impacted positively or negatively by the state of the Canadian economy and consumer spending at a national level, external to any local factors.

● Industry growth: regional job growth/decline that is attributable to the growth, stability, or decline of that particular economic activity in the Canadian economy (with the economic growth component removed). General industry trends are outside the influence of local actors and are therefore removed from the local impact.

■ Local economic growth: local job growth/decline that is attributable to the local economy because it is growing/declining more or less quickly than jobs in the larger economy (with the Canadian economic and industry growth components removed).

This tool, when correctly interpreted, provides greater descriptive power than the location quotient method. It has been applied to NAICS Industries using place of work statistics. Shift-share analysis allows the examination of changes through time (trends) versus the static snapshot of location quotients.

### 3.6.1.   Shift-Share Analysis within Trent Lakes

This subsection looks to the past (2011) and current figures (2021) to assess which sectors have been most positively impacted by local factors. The example below applies the model to the *other amusement and recreation industries* sector:

From 2011 to 2021 the *other amusement and recreation industries* sector saw an increase of 33 jobs in Trent Lakes.

■ It would have been expected that the sector decreased by 1 position based on large-scale industry factors that are relevant to the sector regardless of geographic location.

■ National economic growth factors and their impact on the national sector would have been expected to lead to a net increase of 2 jobs over the same time period.

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- As such, before accounting for local factors, the sector would have been expected to gain 1 job.
- Instead, the local sector is projected to grow by 33 jobs, suggesting that 32 new jobs can be applied to factors specific to Trent Lakes.

Table 21 allocates employment changes for the ten industries most positively impacted by local effects to national, industry and regional/local effects.

Table 21: Shift-Share Analysis: Competitive Industries, Trent Lakes, 2011-2021

| Industry (NAICS classification) | Growth/ Decline | Industry Growth Effect | National Economic Effect | Regional / Local Effect |
|---|---|---|---|---|
| Other amusement and recreation industries | 33 | -1 | 2 | 32 |
| Elementary and secondary schools | 28 | 0 | 0 | 28 |
| Services to buildings and dwellings | 23 | 1 | 1 | 25 |
| Computer systems design and related services | 25 | 1 | 0 | 24 |
| Other specialty trade contractors | 27 | 5 | 2 | 20 |
| Accounting, tax preparation, bookkeeping and payroll services | 16 | 2 | 1 | 19 |
| Beer, wine and liquor stores | 19 | 0 | 0 | 18 |
| Recreational vehicle (RV) parks and recreational camps | 17 | 0 | 0 | 17 |
| Sporting goods, hobby and musical instrument stores | 16 | 0 | 0 | 16 |
| Religious organizations | 15 | 0 | 0 | 15 |

Source: EMSI Analyst 2022.1

Conversely, Table 22 presents the five industries most negatively impacted by regional/local effects from 2011-2021.

Table 22: Shift-Share Analysis: Declining Industries, Trent Lakes, 2011-2028

| Industry (NAICS classification) | Growth/ Decline | Industry Growth Effect | National Economic Effect | Regional / Local Effect |
|---|---|---|---|---|
| Local, municipal and regional public administration | -20 | -3 | 4 | -21 |
| Building finishing contractors | -24 | 2 | 2 | -28 |
| Full-service restaurants and limited-service eating places | -38 | -4 | 5 | -40 |
| Building equipment contractors | -45 | 8 | 6 | -59 |
| Non-metallic mineral mining and quarrying | -67 | 4 | 9 | -80 |

Source: EMSI Analyst 2022.1

## 3.7. Employer Structure

This subsection illustrates the number and size of employers by industry in the Municipality. The data in this section comes from Statistics Canada's Canadian Business Patterns dataset. Employers in this dataset include businesses in the Business Register, which are all Canadian businesses that meet at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to Canada Revenue Agency; or

- Have a minimum of $30,000 in annual revenue; or

- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

Statistics Canada divides businesses into two major groupings:

1. Businesses with a determinate number of employees; and
2. Businesses with an indeterminate number of employees.

Businesses without employees correspond to the "indeterminate" employment category from the previous reference periods. For economic development purposes, businesses with a determinate number of employees (one or more) are of greater interest than indeterminate businesses (which frequently are not active or have very low levels of economic activity). An increase in the number of indeterminate businesses can, however, signal potential new business startups.

According to the Canadian Business Registry, Trent Lakes had 559 businesses as of December 2021, of which 175 (31.3%) had employees. Of these 175 businesses, the majority had between one and nine employees (159 or 85.7%). Comparatively, 2 businesses (1.1%) had over 50 employers.

Table 23: Business counts by size, Trent Lakes, December 2021

| | 1 to 9 Employees | 10 to 49 Employees | 50+ Employees | Indeterminate | Total |
|---|---|---|---|---|---|
| Number of Businesses | 150 | 23 | 2 | 384 | 559 |

Source: Canadian Business Patterns December 2021 from EMSI Analyst

The largest sectors by total number of businesses with employees in Trent Lakes are:

1. Construction
2. Real estate and rental and leasing
3. Professional, scientific and technical services

Table 24 presents the five largest sub-sectors by business counts and includes businesses both with and without employees.

Table 24: Top 5 sub-sectors by business counts, Trent Lakes, 2021

| Sector | Businesses |
|---|---|
| Lessors of real estate | 46 |
| Residential building construction | 35 |
| Offices of real estate agents and brokers | 22 |
| Building equipment contractors | 21 |
| Management, scientific and technical consulting services | 20 |

Source: Canadian Business Patterns December 2021 from EMSI Analyst

Many of these businesses, however, are self-employed individuals with no employees. Table 25 notes the subsectors in Trent Lakes by businesses only with employees, excluding self-employed individuals.

Table 25: Top 5 sub-sectors by businesses with employees, Trent Lakes, 2021

| Sector | Businesses with employees |
|---|---|
| Residential building construction | 15 |
| Building equipment contractors | 13 |
| Full-service restaurants and limited-service eating places | 11 |
| Traveller accommodation | 8 |
| Other specialty trade contractors | 8 |

Source: Canadian Business Patterns December 2021 from EMSI Analyst

# 4. TOURISM

The challenge for assessing the impacts of "tourism" is that there is no set definition of "tourism industries". Instead, various subsectors across a range of industries are all impacted by tourism. For example, the subsector *performing arts companies* is heavily impacted by tourism but is instead nested within the broader *arts, entertainment and recreation* industry.

This report will rely on Industry Canada's profile of tourism industries to create a custom list of subsectors that can be classified as tourism related in Trent Lakes[10] (Table 26). While there are spillover impacts to other industries, these sectors represent those where a significant portion of the sector is impacted by tourism activities.

Table 26: Tourism Sectors

| Tourism Sectors |
| --- |
| Scheduled air transportation |
| Non-scheduled air transportation |
| Rail Transportation |
| Deep sea, coastal and Great Lakes water transportation |
| Inland water transportation |
| Urban transit systems |
| Taxi and limousine service |
| Charter bus industry |
| Scenic and sightseeing transportation, land |
| Scenic and sightseeing transportation, water |
| Travel arrangement and reservation services |
| Performing arts companies |
| Spectator sports |
| Promoters (presenters) of performing arts, sports and similar events |
| Independent artists, writers and performers |
| Heritage institutions |
| Amusement parks and arcades |
| Gambling industries |
| Other amusement and recreation industries |
| Traveller accommodation |
| Recreational vehicle (RV) parks and recreational camps |
| Special food services |
| Drinking places (alcoholic beverages) |
| Full-service restaurants and limited-service eating places |

Source: Industry Canada SME Profile: Tourism Industries in Canada

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[10] Industry Canada, SME Profile: Tourism Industries in Canada. March, 2015

## 4.1. Tourism Industry and Occupation Data

Job counts for those tourism sectors with at least one job are presented in Table 27. Unsurprisingly, results are heavily impacted by COVID-19, with tourism sectors seeing decreases of 81 jobs (37%) between 2016 and 2021. Though current projections do not see increases in jobs between 2021 and 2026, it is likely that as the pandemic subsides, we do see a slight uptick to pre-pandemic numbers.

These data suggest that, in 2021, 13.8% (137 out of 990 positions), or 1 out of every 7.25 jobs in Trent Lakes are *directly related* to the tourism sector.

Table 27: Tourism Jobs, Trent Lakes

| Industry | 2016 Jobs | 2021 Jobs | 2026 Jobs | 2021 to 2026 Change | 2021 - 2026 % Change |
|---|---|---|---|---|---|
| Other amusement and recreation industries | 100 | 73 | 83 | 10 | 13.7% |
| Full-service restaurants and limited-service eating places | 38 | 24 | 18 | -6 | -25.0% |
| Traveller accommodation | 51 | 23 | 18 | -5 | -21.7% |
| Recreational vehicle (RV) parks and recreational camps | 29 | 17 | 18 | 1 | 5.9% |
| Total (all) | 218 | 137 | 137 | 0 | 0.0% |

Source: EMSI Analyst 2022.1

As with the broader industry assessments above, we can calculate the location quotient for tourism industries within Trent Lakes. Of particular note, jobs within the *Recreation vehicle parks and recreational camps* sector are approximately 41 times more concentrated locally when compared to provincial data and 20.4 times more concentrated compared to national totals, speaking to that sector's importance.

Table 28: Location Quotient for Tourism Industries

| Industry | 2021 Jobs | Provincial LQ | National LQ |
|---|---|---|---|
| Other amusement and recreation industries | 73 | 12.88 | 9.73 |
| Full-service restaurants and limited-service eating places | 24 | 0.88 | 0.52 |
| Traveller accommodation | 23 | 10.2 | 3.46 |
| Recreational vehicle (RV) parks and recreational camps | 17 | 41.0 | 20.43 |
| Total (all) | 137 | --- | --- |

Source: EMSI Analyst 2022.1

Using staffing patterns, we can assess the occupations most frequently employed by tourism businesses. Tables 29 and 30 present those occupations expected to see the largest growth or contraction over the next five years. Of note, the percentage data uses decimal rounding, leading to numbers that may appear skewed.

Table 29: Tourism Occupations Expected to Grow, Trent Lakes

| Occupation | 2016 Jobs | 2021 Jobs | 2026 Jobs | 2021 to 2026 Change | 2021 - 2026 % Change |
|---|---|---|---|---|---|
| Program leaders and instructors in recreation, sport and fitness | 16 | 24 | 32 | 8 | 31.0% |
| Operators and attendants in amusement, recreation and sport | 10 | <10 | <10 | 1 | 6.9% |
| Electronic service technicians (household and business equipment) | 0 | <10 | <10 | 1 | 134.2% |
| Coaches | <10 | <10 | <10 | 1 | 25.0% |
| Contractors and supervisors, landscaping, grounds maintenance and horticulture services | <10 | <10 | <10 | 1 | 37.6% |

Source: EMSI Analyst 2022.1

Table 30: Tourism Occupations Expected to Shrink, Trent Lakes

| Occupation | 2016 Jobs | 2021 Jobs | 2026 Jobs | 2021 to 2026 Change | 2021 - 2026 % Change |
|---|---|---|---|---|---|
| Chefs | <10 | <10 | <10 | -1 | -38.6% |
| Light duty cleaners | 13 | <10 | <10 | -1 | -17.0% |
| Cooks | <10 | <10 | <10 | -1 | -21.8% |
| Food counter attendants, kitchen helpers and related support occupations | 12 | <10 | <10 | -2 | -33.6% |
| Accommodation service managers | 18 | <10 | <10 | -3 | -50.3% |

Source: EMSI Analyst 2022.1

Another measure of tourism's impact on the community is through the number of businesses in tourism sectors. As noted in Table 31, in December 2021 there were 53 businesses in the tourism sector, of which 30 had employees. Businesses were most predominant within the *traveller accommodation* and *full-service restaurants and limited-service eating places* sectors. Once again, please note that these businesses may not entirely depend upon tourists. Instead, they are considered to be at least somewhat impacted by tourism, as per Industry Canada's definitions.

Table 31: Business Counts by Tourism Subsector

| Tourism Sector | 1-9 Employees | 10-49 Employees | Indeterminate | Total |
|---|---|---|---|---|
| Traveller accommodation | 6 | 2 | 9 | 17 |
| Full-service restaurants and limited-service eating places | 6 | 5 | 2 | 13 |
| Recreational vehicle (RV) parks and recreational camps | 6 | 0 | 4 | 10 |
| Other amusement and recreation industries | 0 | 4 | 2 | 6 |
| Independent artists, writers and performers | 1 | 0 | 3 | 4 |
| Performing arts companies | 0 | 0 | 2 | 2 |
| Spectator sports | 0 | 0 | 1 | 1 |
| Total | 19 | 11 | 23 | 53 |

Source: Canadian Business Counts, December 2021

## 4.2. Tourism Industry Outputs

Similar to job data, we can isolate total sales figures and average wages for tourism sectors.

This data suggest that tourism businesses are directly responsible for $16.25 million in sales in Trent Lakes and that average wages in the tourism sector are $23,967. Please note that for some businesses in certain sectors, sales and wage data are not available, suggesting there are likely some missed sales and wage data in Table 32 below. Moreover, average annual wages are not adjusted to part- and full-time work, so the low total speaks to the seasonal nature of tourism employment.

Table 32: Regional Sales and Wage Data, by Tourism Industry

| NAICS | Sales | Average Wages |
|---|---|---|
| Recreational vehicle (RV) parks and recreational camps | $6,719,826 | $39,232 |
| Other amusement and recreation industries | $5,861,460 | $22,356 |
| Traveller accommodation | $2,278,476 | $18,077 |
| Full-service restaurants and limited-service eating places | $1,385,512 | $17,189 |
| Total | $16,245,275 | $23,967 |

Source: EMSI Analyst 2022.1