



Situational Analysis

City of Kawartha Lakes

Kawartha Lakes
Jump In



Kawartha Lakes

Jump In



Situational Analysis

for the City of Kawartha Lakes

May 2024



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Executive Summary

This Kawartha Lakes Situational Analysis is being completed as part of the City of Kawartha Lakes Economic Development Refresh. This report is an informational piece crafted in early 2024 and does not prescribe a certain solution; instead, it presents a statistical perspective within the local context. The data presented in this report does not tell the entire story of the City – local context and realities matter and shape what the impact of the data is within the City.

This Situational Analysis begins with an assessment of the people (socio-demographics) that make up Kawartha Lakes to provide a snapshot of the local population and highlight potential future opportunities. This data can be used to inform decision-making; for example, Kawartha Lakes has a sizable population of residents over the age of 55 (i.e., nearing retirement), which, if this demographic remains, suggests the City may soon require an increase in seniors' amenities.

Next, by profiling housing and income levels, a snapshot is created of the City's current "livability". Notably, although City residents have slightly lower median and average salaries compared to their Ontario counterparts, affordability is better. This is seen by only 19% of residents spending over 30% of their income on housing, compared to 28% of Ontario residents doing the same.

Section 2 pivots to an assessment of the local labour force, presenting key performance indicators related to participation, unemployment, and employment rates of various local population cohorts. Though this data is not prescriptive (i.e., suggesting solutions), only descriptive (i.e., reflective of the current situation), further introspection may identify ways to close any labour gaps.

Section 3 of the Situational Analysis reviews the City's economy using the reverse lens; rather than assessing data based on local residents (regardless of where they work), this section reviews data based on local industry and employment data, regardless of where their employees live. Once more, an assessment by industry is done to identify key industries and jobs that can be leveraged to support future community goals and aspiration, and match them up with current, and emerging, community and economic drivers. Finally, the report concludes with an assessment of current businesses by size and leading industries. This is done to present a broad picture of the makeup of local industry and business.

Later reports, as part of the broader Economic Development Refresh, will highlight opportunities based on this quantitative information alongside qualitative assessments derived from consultations with local stakeholders.

1. Demographic Analysis

1.1. Population Growth

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

Table 1 illustrates population changes in Kawartha Lakes from 2011 to 2023, compared to Ontario. The census population in Kawartha Lakes fell slightly from 2006 to but has since risen considerably, approaching 83,000 residents in 2023.

Table 1 also presents 2051 forecasted growth based on Ontario’s Growth Plan for the Greater Golden Horseshoe. With respect to future projections, Kawartha Lakes Council has adopted the Municipal Housing Pledge, outlining how the municipality will meet (and potentially surpass) provincial targets related to housing developments. This Pledge suggests that by 2031 the City will build 6,500 new housing units to account for future growth. Forecasted growth for the City in line with this pledge is to have 117,000 residents and 39,000 jobs by 2051.

Table 1: Population Change, Kawartha Lakes and Ontario, 2011-2051.

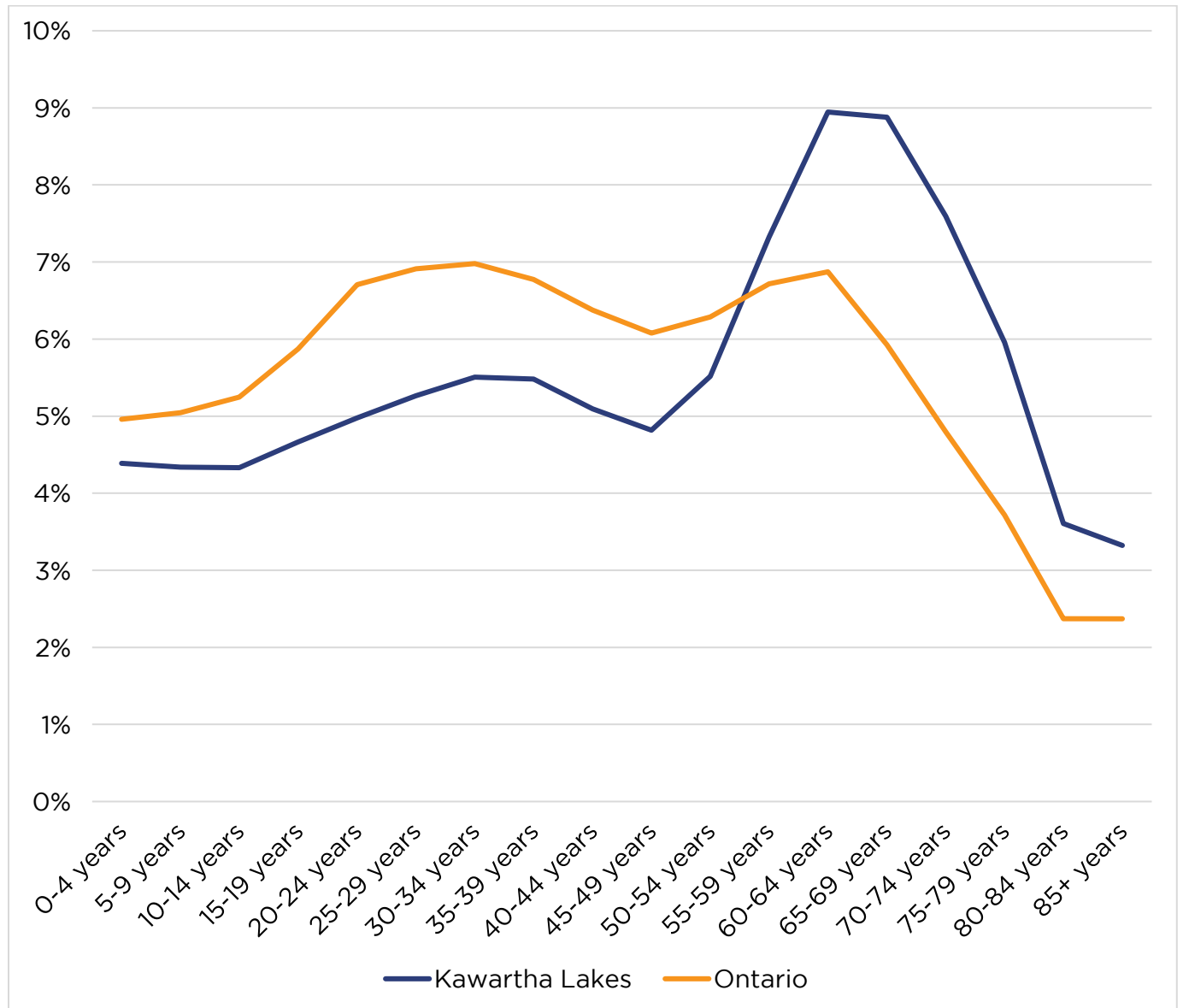
| | 2011 | 2016 | 2021 | 2031 | 2041 | 2051 |
|--|-------------------|-------------------|-------------------|-------------------|-------------------|----------------|
| Kawartha Lakes Population Count | 73,214 | 75,423 | 79,247 | 95,000 | 106,000 | 117,000 |
| % Change | -1.8% | 3.0% | 5.1% | 20% | 12% | 10% |
| Ontario Population Count | 12,851,821 | 13,448,494 | 14,223,942 | 17,818,770 | 20,355,161 | n/a |
| % Change | 5.7% | 4.6% | 5.8% | 25% | 14% | n/a |

Source: Statistics Canada Census Profiles 2011-2021; Hemson Consulting Growth Plan for the Greater Golden Horseshoe 2031-2051. Ontario’s 2031 and 2041 population projections are from the Ministry of Finance, which do not include projections past 2046.

The population in Kawartha Lakes is projected to approach 120,000 residents by 2051.

Remaining data within this section, to maintain consistency with the rest of the document, relies on Manifold Data Mining population figures. Figure 1 contrasts the age profile of residents in Kawartha Lakes and Ontario, in 2023. Kawartha Lakes has a lower percentage of youth (0-19) and middle aged adults (20-55) compared to Ontario, with a much larger older population (55+ individuals). Specifically, Kawartha Lakes residents aged 55 and over represent 46% of the local population compared to 33% of all Ontario residents.

Figure 1: Percent Population by Age, Kawartha vs. Ontario, 2023.



Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2023.

Overall, Kawartha Lakes' working-age population (ages 15-64, 57.6%) is lower than Ontario's (65.6%). Similarly, Kawartha Lakes' median (49, compared to 41 for Ontario) and average (46, compared to 42 for Ontario) ages are higher than Ontario's¹.

Table 2: Kawartha Lakes and Ontario Age Profile, 2023.

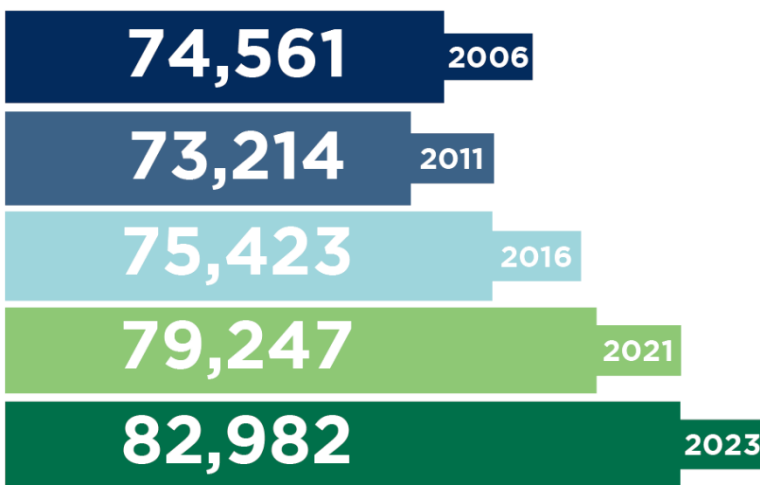
| Age Group | Kawartha Lakes | Ontario |
|-----------|----------------|---------|
| 0-14 | 13.1% | 15.3% |
| 15-64 | 57.6% | 65.6% |
| 65+ | 29.4% | 19.2% |

Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2023.



¹ 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 BOTTOM LINE



| MEDIAN | | AVERAGE | |
|-------------|----|-------------|----|
| Region Age | 49 | Region Age | 46 |
| Ontario Age | 41 | Ontario Age | 42 |

- After a decade of sustained growth, the City’s population is expected to continue growing through 2051, **approaching 120,000 residents.**
- Kawartha Lakes has a current population that is **significantly older than Ontario’s (median age of 49 compared to 41 in Ontario).**
- The City has a lower relative population of youth (**18% of residents are ages 0-19, compared to 21% in Ontario**) and middle aged individuals (**37% of residents are ages 20-54, 46% provincially**).

1.2. Income, Households and Attainability

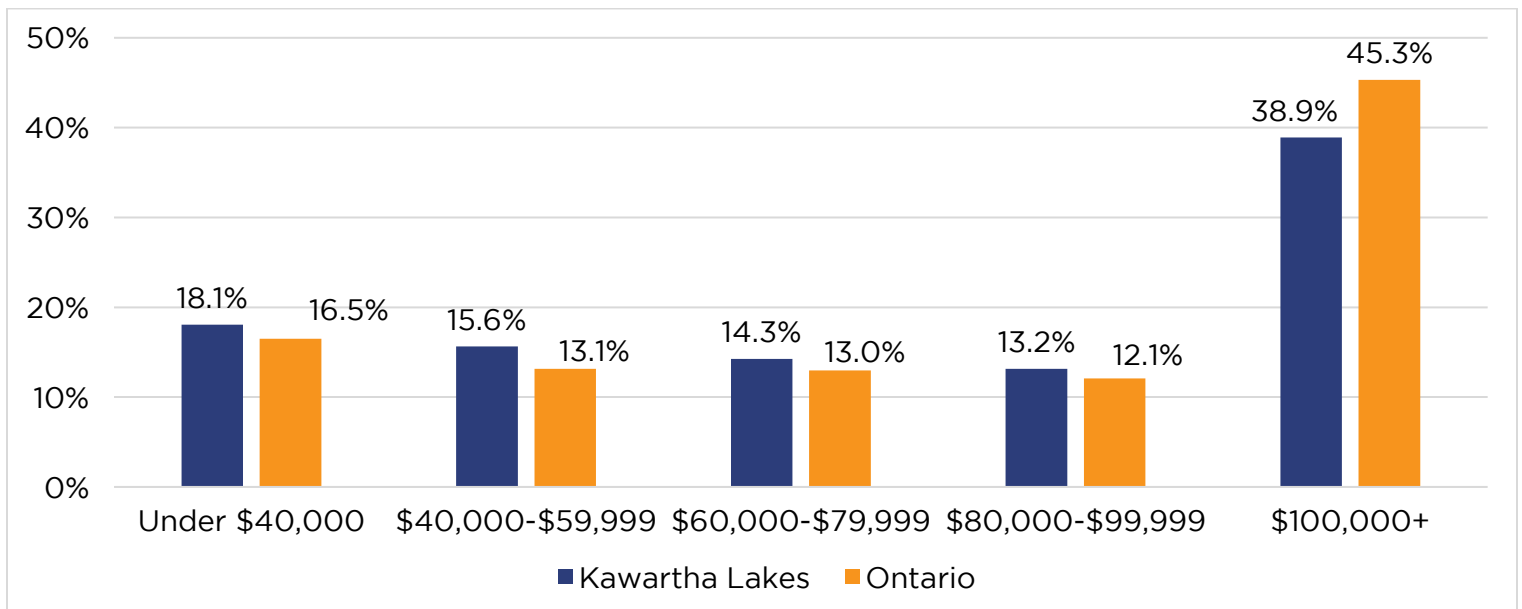
This subsection describes income, households and housing costs of the population. This information is relevant within the context of economic development planning because it provides an understanding of whether a region has attainable housing for resident labour – a key factor in residential and labour force attraction and retention. Concerning employment income, the following observations can be made²:

- In 2022, Kawartha Lakes’ median employment income was **\$41,373**, 6.2% lower than in Ontario (\$43,942).
- In 2022, the average employment income for Kawartha Lakes residents was **\$52,520**, 14.3% lower than Ontario’s (\$60,007).

Figure 2 illustrates the distribution of household incomes. Approximately 68.6% of households in Kawartha Lakes earn less than \$100,000, compared to 54.8% in Ontario.

- Median household total income in Kawartha Lakes: **\$85,532** vs. \$96,552 in Ontario.
- Average household total income in Kawartha Lakes: **\$105,020** vs. \$123,610 in Ontario.

Figure 2: Household Income Levels by Percentage of the Population, 2023.



Source: Manifold Data Mining Inc. 2023 (2022 incomes).

² Please note, all income data uses the year previous; therefore 2023 data uses 2022 incomes.

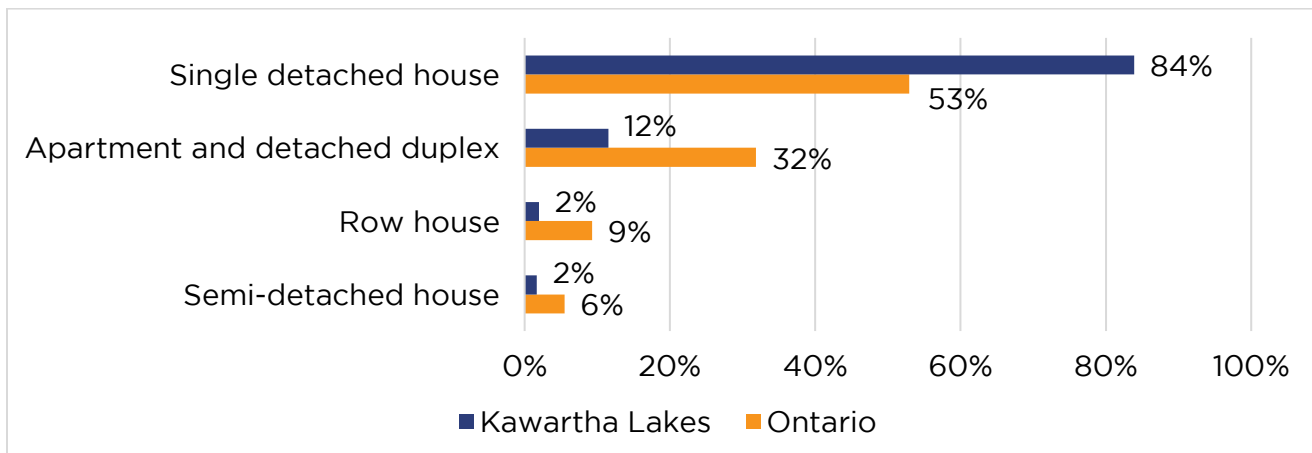
Residents in Kawartha Lakes have slightly lower levels of employment and household income compared to Ontario. The City, though, offers more favourable costs of living. Table 3 and Figure 3 highlight key housing characteristics-compared to Ontario. Kawartha Lakes has a slightly lower cost of housing, with greater housing ownership, leading to fewer residents spend over 30% of their total income on shelter costs.

Table 3: Households and Dwelling Attainability, 2023.

| Housing Characteristics | Kawartha Lakes | Ontario |
|--|----------------|------------------|
| Total Number of Households | 34,034 | 5,941,308 |
| Average value of dwelling (\$) | \$740,762 | \$934,642 |
| Median value of dwellings (\$) | \$682,839 | \$797,175 |
| Median monthly shelter costs for owned dwellings | \$1,120 | \$1,477 |
| Average monthly shelter costs for owned dwellings | \$1,320 | \$1,748 |
| % of households owned | 83% | 70% |
| % of households rented | 17% | 30% |
| Median monthly shelter costs for rented dwellings (\$) | \$1,160 | \$1,108 |
| Average monthly shelter costs for rented dwellings (\$) | \$1,174 | \$1,220 |
| Average number of persons in private households | 2.37 | 2.57 |
| Population spending 30% or more of household total income on shelter costs | 19% | 28% |

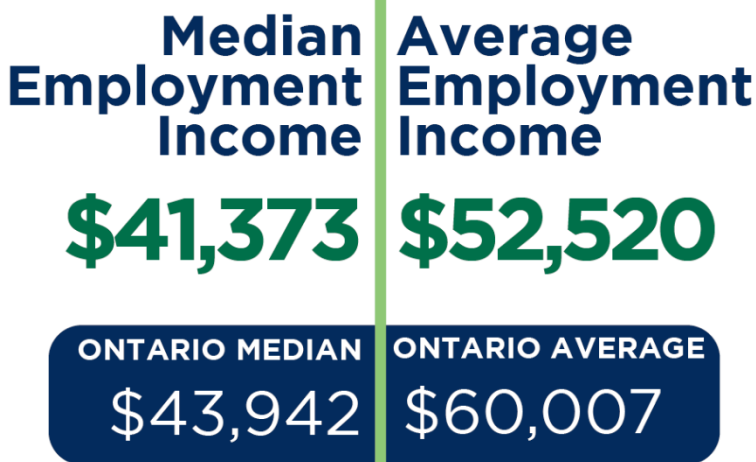
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics. 2023.

Figure 3: Occupied Dwellings by Structure Type, 2023.



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2023.

THE BOTTOM LINE



19%

**Ontario
28%**

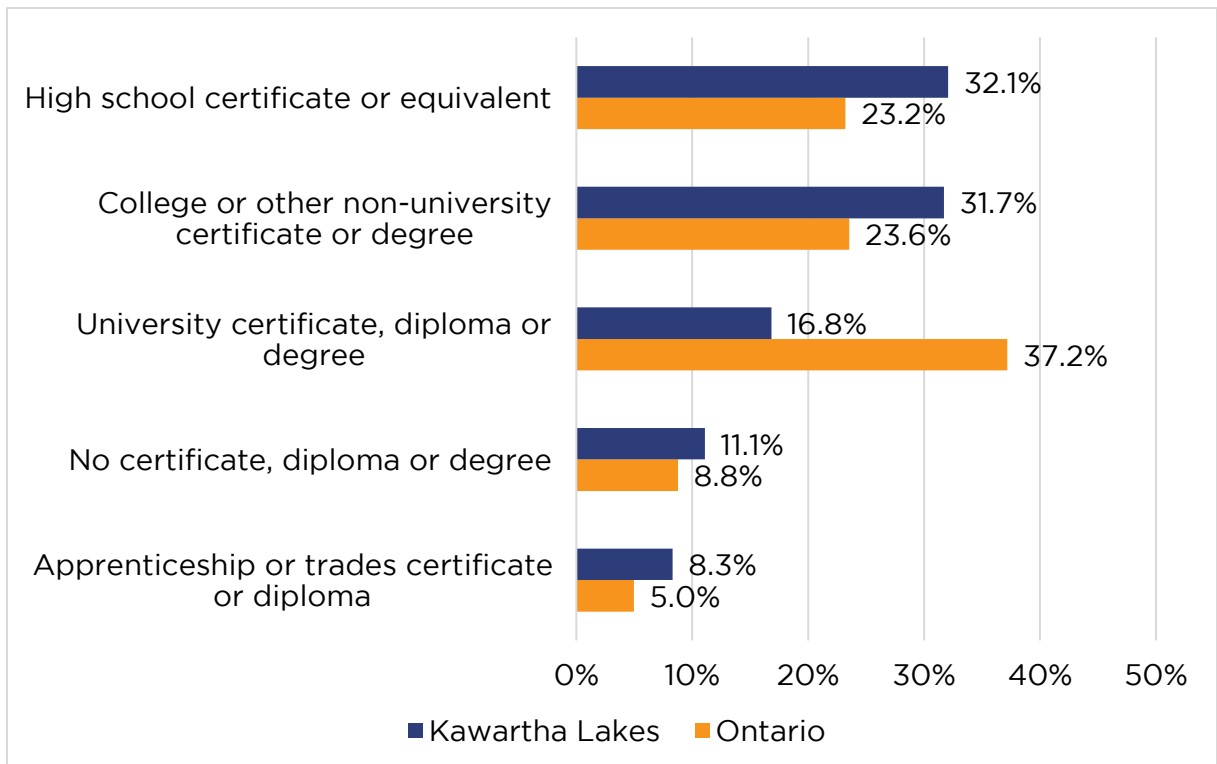
of Kawartha Lakes' population spends 30% or more of total household income on shelter costs.

- In **2022 Kawartha Lakes residents had slightly lower median and average incomes** than their Ontario counterparts.
- This difference was offset by Kawartha Lakes' slightly more comparative affordability. **Only 19% of residents are spending 30% or more of total income on shelter costs**, compared to 28% of Ontario residents.
- This suggests that while Kawartha Lakes residents earn slightly less than Ontario residents as a whole, **their quality of life and affordability is higher.**

1.3. Education, Skills and Training

This subsection reviews the level of education and major fields of study for residents of Kawartha Lakes and Ontario. Figures 4 and 5 outline the education levels obtained by Kawartha Lakes residents ages 25-64, as compared to Ontario. Definitions may be found in the footnote³.

Figure 4: Educational Attainment Breakdown, Residents Ages 25 to 64, 2023.



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2023.

³ '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.

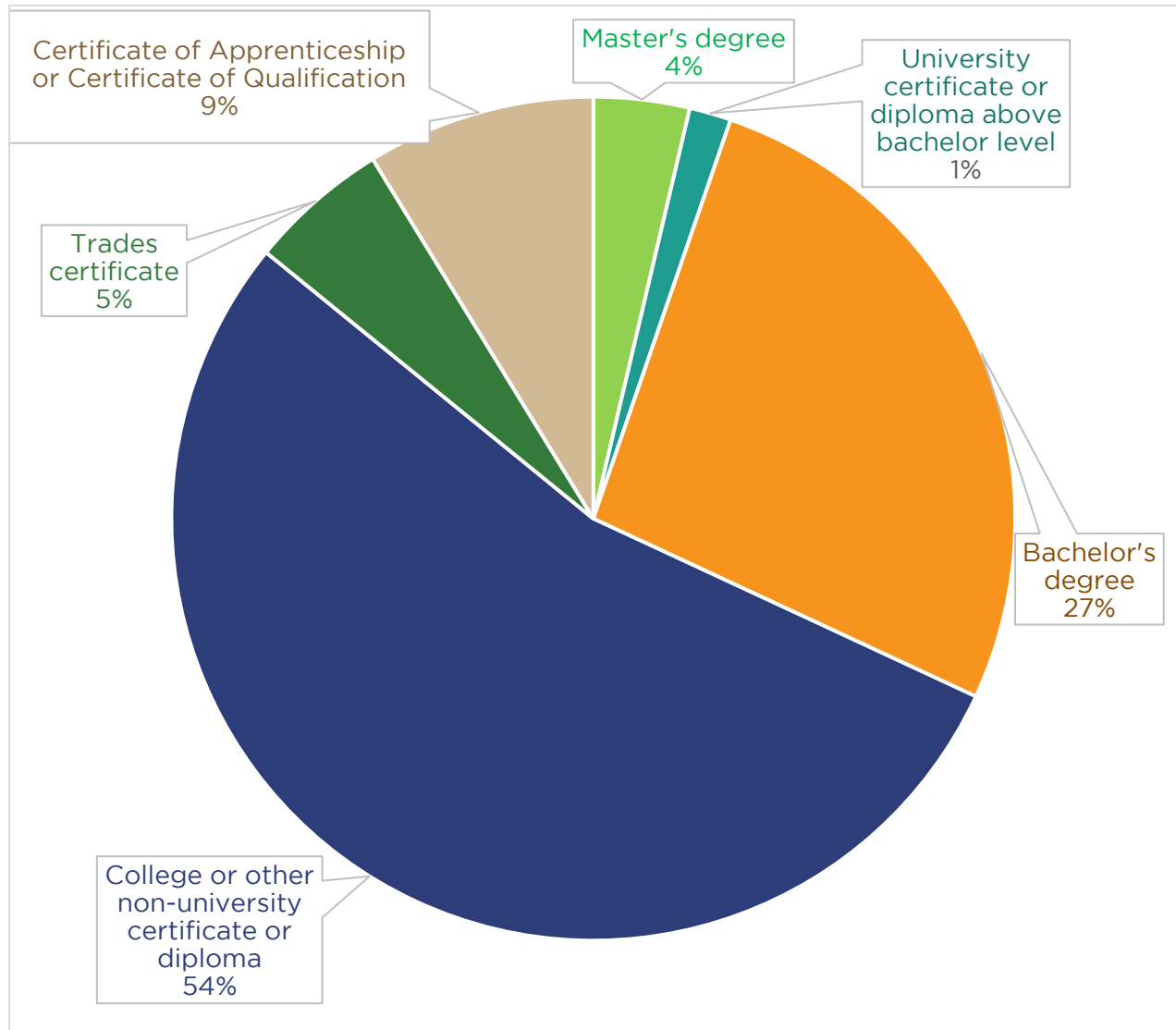
'Apprenticeship or trades certificate or diploma' includes Registered Apprenticeship certificates

'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 Kawartha Lakes residents ages 25 to 64. Post-secondary attainment suggests that:

- A total of 22,617 residents aged 25 to 64 have post-secondary education.
- A college degree is the most common type of education; attained by just over half - 56% - (attained by 12,616 residents) with a post-secondary education, aged 25 to 64.
- Approximately one out of four residents (28%) with post-secondary attainment, aged 25 to 64, has a bachelor's degree.

Figure 5: Percentage of Residents aged 24- 65 with Post-Secondary Attainment, 2023.



Source: McSweeney & Associates from Manifold SuperDemographics 2023.

Table 4 illustrates the major fields of study⁴ for all residents 15 years and older. It is collected for the highest certificate, diploma or degree above the secondary school level. The largest fields of study in the population are ‘Health professions and related programs;’ and ‘Business, management, marketing and related support.’⁵

Table 4: Post-Secondary Major Field of Study, Kawartha Lakes, 2023.

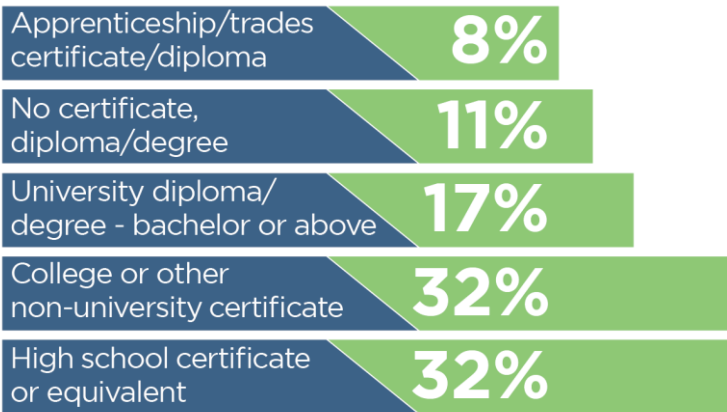
| Classification of Instructional Programs (CIP) | Total | Female | Male |
|--|---------------|---------------|---------------|
| Total | 72,149 | 36,359 | 35,789 |
| No postsecondary certificate, diploma or degree | 37,027 | 18,080 | 18,947 |
| 51. Health professions and related programs | 5,510 | 5,011 | 499 |
| 52. Business, management, marketing and related support services | 5,101 | 3,183 | 1,917 |
| 47. Mechanic and repair technologies/technicians | 2,437 | 51 | 2,386 |
| 46. Construction trades | 2,352 | 39 | 2,313 |
| 13. Education | 2,186 | 1,658 | 528 |
| 15. Engineering technologies and engineering-related fields | 1,965 | 171 | 1,794 |
| 43. Security and protective services | 1,326 | 348 | 978 |
| 12. Personal and culinary services | 1,277 | 971 | 306 |
| 48. Precision production | 1,129 | 45 | 1,084 |
| 45. Social sciences | 1,097 | 564 | 533 |
| 19. Family and consumer sciences/human sciences | 1,065 | 1,010 | 55 |
| 01. Agriculture, agriculture operations and related sciences | 1,020 | 418 | 602 |
| 50. Visual and performing arts | 922 | 627 | 295 |
| 22. Legal professions and studies | 810 | 637 | 173 |
| 11. Computer and information sciences and support services | 754 | 217 | 537 |
| 44. Public administration and social service professions | 637 | 588 | 49 |
| 42. Psychology | 543 | 437 | 106 |
| 14. Engineering | 530 | 87 | 443 |
| 26. Biological and biomedical sciences | 520 | 336 | 184 |

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2023.

⁴ ‘Major Field of study’ is defined by Classification of Instructional Programs (CIP) 2021 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.

⁵ 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.

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- Kawartha Lakes residents are **more likely to have a College or other non-university certificate or degree than their Ontario counterparts (32% compared to 24%)** and correspondingly **less likely to have a university certificate, diploma or degree (17% compared to 37%)**.
- This suggests that businesses relying on more technical skills learned at non-university post-secondary institutions are more likely to find relevant skills and educational levels among the available labour pool.

1.4. Language Characteristics

Table 5 indicates knowledge of Canada’s official languages. Almost every resident within Kawartha Lakes speaks either English or French (or both), as only 0.2% of residents speak neither English or French (while 2.4% of residents across the province speak neither English nor French).

Table 5: Language Characteristics, 2023.

| Characteristics | Kawartha Lakes | Kawartha Lakes % | Ontario % |
|----------------------------|----------------|------------------|-------------|
| Total population | 82,982 | 100% | 100% |
| English | 82,122 | 99.0% | 93.5% |
| French | 700 | 0.8% | 3.4% |
| English and French | 31 | 0.0% | 0.7% |
| Neither English nor French | 129 | 0.2% | 2.4% |

Source: McSweeney and Associates from Manifold Data Mining Inc. SuperDemographics 2023.

Almost all (99.0%) of Kawartha Lakes residents speak English as their first language.



1.5. Mobility Characteristics

Residents in Kawartha Lakes have slightly lower mobility rates⁶ to the province. Estimates presented in Table 6 indicate that those moving to Kawartha Lakes from outside the City are most likely to be moving from another community within Ontario (intra-provincial migrants).

Table 6: Kawartha Lakes Mobility Rates, 2023.

| Characteristics | Kawartha Lakes | Kawartha Lakes % | Ontario % |
|---|----------------|------------------|-------------|
| Mobility status – place of residence one year ago | | | |
| Total population | 82,263 | 100% | 100% |
| Non-movers | 75,224 | 91.4% | 88.3% |
| Movers | 7,039 | 8.6% | 11.7% |
| Non-migrants | 2,604 | 3.2% | 6.7% |
| Migrants | 4,435 | 5.4% | 5.0% |
| Internal Migrants | 4,290 | 5.2% | 4.2% |
| Intra-provincial migrants | 4,150 | 5.0% | 3.9% |
| Interprovincial migrants | 139 | 0.2% | 0.3% |
| Migrants from outside Canada | 146 | 0.2% | 0.8% |
| Mobility status – place of residence status five years ago | | | |
| Total population | 79,336 | 100% | 100% |
| Non-movers | 53,148 | 67.0% | 62.3% |
| Movers | 26,188 | 33.0% | 37.7% |
| Non-migrants | 8,795 | 11.1% | 15.7% |
| Migrants | 17,393 | 21.9% | 22.0% |
| Internal Migrants | 17,062 | 21.5% | 16.4% |
| Intra-provincial migrants | 16,549 | 20.9% | 14.8% |
| Interprovincial migrants | 513 | 0.6% | 1.6% |
| Migrants from outside Canada | 3 | 0.0% | 5.6% |

Source: Manifold Data Mining Inc. SuperDemographics 2023.

⁶ Mobility status refers to the relationship between a person's usual place of residence now and either one or five years ago. **Non-movers** are persons who were living at the same address and **Movers** are persons who were living at a different address. **Non-migrants** are movers who, on Census Day, were living at a different address, but in the same census subdivision (CSD). **Migrants** are movers who were residing in a different CSD (internal migrants) or who were living outside Canada (external migrants).

2. Labour Force Profiling and Analysis

2.1. Key Indicators

Kawartha Lakes has a labour force of **41,613** individuals. Kawartha Lakes has lower participation (57.7% compared to 66.0%) employment (54.8%/62.4%), and unemployment rates (5.0%/5.4%) relative to Ontario. This is to be expected given the general older population in Kawartha Lakes, as it suggests that many residents are outside the labour force (lower participation rate). A lower unemployment rate does suggest that those individuals who are looking for work are finding it at a slightly better rate than their Ontario counterparts. These findings are similar to those noted in work that was completed by the Centre for Workforce Development in 2020.⁷ That report was an in-depth review of Eastern Ontario’s labour force from 2008 to 2018 and provided a wealth of labour-related data.

Table 7: Key Labour Force Statistics by Gender, Kawartha Lakes, 2023.

| Labour Force Activity | Kawartha Lakes | | | Ontario | | |
|---|----------------|-------------|-------------|-------------|-------------|-------------|
| | Total | Male | Female | Total | Male | Female |
| Total population 15 years and over | 72,149 | 35,789 | 36,359 | 13,118,324 | 6,382,104 | 6,736,220 |
| In the labour force | 41,613 | 21,873 | 19,740 | 8,651,221 | 4,482,628 | 4,168,593 |
| Employed | 39,538 | 20,769 | 18,769 | 8,188,673 | 4,251,439 | 3,937,235 |
| Unemployed | 2,075 | 1,104 | 971 | 462,547 | 231,189 | 231,358 |
| Not in the labour force | 30,535 | 13,916 | 16,620 | 4,467,103 | 1,899,476 | 2,567,627 |
| Participation rate % | 57.7 | 61.1 | 54.3 | 66.0 | 70.2 | 61.9 |
| Employment rate % | 54.8 | 58.0 | 51.6 | 62.4 | 66.6 | 58.5 |
| Unemployment rate % | 5.0 | 5.1 | 4.9 | 5.4 | 5.2 | 5.6 |

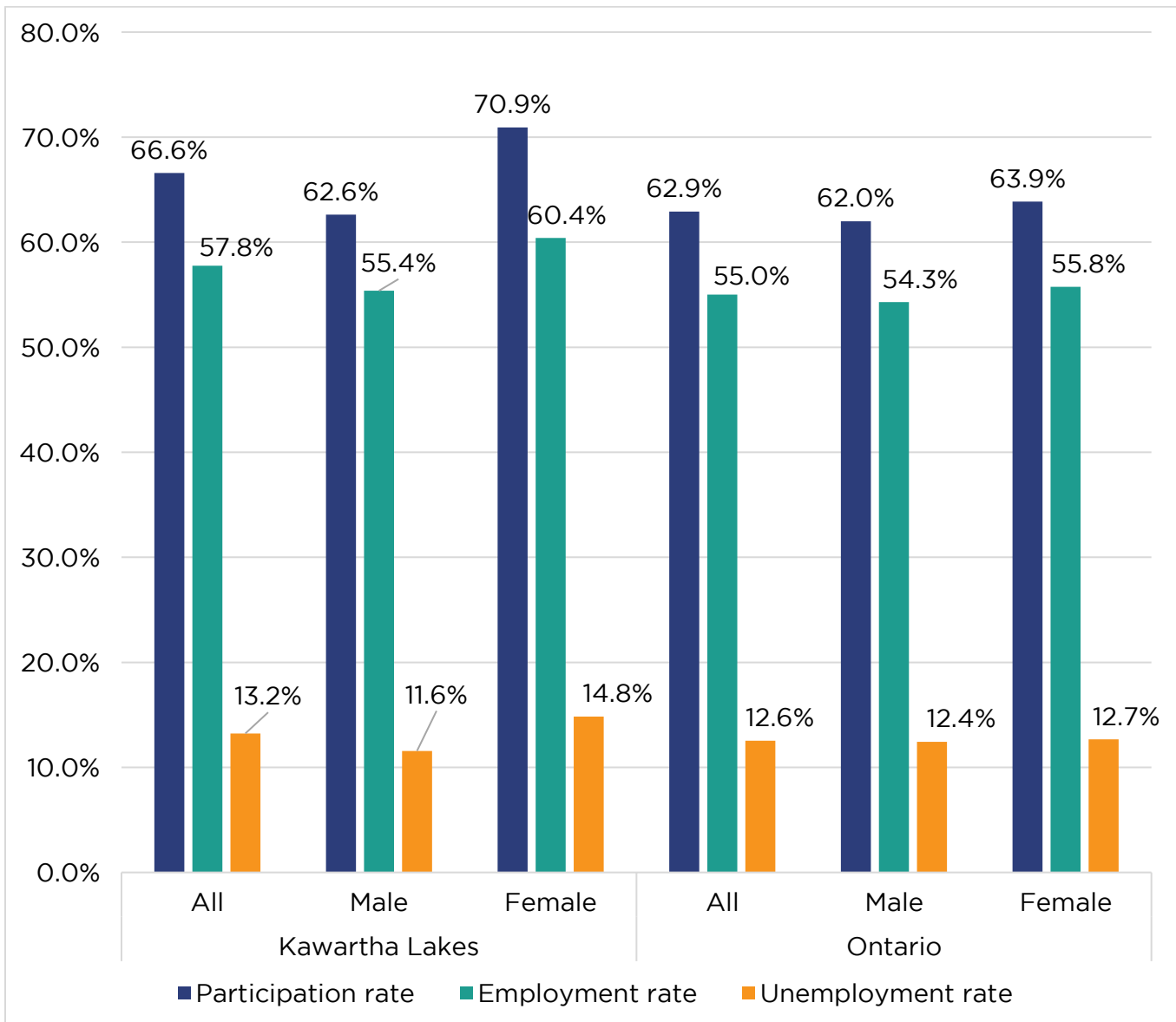
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2023.

Kawartha Lakes has a lower participation rate than Ontario, suggesting many older residents may not be looking to re-enter the workforce.

⁷ Centre for Workforce Development. [Examining Labour Force Participation in Eastern Ontario](#). 2020.

Key labour force indicators are broken down by age and gender in Figure 6 and used to highlight underemployed/underutilized labour groups. Kawartha Lakes has a higher youth participation rate, suggesting that Kawartha Lakes' youth are significantly interested in engaging in the labour force. The gap is wider for females (7% higher than the provincial rate) than for males (only 0.6% higher). Altogether, this information suggests that local youth are quite interested in entering the labour force, with two out of three (66.6%) participating in the economy.

Figure 6: Labour Force Statistics by Gender, Population 15 to 24, 2023.



Source: Manifold SuperDemographics 2023.

Table 8 illustrates labour force characteristics for youth (15 to 24) and mature adults (25 and older) in Kawartha Lakes, benchmarked against Ontario data.

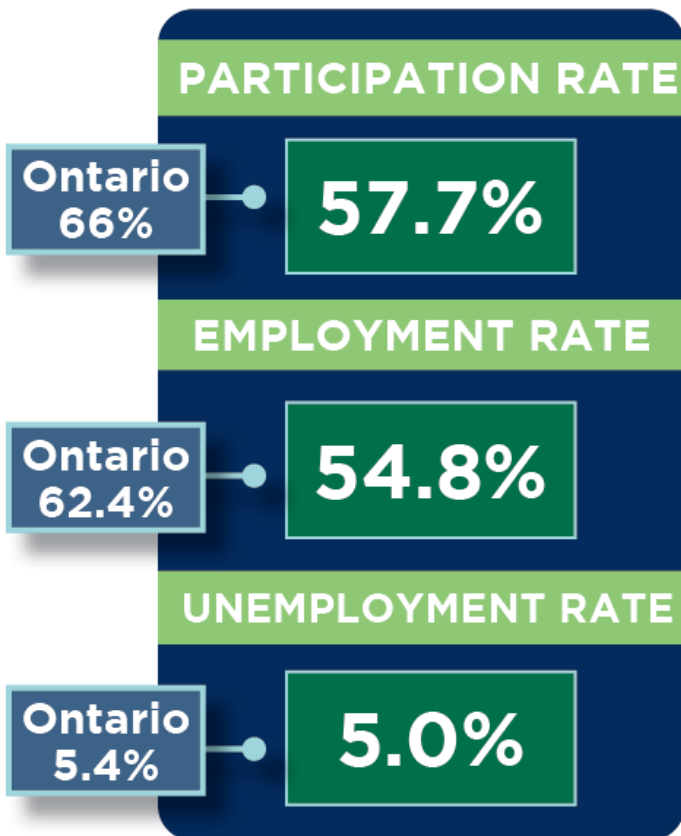
Table 8: Labour Force Characteristics by Age and Gender, 2023.

| Population 15 to 24 years old: | | | | | | |
|--------------------------------|----------------|------|--------|---------|------|--------|
| | Kawartha Lakes | | | Ontario | | |
| | Total | Male | Female | Total | Male | Female |
| Participation rate (%) | 66.6 | 62.6 | 70.9 | 62.9 | 62.0 | 63.9 |
| Employment rate (%) | 57.8 | 55.4 | 60.4 | 55.0 | 54.3 | 55.8 |
| Unemployment rate (%) | 13.2 | 11.6 | 14.8 | 12.6 | 12.4 | 12.7 |
| Population 25 years and over: | | | | | | |
| | Kawartha Lakes | | | Ontario | | |
| | Total | Male | Female | Total | Male | Female |
| Participation rate (%) | 56.6 | 60.9 | 52.4 | 66.5 | 71.8 | 61.6 |
| Employment rate (%) | 54.4 | 58.4 | 50.6 | 63.7 | 68.9 | 58.9 |
| Unemployment rate (%) | 3.8 | 4.2 | 3.4 | 4.2 | 4.0 | 4.3 |

Source: Manifold SuperDemographics, 2023.



THE BOTTOM LINE



- Kawartha Lakes' participation rate is **slightly lower than their provincial counterparts (57.7% compared to 66.0%)**.
- **This is likely explained by Kawartha Lakes' higher average and median ages.** That is, it is likely that a much larger percentage of Kawartha Lakes' residents are retired and therefore not engaged in the labour force. *N.B. There are other possible explanations, this is just a likelihood given the age distribution of the population.*
- Youth participation rates are **slightly higher than their provincial counterparts (66.6% in Kawartha Lakes, 62.9% provincially)**.

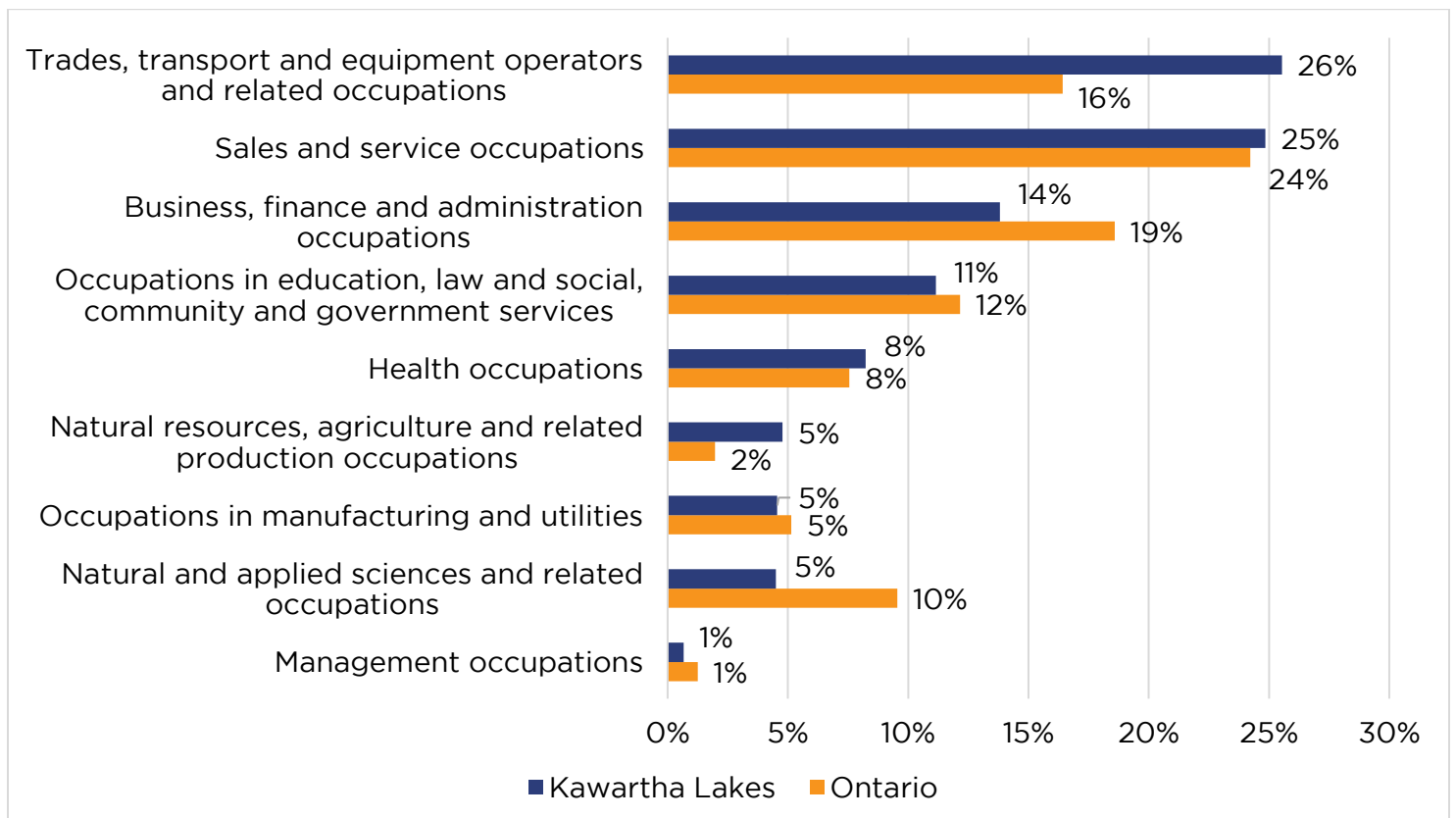
2.2. Labour Supply in Kawartha Lakes

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 Kawartha Lakes residents most commonly work in⁸:

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

Figure 7: Resident Labour Force by Occupation, 1-digit NOCs, 2023.



Source: Manifold SuperDemographics 2023.

⁸ Please note that where the totals are the same, but the bars are different lengths (health occupations, management occupations) the difference is due to rounding.

The number of part-time and full-time workers also helps identify potential labour force engagement and supply. In Kawartha Lakes, 52.9% of employed individuals typically worked full-time while 47.1% worked part-time. This is slightly different than Ontario where 54.5% of individuals typically worked full-time and 45.5% worked part-time.

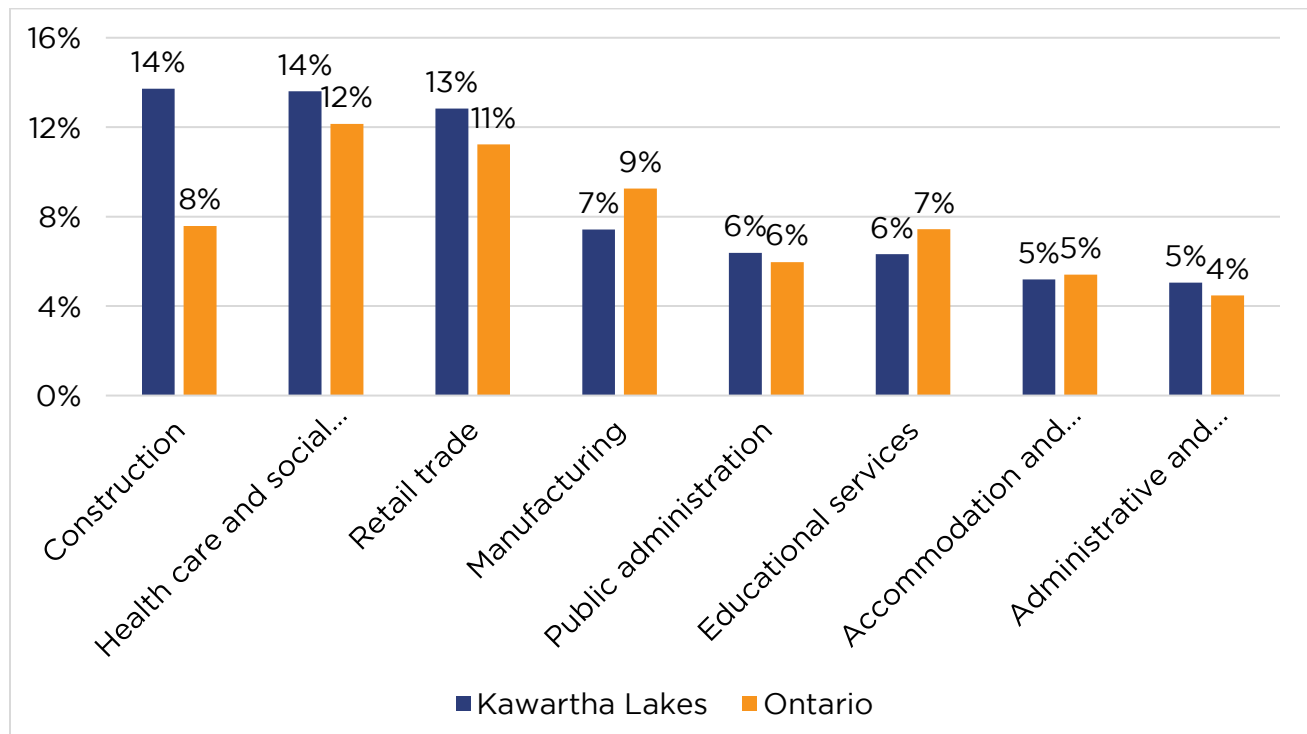
Table 9: Percentage of Employed Individuals by Full-Time or Part-Time Status, 2023.

| Status | Kawartha Lakes | Kawartha Lakes % | Ontario % |
|-----------|----------------|------------------|-----------|
| Full-Time | 20,763 | 52.9% | 54.5% |
| Part-Time | 18,465 | 47.1% | 45.5% |

Source: Manifold SuperDemographics 2023.

Figure 8 illustrates the industries in Kawartha Lakes that represent at least 5.0% of all local employment. Kawartha Lakes has larger labour concentrations relative to Ontario in several sectors, but most prominently in construction (13.7% locally compared to only 7.6% across Ontario). Concentrations are explored in-depth in section 3.5.

Figure 8: Labour Force by Industry, 2023.

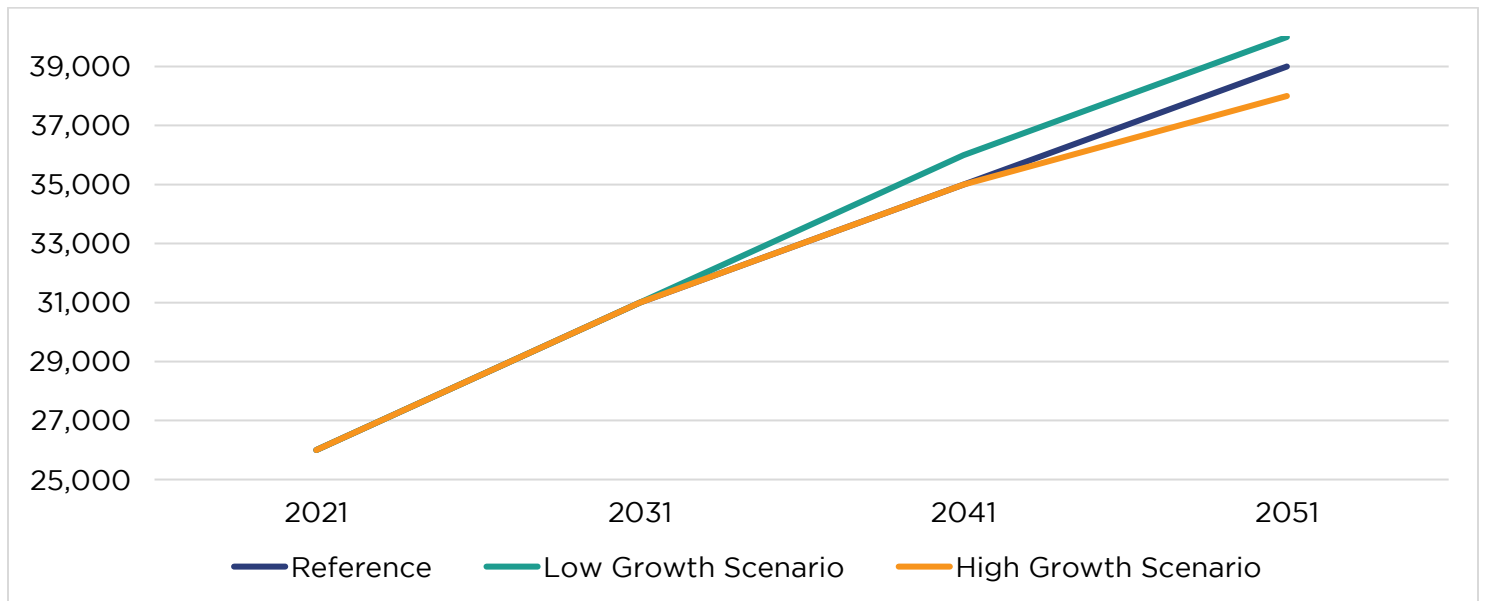


Source: Manifold SuperDemographics 2023.

2.3. Employment Forecasts to 2051

As part of the Greater Golden Horseshoe Growth Forecast through 2051, Hemson Consulting put together employment forecasts for the City of Kawartha Lakes. Those projections are presented in Figure 9, noting low, high, and reference scenarios. In 2021, Hemson Consulting noted that approximately 26,000 jobs existed within Kawartha Lakes, with expected growth to between 38,000 and 40,000 jobs by 2051. As with the population projections section above, it is clear that the City of Kawartha Lakes is poised for significant growth between 2024 and 2051.

Figure 9: Employment Forecasts, City of Kawartha Lakes, 2021 to 2051



Source: Hemson Consulting, Greater Golden Horseshoe: Growth Forecasts to 2051.

THE BOTTOM LINE

- Kawartha Lakes residents are **nearly twice as likely** to be working in either **construction industries compared to Ontario residents.**
- This speaks to the importance of the construction sector to Kawartha Lakes' economy.

2.4. 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 Kawartha Lakes and the number of workers living in Kawartha Lakes that worked/work in that occupation (i.e., local supply). There are approximately 50% more workers than jobs in Kawartha Lakes, making the area a net exporter of labour. Specifically, in Kawartha Lakes, there is a net surplus of approximately **13,938 workers**.

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 Kawartha Lakes, three occupations have labour surpluses of over 1,500 workers:

- Trades, transport and equipment operators and related occupations (4,828 more residents working in the sector, compared to the number of jobs).
- Sales and service occupations (2,607).
- Business, finance and administration occupations (1,649).

In Kawartha Lakes, there are **no occupations** with a labour market gap – 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 Table 10 indicate the direction and magnitude of local labour market imbalances⁹.

⁹ As a reminder subtotals may not add up to broader totals due to methodological rounding.

Table 10: Labour Market Gaps/Surpluses by Occupation, 1-digit NOCs, 2023.

| Occupation Group (1-digit NOCs code) | Kawartha Lakes Residents Working in Occupation | Jobs in Kawartha Lakes | Gap (+)/ Surplus (-) |
|---|--|------------------------|----------------------|
| Legislative and senior management occupations | 268 | 87 | -181 |
| Business, finance and administration occupations | 5,595 | 3,946 | -1,649 |
| Natural and applied sciences and related occupations | 1,825 | 1,452 | -373 |
| Health occupations | 3,334 | 2,192 | -1,142 |
| Occupations in education, law and social, community and government services | 4,516 | 3,480 | -1,036 |
| Occupations in art, culture, recreation and sport | 773 | 600 | -173 |
| Sales and service occupations | 10,065 | 7,458 | -2,607 |
| Trades, transport and equipment operators and related occupations | 10,342 | 5,514 | -4,828 |
| Natural resources, agriculture and related production occupations | 1,933 | 902 | -1,031 |
| Occupations in manufacturing and utilities | 1,846 | 1,637 | -209 |
| N/A or Unclassified | 1,117 | 407 | -710 |
| Total Labour Force 15 years and older | 41,613 | 27,675 | -13,938 |

Source: EMSI Analyst 2023.3 and Manifold SuperDemographics 2023.

The same type of analysis can be done for labour supply and demand for local industries. The industries with the largest labour surpluses (Table 11) are:

- Construction (3,002 more workers than jobs).
- Retail trade (1,730).

These significant labour surpluses suggest that a significant portion of employed Kawartha Lakes residents are leaving the community for their work or are working at home while commuting “remotely”.

Table 11: Labour Market Surplus by Sector, 2023.

| Sectors | Kawartha Lakes Residents Working in industry | Jobs in Kawartha Lakes | Gap (+)/ Surplus (-) |
|---|--|------------------------|----------------------|
| Agriculture, forestry, fishing and hunting | 1,449 | 642 | -807 |
| Mining, quarrying, and oil and gas extraction | 218 | 112 | -106 |
| Utilities | 671 | 199 | -472 |
| Construction | 5,556 | 2,554 | -3,002 |
| Manufacturing | 3,005 | 1,710 | -1,295 |
| Wholesale trade | 1,145 | 874 | -271 |
| Retail trade | 5,199 | 3,469 | -1,730 |
| Transportation and warehousing | 1,696 | 1,270 | -426 |
| Information and cultural industries | 372 | 180 | -192 |
| Finance and insurance | 1,010 | 750 | -260 |
| Real estate and rental and leasing | 654 | 644 | -10 |
| Professional, scientific and technical services | 2,018 | 1,195 | -823 |
| Management of companies and enterprises | 0 | 0 | 0 |
| Administrative and support, waste management and remediation services | 2,044 | 1,784 | -260 |
| Educational services | 2,559 | 1,849 | -710 |
| Health care and social assistance | 5,512 | 4,173 | -1,339 |
| Arts, entertainment and recreation | 830 | 586 | -244 |
| Accommodation and food services | 2,101 | 2,035 | -66 |
| Other services (except public administration) | 1,875 | 1,084 | -791 |
| Public administration | 2,581 | 2,157 | -424 |
| N/A or unclassified | 1,117 | 407 | -710 |
| Total Labour Force 15 years and older | 41,613 | 27,675 | -13,938 |

Source: EMSI Analyst 2023.3 and Manifold SuperDemographics 2023.

THE BOTTOM LINE

- There are approximately **50% more workers in Kawartha Lakes across industries and occupations** compared to available jobs within the City.
- This surplus of labour suggests that Kawartha Lakes provides a significant amount of labour to external communities to fulfill labour demands.



2.5. Workforce Commuting Flow

This subsection aims to identify the most probable labour force recruitment area for Kawartha Lakes using commuting patterns. Tables 12 and 13 show the top commuting flows for persons reporting a “usual place of work” or “place of residence” in Kawartha Lakes, and reveal the following trends regarding labour force commuting¹⁰:

- Just over half (54%) of residents work within the local community. For those who do not, just under 10% commute to Peterborough.
- Kawartha Lakes exports approximately 46% of its resident labour with a usual place of work.
- Top recruitment areas for Kawartha Lakes are Peterborough and Trent Lakes.
- Kawartha Lakes imports 20% of its total workforce with a usual place of work.

There are four important pieces to keep in mind when assessing the data:

1. This information is from the 2021 Census from Statistics Canada. The numbers should not be directly contrasted with either Manifold or EMSI Analyst data, as they are from distinct years and reflect differing methodologies.
2. This data is representative of a snapshot in time of when the Census was taken (spring/early summer 2021). As such, commuting data was impacted by the pandemic, leading to a decrease in residents with a “usual place of work”. These numbers are valuable as relative measures (i.e., noting communities that supply/recruit the most labour to/from Kawartha Lakes. However, they likely undercount the total number of commuters to each community (including locally).
3. These numbers are representative of only those people with a usual place of work. Therein, there will be fewer total individuals reflected here because self-employed folks with no physical location, those working from home, or those with hybrid/varied workplaces will not be counted.
4. Table 12 only presents geographies where at least 500 Kawartha Lakes residents commute into, while Table 13 only presents geographies where at least 200 residents commute into Kawartha Lakes. Totals presented within the Tables include all geographies and therefore the subtotals above will not add up to the total figures.

¹⁰ Please note, subtotals (male and female) may not equal totals due to rounding and privacy issues.

Table 12: Top Places to Work for Kawartha Lakes Residents, 2021.

| Place of Work | Total | Male | Female |
|---|---------------|---------------|---------------|
| Kawartha Lakes | 11,080 | 4740 | 6345 |
| Peterborough | 1,700 | 695 | 1,005 |
| Toronto | 855 | 595 | 260 |
| Scugog | 695 | 315 | 380 |
| Clarington | 610 | 370 | 240 |
| Oshawa | 555 | 280 | 275 |
| Brock | 545 | 240 | 305 |
| Whitby | 510 | 350 | 160 |
| Total residents with a usual place of work | 20,505 | 10,085 | 10,350 |
| # of residents working outside of Kawartha Lakes | 9,425 | 5,345 | 4,005 |
| % of residents working outside of Kawartha Lakes | 46% | 53% | 39% |

Source: Statistics Canada, Commuting Flows Tables 2021.

Table 13: Top Labour Recruitment Areas for Kawartha Lakes, 2021.

| Place of Residence | Total | Male | Female |
|---|---------------|--------------|--------------|
| Kawartha Lakes | 11,080 | 4,740 | 6,345 |
| Peterborough | 600 | 320 | 280 |
| Trent Lakes | 320 | 100 | 220 |
| Selwyn | 220 | 105 | 115 |
| Brock | 200 | 90 | 110 |
| Total people with a usual place of work in Kawartha Lakes | 13,825 | 6,065 | 7,680 |
| # of people working inside Kawartha Lakes who live outside of Kawartha Lakes | 2,745 | 1,325 | 1,335 |
| % of people working inside Kawartha Lakes who live outside of Kawartha Lakes | 20% | 22% | 17% |

Source: Statistics Canada, Commuting Flows Tables 2021.

THE BOTTOM LINE

- Kawartha Lakes' economy is closely linked with Peterborough County, with the vast majority of commuting being done between these two municipalities.

Labour Force Commuting Out

% Residents with a usual place of work outside of Kawartha Lakes.

46%



Labour Force Commuting In

% of individuals working inside Kawartha Lakes who live outside of the City.

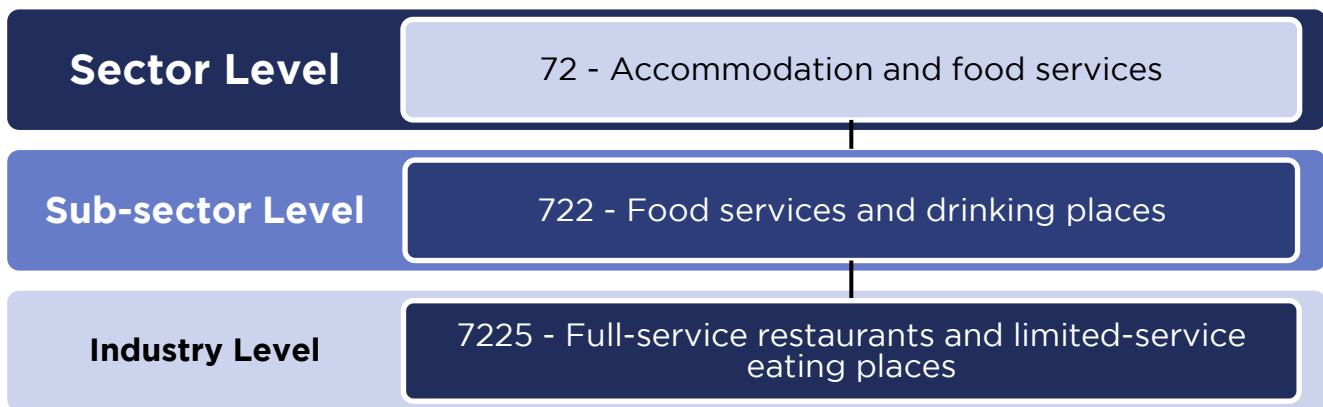
20%



3. Kawartha Lakes Economic Base Analysis

This section investigates the local economy pertinent to Kawartha Lakes; that is, the jobs and businesses that drive the local economy. 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.¹¹

The “North American Industry Classification System” (NAICS) of classifying industries is used for this report. The largest groupings or aggregations of industry 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: The Sector is ‘Accommodation and food services’. The Sub-sector of this would be ‘Food services and drinking places’. The Industry of this sub-sector is ‘Full-service restaurants and limited-service eating places’.



¹¹ Appendix A replicates this analysis for the City’s **Economic Region**. After a review of commuting patterns and discussion with Kawartha Lakes staff, it was agreed that the central focus of the “Economic Region” will be the combined economies of **Kawartha Lakes** and **Peterborough County**, benchmarked by Ontario.

3.1. Employment Profile

The primary employment sectors in Kawartha Lakes are health care and social assistance; retail trade; and construction. Between 2012 and 2022, the economy grew by **1,124 jobs (4.1%)**. Job growth in the City was lower than in the province, where job totals increased by 15% from 2012 to 2012. Table 14 indicates the representative size of each of these sectors.

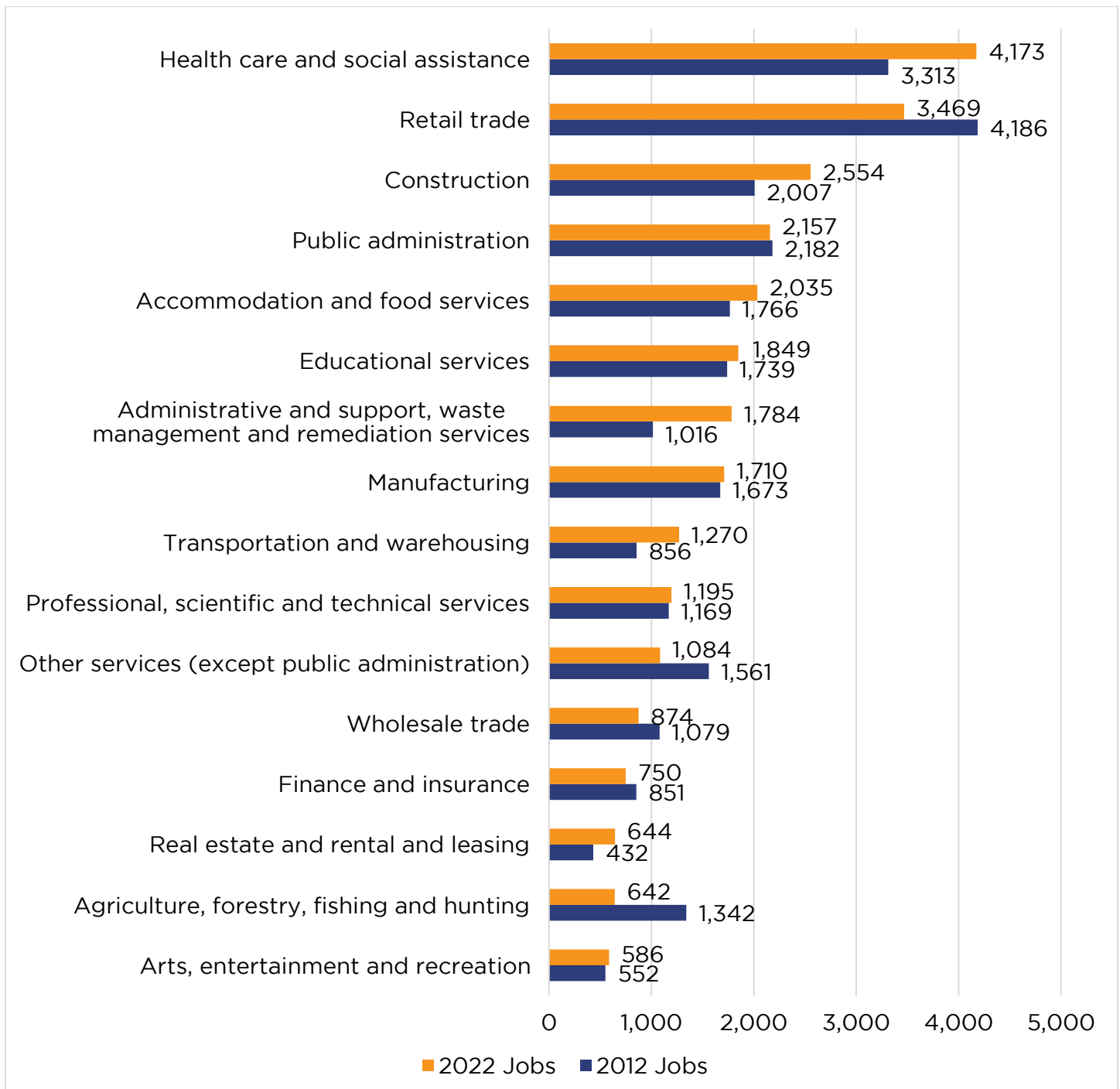
Table 14: Employment Growth and Relative Size by Sector, Kawartha Lakes and Ontario, 2012-2022.

| NAICS | Description | 2022 Jobs | 2012-2022 Change | % of Jobs in Kawartha Lakes | % of Jobs in Ontario |
|------------|---|---------------|------------------|-----------------------------|----------------------|
| 11 | Agriculture, forestry, fishing and hunting | 642 | -700 | 2.3% | 1.0% |
| 21 | Mining, quarrying, and oil and gas extraction | 112 | -14 | 0.4% | 0.4% |
| 22 | Utilities | 199 | 81 | 0.7% | 0.6% |
| 23 | Construction | 2,554 | 547 | 9.2% | 7.0% |
| 31-33 | Manufacturing | 1,710 | 38 | 6.2% | 8.8% |
| 41 | Wholesale trade | 874 | -205 | 3.2% | 4.9% |
| 44-45 | Retail trade | 3,469 | -717 | 12.5% | 10.0% |
| 48-49 | Transportation and warehousing | 1,270 | 415 | 4.6% | 4.8% |
| 51 | Information and cultural industries | 180 | -2 | 0.7% | 2.2% |
| 52 | Finance and insurance | 750 | -102 | 2.7% | 5.2% |
| 53 | Real estate and rental and leasing | 644 | 212 | 2.3% | 2.3% |
| 54 | Professional, scientific and technical services | 1,195 | 26 | 4.3% | 8.9% |
| 55 | Management of companies and enterprises | 0 | -40 | 0.0% | 0.6% |
| 56 | Administrative and support, waste management and remediation services | 1,784 | 768 | 6.4% | 5.6% |
| 61 | Educational services | 1,849 | 111 | 6.7% | 7.1% |
| 62 | Health care and social assistance | 4,173 | 860 | 15.1% | 11.3% |
| 71 | Arts, entertainment and recreation | 586 | 35 | 2.1% | 1.8% |
| 72 | Accommodation and food services | 2,035 | 269 | 7.4% | 6.1% |
| 81 | Other services (except public administration) | 1,084 | -477 | 3.9% | 3.7% |
| 91 | Public administration | 2,157 | -24 | 7.8% | 6.2% |
| X0 | Unclassified | 407 | 45 | 1.5% | 1.6% |
| All | | 27,675 | 1,124 | 100% | 100% |

Source: EMSI Analyst 2023.3.

To better understand how each sector supports jobs, Figure 10 shows 2012 and 2022 job counts for all industries with at least 500 jobs in 2022 in the Economic Region.

Figure 10: Largest Industries by Number of Jobs, 2012 and 2022.



Source: EMSI Analyst 2023.3.

Table 15 breaks job count data into further subcategories, presenting 2022 job count figures for the top 20 four-digit industry classifications. Elementary and secondary schools employed the most individuals in Kawartha Lakes in both 2012 and 2022. Among these industries, offices of physicians saw the largest job increase (354 positions).

Table 15: Industry Job Counts, 2012 and 2022, Kawartha Lakes.

| NAICS | Description | 2012 Jobs | 2022 Jobs | 2012-2022 Job Change | 2012-2022 % Job Change |
|-------|--|-----------|-----------|----------------------|------------------------|
| 6111 | Elementary and secondary schools | 1,423 | 1,248 | -175 | -12% |
| 9130 | Local, municipal and regional public administration | 1,232 | 1,106 | -127 | -10% |
| 6221 | General medical and surgical hospitals | 917 | 960 | 42 | 5% |
| 5617 | Services to buildings and dwellings | 557 | 797 | 240 | 43% |
| 4451 | Grocery stores | 907 | 768 | -139 | -15% |
| 6231 | Nursing care facilities | 912 | 754 | -159 | -17% |
| 9120 | Provincial and territorial public administration | 836 | 676 | -160 | -19% |
| 2361 | Residential building construction | 490 | 601 | 111 | 23% |
| 6211 | Offices of physicians | 228 | 583 | 354 | 155% |
| 1110 | Farms | 1,272 | 579 | -693 | -54% |
| 2382 | Building equipment contractors | 427 | 522 | 94 | 22% |
| 5312 | Offices of real estate agents and brokers | 150 | 462 | 313 | 209% |
| 2381 | Foundation, structure, and building exterior contractors | 276 | 412 | 136 | 49% |
| 7139 | Other amusement and recreation industries | 208 | 409 | 201 | 97% |
| X000 | Unclassified | 362 | 407 | 45 | 12% |
| 5613 | Employment services | 171 | 400 | 229 | 133% |
| 6241 | Individual and family services | 252 | 374 | 123 | 49% |
| 3115 | Dairy product manufacturing | 96 | 346 | 250 | 260% |
| 6213 | Offices of other health practitioners | 98 | 339 | 241 | 244% |
| 4411 | Automobile dealers | 434 | 328 | -106 | -24% |

Source: EMSI Analyst 2023.3.

3.2. Economic Output

This subsection highlights industries with the largest economic impact. Table 16 illustrates industries with the highest level of economic output as measured by total sales. Average wages by industry are also illustrated. The three private sector industries with the most sales in Kawartha Lakes are:

- Dairy product manufacturing.
- Residential building construction.
- Farming.

Table 16: Economic Output by Industry, 2021.

| Industry | Sales | Average Wages |
|--|------------------------|-----------------|
| Provincial and territorial public administration | \$358,856,347 | \$84,147 |
| Local, municipal and regional public administration | \$248,396,175 | \$68,404 |
| Dairy product manufacturing | \$170,710,775 | \$45,007 |
| Residential building construction | \$166,892,769 | \$50,366 |
| Elementary and secondary schools | \$161,806,560 | \$69,314 |
| Farms | \$150,790,608 | \$22,173 |
| Other transit and ground passenger transportation | \$150,574,313 | N/A |
| Other miscellaneous manufacturing | \$135,711,254 | \$51,659 |
| General medical and surgical hospitals | \$128,500,267 | \$59,696 |
| Building equipment contractors | \$103,642,435 | \$73,329 |
| Electric power generation, transmission and distribution | \$78,035,359 | \$98,321 |
| Motor vehicle parts manufacturing | \$73,234,023 | \$55,516 |
| Full-service restaurants and limited-service eating places | \$68,204,432 | \$16,210 |
| All industries | \$4,589,633,763 | \$54,534 |

Source: 2023.3 EMSI Analyst, based on 2021 National Input-Output Tables by StatsCan.

3.3. Export Sales

Exports show the amount of money that is spent by industries outside the region (domestically and internationally) in exchange for goods or services produced by an industry located in the City. In 2021, the most recent data available, total export sales from Kawartha Lakes amounted to just under \$3 billion. Table 17 presents the largest drivers of external revenues into the City of Kawartha Lakes.

Table 17: Top Export Dollars Flowing into Kawartha Lakes by Industry, 2021.

| Industry | Total Export Sales |
|---|------------------------|
| Public administration | \$628,686,308 |
| Manufacturing | \$562,753,333 |
| Health care and social assistance | \$270,942,725 |
| Transportation and warehousing | \$223,472,174 |
| Educational services | \$172,991,374 |
| Construction | \$130,609,488 |
| Wholesale trade | \$125,786,045 |
| Administrative and support, waste management and remediation services | \$107,997,513 |
| Retail trade | \$102,975,964 |
| Agriculture, forestry, fishing and hunting | \$99,730,550 |
| Finance and insurance | \$82,892,183 |
| Professional, scientific and technical services | \$71,417,491 |
| Utilities | \$37,776,126 |
| Accommodation and food services | \$34,589,357 |
| Mining, quarrying, and oil and gas extraction | \$34,044,251 |
| Other services (except public administration) | \$33,862,382 |
| Information and cultural industries | \$28,846,725 |
| Real estate and rental and leasing | \$27,945,846 |
| Arts, entertainment and recreation | \$18,242,925 |
| Total | \$2,795,562,762 |

Source: 2023.3 EMSI Analyst, based on 2021 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 Kawartha Lakes. Table 18 presents the top four-digit industries in terms of total purchases made (more than \$29 million in purchases), as well as the percentage of those purchases that are made in-region and out-of-region. Farms in the City are a major economic driver, evidenced by total purchases from this subsector being more than \$30 million more than the next highest subsector.

Table 18: Top Industries by Purchasing Power, Kawartha Lakes, 2021.

| Industry | Total Purchases from Sector | Percentage Purchased in the City | Percentage Purchased Out of the City |
|---|-----------------------------|----------------------------------|--------------------------------------|
| Farms | \$88,391,760 | 37% | 63% |
| Petroleum and coal product manufacturing | \$55,408,033 | 0% | 100% |
| Lessors of real estate | \$50,669,262 | 24% | 76% |
| Depository credit intermediation | \$44,449,076 | 28% | 72% |
| General medical and surgical hospitals | \$44,212,143 | 51% | 49% |
| Pharmaceutical and medicine manufacturing | \$38,534,989 | 1% | 99% |
| Computer systems design and related services | \$35,875,234 | 35% | 65% |
| Architectural, engineering and related services | \$34,524,622 | 21% | 79% |
| Plastic product manufacturing | \$30,658,912 | 73% | 27% |
| Motor vehicle parts manufacturing | \$29,731,022 | 73% | 27% |
| Insurance carriers | \$29,023,489 | 52% | 48% |

Source: 2023.3 EMSI Analyst, based on 2021 National Input-Output Tables by StatsCan.

THE BOTTOM LINE

- Within private industries, **dairy product manufacturers and residential builders** are both significant generators of local sales.
- For most of the largest local industries by “purchasing power”, **the majority of purchases are made from outside the region.**
- With respect to industry output, the economic impact of **farms** is made clear, with significant sales and purchases.



3.5. Location Quotient Analysis

Location quotient (LQ) analysis compares the level of employment concentration (or specialization) in a local economy (i.e., Kawartha 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?

LQ helps to identify the strengths of the community. As a reminder, this assessment focuses on jobs in the local economy, not where residents are employed. Table 19 presents LQ data at a 2-digit level, while Tables 18 and 19 present this information at a 4-digit level. The location quotient at the broadest industry classification level indicates that Kawartha Lakes has the strongest specializations (an LQ of at least 1.2) relative to both the rest of the province and nation in the following sectors:

- Agriculture, forestry, fishing and hunting.
- Construction.
- Health care and social assistance.
- Public administration.

Table 19: Location Quotient Analysis by Sector.

| Description | 2022 Provincial Location Quotient | 2022 National Location Quotient |
|---|-----------------------------------|---------------------------------|
| Agriculture, forestry, fishing and hunting | 2.25 | 1.36 |
| Administrative and support, waste management and remediation services | 1.15 | 1.33 |
| Construction | 1.32 | 1.25 |
| Health care and social assistance | 1.33 | 1.23 |
| Public administration | 1.26 | 1.21 |
| Retail trade | 1.25 | 1.18 |
| Arts, entertainment and recreation | 1.17 | 1.15 |
| Accommodation and food services | 1.20 | 1.14 |
| Utilities | 1.13 | 1.14 |
| Real estate and rental and leasing | 1.01 | 1.14 |

Source: EMSI Analyst 2023.3.

Unsurprisingly, four of the five sectors most heavily concentrated in the City, compared to Canada, are also most heavily concentrated compared to Ontario. Dairy product manufacturing is nine times more concentrated in the City of Kawartha Lakes compared to both the national and provincial economies. Moreover, the next most heavily concentrated industry is agricultural supplies merchant wholesalers (6.6 times more concentrated nationally, 7.4 times more concentrated provincially), highlighting the importance of agriculture-related businesses to the City's economy.

Table 20: Top 5 Location Quotient Sectors, Kawartha Lakes, Benchmarked to Canada.

| Description | 2022 National Location Quotient |
|--|---------------------------------|
| Dairy product manufacturing | 9.2 |
| Agricultural supplies merchant wholesalers | 6.6 |
| Recreational vehicle (RV) parks and recreational camps | 6.3 |
| Local messengers and local delivery | 5.5 |
| Other transit and ground passenger transportation | 4.9 |

Source: EMSI Analyst 2023.3.

Table 21: Top 5 Location Quotient Sectors, Kawartha Lakes, Benchmarked to Ontario.

| Description | 2022 Provincial Location Quotient |
|--|-----------------------------------|
| Dairy product manufacturing | 9.2 |
| Agricultural supplies merchant wholesalers | 7.4 |
| Recreational vehicle (RV) parks and recreational camps | 7.2 |
| Local messengers and local delivery | 5.7 |
| Other motor vehicle dealers | 5.2 |

Source: EMSI Analyst 2023.3.

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 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. 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 the Local Economy

This subsection looks to the past (2012) and current figures (2022) to assess which sectors have been most positively impacted by local factors. The example below applies the model to local messengers and local delivery:

From 2012 to 2022 this sector saw an increase of 315 jobs in Kawartha Lakes.

- It would have been expected that the sector **increased by 3** positions 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 stagnant growth (0 jobs) over the same period.
- As such, before accounting for local factors, the sector would have been expected to gain 3 jobs.
- Instead, the local sector grew by 315 jobs, suggesting that 312 new jobs can be applied to factors specific to Kawartha Lakes.

Table 22 allocates employment changes for the industries most positively impacted (more than 150 jobs) by local effects to national, industry and regional/local effects.

Table 22: Shift-Share Analysis: Competitive Industries, Kawartha Lakes, 2012-2022.

| Industry (NAICS classification) | Growth/ Decline | Industry Growth Effect | National Economic Effect | Regional / Local Effect |
|---|--------------------|------------------------------|--------------------------------|-------------------------------|
| Local messengers and local delivery | 315 | 3 | 0 | 312 |
| Offices of physicians | 354 | 30 | 28 | 296 |
| Offices of real estate agents and brokers | 313 | 18 | 18 | 276 |
| Dairy product manufacturing | 250 | 0 | 12 | 238 |
| Offices of other health practitioners | 241 | 32 | 12 | 197 |
| Employment services | 229 | 13 | 21 | 194 |
| Services to buildings and dwellings | 240 | (13) | 69 | 183 |

Source: EMSI Analyst 2023.3.

Conversely, Table 23 presents the five industries most negatively impacted by regional/local effects from 2012-2022.

Table 23: Shift-Share Analysis: Declining Industries, Economic Region, 2012-2022.

| Industry (NAICS classification) | Growth/ Decline | Industry Growth Effect | National Economic Effect | Regional / Local Effect |
|--|--------------------|------------------------------|--------------------------------|-------------------------------|
| Farms | -693 | -370 | 157 | -480 |
| Facilities support services | 36 | 468 | 0 | -432 |
| Nursing care facilities | -159 | 131 | 113 | -402 |
| Elementary and secondary schools | -175 | 51 | 176 | -402 |
| Provincial and territorial public administration | -160 | 26 | 103 | -290 |

Source: EMSI Analyst 2023.3.

3.7. Employer Structure

This subsection illustrates the number and size of employers by industry in the City. 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.
- Have a minimum of \$30,000 in annual revenue.
- 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.
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, Kawartha Lakes had 7,513 businesses as of June 2023, of which 2,178 (28.9%) had employees. Of these 2,178 businesses, the majority had between one and nine employees (1,703 or 78.2%). Comparatively, 68 businesses (3.1%) had over 50 employees. These figures are presented in Table 24.

Table 24: Business Counts by Size, Kawartha Lakes, June 2023.

| | 1 to 9 Employees | 10 to 49 Employees | 50+ Employees | Indeterminate | Total |
|----------------------|------------------|--------------------|---------------|---------------|-------|
| Number of Businesses | 1,703 | 407 | 68 | 5,335 | 7,513 |

Source: Canadian Business Patterns June 2023 from EMSI Analyst.

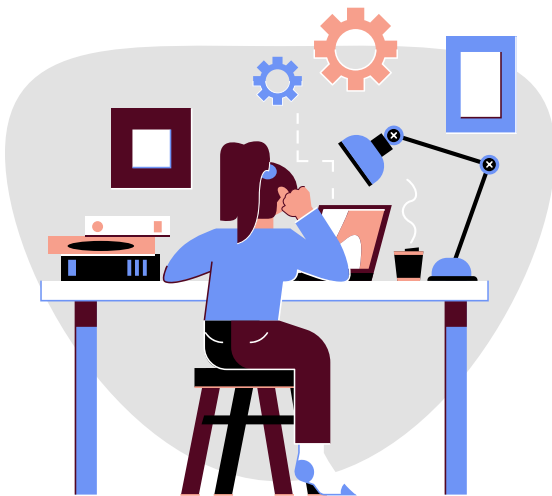
Table 25 notes the subsectors in Kawartha Lakes by businesses only with employees, excluding self-employed individuals. Construction-related businesses, full-service restaurants, and farming businesses are most typically represented locally.

Table 25: Top 5 Sectors by Businesses with Employees, Kawartha Lakes, 2023.

| Sector | Businesses with Employees |
|--|---------------------------|
| Residential building construction | 121 |
| Full-service restaurants and limited-service eating places | 102 |
| Building equipment contractors | 85 |
| Services to buildings and dwellings | 84 |
| Farms | 73 |
| Other specialty trade contractors | 73 |
| Automotive repair and maintenance | 60 |
| Foundation, structure, and building exterior contractors | 60 |
| Building finishing contractors | 58 |
| Offices of physicians | 51 |

Source: Canadian Business Patterns June 2023 from EMSI Analyst.

THE BOTTOM LINE



- **Of businesses with at least one employee, 78.2% had fewer than 10 employees.**
- This impact from small business is important to highlight because often development is seen as chasing large employers offering hundreds or thousands of jobs. However, local growth and employment are often more a product of small business development.

3.7.1. Kawartha Lakes Business Inventory

The City of Kawartha Lakes' Economic Development Department, in collaboration with local chambers of commerce and the Lindsay Downtown Business Improvement Area (BIA) has undertaken a thorough inventory of the businesses located within the municipality. In 2023, 672 businesses and employment properties were surveyed, representing 6,479 jobs and over three million square feet of occupied floor space. A plurality of respondents were from the retail trade sector, which represented 30% of all survey takers.

Of the 672 businesses to respond, the majority operated in Lindsay (484 respondents) Respondents had an average of 17 employees within their business, suggesting that small businesses (identified as representing 78.2% of businesses according to the above business count data) were less likely to fill in the survey compared to larger businesses.

Among respondents, 64% were independent businesses and 43% identified as members of a Chamber of Commerce or the Lindsay Downtown BIA. Regarding future expectations, 64% of respondents had plans to hire in the future and 12% of businesses planned to expand their floor space. With respect to the available labour force, two-in-five (39%) businesses felt there was a skills shortage, which is in line with the economic engagement rates discussed previously, where fewer individuals were participating in the labour force.

This survey and its responses provide an invaluable tool for the City's Economic Development department. Gathering local information from businesses in Kawartha Lakes allows staff and Council to make informed decisions about the future of Kawartha Lakes.

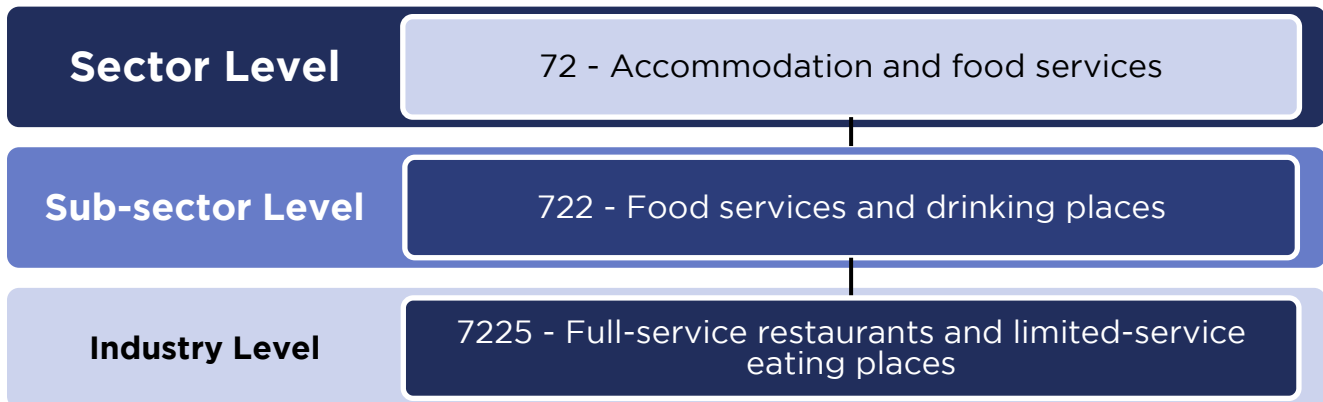


Appendix A: Regional Economic Base Analysis

This section mirrors the Economic Base Analysis in Section 3 but expands the assessment to include the entirety of the local economy pertinent to Kawartha Lakes; that is, the jobs and businesses that drive the local economy. Through a review of commuting patterns and discussion with Kawartha Lakes staff, it was agreed that the central focus of this section will be the combined economies of **Kawartha Lakes** and **Peterborough County** (Kawartha Lakes Economic Region), benchmarked by Ontario.

Once again, 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.

As a reminder note, the “North American Industry Classification System” (NAICS) of classifying industries is used for this Appendix. The largest groupings or aggregations of industry categories are called sectors, which are broken down into sub-sectors, which are then further broken down into Industries.



Employment Profile

The primary employment sectors in the Economic Region are health care and social assistance; retail trade; and construction. Between 2012 and 2022, the economy grew by **10,796 jobs (12%)**. Table 26 indicates the percentage of growth for each of these sectors.

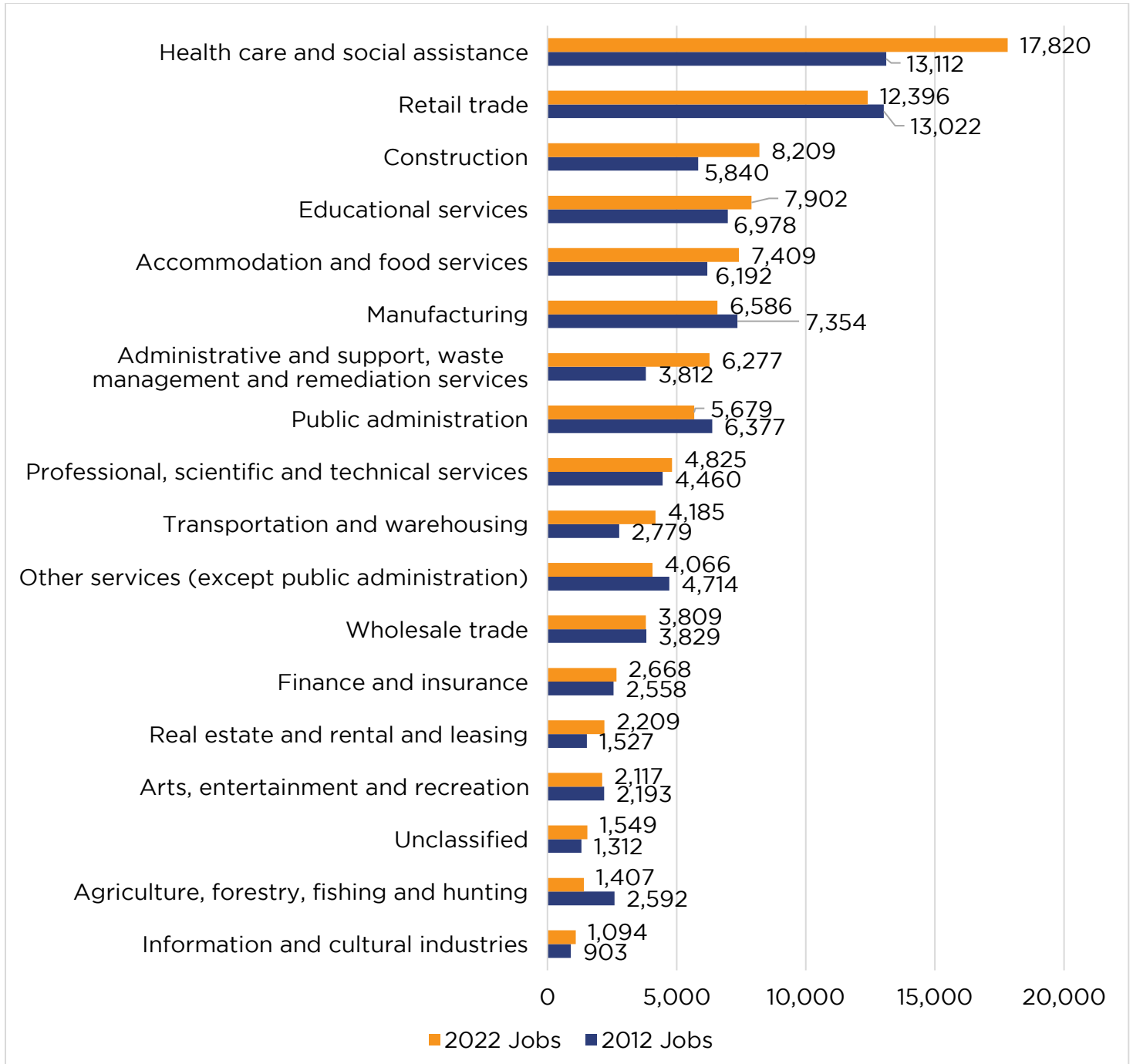
Table 26: Employment Growth by Sector, Kawartha Lakes Economic Region and Ontario, 2012-2022.

| NAICS | Description | 2022 Jobs | 2012-2022 Change | % of Jobs in Economic Region | % of Jobs in Ontario |
|------------|---|----------------|------------------|------------------------------|----------------------|
| 11 | Agriculture, forestry, fishing and hunting | 1,407 | -1,185 | 1.4% | 1.0% |
| 21 | Mining, quarrying, and oil and gas extraction | 530 | -76 | 0.5% | 0.4% |
| 22 | Utilities | 692 | 201 | 0.7% | 0.6% |
| 23 | Construction | 8,209 | 2,369 | 8.1% | 7.0% |
| 31-33 | Manufacturing | 6,586 | -768 | 6.5% | 8.8% |
| 41 | Wholesale trade | 3,809 | -19 | 3.8% | 4.9% |
| 44-45 | Retail trade | 12,396 | -626 | 12.2% | 10.0% |
| 48-49 | Transportation and warehousing | 4,185 | 1,406 | 4.1% | 4.8% |
| 51 | Information and cultural industries | 1,094 | 191 | 1.1% | 2.2% |
| 52 | Finance and insurance | 2,668 | 111 | 2.6% | 5.2% |
| 53 | Real estate and rental and leasing | 2,209 | 682 | 2.2% | 2.3% |
| 54 | Professional, scientific and technical services | 4,825 | 365 | 4.8% | 8.9% |
| 55 | Management of companies and enterprises | 115 | 18 | 0.1% | 0.6% |
| 56 | Administrative and support, waste management and remediation services | 6,277 | 2,465 | 6.2% | 5.6% |
| 61 | Educational services | 7,902 | 924 | 7.8% | 7.1% |
| 62 | Health care and social assistance | 17,820 | 4,708 | 17.5% | 11.3% |
| 71 | Arts, entertainment and recreation | 2,117 | -76 | 2.1% | 1.8% |
| 72 | Accommodation and food services | 7,409 | 1,217 | 7.3% | 6.1% |
| 81 | Other services (except public administration) | 4,066 | -648 | 4.0% | 3.7% |
| 91 | Public administration | 5,679 | -698 | 5.6% | 6.2% |
| X0 | Unclassified | 1,549 | 237 | 1.5% | 1.6% |
| All | | 101,543 | 10,796 | 100% | 100% |

Source: EMSI Analyst 2023.3.

To better understand how each sector supports jobs, Figure 11 shows 2012 and 2022 job counts for all industries with at least 1,000 jobs in 2022 in the Economic Region.

Figure 11: Largest Industries by Number of Jobs, 2012 and 2022.



Source: EMSI Analyst 2023.3.

Table 27 breaks job count data into further subcategories, presenting 2022 job count figures for the top 20 four-digit industry classifications. Full-service restaurants and limited-service eating places employed the most individuals in the Economic Region and saw growth of over 1,000 jobs between 2012 and 2022.

Table 27: Industry Job Counts, 2012 and 2022, Kawartha Lakes Economic Region.

| NAICS | Description | 2012 Jobs | 2022 Jobs | 2012-2022 Job Change | 2012-2022 % Job Change |
|-------|--|-----------|-----------|----------------------|------------------------|
| 7225 | Full-service restaurants and limited-service eating places | 4,811 | 6,015 | 1,204 | 25% |
| 6111 | Elementary and secondary schools | 4,265 | 4,556 | 291 | 7% |
| 6221 | General medical and surgical hospitals | 3,809 | 4,048 | 239 | 6% |
| 9130 | Local, municipal and regional public administration | 3,392 | 3,051 | -341 | -10% |
| 6211 | Offices of physicians | 1,347 | 2,810 | 1,462 | 109% |
| 4451 | Grocery stores | 2,532 | 2,638 | 106 | 4% |
| 5617 | Services to buildings and dwellings | 1,574 | 2,415 | 840 | 53% |
| 6231 | Nursing care facilities | 1,748 | 2,222 | 475 | 27% |
| 2361 | Residential building construction | 1,215 | 1,895 | 680 | 56% |
| 6113 | Universities | 1,270 | 1,730 | 459 | 36% |
| 2382 | Building equipment contractors | 1,619 | 1,694 | 76 | 5% |
| 6241 | Individual and family services | 1,151 | 1,628 | 477 | 41% |
| 9120 | Provincial and territorial public administration | 2,215 | 1,507 | -708 | -32% |
| 6213 | Offices of other health practitioners | 557 | 1,414 | 857 | 154% |
| 7139 | Other amusement and recreation industries | 922 | 1,351 | 429 | 47% |
| 5312 | Offices of real estate agents and brokers | 513 | 1,275 | 761 | 148% |
| 5614 | Business support services | 706 | 1,226 | 520 | 74% |
| 6244 | Child day-care services | 632 | 1,204 | 573 | 91% |
| 1110 | Farms | 2,319 | 1,152 | -1,167 | -50% |
| 2383 | Building finishing contractors | 997 | 1,137 | 140 | 14% |

Source: EMSI Analyst 2023.3.

Economic Output

This subsection highlights industries with the largest economic impact. Table 28 illustrates industries with the highest level of economic output as measured by total sales. Average wages by industry are also illustrated. Three four-digit industries each account for over \$600 million in total sales within Kawartha Lakes:

- Provincial and territorial public administration.
- Local, municipal and regional public administration.
- General medical and surgical hospitals.

Each of these three top industries by economic output provides strong wages for employees, as all three have average wages over \$60,000.¹²

Table 28: Economic Output by Industry, 2021.

| Industry | Sales | Average Wages |
|--|-------------------------|-----------------|
| Provincial and territorial public administration | \$810,438,755 | \$87,723 |
| Local, municipal and regional public administration | \$606,971,268 | \$64,568 |
| General medical and surgical hospitals | \$600,341,170 | \$61,791 |
| Grain and oilseed milling | \$574,260,573 | \$55,950 |
| Elementary and secondary schools | \$571,832,114 | \$67,719 |
| Residential building construction | \$553,247,151 | \$45,361 |
| Lessors of real estate | \$396,559,621 | \$40,846 |
| Electric power generation, transmission and distribution | \$335,622,527 | \$85,098 |
| Farms | \$322,069,261 | \$23,420 |
| Other miscellaneous manufacturing | \$296,803,486 | \$49,039 |
| Plastic product manufacturing | \$290,626,060 | \$42,807 |
| Full-service restaurants and limited-service eating places | \$288,836,393 | \$17,654 |
| Building equipment contractors | \$282,630,082 | \$65,998 |
| All industries | \$16,845,496,706 | \$50,781 |

Source: 2023.3 EMSI Analyst, based on 2021 National Input-Output Tables by StatsCan.

¹² Wages are based on hourly rates and do not account for part-time work. Therefore, average wages in some industries will be below minimum wage due to seasonality.

Export Sales

Exports show the amount of money that is spent by industries outside the region (domestically and internationally) in exchange for goods or services produced by an industry located in the Economic Region. In 2021, the most recent data available, total export sales from the Economic Region amounted to just over \$9 billion. Table 29 presents the largest drivers of external revenues into the Economic Region.

Table 29: Top Export Dollars Flowing into Kawartha Lakes Economic Region by Industry, 2021.

| Industry | Total Export Sales |
|---|------------------------|
| Manufacturing | \$2,453,380,826 |
| Public administration | \$1,464,325,631 |
| Health care and social assistance | \$1,171,376,090 |
| Educational services | \$722,865,249 |
| Transportation and warehousing | \$443,894,405 |
| Wholesale trade | \$369,906,727 |
| Construction | \$325,551,047 |
| Retail trade | \$297,308,736 |
| Professional, scientific and technical services | \$294,541,726 |
| Administrative and support, waste management and remediation services | \$266,683,268 |
| Finance and insurance | \$249,822,720 |
| Agriculture, forestry, fishing and hunting | \$225,049,289 |
| Mining, quarrying, and oil and gas extraction | \$187,516,311 |
| Real estate and rental and leasing | \$141,440,623 |
| Utilities | \$137,426,080 |
| Accommodation and food services | \$122,842,741 |
| Other services (except public administration) | \$111,182,088 |
| Information and cultural industries | \$110,896,718 |
| Arts, entertainment and recreation | \$59,250,091 |
| Management of companies and enterprises | \$2,600,824 |
| Total | \$9,157,861,187 |

Source: 2023.3 EMSI Analyst, based on 2021 National Input-Output Tables by StatsCan.

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 the Economic Region. Table 30 presents the top four-digit industries in terms of total purchases made (more than \$100 million in purchases), as well as the percentage of those purchases that are made in-region and out-of-region. Farms in the Economic Region are a major economic driver, evidenced by total purchases from this subsector being more than double the next highest subsector.

Table 30: Top Industries by Purchasing Power, Kawartha Lakes Economic Region, 2021.

| Industry | Total Purchases from Sector | Percentage Purchased in Region | Percentage Purchased Out of Region |
|--|-----------------------------|--------------------------------|------------------------------------|
| Farms | \$398,418,976 | 24% | 76% |
| Lessors of real estate | \$189,117,197 | 55% | 45% |
| Petroleum and coal product manufacturing | \$183,043,550 | 21% | 79% |
| Depository credit intermediation | \$155,513,654 | 40% | 60% |
| Architectural, engineering and related services | \$120,382,944 | 60% | 40% |
| Computer systems design and related services | \$119,953,301 | 34% | 66% |
| General medical and surgical hospitals | \$117,563,288 | 94% | 6% |
| Plastic product manufacturing | \$114,318,913 | 88% | 12% |
| Pharmaceutical and medicine manufacturing | \$106,919,497 | 6% | 94% |
| Electric power generation, transmission and distribution | \$105,397,904 | 74% | 26% |
| Insurance carriers | \$101,821,031 | 39% | 61% |

Source: 2023.3 EMSI Analyst, based on 2021 National Input-Output Tables by StatsCan.

Location Quotient Analysis

LQ helps to identify the strengths of the community. As a reminder, this assessment focuses on jobs in the local economy, not where residents are employed. The location quotient at the broadest industry classification level indicates that the Kawartha Lakes Economic Region has the strongest specializations (an LQ of at least 1.2) relative to both the rest of the province and nation in the following sectors:

- Health care and social assistance.
- Retail trade.

Table 31 presents LQ data at a 2-digit level, while Tables 32 and 33 present this information at a 4-digit level.

Table 31: Location Quotient Analysis by Sector.

| Description | 2022 Provincial Location Quotient | 2022 National Location Quotient |
|---|-----------------------------------|---------------------------------|
| Health care and social assistance | 1.5 | 1.4 |
| Administrative and support, waste management and remediation services | 1.1 | 1.3 |
| Retail trade | 1.2 | 1.2 |
| Accommodation and food services | 1.2 | 1.1 |
| Arts, entertainment and recreation | 1.2 | 1.1 |
| Construction | 1.2 | 1.1 |
| Educational services | 1.1 | 1.1 |
| Utilities | 1.1 | 1.1 |
| Real estate and rental and leasing | 0.9 | 1.1 |
| Other services (except public administration) | 1.1 | 1.0 |

Source: EMSI Analyst 2023.3.

Unsurprisingly, three of the five sectors most heavily concentrated in the Economic Region, compared to Canada, are also most heavily concentrated compared to Ontario. However, used motor vehicle parts and accessories merchant wholesalers and foundries are both more concentrated compared to national figures than provincial marks. Conversely, support activities for forestry and non-metallic mineral mining and quarrying sectors are more concentrated compared to the provincial economy than the national economy.

Table 32: Top 5 Location Quotient Sectors, Kawartha Lakes Economic Region, Benchmarked to Canada.

| Description | 2022 National Location Quotient |
|---|---------------------------------|
| Charter bus industry | 5.7 |
| Grain and oilseed milling | 4.3 |
| Used motor vehicle parts and accessories merchant wholesalers | 4.1 |
| Foundries | 3.9 |
| Recreational vehicle (RV) parks and recreational camps | 3.8 |

Source: EMSI Analyst 2023.3.

Table 33: Top 5 Location Quotient Sectors, Kawartha Lakes Economic Region, Benchmarked to Ontario.

| Description | 2022 Provincial Location Quotient |
|--|-----------------------------------|
| Support activities for forestry | 9.4 |
| Charter bus industry | 5.3 |
| Grain and oilseed milling | 5.0 |
| Recreational vehicle (RV) parks and recreational camps | 4.3 |
| Non-metallic mineral mining and quarrying | 4.3 |

Source: EMSI Analyst 2023.3.

Shift-Share Analysis

This subsection looks to the past (2012) and current figures (2022) to assess which sectors have been most positively impacted by local factors. The example below applies the model to the offices of physicians sector:

From 2012 to 2022 this sector saw an increase of 1,462 jobs in the Kawartha Lakes Economic Region.

- It would have been expected that the sector **increased by 178** positions 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 an **increase** of 167 more jobs over the same time period.
- As such, before accounting for local factors, the sector would have been expected to gain 344 jobs.
- Instead, the local sector is projected to grow by 1,462 jobs, suggesting that 1,118 new jobs can be applied to factors specific to Kawartha Lakes.

Table 34 allocates employment changes for the industries most positively impacted (500+ jobs) by local effects to national, industry and regional/local effects.

Table 34: Shift-Share Analysis: Competitive Industries, Economic Region, 2012-2022.

| Industry (NAICS classification) | Growth/ Decline | Industry Growth Effect | National Economic Effect | Regional / Local Effect |
|--|--------------------|------------------------------|--------------------------------|-------------------------------|
| Offices of physicians | 1,462 | 178 | 167 | 1,118 |
| Services to buildings and dwellings | 840 | -36 | 195 | 681 |
| Offices of real estate agents and brokers | 761 | 61 | 63 | 636 |
| Offices of other health practitioners | 857 | 178 | 69 | 610 |
| Employment services | 633 | 32 | 52 | 549 |
| Business support services | 520 | -100 | 87 | 532 |
| Full-service restaurants and limited-service eating places | 1,204 | 99 | 595 | 511 |

Source: EMSI Analyst 2023.3.

Conversely, Table 35 presents the five industries most negatively impacted by regional/local effects from 2012-2022.

Table 35: Shift-Share Analysis: Declining Industries, Economic Region, 2012-2022.

| Industry (NAICS classification) | Growth/ Decline | Industry Growth Effect | National Economic Effect | Regional / Local Effect |
|--|--------------------|------------------------------|--------------------------------|-------------------------------|
| Provincial and territorial public administration | -708 | 70 | 274 | -1,052 |
| Farms | -1,167 | -674 | 287 | -779 |
| Local, municipal and regional public administration | -341 | -140 | 419 | -620 |
| Navigational, measuring, medical and control instruments manufacturing | -449 | -87 | 63 | -426 |
| Metalworking machinery manufacturing | -474 | -119 | 65 | -420 |

Source: EMSI Analyst 2023.3.



Appendix B: 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 2023 from Manifold Data Mining Inc.
- EMSI Analyst 2023.Q3.

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 2023 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:

Manifold data sources include Statistics Canada, Health Canada, real estate boards/companies, Canadian Bankers Association, Bank of Canada, Canada Post Corporation, consumer and business directories books, flyer distribution associations, regional health ministries, Citizenship and Immigration Canada, regional school boards, proprietary survey and research, and publications of hospitals, and the Canada Mortgage Housing Corporation.

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 City of Kawartha Lakes of 2001 is the same as the City of Kawartha Lakes of 2023. 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 the Canadian Business Registry, 2001-2021 Census data, Survey of Employment, Payroll and Hours, Labour Force Surveys, the Canadian Occupational Projection System, Statistics Canada (CANSIM) Demographics, and Post-secondary student information system education data.

