



Eastern Ontario Economic  
Development Strategy Refresh

Appendix D

*Eastern Ontario Regional Profile*



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### Notes to Reader

In order to capture a complete picture of industry employment, Emsi Analyst (provided by the Government of Ontario) and Statistics Canada Census data was accessed.

#### Industry Data

Emsi combines employment data from Survey of Employment, Payrolls and Hours (SEPH) with data from the Labour Force Survey (LFS), Census, and Canadian Business Counts (CBC) to form detailed geographic estimates of employment. Projections are based on the latest available Emsi industry data, 10-year past local trends in each industry and growth rates from national industry projections from the Canadian Occupational Projection System (COPS) produced by Human Resources and Skills Development Canada.

#### Occupation Data

Emsi's occupation data are based on Emsi's industry data, regional occupation data from the Labour Force Survey (LFS), and regional staffing patterns taken from the Census.



# 1. Regional Economy

## 1.1 Demographic Characteristics

### Population

Table 1 shows the population and rate of population change in eastern Ontario from 2006 to 2016. In 2016, Eastern Ontario was home to over two million people. This includes the population of the Counties, separated cities, the City of Ottawa and the reserves. The City of Ottawa accounted for just under half (934,243) of this population. The Total Eastern Ontario Region (without Ottawa) accounted for 1.1 million with 747,161 people living in the counties, 399,101 in the separated cities and 6,367 reserve populations. The Total Eastern Ontario Region (without Ottawa) accounted for 8.6% of Ontario's total population in 2016.

**Table 1: Population and the Rate of Population Change in Eastern Ontario (2006-2016)**

Geographic Area	Population			Population Change		
	2006	2011	2016	2006-2011 (%)	2011-2016 (%)	2006-2016 (%)
Counties of Eastern Ontario (not incl. any separated cities)	708,636	726,206	747,161	2.5%	2.9%	5.4%
Separated cities (all except Ottawa)	384,611	395,706	399,101	2.9%	0.9%	3.8%
Counties plus separated cities (excluding Ottawa)	1,093,247	1,121,912	1,146,262	2.6%	2.2%	4.8%
City of Ottawa	812,129	883,391	934,243	8.8%	5.8%	15.0%
Reserves	2,455*	4,772*	6,367	94.4%*	33.4%*	159.3%*
Eastern Ontario Region	1,905,376**	2,005,303**	2,086,872	5.2%**	4.1%**	9.5%**
<b>Total Eastern Ontario Region (without Ottawa)</b>	<b>1,093,247**</b>	<b>1,121,912**</b>	<b>1,152,629</b>	<b>2.6%**</b>	<b>2.7%**</b>	<b>5.4%**</b>
Ontario	12,160,282	12,851,821	13,448,494	5.7%	4.6%	10.6%

Source: Statistics Canada, Census 2006. National Household Survey 2011, Census 2016

Eastern Ontario Region includes the Counties, separated cities, the City of Ottawa and the reserves.

Total Eastern Ontario Region (without Ottawa) includes the Counties, separated cities, and the reserves.

\* Due to statistical limitations with Statistics Canada several Reserve populations had data either suppressed or not available in the 2006 and 2011 Census.



\*\*Eastern Ontario Reserve Population in 2006 and 2011 does not include all reserves. As such the total reserve populations figures presented here were not accounted in the final Eastern Ontario Region population count.

Total Eastern Ontario Region (without Ottawa) grew by 5.4% from 2006 to 2016; the region increased at a consistent pace over the last two census periods at rates close to 3% (between each census). The Counties of Eastern Ontario (not incl. any separated cities) also showed a similar growth pattern, increasing at rates close to 3% (between each census). The separated cities saw a growth of 3.8% from 2006 to 2016; the majority of the growth occurred from 2006 to 2011 (2.9%). From 2011 to 2016, the separated cities saw growth of only 0.9%.

From 2006 to 2016, the City of Ottawa saw growth of 15%; the majority of the growth occurred from 2006 to 2011 (8.8%). Ottawa continues to grow at a higher pace than the counties and separated cities with a growth of 5.8% in the five-year span. Since the reserve population has suppressed numbers in the 2006 and the 2011 census, the growth of the reserve population cannot be accurately determined.

Table 2 provides a comparison breakdown of the Counties and Separated cities net increases in the two five year periods (2006-2011 and 2011-2016). In order of rate of population increase from 2011 to 2016, the fast-growing counties (not including separated cities) in Eastern Ontario were: Haliburton (5.9%), Lanark (5.7%), Prescott and Russell (4.6%), Northumberland (4.2%), Stormont, Dundas, and Glengarry (3.1%), Kawartha Lakes (3%), Leeds and Grenville (2.7%), Lennox and Addington (2.6%), Peterborough (1.9%), Renfrew (1.8%), and Frontenac (1.1%). Only two counties (not including separated cities) witnessed net declines in population: Prince Edward (-2.1%) and Hastings (-0.6%). In order of rate of population increase from 2011 to 2016, the fast-growing separated cities in Eastern Ontario were: Peterborough (2.9%), Belleville (2.6%), Quinte West (1.1%), Cornwall (0.5%), and Kingston (0.4%). Five separated cities posted net declines in population: Pembroke (-3.3%), Brockville (-2.4%), Smiths Falls (-2.2%), Prescott (-1.4%), and Gananoque (-0.7%).

**Table 2: Net Increase of Population in Eastern Ontario in the two five year periods (2006-2011 and 2011-2016)**

Geographic Area	Population Change				Geographic Area	Population Change			
	2006-2011	% Increase	2011-2016	% Increase		2006-2011	% Increase	2011-2016	% Increase
Frontenac	-283	-1.1%	302	1.1%	Belleville (Hastings)	633	1.3%	1,262	2.6%
Haliburton	909	5.6%	1,006	5.9%	Brockville (Leeds and Grenville)	-87	-0.4%	-524	-2.4%
Hastings	3,438	8.8%	-242	-0.6%	Cornwall (Stormont, Dundas and Glengarry)	375	0.8%	249	0.5%
Kawartha Lakes	-1,342	-1.8%	2,204	3.0%	Gananoque (Leeds and Grenville)	-91	-1.7%	-35	-0.7%
Lanark	2,067	3.8%	3,229	5.7%	Kingston (Frontenac)	6,156	5.3%	435	0.4%
Leeds and Grenville	174	0.3%	1,861	2.7%	Pembroke (Renfrew)	430	3.1%	-478	-3.3%
Lennox and Addington	1,267	3.1%	1,079	2.6%	Peterborough (Peterborough)	3,371	4.5%	2,255	2.9%
Northumberland	1,163	1.4%	3,472	4.2%	Prescott (Leeds and Grenville)	104	2.5%	-62	-1.4%
Peterborough	1,477	2.7%	1,053	1.9%	Quinte West (Hastings)	389	0.9%	491	1.1%
Prescott and Russell	5,197	6.5%	3,952	4.6%	Smiths Falls (Lanark)	-185	-2.0%	-198	-2.2%



Geographic Area	Population Change				Geographic Area	Population Change			
	2006-2011	% Increase	2011-2016	% Increase		2006-2011	% Increase	2011-2016	% Increase
Prince Edward	-238	-0.9%	-523	-2.1%	Separated cities (all except Ottawa)	11,095	2.9%	3,395	0.9%
Renfrew	3,351	4.0%	1,546	1.8%					
Stormont, Dundas and Glengarry	390	0.6%	2016	3.1%					
Counties of Eastern Ontario (not incl. any separated cities)	17,570	2.5%	20,955	2.9%					

Source: Statistics Canada, Census 2006. National Household Survey 2011, Census 2016

Eastern Ontario Region includes the Counties, separated cities, the City of Ottawa and the reserves.

Total Eastern Ontario Region (without Ottawa) includes the Counties, separated cities, and the reserves.

\* Due to statistical limitations with Statistics Canada several Reserve populations had data either suppressed or not available in the 2006 and 2011 Census.

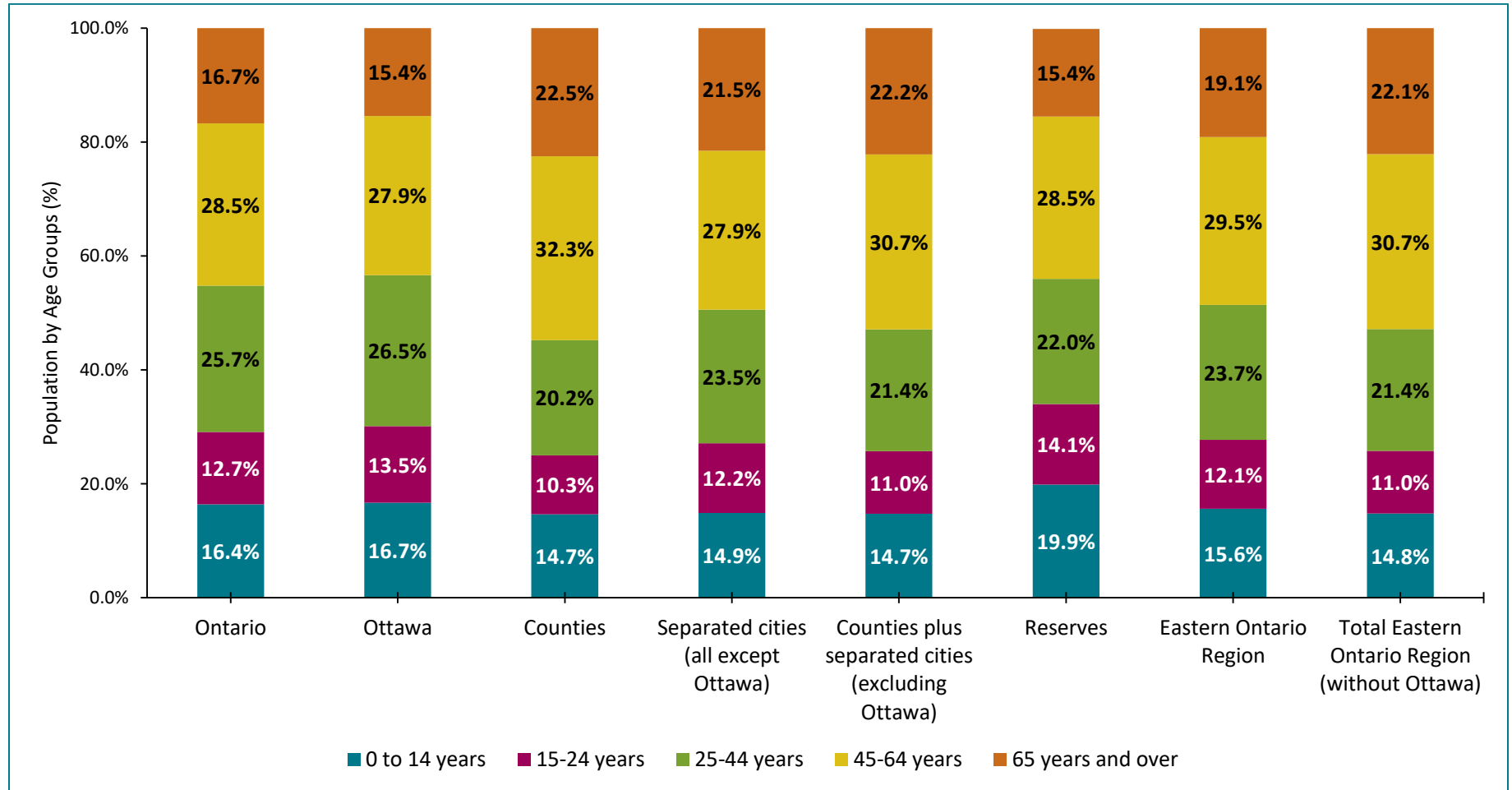
\*\*Eastern Ontario Reserve Population in 2006 and 2011 does not include all reserves. As such the total reserve populations figures presented here were not accounted in the final Eastern Ontario Region population count.

## Age

Like most regions in Ontario, the population of Eastern Ontario is becoming progressively older. Eastern Ontario is aging faster in relation to the Province as a whole. In all age categories 65 years old or older, the total Eastern Ontario Region (without Ottawa) has a higher relative percentage of its population at 22.1% compared to the Province at 16.7% (Figure 1). The most likely reasons are youth out-migration, coupled with the increasing age of the 'baby-boomers' demographic, and in-migration of retirees. The largest cohort of the population is aged between 45-64 years at 30.7%.



Figure 1: Age groups of the population in Eastern Ontario, 2016



Source: Statistics Canada, Census of Population, 2016

Eastern Ontario Region includes the Counties, separated cities, the City of Ottawa and the reserves.

Total Eastern Ontario Region (without Ottawa) includes the Counties, separated cities, and the reserves.



Figure 2 shows the population in the Counties of Eastern Ontario (not incl. any separated cities) by broad age groups in 2016. All counties have a higher percentage of their population in the later years of their working lifetime. At least 50%<sup>1</sup> of the population in all the counties are 45 years and over. This poses challenges for the future as the counties will face pressures in terms of service delivery and access in allowing seniors to 'age in place'. Figure 2 also illustrates that Eastern Ontario's counties have significantly lower population distributions amongst their young workforce (25-44). For example, the in Haliburton shows the lowest proportion of the young workforce at 15% of the total population while Renfrew and Prescott and Russell shows the highest proportion of young workers at 24% and 23%, respectively.

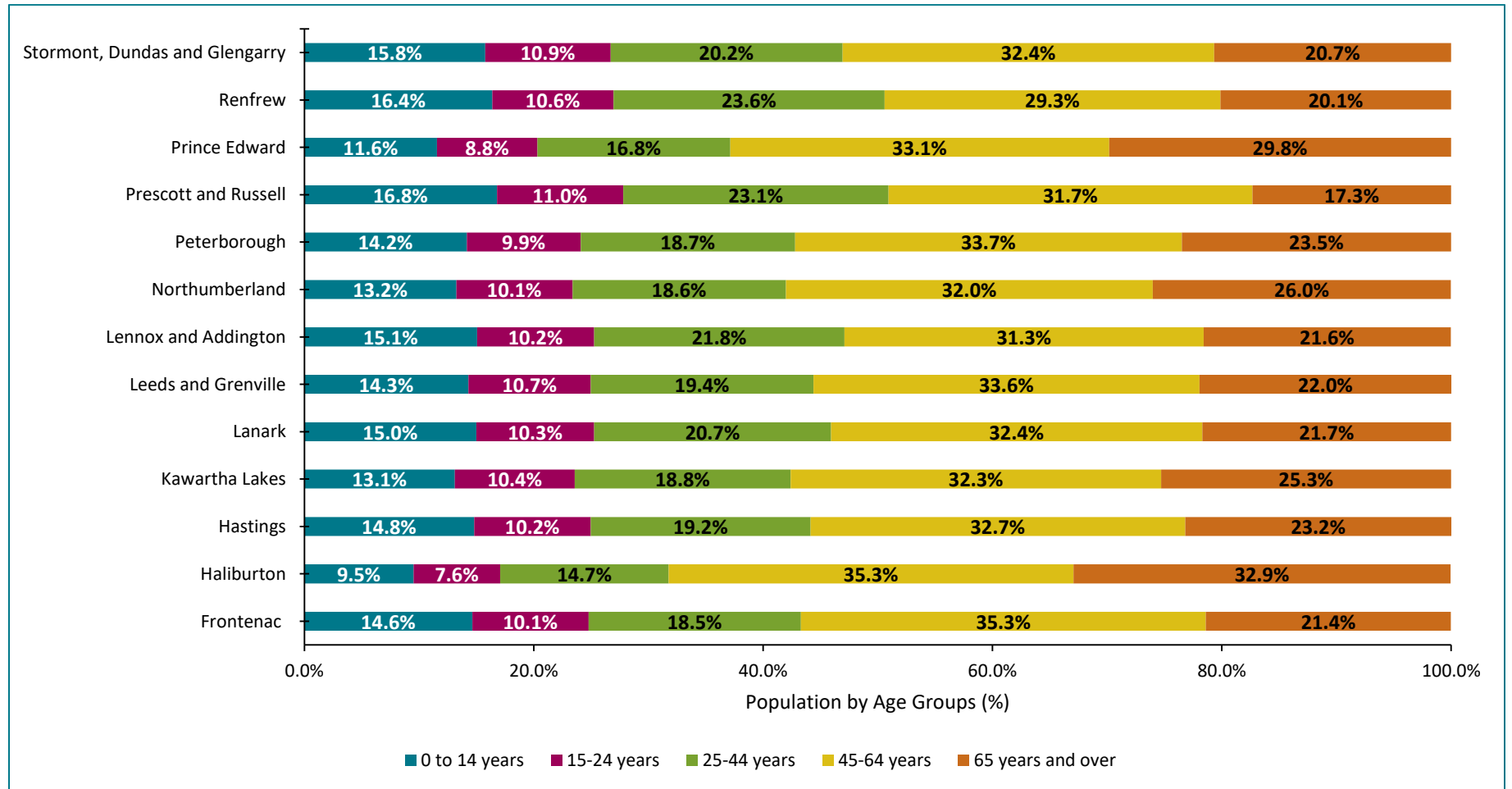
Figure 3 shows the population in separated cities (all except Ottawa) by broad age groups in 2016. Similar to trends seen in the counties, the separated cities had a higher percentage of their population 45 years and over. Kingston and Peterborough had the highest proportion of young workers (25-44) at 13% while Prescott showed the lowest at 9.3%. The youngest county by median age is Frontenac at 43.6 years. The median age of the province is 41.3 years.

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<sup>1</sup> Renfrew and Prescott and Russell showed 49% each.



Figure 2: Age groups of the population in Counties of Eastern Ontario (not incl. any separated cities), 2016

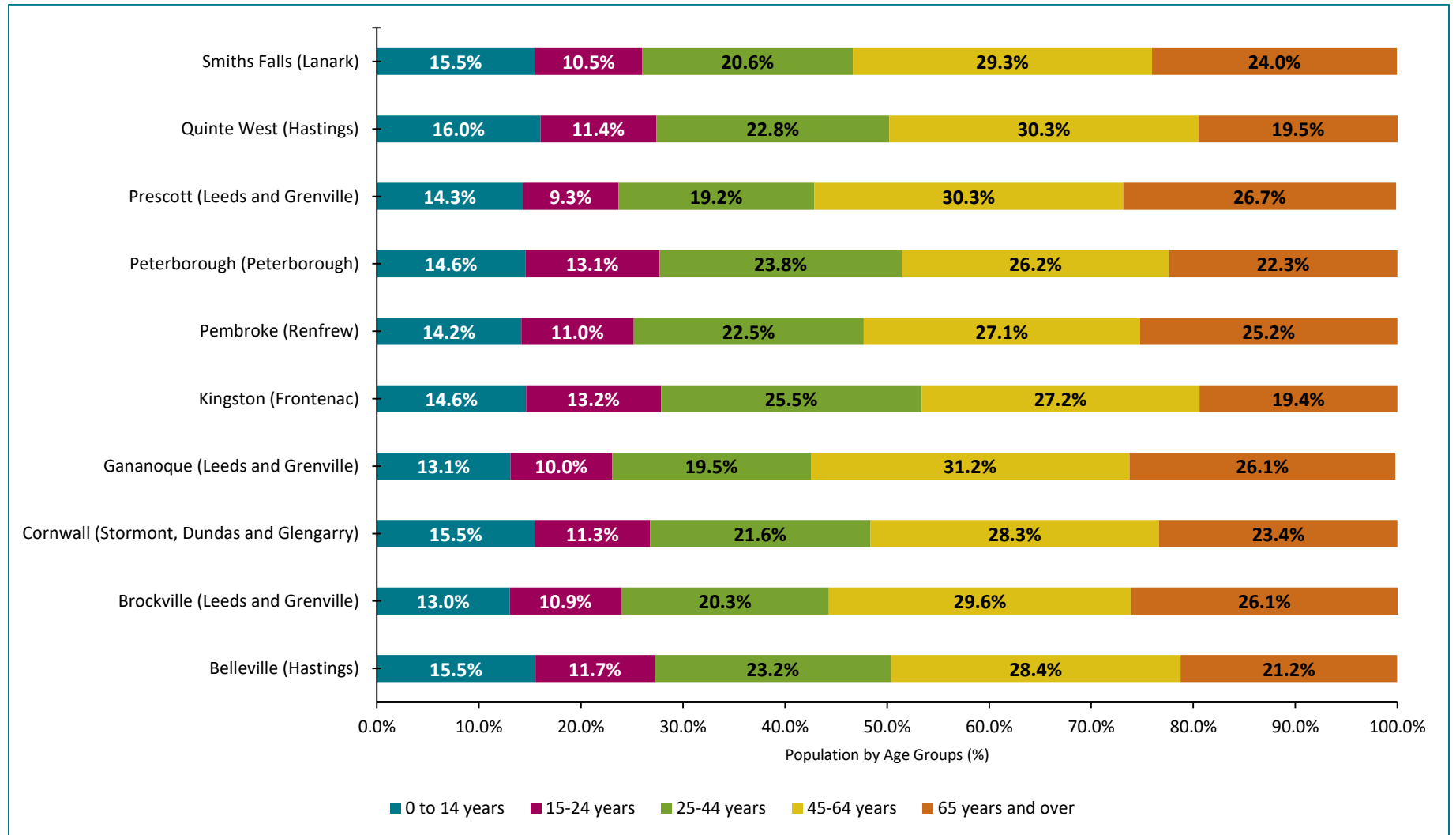


Source: Statistics Canada, Census of Population, 2016





Figure 3: Age groups of the population in Separated cities (all except Ottawa), 2016



Source: Statistics Canada, Census of Population, 2016



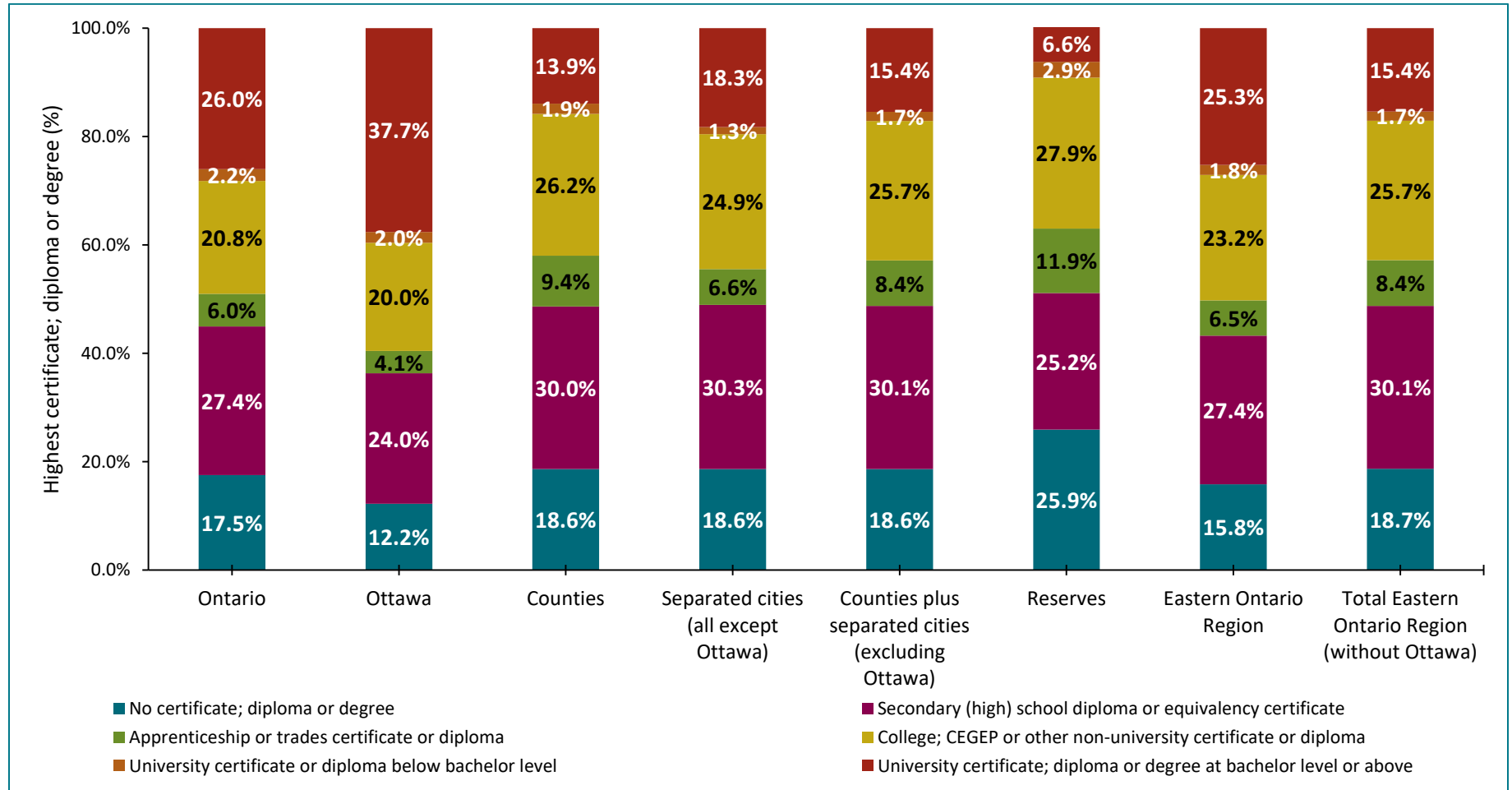
## Educational Attainment and Field of Study

Educational attainment is one of the most important socio-economic indicators to consider when evaluating a community's economic growth potential, as it speaks directly to its ability to staff new and existing businesses. As of 2016, the total Eastern Ontario Region (without Ottawa) has a higher proportion of the population without a certificate; diploma or degree at 18.7% compared to the province at 17.5% (Figure 4). Approximately 30% of the population had a secondary (high) school diploma or equivalency certificate. 15.4% of the population has a university certificate; diploma or degree at bachelor level or above compared to the province with 26%.

Figure 5 provides a closer look at individual counties and reveals that Prince Edward, Lanark, Frontenac and Peterborough have the highest proportion of the population with a university certificate; diploma or degree at bachelor level or above. Figure 6 shows that Kingston has the highest proportion of the population with a university certificate; diploma or degree at bachelor level or above at 27%. This is higher than the provincial average of 26%. Kingston has the greatest access to post-secondary education due to its conglomerate of post-secondary institutions (Queens University, Royal Military College, and St. Lawrence College).



Figure 4: Educational Attainment of the population aged 15 years and over in Eastern Ontario, 2016



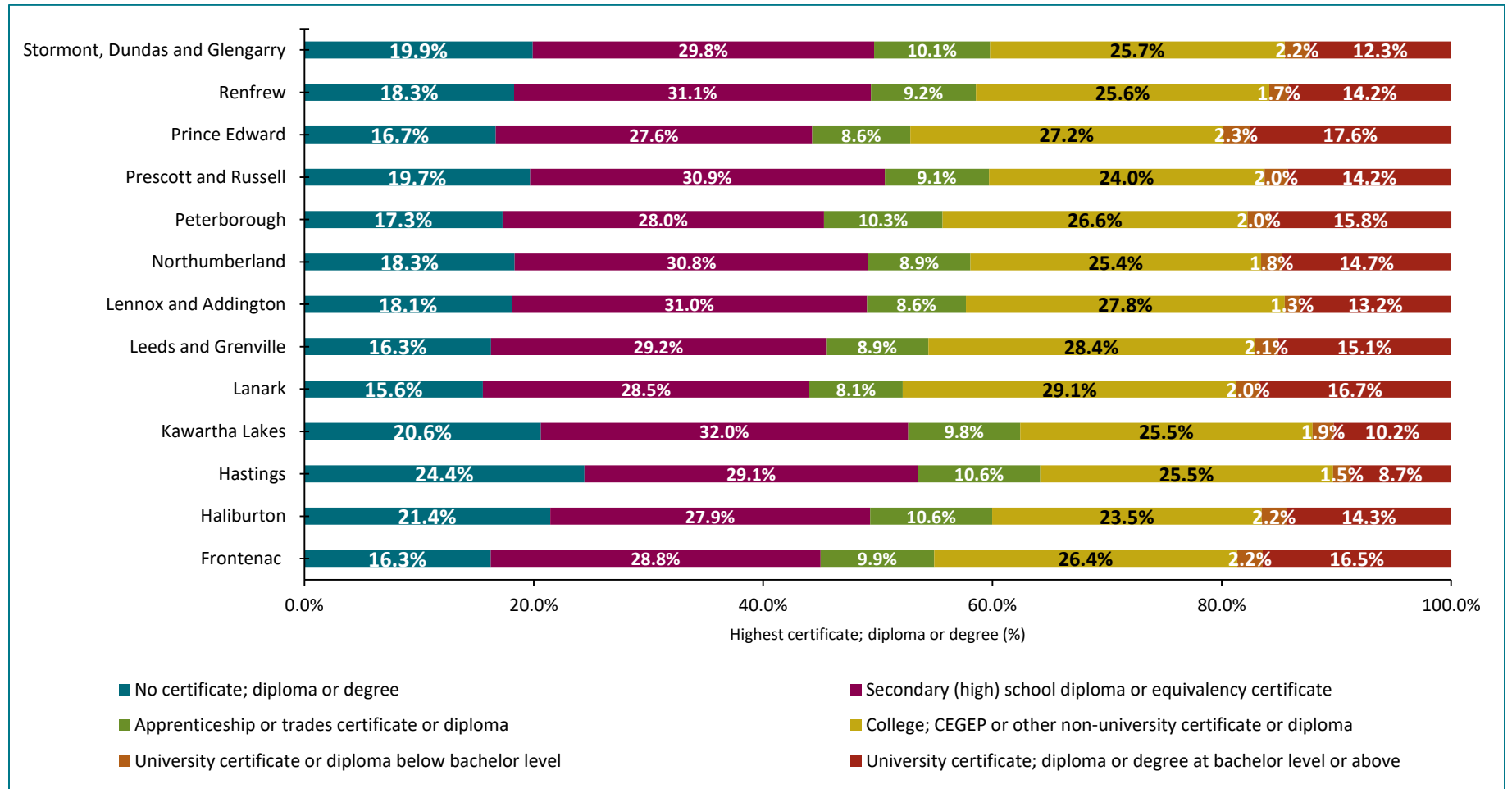
Source: Statistics Canada, Census, 2016

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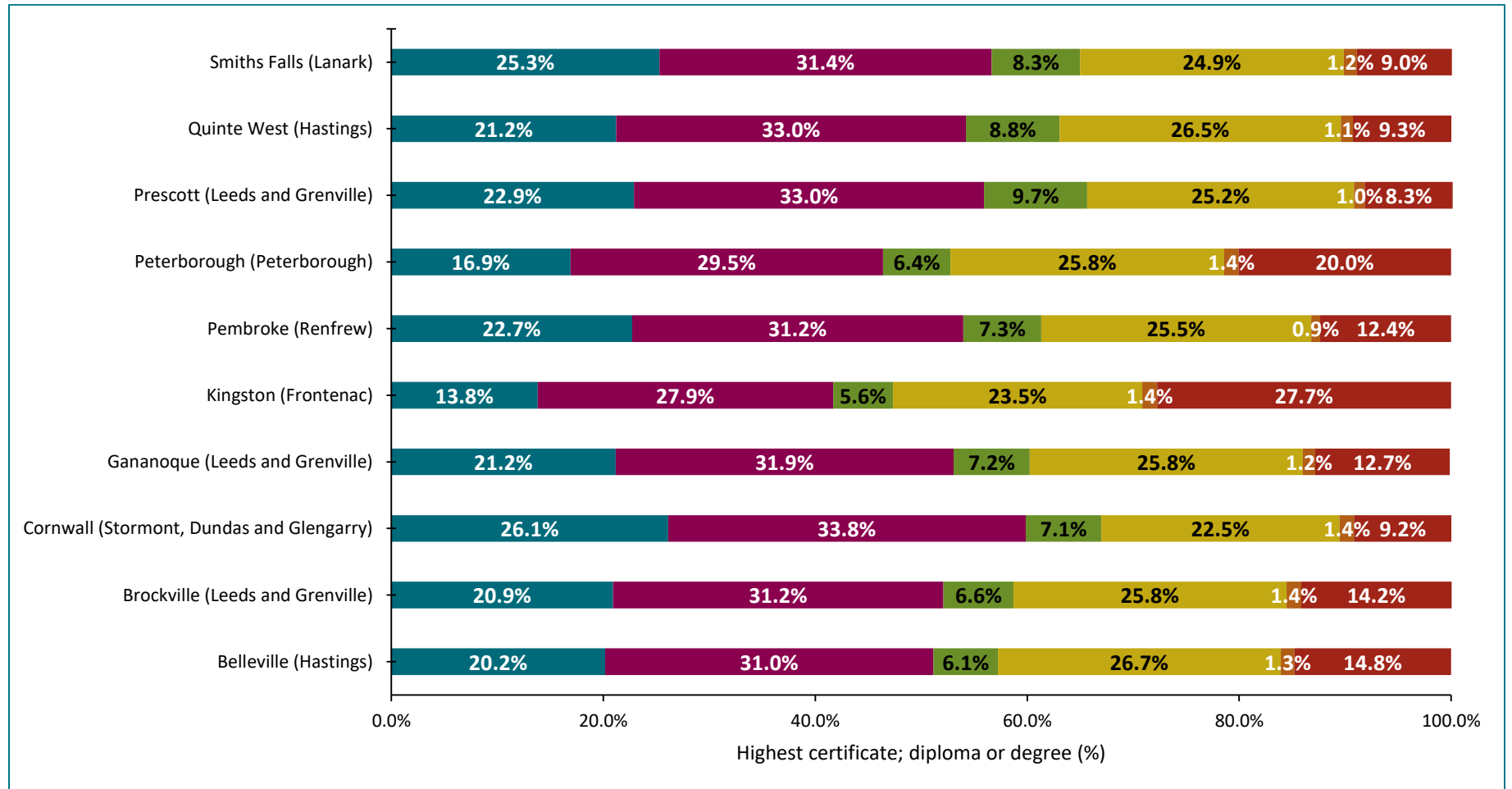
Figure 5: Educational Attainment of the population aged 15 years and over in Counties of Eastern Ontario (not incl. any separated cities), 2016



Source: Statistics Canada, Census, 2016



Figure 6: Educational Attainment of the population aged 15 years and over in Separated cities (all except Ottawa), 2016



Source: Statistics Canada, Census, 2016

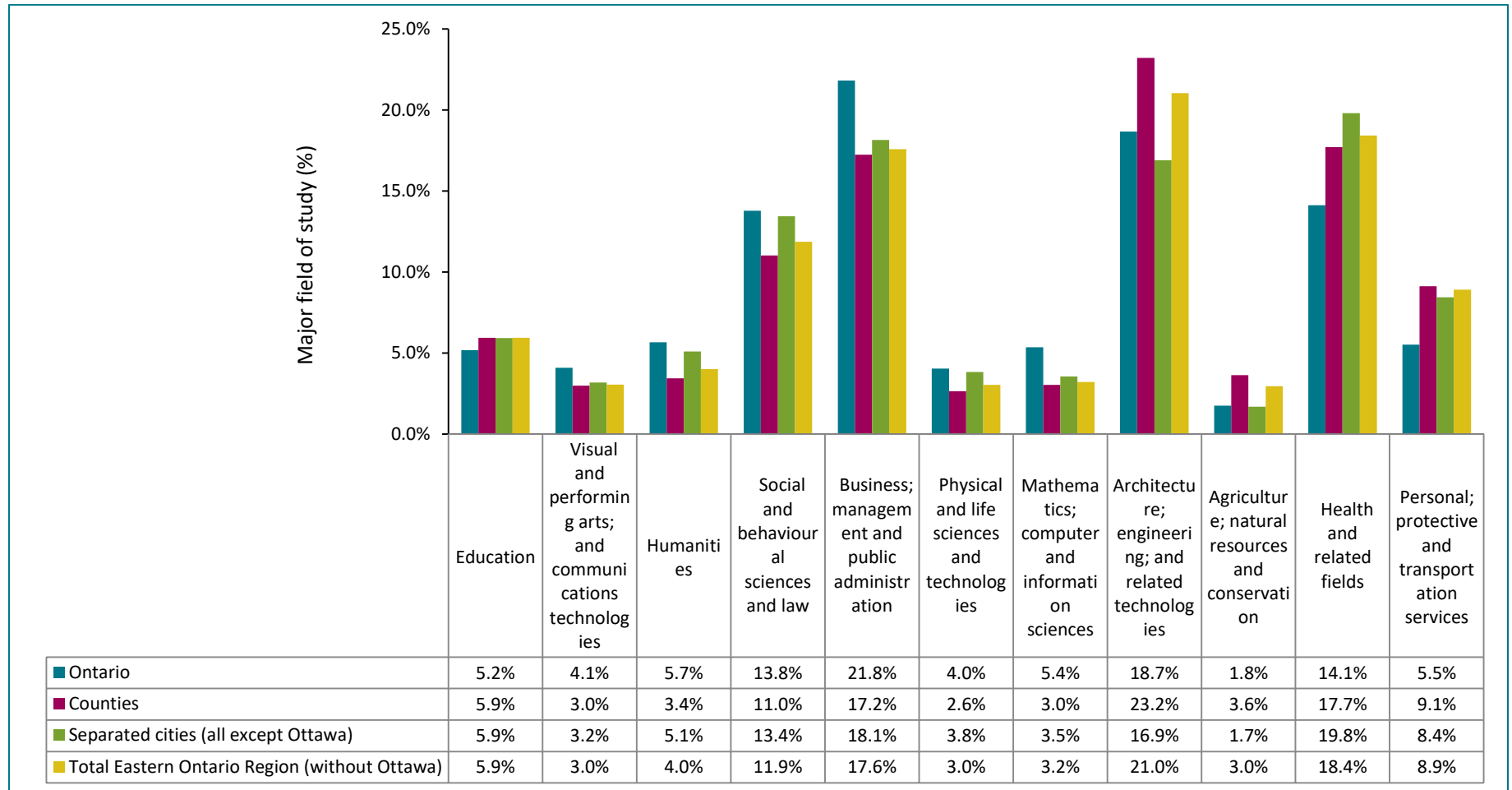


Figure 7 illustrates the major fields of study of Eastern Ontario residents with post-secondary qualifications. Based on data from 2016 Census, the predominant fields by number of graduates aged (25-64) in total Eastern Ontario Region (without Ottawa) were: Architecture, Engineering, and Related Technologies (21%), Health and Related Fields (18.4%), and Business, Management, and Public Administration (17.6%). These three fields of study comprise over half the post-secondary degrees held in Eastern Ontario. These results have a significant bearing on the kinds of businesses and enterprises that are located in Eastern Ontario, the labour pool that can support the attraction of new industry, and the kinds of services and training programs required to meet labour force needs.

Graduates and students aged 20-24 in Eastern Ontario are also traditionally rooted within the three predominant fields of study, interestingly, however, they are also entering non-traditional fields such as Social and Behavioural Sciences and Law, Humanities, Visual and Performing Arts and Communications Technology.



Figure 7: Major Field of Study (CIP) 2016 for the population aged 25 to 64 years in Eastern Ontario, 2016



Source: Statistics Canada, Census, 2016

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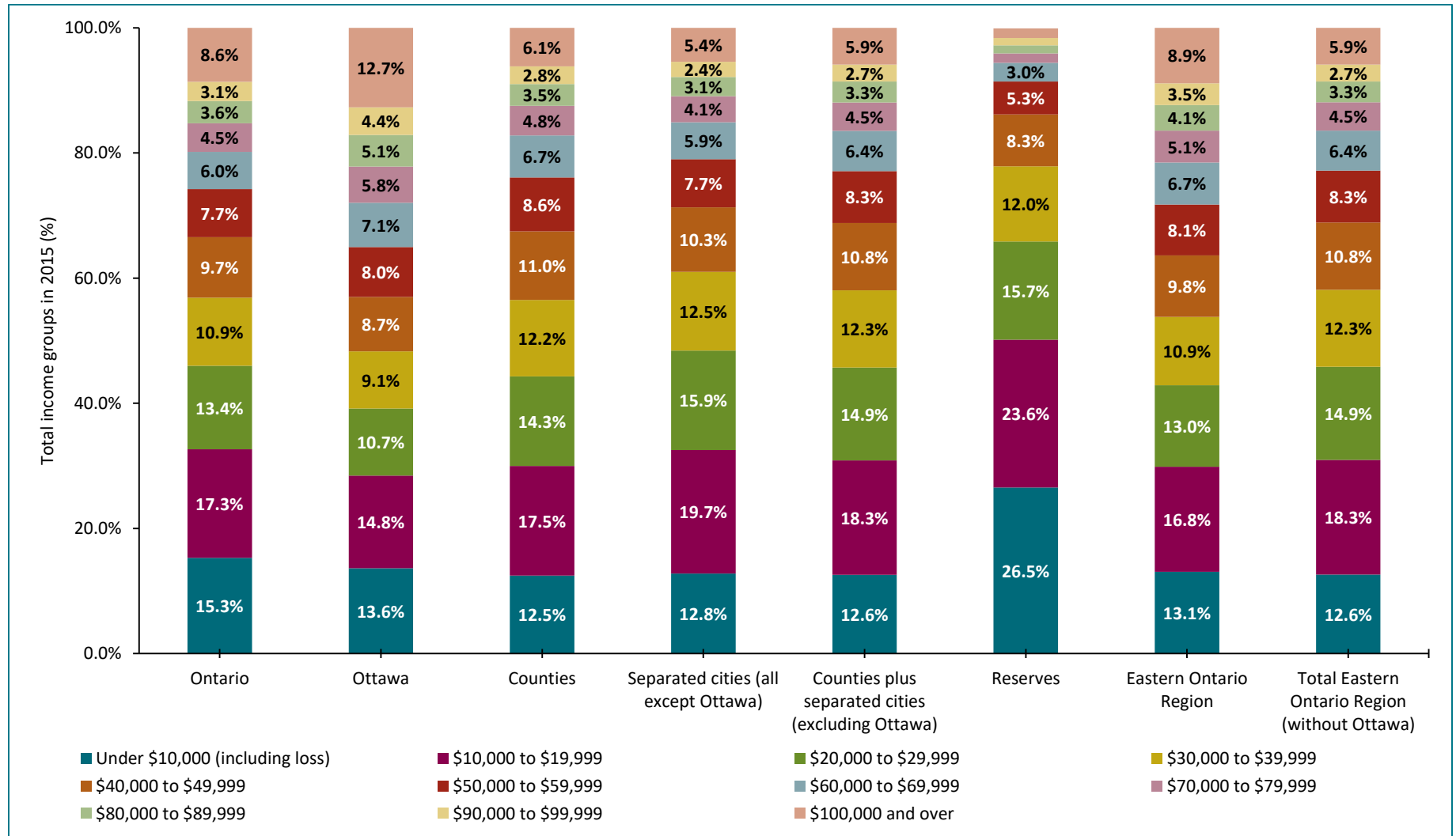
## Personal Income

A community's socio-economic composition is also determined by the income of its population. Figure 8 provides census information on individual income for the total Eastern Ontario Region (without Ottawa) compared to the province in 2015. The region has a lower proportion of the population with incomes under \$10,000 (including loss) at 12.6% compared to Ottawa at 13.6% and Ontario at 15.3%. The region also has a higher greater percentage of individuals making incomes from \$30,000 - \$59,999 at 31% compared to Ottawa at 25.8% and Ontario at 28.2%.





Figure 8: Individual Income by Groups (%), Eastern Ontario, 2015



Source: Statistics Canada, Census, 2016



In addition to an overview of the region’s income levels, these figures can reveal insights into the social and economic issues facing a region. A high average income suggests high levels of disposable income, and the distribution of individuals across the income groups can indicate income inequality in the region. Table 3 showcases the median income of the total Eastern Ontario Region (without Ottawa) compared to the province.

The median income in counties plus separated cities (excluding Ottawa) at \$33,927 differs slightly than their separated cities (all except Ottawa) counterparts at \$29,565. This can be attributed to a number of factors including the concentration of social services provided by traditional urban centres and the diversity of housing options available in these centres (more affordable housing). The median income of the counties plus separated cities (excluding Ottawa) is lower than the median income in Ottawa at \$41,857 and Ontario at \$33,539. The median income of the separated cities shows that Kingston has the highest median of \$35,034 while Cornwall showed the lowest at \$26,644. This suggests that some parts of Ontario are receiving a greater share of high- paying jobs. Indicative of this trend can be found in Eastern Ontario communities such as Kingston and Ottawa who both have large institutional presences that often attract high paying knowledge-based jobs.

Prescott and Russell, Lanark and Frontenac counties also demonstrated higher averages in income than other Eastern Ontario communities. This may be a result of an established older population moving into the areas that have carried over into senior positions across several businesses.

**Table 3: Median total income in 2015 among recipients (\$) in Eastern Ontario, 2016**

Geographic Area	Median total income in 2015 among recipients (\$)	Geographic Area	Median total income in 2015 among recipients (\$)
Frontenac	\$ 35,438	Belleville (Hastings)	\$ 30,661
Haliburton	\$ 29,425	Brockville (Leeds and Grenville)	\$ 29,090
Hastings	\$ 30,305	Cornwall (Stormont, Dundas and Glengarry)	\$ 26,644
Kawartha Lakes	\$ 32,302	Gananoque (Leeds and Grenville)	\$ 31,646
Lanark	\$ 35,805	Kingston (Frontenac)	\$ 35,034
Leeds and Grenville	\$ 34,329	Pembroke (Renfrew)	\$ 28,945
Lennox and Addington	\$ 34,832	Peterborough (Peterborough)	\$ 30,040
Northumberland	\$ 33,927	Prescott (Leeds and Grenville)	\$ 27,520
Peterborough	\$ 31,792	Quinte West (Hastings)	\$ 32,750
Prescott and Russell	\$ 38,814	Smiths Falls (Lanark)	\$ 27,281
Prince Edward	\$ 32,133	Separated cities (all except Ottawa)	\$ 29,565
Renfrew	\$ 34,319	Ottawa	\$ 41,857



Geographic Area	Median total income in 2015 among recipients (\$)	Geographic Area	Median total income in 2015 among recipients (\$)
Stormont, Dundas and Glengarry	\$ 30,935	Reserves	\$ 21,200
Counties plus separated cities (excluding Ottawa)	\$ 33,927	Ontario	\$ 33,539

Source: Statistics Canada, Census, 2016

### Young Adult Migration

Figure 7 and Figure 8 provides a closer look at intraprovincial, interprovincial and external migrants that have moved into the Eastern Ontario Counties and Cities. Intraprovincial migrants include in-migrants who lived in the same province or territory for five years. Northumberland County showed the highest proportion of intraprovincial migrants. Kingston, Belleville, and Peterborough demonstrated the largest number of intraprovincial migrants to enter their city borders. These three cities are known for their post-secondary institutions which gather a significant portion of their student base from surrounding rural communities. Queens University's international acclaim can also be attributed to Kingston's ability to attract several young out of country migrants.



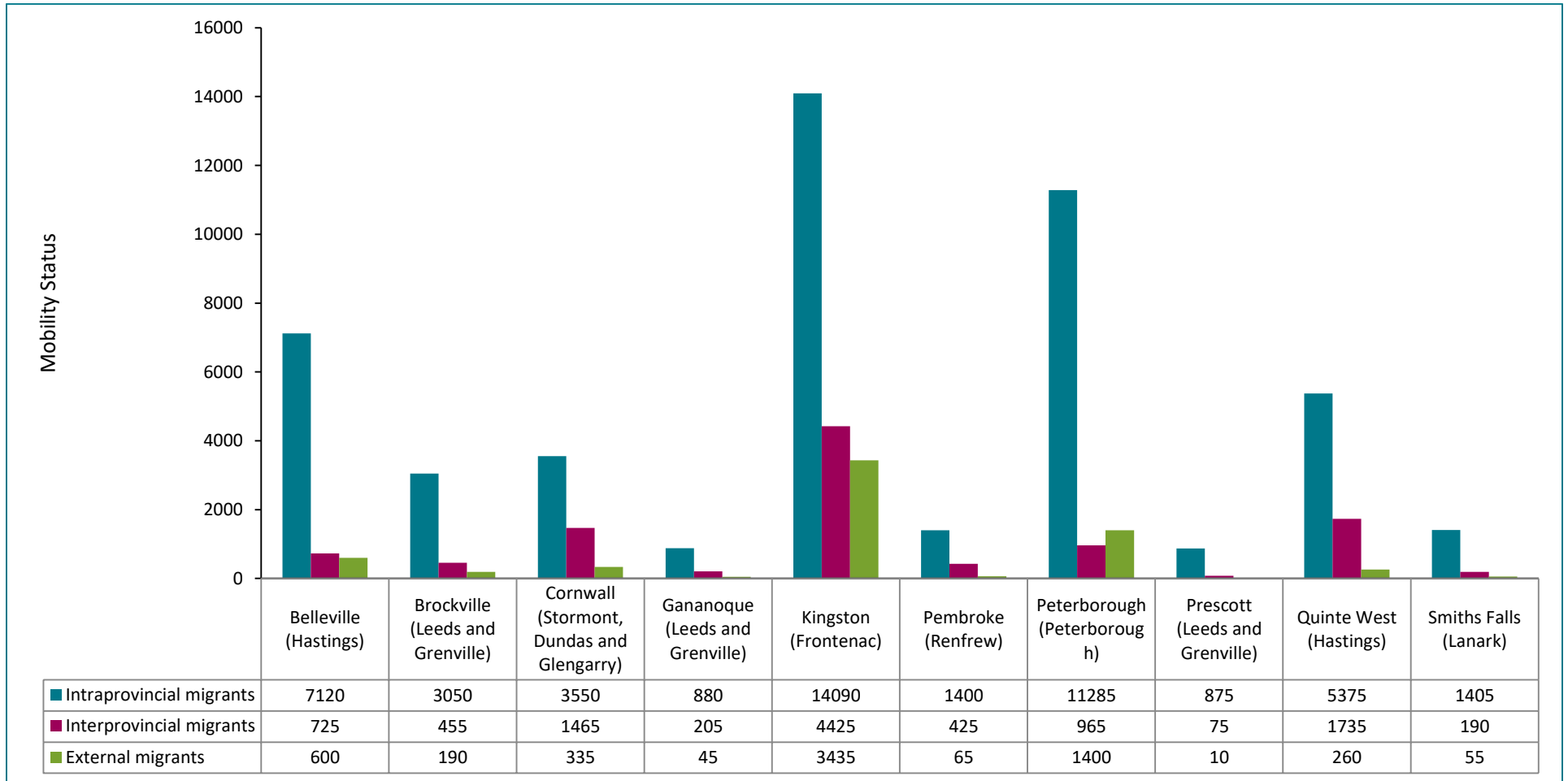
Figure 9: Mobility Status Based on Place of Residence 5 Years Ago, Counties of Eastern Ontario (not incl. any separated cities), 2016



Source: Statistics Canada, Census, 2016



Figure 10: Mobility Status Based on Place of Residence 5 Years Ago, Separated cities (all except Ottawa), 2016



Source: Statistics Canada, Census, 2016



## 1.2 Labour Force and Employment Profile

Statistics Canada collects both labour force and employment data for the Canadian population aged 15 and over; or those considered part of the labour force based on capabilities. Labour force data is concerned with the employed and unemployed resident population of a community, regardless of the community in which the individual is employed. Employment, on the other hand, is concerned with the number of individuals employed within a certain community irrespective of where they live. While not a direct representation of the number of jobs in a community, employment data offers a better estimate of the total number of jobs contained in a community.

The following section provides an overview of the characteristics of the labour force, the labour force by industry (North American Industrial Classification Standard - NAICS) and Occupation (National Occupational Classification - NOC), and the employment by industry (NAICS). For most variables and geographies, the most recent data is based on the 2011 National Household Survey.

### Labour Force Characteristics

The total labour force in Eastern Ontario (excluding Ottawa) reduced by approximately 0.3% from 2011 to 2016. This number is opposite of the 1.5% growth that was recorded for 2006-2011. Eastern Ontario's separated cities (excluding Ottawa) had a net decline of 140 individuals in the five-year span, and the Counties had a net decline of 1,605 individuals. Comparatively, the province experienced a growth of 4%, more than quadruple the level witnessed by Eastern Ontario.

The rate at which individuals are entering the labour force compared to those leaving the labour force (either through retirement, migration out of the region or electing to not be an active participant in the labour force) is significantly lower in the last five years when compared to 2011 levels. The Counties (not including any separated cities) has witnessed a ratio of eight people leaving the labour force for every individual entering. That number is similar in the separated cities (excluding Ottawa) where for every six to seven individuals leaving the labour force, one is entering. While above the average (Ontario's witnessed a 2:1 ratio of individuals leaving to entering), the figures are much more drastic due to the trends witnessed over the last five years. From 2011-2016, the Counties (not including any separated cities) have seen the ratio increase from 4:1 to 135:1, consistent with the demographic changes that have been occurring in the labour force. Similarly, to a lesser extent the separated cities (excluding Ottawa) have seen its ratio rise from 2:1 in 2011 to 6:1 in 2016.



**Table 4: Eastern Ontario's Labour Force Characteristics (Summary)**

Geographic Area	Total Population 15 Years and Over	In the Labour Force	Employed	Unemployed	Not in the Labour Force	Participation Rate (%)	Unemployment Rate (%)	Self Employed	Self Employed (%)
<b>Counties of Eastern Ontario (not incl. any separated cities)</b>									
2016	624900	376260	350920	25345	248615	60.20%	6.70%	52105	13.80%
2011	605030	376400	348765	27455	228655	62.20%	7.30%	49065	13.00%
2006	585145	371990	350940	21025	213165	63.57%	5.65%		
Change 2006-2016	39755	4270	-20	4320	35450	-3.37%	1.05%		
Change 2011-2016	19870	-140	2155	-2110	19960	-2.00%	-0.60%		
<b>Separated cities (all except Ottawa)</b>									
2016	328680	193535	177700	15845	135145	58.90%	8.20%	17035	8.80%
2011	321450	195140	178135	17190	126280	60.70%	8.80%	15450	7.92%
2006	310540	191125	177500	13625	119415	61.55%	7.13%		
Change 2006-2016	18140	2410	200	2220	15730	-2.65%	1.07%		
Change 2011-2016	7230	-1605	-435	-1345	8865	-1.80%	-0.60%		
<b>Eastern Ontario (counties and separated cities)</b>									
2016	953580	569795	528620	41190	383760	59.75%	7.23%	69140	12.13%
2011	926480	571540	526900	44645	354935	61.69%	7.81%	64515	11.29%
2006	895685	563115	528440	34650	332580	62.87%	6.15%		
Change 2006-2016	57895	6680	180	6540	51180	-3.12%	1.08%		
Change 2011-2016	27100	-1745	1720	-3455	28825	-1.94%	-0.58%		
<b>City of Ottawa</b>									
2016	761420	513655	476540	37120	247765	67.50%	7.20%	50965	9.90%
2011	718960	498370	463625	34745	220590	69.30%	7.00%	45345	9.10%
2006	658495	456480	429575	26905	202020	69.32%	5.89%		
Change 2006-2016	102925	57175	46965	10215	45745	-1.82%	1.31%		
Change 2011-2016	42460	15285	12915	2375	27175	-1.80%	0.20%		
<b>Ontario</b>									
2016	11038440	7141675	6612150	529525	3896765	64.70%	7.40%	824595	11.50%
2011	10473670	6864990	6297005	567985	3608685	65.50%	8.30%	706425	10.29%
2006	9819420	6587580	6164245	423335	3231840	67.09%	6.43%		
Change 2006-2016	1219020	554095	447905	106190	664925	-2.39%	0.97%		
Change 2011-2016	564770	276685	315145	-38460	288080	-0.80%	-0.90%		

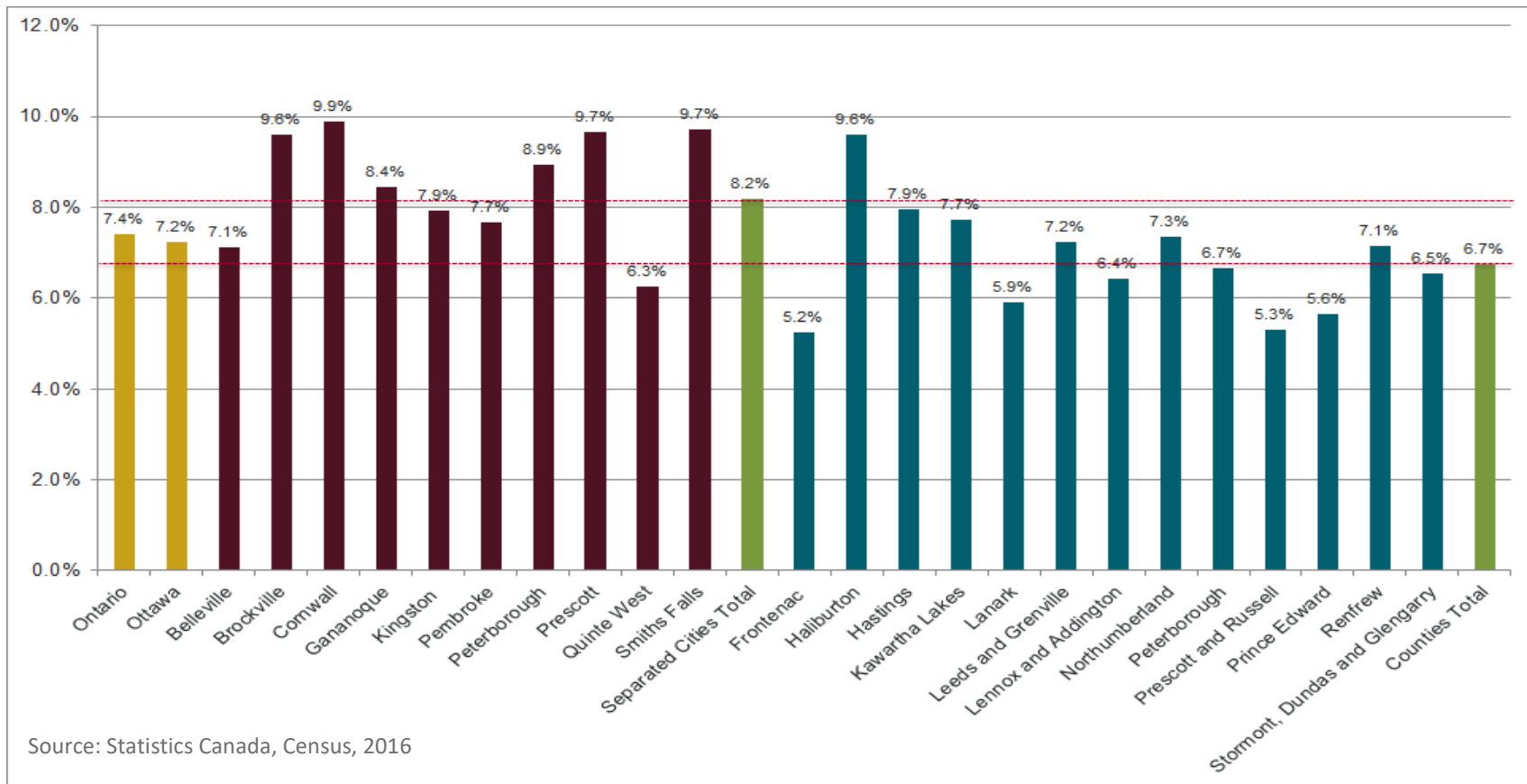
Source: Statistics Canada, Census 2006. National Household Survey 2011, Census 2016



The unemployment rate of a community's population can be affected by a number of factors. One of the most central factors influencing an individual's ability to obtain and sustain employment is educational attainment. In other words, those individuals with more education will typically have lower rates of unemployment than those individuals with less education. With this in mind, Table 4 and Figure 11 provide unemployment rates for Eastern Ontario. Despite Eastern Ontario's counties having a minimal growth in labour, they combine for a 6.7% unemployment rate - a lower figure than both Eastern Ontario's separated cities (8.2%) and Ontario (7.4%).

The counties (without separated cities) with a higher (or equal) unemployment rate than the Ontario average are Haliburton (9.6%), Hastings (7.9%), and Kawartha Lakes (7.7%).

**Figure 11: Eastern Ontario's Counties and Separated Cities Unemployment Rates (2016)**







Eastern Ontario's counties demonstrate a high level of self-employed workers in the labour force (13.8%). Counties such as Prince Edward and Haliburton each showcased self-employed levels greater than 20%. The strong self-employed labour force is a good indication of a durable entrepreneurial support system set in place.

Table 5 provides a breakdown of labour force characteristics by county, separated city and Ontario

**Table 5: Eastern Ontario's Labour Force Characteristics (Full)**

Geographic Area	Total Population 15 Years and Over	In the Labour Force	Employed	Unemployed	Not in the Labour Force	Participation Rate (%)	Unemployment Rate (%)	Self Employed	Self Employed (%)
<b>Frontenac</b>									
2016	22600	13620	12910	715	8975	60.30%	5.20%	2035	14.90%
2011	21985	13920	13050	695	8065	63.30%	5.00%	1950	14.00%
2006	22095	13970	13215	750	8135	63.23%	5.37%		
<b>Haliburton</b>									
2016	16070	7875	7120	755	8195	49.00%	9.60%	1600	20.30%
2011	14940	7580	6870	705	7360	50.70%	9.30%	1205	15.90%
2006	13980	7620	7045	570	6360	54.51%	7.48%		
<b>Hastings</b>									
2016	35295	19135	17610	1520	16150	54.20%	7.90%	2835	14.80%
2011	35235	19835	18085	1750	15430	56.30%	8.80%	2590	13.10%
2006	32085	18675	17500	1165	13405	58.20%	6.24%		
<b>Kawartha Lakes</b>									
2016	63510	36160	33365	2795	27345	56.90%	7.70%	5165	14.30%
2011	61245	36130	33065	3065	25115	59.00%	8.50%	5025	13.90%
2006	61460	37775	35420	2355	23685	61.46%	6.23%		
<b>Lanark</b>									
2016	49620	31170	29320	1845	18450	62.80%	5.90%	4475	14.40%
2011	46965	30670	28420	2255	16285	65.30%	7.40%	4030	13.10%
2006	44640	29575	27925	1655	15060	66.25%	5.60%		
<b>Leeds and Grenville</b>									
2016	62155	38465	35695	2780	23690	61.90%	7.20%	5500	14.30%
2011	59865	38220	35605	2615	21645	63.80%	6.80%	4855	12.70%
2006	58240	38260	36340	1920	19985	65.69%	5.02%		



Geographic Area	Total Population 15 Years and Over	In the Labour Force	Employed	Unemployed	Not in the Labour Force	Participation Rate (%)	Unemployment Rate (%)	Self Employed	Self Employed (%)
<b>Lennox and Addington</b>									
2016	34760	21100	19745	1355	13655	60.70%	6.40%	2360	11.20%
2011	33655	20815	19175	1640	12840	61.80%	7.90%	2155	10.40%
2006	32445	20415	19370	1040	12030	62.92%	5.09%		
<b>Northumberland</b>									
2016	72040	40880	37880	3000	31160	56.70%	7.30%	5765	14.10%
2011	68120	41365	37925	3440	26755	60.70%	8.30%	5860	14.20%
2006	66105	40575	38135	2440	25535	61.38%	6.01%		
<b>Peterborough</b>									
2016	48455	28620	26710	1905	19840	59.10%	6.70%	4525	15.80%
2011	47760	28605	26530	2075	19150	59.90%	7.30%	4620	16.20%
2006	48645	30520	28690	1830	18115	62.74%	6.00%		
<b>Prescott and Russell</b>									
2016	72270	48170	45625	2550	24100	66.70%	5.30%	5595	11.60%
2011	69075	47930	45390	2540	21150	69.40%	5.30%	5270	11.00%
2006	63785	44045	42180	1865	19745	69.05%	4.23%		
<b>Prince Edward</b>									
2016	21270	11530	10880	650	9740	54.20%	5.60%	2340	20.30%
2011	21605	11890	10885	1000	9720	55.00%	8.40%	1860	15.60%
2006	21315	12570	11810	760	8745	58.97%	6.05%		
<b>Renfrew</b>									
2016	71740	44570	41380	3185	27165	62.10%	7.10%	4900	11.00%
2011	71160	44820	41310	3515	26340	63.00%	7.80%	4935	11.00%
2006	68145	43500	40595	2900	24645	63.83%	6.67%		
<b>Stormont, Dundas, and Glengarry</b>									
2016	55115	34965	32680	2290	20150	63.40%	6.50%	5010	14.30%
2011	53420	34620	32455	2160	18800	64.80%	6.20%	4710	13.60%
2006	52205	34490	32715	1775	17720	66.07%	5.15%		



Geographic Area	Total Population 15 Years and Over	In the Labour Force	Employed	Unemployed	Not in the Labour Force	Participation Rate (%)	Unemployment Rate (%)	Self Employed	Self Employed (%)
<b>Total Eastern Ontario Counties (without Separated Cities)</b>									
2016	624900	376260	350920	25345	248615	60.20%	6.70%	52105	13.80%
2011	605030	376400	348765	27455	228655	62.20%	7.30%	49065	13.00%
2006	585145	371990	350940	21025	213165	63.57%	5.65%		
<b>Belleville</b>									
2016	41475	24375	22645	1735	17100	58.80%	7.10%	2170	8.90%
2011	40530	24875	22905	1965	15655	61.40%	7.90%	2100	8.40%
2006	39925	25340	23695	1650	14590	63.47%	6.51%		
<b>Brockville</b>									
2016	18285	9790	8845	940	8500	53.50%	9.60%	845	8.60%
2011	18595	10490	9620	870	8105	56.40%	8.30%	905	8.60%
2006	18310	10465	9665	795	7845	57.15%	7.60%		
<b>Cornwall</b>									
2016	37955	20210	18210	2000	17745	53.20%	9.90%	1415	7.00%
2011	37745	20850	18570	2285	16895	55.20%	11.00%	1430	6.90%
2006	37115	20755	19175	1575	16360	55.92%	7.59%		
<b>Gananoque</b>									
2016	4325	2550	2330	215	1770	59.00%	8.40%	260	10.20%
2011	4305	2480	2365	115	1825	57.60%	4.60%	200	8.10%
2006	4375	2790	2575	220	1580	63.77%	7.89%		
<b>Kingston</b>									
2016	102125	63770	58710	5060	38355	62.40%	7.90%	5770	9.00%
2011	100835	64935	59470	5645	35895	64.40%	8.70%	5110	7.90%
2006	95520	61235	56940	4300	34280	64.11%	7.02%		
<b>Pembroke</b>									
2016	11090	6125	5660	470	4965	55.20%	7.70%	495	8.10%
2011	11560	6965	6460	505	4595	60.30%	7.30%	545	7.80%
2006	11290	6150	5750	400	5140	54.47%	6.50%		



Geographic Area	Total Population 15 Years and Over	In the Labour Force	Employed	Unemployed	Not in the Labour Force	Participation Rate (%)	Unemployment Rate (%)	Self Employed	Self Employed (%)
<b>Peterborough (City)</b>									
2016	66790	39560	36030	3535	27225	59.20%	8.90%	3725	9.40%
2011	64950	38840	35035	3805	26110	59.80%	9.80%	3165	8.10%
2006	62355	38350	35260	3090	24010	61.50%	8.06%		
<b>Prescott</b>									
2016	3500	1760	1595	170	1735	50.30%	9.70%	170	9.70%
2011	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
2006	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<b>Quinte West</b>									
2016	35880	21635	20280	1355	14250	60.30%	6.30%	1850	8.60%
2011	35505	21620	20010	1615	13855	60.90%	7.50%	1660	7.70%
2006	34570	21975	20780	1195	12590	63.57%	5.44%		
<b>Smiths Falls</b>									
2016	7255	3760	3395	365	3500	51.80%	9.70%	335	8.90%
2011	7425	4085	3700	385	3345	55.00%	9.40%	335	8.20%
2006	7080	4065	3660	400	3020	57.42%	9.84%		
<b>Total Separated Cities without Ottawa</b>									
2016	328680	193535	177700	15845	135145	58.90%	8.20%	17035	8.80%
2011	321450	195140	178135	17190	126280	60.70%	8.80%	15450	7.90%
2006	310540	191125	177500	13625	119415	61.55%	7.13%		
<b>Total Eastern Ontario without Ottawa</b>									
2016	953580	569795	528620	41190	383760	59.75%	7.23%	69140	12.13%
2011	926480	571540	526900	44645	354935	61.69%	7.81%	64515	11.29%
2006	895685	563115	528440	34650	332580	62.87%	6.15%		
<b>Ottawa</b>									
2016	761420	513655	476540	37120	247765	67.50%	7.20%	50965	9.90%
2011	718960	498370	463625	34745	220590	69.30%	7.00%	45345	9.10%
2006	658495	456480	429575	26905	202020	69.32%	5.89%		



Geographic Area	Total Population 15 Years and Over	In the Labour Force	Employed	Unemployed	Not in the Labour Force	Participation Rate (%)	Unemployment Rate (%)	Self Employed	Self Employed (%)
Total Eastern Ontario									
2016	1715000	1083450	1005160	78310	631525	63.17%	7.23%	120105	11.09%
2011	1645440	1069910	990525	79390	575525	65.02%	7.42%	109860	10.27%
2006	1554180	1019595	958015	61555	534600	65.60%	6.04%		

Source: Statistics Canada, Census 2006. National Household Survey 2011, Census 2016

## Labour Force by Industry

An understanding of the skills of the resident labour force by industry can provide an indication of the areas in which a community or jurisdiction can provide support to investment attraction and retention initiatives based on the industry-related skills of its labour force. Figure 12 and 13 illustrate the 2016 labour force composition of Eastern Ontario's counties, separated cities, Ottawa and Ontario by major industry sector as defined by NAICS.

Eastern Ontario's counties had a total labour force of 376,260 in 2016, concentrated predominantly in the following three industries: Healthcare and Social Assistance (12.50%), Retail Trade (12.06%), and Construction (10.63%).

Two of these sectors (Retail and Health) account for the highest proportions of labour force across the province as well, but at comparatively lower proportions than in Eastern Ontario's counties. Eastern Ontario's counties held a greater proportion of labour force in Agriculture, Forestry, Fishing and Hunting (3.92%) when compared to the separated cities (0.79%) and the province (1.46%), indicating that a great deal of primary industry activity still occurs in Eastern Ontario's rural side.

Eastern Ontario's separated cities (minus Ottawa) had a total labour force of 193,535 in 2016, concentrated predominantly in the following three industries: Healthcare and Social Assistance (14.87%), Retail Trade (13.20%), and Educational Services (9.52%). While the predominant industries are the same between the counties and separated cities, it should be noted that separated cities had a larger proportion of labour force dedicated to these industries. Eastern Ontario's separated cities held a significantly greater proportion of labour force in Educational Services (9.52%) when compared to the counties (6.73%) and Ontario (7.58%). This may be correlated back to the several educational institutions that house campuses within Eastern Ontario's separated cities. Information and Cultural Industries in Eastern Ontario's counties and separated cities are proportionally lower (1.33% and 1.55% respectively) than both Ottawa (2.79%) and Ontario (2.54%)

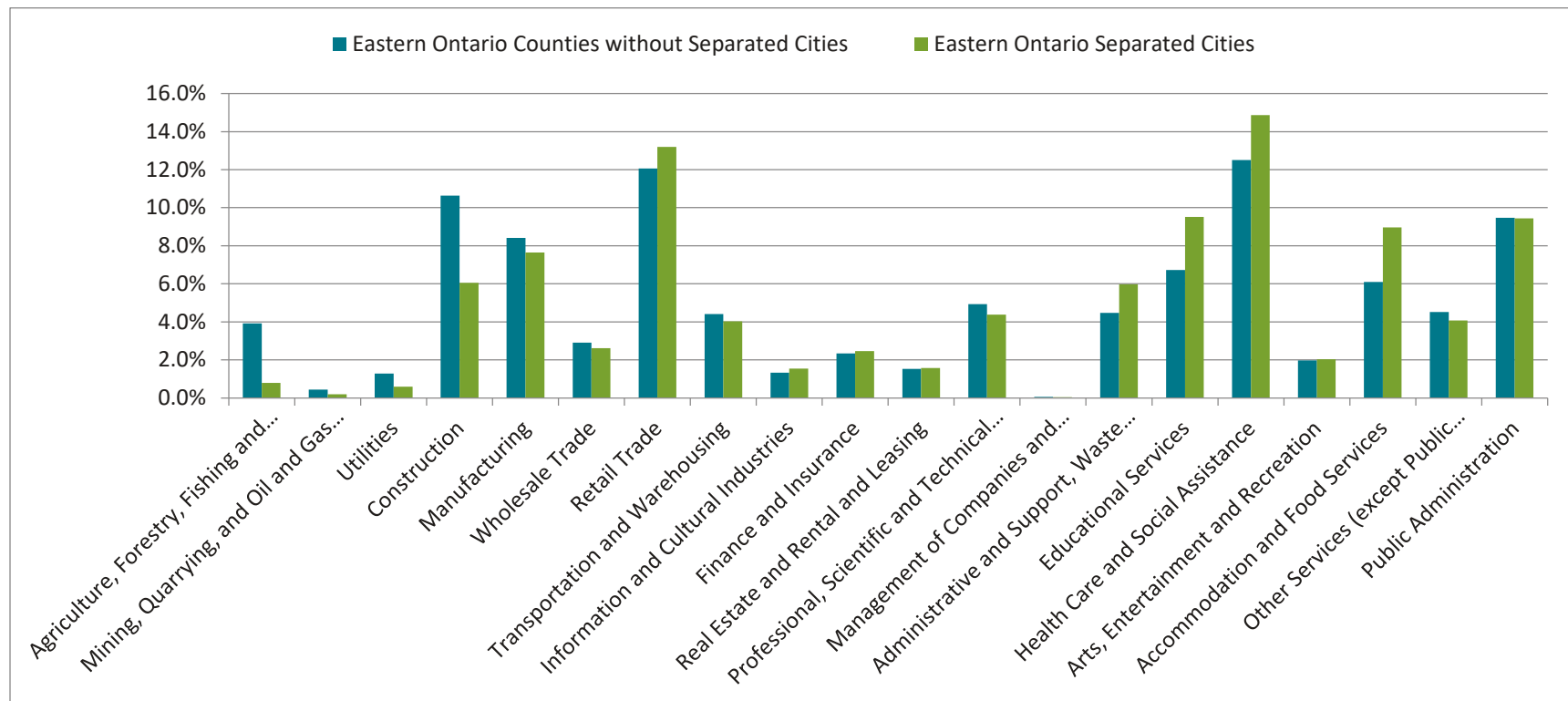
Table 6 provides a summary of total net growth in the labour force by industry from 2006-2016. The largest industry to lose labour force was Manufacturing and Other Services. During the ten year span, Eastern Ontario (excluding Ottawa)'s manufacturing sector lost over 19,355 labourers. Other Services lost over two thousand labourers. Other sectors to see significant loses were Wholesale Trade (-1780), Agriculture (-



1625), and Information and Cultural Industries (-1455). Industries with significant growth include Public Administration (26865), Health Care and Social Assistance (9555), Construction (8265), and Educational Services (2165).

Overall, labour force growth has shown a growth in Eastern Ontario over the last ten years, particularly in the public administration sector, and industries with social implications for the overall health of quality of life such as health care and educational services. From an investment attraction perspective, the growth of labour in the transportation/warehousing and health care sectors speaks to the greater opportunities for development of spin-offs from these sectors.

**Figure 12: Proportion of Total Labour Force by Industry – (NAICS) (2016)**

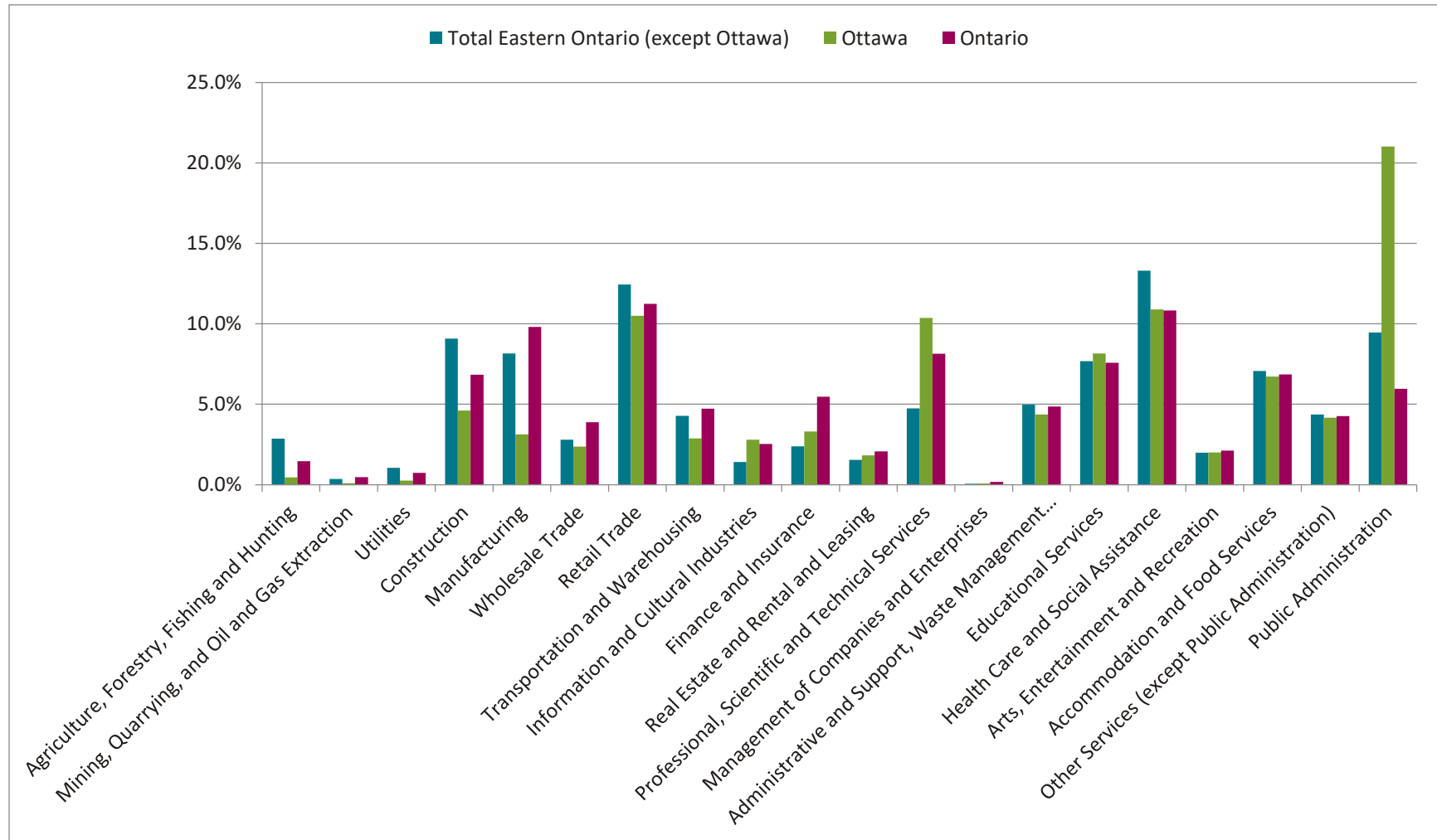


Source: Statistics Canada; Census, 2016

\*Total labour force working in applicable industries



Figure 13: Proportion of Total Labour Force by Industry – (NAICS) (2016)



Source: Statistics Canada, Census, 2016

\*Total labour force working in applicable industries



**Table 6: Eastern Ontario's Net Labour Force Growth by Industry (2006-2016)**

Eastern Ontario Counties without Separated Cities														
Industry (NAICS)	Front.	Hali.	Hast.	K.L.	Lana.	L & G	L & A	NorH.	Pete.	P & R	PE	Ren.	S.D.G	Total*
Total*	-340	870	-2325	-1775	4560	180	17130	60	-3815	5260	-1385	3835	1270	23525
11	-40	-65	-320	-90	-150	105	-125	-175	-225	-25	-195	-325	-95	-1725
21	-5	10	-10	40	0	20	-5	15	0	5	5	110	35	220
22	25	25	115	5	-70	65	90	-65	20	25	-20	120	10	345
23	125	-65	230	630	1065	765	205	630	455	1040	225	820	700	6825
31-33	-225	-125	-280	-1970	-805	-1420	-200	-2075	-1130	-1010	-565	-1915	-1435	-13155
41	-115	-5	-160	-290	-245	40	35	-90	-25	-135	-120	-295	-60	-1465
44-45	-130	50	-235	-295	-20	330	-10	445	-160	320	25	210	680	1210
48-49	-70	40	-120	90	20	-150	20	210	-295	-115	-70	-15	-240	-695
51	-70	-10	-10	10	30	-20	-175	-115	-25	-190	-100	5	-205	-875
52	0	60	40	95	165	60	15	75	-155	165	-20	10	-180	330
53	0	-120	0	5	90	35	5	150	-50	-95	-30	5	70	65
54	170	50	-20	30	0	20	65	95	20	60	35	0	-105	420
55	15	0	-10	35	-5	-40	0	0	-25	0	10	20	5	5
56	-50	155	170	-115	155	20	145	-180	-45	345	25	245	-160	710
61	-50	35	75	-15	255	70	130	145	-130	855	-230	-10	-120	1010
62	310	85	605	320	225	270	360	915	270	720	5	1070	965	6120
71	0	20	25	-140	95	-160	-45	-25	-180	170	-45	-135	-140	-560
72	-270	55	65	-65	205	-135	175	85	-385	605	110	80	25	550
81	0	-70	-50	-345	-55	-25	-85	-360	-140	55	-100	-255	60	-1370
91	40	745	-2435	290	3605	330	16530	380	-1610	2465	-330	4090	1460	25560

Source: Statistics Canada, Census 2006. National Household Survey 2011, Census 2016

\*Total labour force working in applicable industries





Eastern Ontario Separated Cities | Total Eastern Ontario | Ottawa

Industry (NAICS)	Bell.	Broc.	Corn.	Gan.	King.	Pem.	Pete.	Presc.	Q.W	S.F	Total* separated cities	Total* EO w/o Ottawa	Ottawa
Total*	-1185	-760	-760	-250	1840	-65	955	-135	-395	-260	-1015	22510	52370
11	-10	40	30	-20	-40	-50	50	15	80	5	100	-1625	-200
21	0	-5	10	0	40	-20	50	-10	-5	10	70	290	25
22	-35	25	5	-15	50	-10	-170	10	-90	-5	-235	110	-95
23	85	105	235	5	385	100	275	-30	235	45	1440	8265	5100
31-33	-890	-640	-1380	-125	-545	-295	-1125	-185	-670	-345	-6200	-19355	-5280
41	165	-140	-75	40	-95	-35	-310	10	105	20	-315	-1780	380
44-45	-950	110	405	5	-85	-140	320	-5	-790	40	-1090	120	6275
48-49	30	-65	130	-30	-270	-100	105	-30	-50	-20	-300	-995	-330
51	-75	-75	-40	-20	-105	-45	-170	15	-140	75	-580	-1455	-910
52	-100	55	55	20	50	5	0	10	20	-25	90	420	1790
53	-195	5	-35	5	-90	-40	-180	10	-45	5	-560	-495	970
54	-415	20	10	-5	140	85	-5	10	-10	65	-105	315	1855
55	0	-5	5	0	-35	0	10	0	10	0	-15	-10	155
56	125	-165	-685	-60	-5	160	405	0	-100	-40	-365	345	365
61	240	-15	-185	15	255	20	460	35	220	110	1155	2165	10065
62	390	55	460	5	1320	-45	795	-15	580	-110	3435	9555	11365
71	25	-40	60	-20	240	0	110	0	-115	-10	250	-310	690
72	-40	115	290	30	880	95	25	5	165	5	1570	2120	5915
81	-95	-165	-80	-90	-215	105	10	10	-100	-45	-665	-2035	-870
91	560	25	25	10	-35	145	300	10	305	-40	1305	26865	15105

Source: Statistics Canada, Census 2006. National Household Survey 2011, Census 2016

NAIC Categories: 11 - Agriculture, Forestry, Fishing and Hunting, 21 - Mining, Quarrying, and Oil and Gas Extraction, 22 - Utilities, 23 - Construction, 31-33 - Manufacturing, 41 - Wholesale Trade. 44-45 - Retail Trade, 48-49 - Transportation and Warehousing, 51 - Information and Cultural Industries, 52 - Finance and Insurance, 53- Real Estate and Rental and Leasing, 54 - Professional, Scientific and Technical Services, 55 - Management of Companies and Enterprises, 56 - Administrative and Support, Waste Management and Remediation Services, 61 - Educational Services, 62 - Health Care and Social Assistance, 71 - Arts, Entertainment and Recreation, 72 - Accommodation and Food Services, 81 - Other Services (except Public Administration), 91 -Public Administration

\* Total labour force working in applicable industries



## Labour Force by Occupation

In order to get a complete picture of the labour force capabilities for a particular area, it is necessary to examine the labour force by occupation, that is, by the core activities associated with an individual's employment. This is in contrast to the previous section, which outlines the labour force by the industry in which the individual is employed. Examining the labour force by occupation provides a more detailed look at the individual specializations which may not be as evident through industry-based statistics and provide more of an indication of the extent of knowledge workers that may be present in a local economy.

Sales and service occupations accounted for the largest proportional shares of labour force across Ontario, Eastern Ontario counties and separated cities, as well as the City of Ottawa in 2016. Across Eastern Ontario, proportional shares of the labour force by occupation differed between counties and separated cities. Eastern Ontario's counties had a larger proportional share of the labour force in Trades, Transport and Equipment Operators and Related Occupations (19%) while their counterparts the cities had (13%). Other significant occupations included Business, Finance and Administration (14%). However when compared to the province (16%) it was proportionally lower.

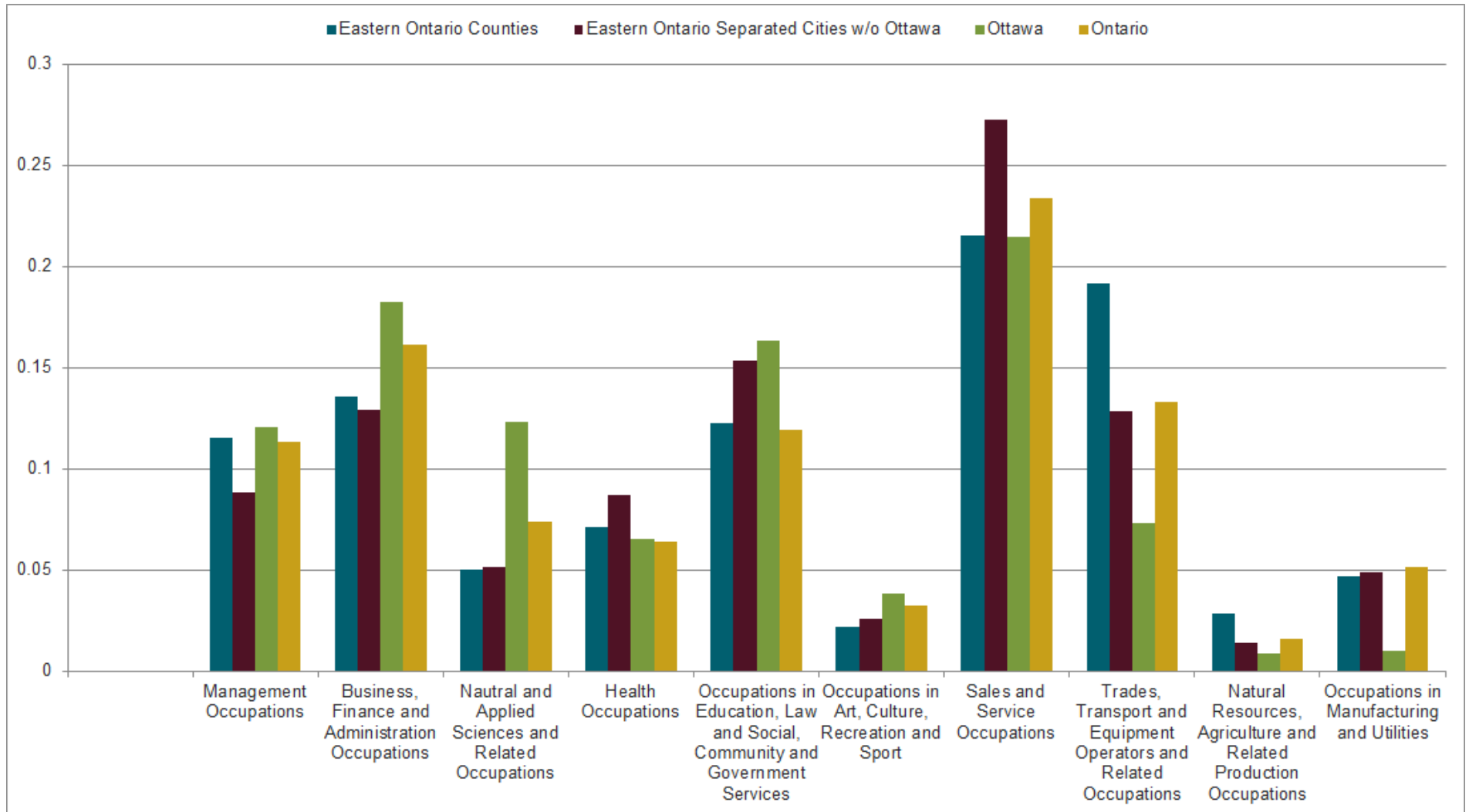
Eastern Ontario's separated cities (excluding Ottawa) had a 9% proportional share of labour force dedicated to health occupations, well above the province's proportional share. Figure 14 provides a further breakdown of proportions of the labour force by occupations in Eastern Ontario, Ontario and Ottawa.

Table 7 provides a summary of total net growth in the labour force by occupation from 2006-2016. The largest occupation classes to lose labour force were those in Sales and service occupations, Business, finance and administrative, Occupations unique to the primary industry, and Occupations unique to processing, manufacturing and utilities. During the ten year span, Eastern Ontario (excluding Ottawa)'s lost over forty-two thousand and seven hundred occupations related to these classes.

Occupations related to trades, transport and equipment operators and related occupations; saw a small growth of upwards to three hundred and eighty-five labourers in the last ten years.



Figure 14: Proportion of Total Labour Force by Occupations (NOC) (2016)



Source: Statistics Canada. Census, 2016.



**Table 7: Eastern Ontario's Net Labour Force Growth by Occupation (2006-2016)**

Eastern Ontario Counties without Separated Cities														
NOC	Front.	Hali.	Hast.	K.L.	Lana.	L & G	L & A	NorH.	Pete.	P & R	PE	Ren.	S.D.G	Total*
Total*	-370	260	370	-1790	1505	160	645	55	-2025	3905	-1030	905	355	2945
A	90	110	655	535	700	835	610	955	605	1350	485	970	1565	9465
B	-120	-175	-155	-590	-350	-280	-345	-455	-785	95	-205	-415	-530	-4310
C	55	95	-20	115	10	60	75	-205	-25	345	-110	-25	-10	360
D	275	60	280	230	435	350	400	605	230	370	-60	890	440	4505
E	570	380	725	1355	1380	1005	1075	1600	900	2705	135	4470	1275	17575
F	-10	-5	90	-110	95	55	0	-100	-90	-25	-85	-60	-115	-360
G	-750	-10	-540	-1455	-710	-680	-655	-145	-1195	230	-310	-2975	-160	-9355
H	-190	-115	210	190	865	235	70	-180	-295	260	-90	-145	310	1125
I	-305	-95	-670	-845	-660	-775	-390	-1005	-905	-880	-515	-980	-1605	-9630
J	10	25	-210	-1200	-280	-650	-190	-1020	-460	-530	-280	-820	-805	-6410
Eastern Ontario Separated Cities   Total Eastern Ontario   Ottawa														
NOC	Bell.	Broc.	Corn.	Gan.	King.	Pem.	Pete.	Presc.	Q.W	S.F	Total*	Total* w/o Ottawa	Ottawa	
Total*	-1165	-770	-790	-260	1850	-75	950	-110	-420	-275	-1065	1880	52350	
A	150	-105	-140	55	235	-30	180	-5	170	5	515	9980	6980	
B	-1605	-135	-1225	-60	-1990	-195	-1100	45	-680	60	-6885	-11195	-1975	
C	-455	-70	-130	-45	-235	5	385	-45	-5	-10	-605	-245	2445	
D	265	20	455	-50	1355	75	675	0	455	-45	3205	7710	8780	
E	1160	150	370	130	3760	560	1365	45	2175	15	9730	27305	27670	
F	-45	-45	-90	35	-105	-115	170	10	30	25	-130	-490	-650	
G	-130	-85	135	-140	-900	-30	5	-20	-1530	-60	-2755	-12110	9035	
H	-90	-265	555	-130	10	-90	-160	-135	-370	-65	-740	385	2605	
I	-80	15	15	-5	-40	-35	20	25	-195	-35	-315	-9945	-1050	
J	-330	-245	-735	-40	-230	-215	-595	-30	-470	-150	-3040	-9450	-1480	

Source: Statistics Canada, Census 2006. National Household Survey 2011, Census 2016

NOC Categories: A - Management occupations, B - Business, finance and administrative occupations, C - Natural and applied sciences and related occupations, D - Health occupations, E - Occupations in social science, education, government service and religion, F - Occupations in art, culture, recreation and sport, G - Sales and service occupations, H - Trades, transport and equipment operators and related occupations, I - Occupations unique to primary industry, J - Occupations unique to processing, manufacturing and utilities.

\* Total labour force working in applicable industries



## Employment Demand

Through the use of Vicinity Jobs<sup>2</sup>, the availability of local jobs can be measured and aggregated over a specified time period. Vicinity jobs provide information from several jobs boards and reports on the total job postings and job profiles that were created within the given time specifications. By looking at the job postings and profiles created within a region, a sense for the type of demand and broader picture of the employment landscape and availability of skills can be developed. Job postings<sup>3</sup> and Job Seekers<sup>4</sup> were examined between January 1<sup>st</sup>, 2018 and December 31<sup>st</sup>, 2018.

Figure 15 and 16 represents the number of postings and job seekers by industry type that was made within Eastern Ontario. In 2018, there were 39,307 job postings made. However, there were 52,855 job seekers. Evidently, the number of seekers far exceeds the number of postings which would imply that job seekers have to search outside the region to fulfil their career needs.

As is evident from the graphs, the most common job posting is in the Health Care and Social Assistance sector. The next most common job posting was in Retail Trade with 4,104 postings. Equally, the most common job seeker is seeking employment in the Accommodation and Food Services, Retail Trade, and Manufacturing.

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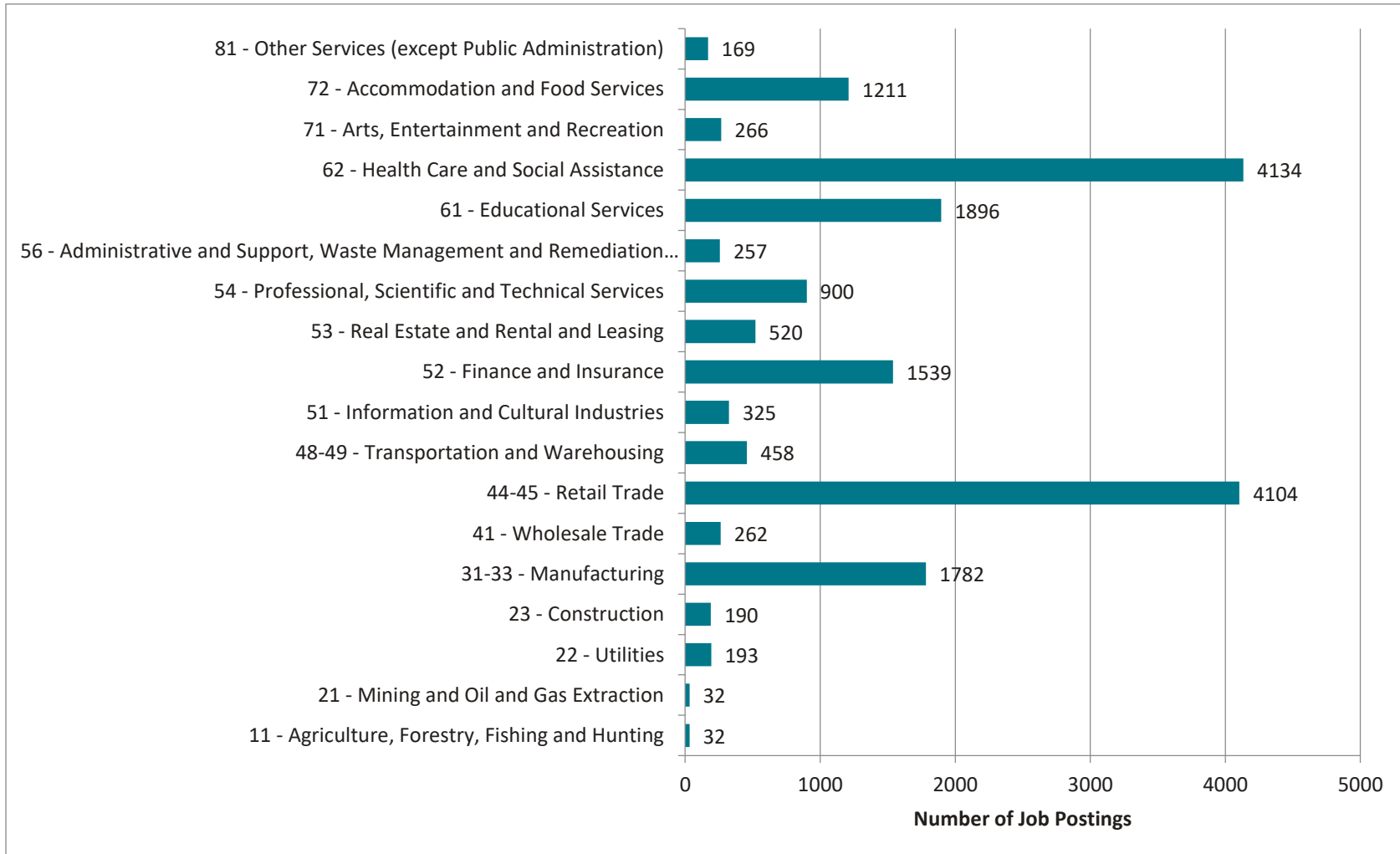
<sup>2</sup> Vicinity Jobs Inc. is a Canadian Big Data analytics and Internet search technology company, and a recognized Canadian leader in the delivery of real-time labour market information technology solutions.

<sup>3</sup> Job posting is a request made by an employer seeking a hire

<sup>4</sup> Job seeker is an individual creating a profile to seek employment. A job seeker can be employed while seeking employment.



Figure 15: Eastern Ontario Labour Demand by Industry, 2018 \*

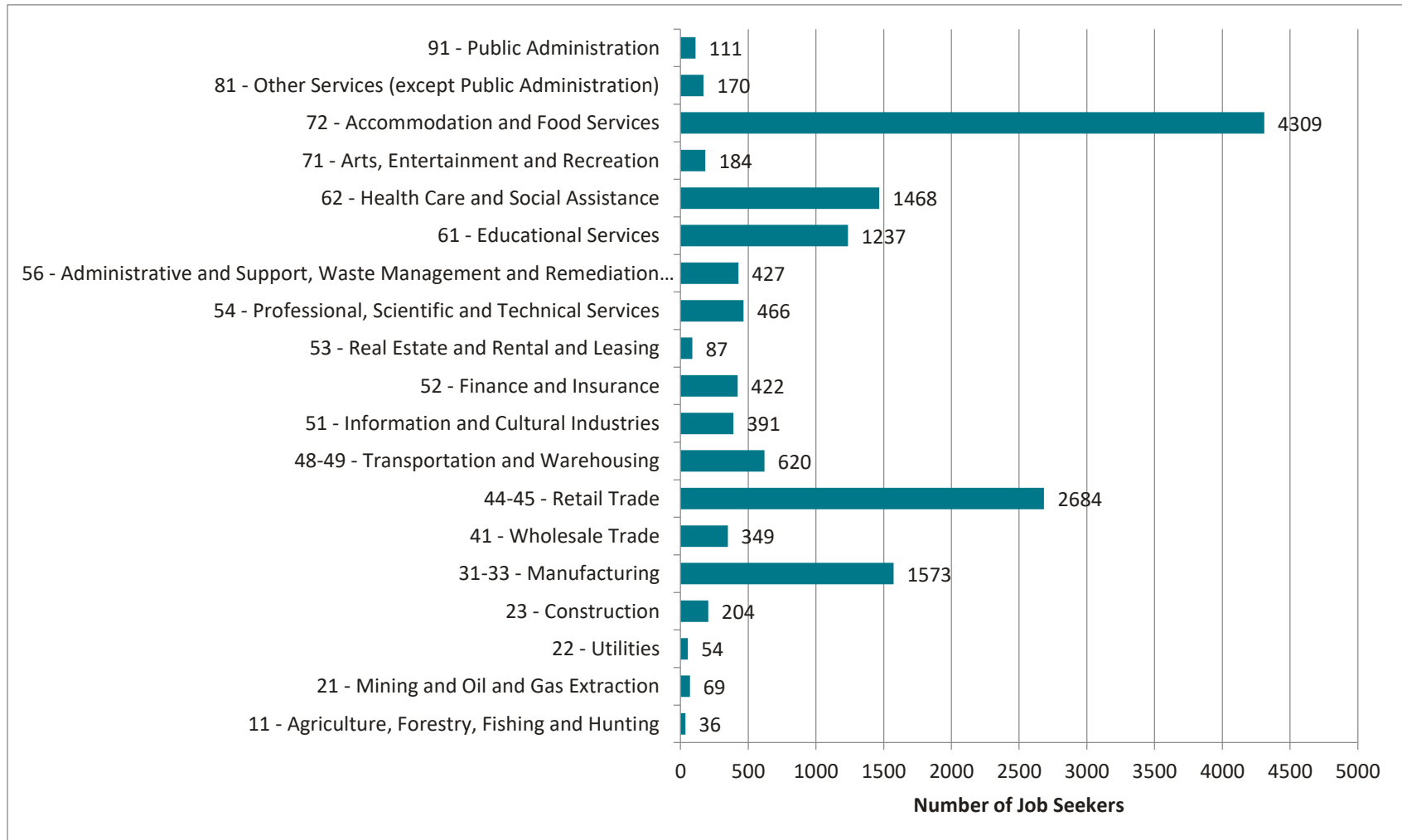


Source: Vicinity Jobs, Adapted by MDB Insight

\*Number of Postings applicable to the reporting period but excluded from this report's grand total due to lack of reliable and relevant information: 20,524



Figure 16: Eastern Ontario Labour Supply by Industry, 2018\*



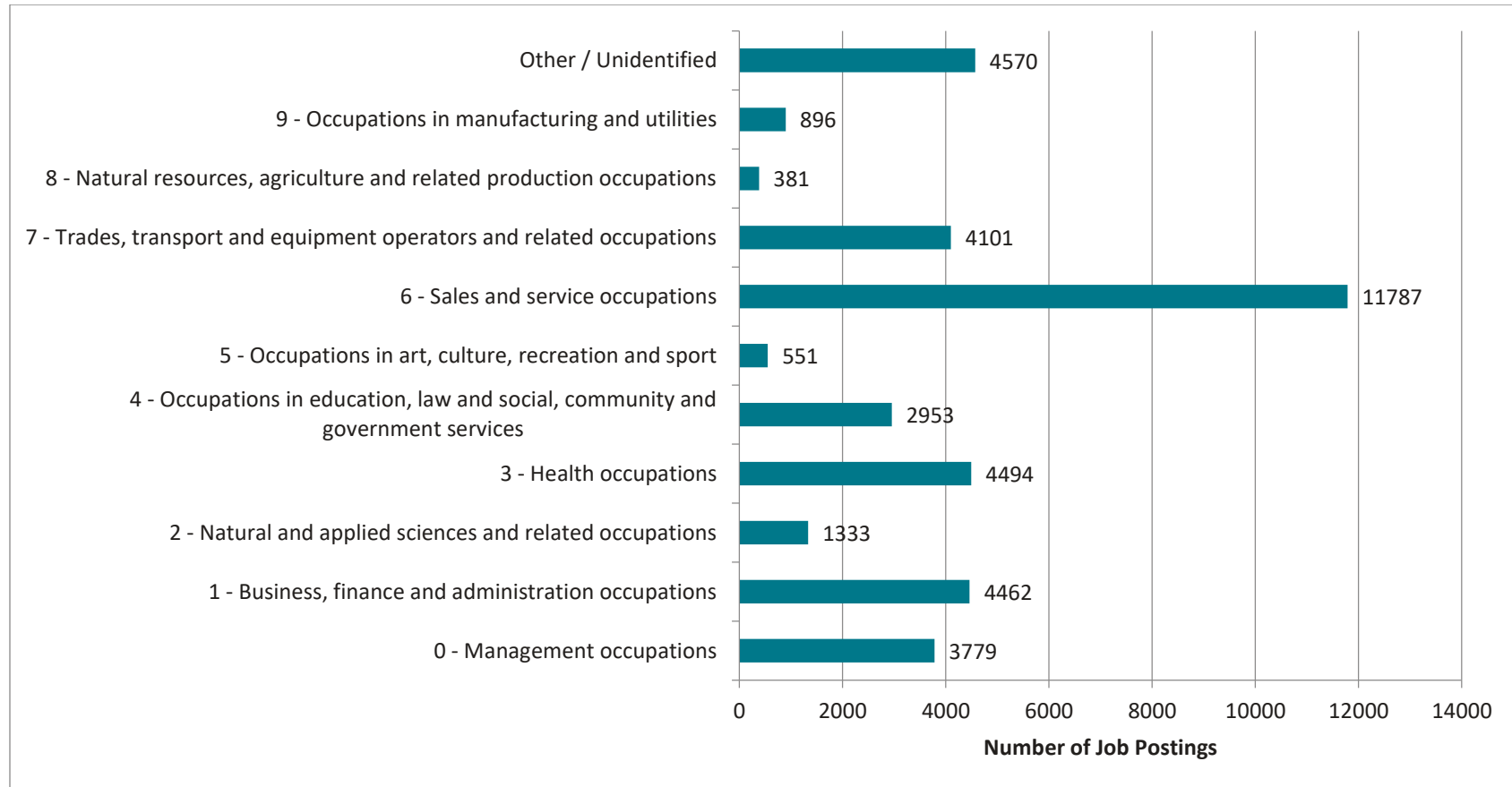
Source: Vicinity Jobs, Adapted by MDB Insight

\* Number of Job Seekers applicable to the reporting period but excluded from this report's grand total due to lack of reliable and relevant information: 37,994



Figure 17 and 18 represents the number of postings and job seekers by occupation type that was made within Eastern Ontario. The most common job posting was in sales and service occupations (11,787 postings) followed by health occupations (4,494 postings). The most common occupation job seekers were seeking employment in sales and service occupations (14,465 qualified candidates) and trades, transport and equipment operators and related occupations (6,697 qualified candidates).

**Figure 17: Eastern Ontario Labour Demand by Occupation, 2018**

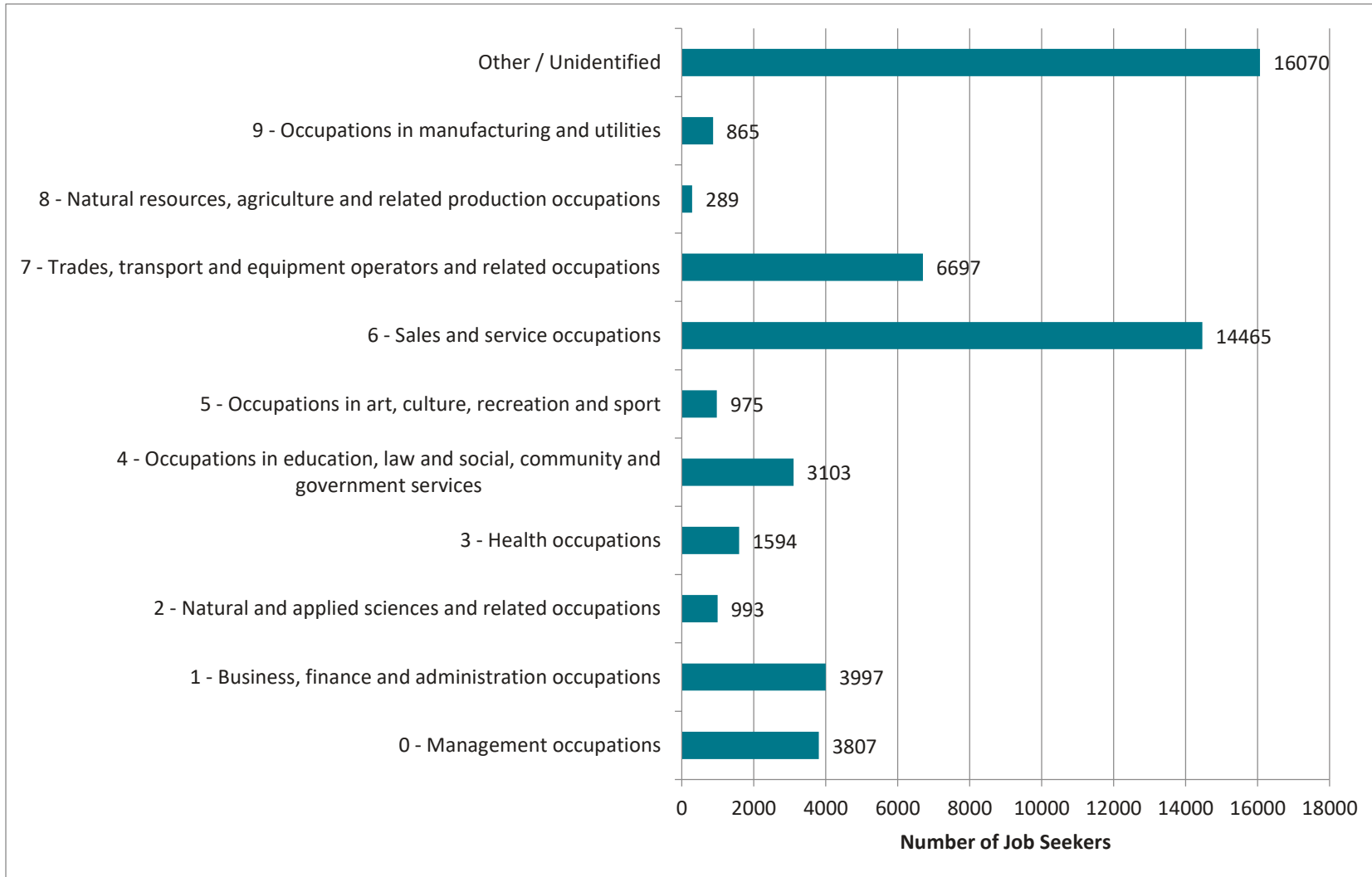


Source: Vicinity Jobs, Adapted by MDB Insight





Figure 18: Eastern Ontario Labour Supply by Occupation, 2018



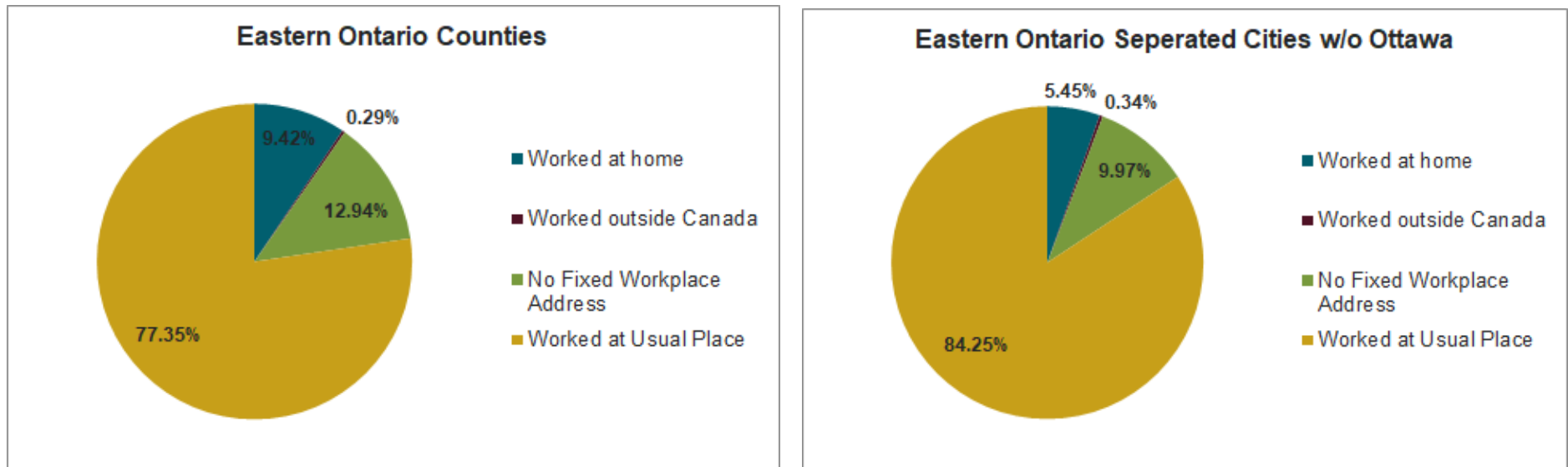
Source: Vicinity Jobs, Adapted by MDB Insight



## Place of Work

Figure 19 illustrates the proportion of workers within Eastern Ontario's counties and separated cities, in 2016, by their place of work. The place of work of the counties' labour force is generally reflective of their separated cities, while there are some notable differences. The county has a much larger proportion of its labour force that works at home when compared to the separated cities. This may be a result of the counties' high rates of self-employed farmers along with home-based businesses involved in professional and scientific services. Furthermore, the county has a larger proportion of its labour force that has no fixed place of work. This may be attributed to the counties' share of construction workers and trades contractors.

Figure 19: Place of Work Status in Eastern Ontario's Counties and Separated Cities (2016)



Source: Statistics Canada. Census 2016



## 2. Industry Profile

### 2.1 Location Quotients

In order to determine the level and degree of industrial specialization that has developed in Eastern Ontario, and thus the diversity of the regional economy, location quotients (LQs) have been calculated to measure the relative concentration of industry/business activity by major industry sector.

Location Quotients are a commonly used tool in regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. Understanding that the Eastern Ontario is within a highly competitive provincial economy, LQs have been calculated to compare the Eastern Ontario's labour force concentrations relative to the Province of Ontario, to provide an understanding of the areas in which Eastern Ontario imposes a competitive advantage over the rest of the province. Similarly, LQs have also been calculated to compare the counties and separated cities relative to Eastern Ontario to provide an understanding of the areas in which specific communities specialize in. Given the Eastern Ontario is one of Canada's largest metropolitan areas, LQs have also been calculated relative to Canada as well to provide an indication of areas where the Eastern Ontario can compete on a national scale.

A location quotient greater than 1.0 for a given sector indicates a local concentration of economic activity as compared to the overarching region (either Ontario or any other region) and may be an indication of competitive advantage with respect to the attraction of that industry sector. Location Quotients equal to 1.0 for a given sector suggest that the study area has the same concentration of economic activity as the overarching comparator. Finally, a location quotient of less than 1.0 suggests that the region does not have a strong competitive advantage in that sector.

In theory, an industrial or business concentration that is greater than the overarching average may also represent the export base of the participating region (both in terms of products or services). Businesses that make up this export base may have chosen to locate in the community due to certain local or regional competitive advantages. These competitive advantages can be used to attract additional investment, in the same or complementary industries.

As expected, Eastern Ontario's counties (excluding separated cities) have a higher concentration of resident labour force in the Agricultural, Forestry and Forestry sector in 2016, reflective of the counties' rural character. Public Administration also had a very high concentration of resident labour force, reflectively of the significant growth in the sector since 2006. Inevitably, they also experience a very low concentration of finance, and insurance labour force typically found predominantly in urban financial centres (i.e. Eastern Ontario's separated cities).



The counties exhibited higher than average concentrations of the labour force in a number of other sectors including Utilities and Construction. This may be a result of Eastern Ontario’s continued infrastructure improvements including the Eastern Ontario Regional Network initiative.

Eastern Ontario’s separated cities have a higher concentration of resident labour force in the Public Administration sector in 2016, reflective of the cities being the seat of the provincial government, and home to a number of federal and provincial agencies and departments. Inevitably, they also experience a very low concentration of primary industry sectors, utilities and construction as they already have a fundamental infrastructure network in place.

The cities exhibited higher than average concentrations of the labour force in a number of other sectors including Accommodation and Food Services, Health Care and Social Assistance, and Educational Services, reflective of their urban character and role as economic centres within their respective counties. This is further confirmed when comparing the counties and cities against each other. The cities have a larger concentration of labour force in educational services, management, accommodations and administrative support, while the counties have a larger concentration of labour force in agricultural, forestry and fishing, and utility positions.

Table 8 provides a breakdown of Eastern Ontario’s labour force by industry.

**Table 8: Eastern Ontario’s Labour Force Location Quotient (2006, 2011 and 2016)**

Industry (NAICS)	Eastern Ontario Counties without Separated Cities									Eastern Ontario Separated Cities								
	% Change 2006-2016	LQ Against Ontario				LQ Against EO				% Change 2006-2016	LQ Against Ontario				LQ Against EO			
		2006 LQ	2011 LQ	2016 LQ	LQ Level - 2016	2006 LQ	2011 LQ	2016 LQ	LQ Level - 2016		2006 LQ	2011 LQ	2016 LQ	LQ Level - 2016	2006 LQ	2011 LQ	2016 LQ	LQ Level - 2016
11	-10.66%	3.10	2.59	2.68	V High	1.43	1.41	1.37	High	7.19%	0.48	0.39	0.54	Low	0.22	0.21	0.28	V Low
21	15.55%	0.92	0.83	0.96	Avg	1.29	1.35	1.24	Avg	24.56%	0.34	0.2	0.41	Low	0.47	0.32	0.53	Low
22	7.88%	1.45	1.47	1.76	High	1.19	1.22	1.22	Avg	-17.54%	0.81	0.69	0.8	Avg	0.66	0.57	0.56	Low
23	21.08%	1.54	1.53	1.55	V High	1.18	1.17	1.17	Avg	14.43%	0.87	0.87	0.89	Avg	0.66	0.67	0.67	Low
31-33	-29.77%	1.23	0.91	0.86	Avg	1.06	1.04	1.03	Avg	-30.05%	1.04	0.8	0.78	Avg	0.90	0.92	0.94	Avg
41	-12.04%	0.76	0.72	0.75	Avg	1.08	1.04	1.04	Avg	-6.02%	0.60	0.64	0.67	Low	0.85	0.92	0.93	Avg
44-45	2.80%	1.13	1.12	1.07	Avg	0.97	0.99	0.97	Avg	-4.20%	1.23	1.17	1.17	Avg	1.06	1.03	1.06	Avg
48-49	-4.11%	1.05	0.92	0.93	Avg	1.06	1.02	1.03	Avg	-3.80%	0.89	0.86	0.85	Avg	0.90	0.96	0.94	Avg



Industry (NAICS)	Eastern Ontario Counties without Separated Cities									Eastern Ontario Separated Cities								
	% Change 2006-2016	LQ Against Ontario				LQ Against EO				% Change 2006-2016	LQ Against Ontario				LQ Against EO			
		2006 LQ	2011 LQ	2016 LQ	LQ Level - 2016	2006 LQ	2011 LQ	2016 LQ	LQ Level - 2016		2006 LQ	2011 LQ	2016 LQ	LQ Level - 2016	2006 LQ	2011 LQ	2016 LQ	LQ Level - 2016
51	-15.10%	0.62	0.55	0.53	Low	0.97	0.95	0.95	Avg	-16.57%	0.69	0.63	0.61	Low	1.06	1.09	1.1	Avg
52	3.97%	0.43	0.45	0.43	V Low	1.00	0.97	0.98	Avg	1.97%	0.43	0.49	0.45	V Low	1.00	1.07	1.03	Avg
53	1.16%	0.79	0.61	0.74	Low	0.95	0.89	0.99	Avg	-15.89%	0.91	0.83	0.76	Avg	1.09	1.21	1.02	Avg
54	2.36%	0.67	0.67	0.61	Low	1.05	1.08	1.04	Avg	-1.26%	0.57	0.53	0.54	Low	0.90	0.85	0.92	Avg
55	2.63%	0.56	0.24	0.3	V Low	1.00	0.59	1.03	Avg	-14.29%	0.56	0.73	0.27	V Low	1.00	1.81	0.93	Avg
56	4.50%	1.04	0.85	0.92	Avg	0.89	0.86	0.9	Avg	-3.14%	1.39	1.25	1.23	Avg	1.20	1.27	1.2	Avg
61	4.24%	0.92	0.95	0.89	Avg	0.91	0.87	0.88	Avg	6.88%	1.18	1.38	1.26	High	1.17	1.26	1.24	Avg
62	15.30%	1.09	1.14	1.16	Avg	0.96	0.95	0.94	Avg	13.96%	1.22	1.31	1.37	High	1.07	1.09	1.12	Avg
71	-7.17%	1.11	0.97	0.93	Avg	1.06	1.01	0.99	Avg	6.96%	0.93	0.93	0.96	Avg	0.89	0.97	1.02	Avg
72	2.51%	1.06	0.79	0.89	Avg	0.91	0.81	0.86	Avg	10.25%	1.35	1.33	1.31	High	1.16	1.36	1.27	High
81	-7.61%	1.18	0.99	1.06	Avg	1.06	1	1.03	Avg	-7.96%	0.99	0.98	0.96	Avg	0.89	0.99	0.93	Avg
91	273.22%	0.39	1.53	1.59	V High	0.56	1	1	Avg	7.92%	1.24	1.52	1.58	V High	1.80	0.99	1	Avg

Source: Statistics Canada, Census 2006. National Household Survey 2011, Census 2016

NAIC Categories: 11 - Agriculture, Forestry, Fishing and Hunting, 21 - Mining, Quarrying, and Oil and Gas Extraction, 22 - Utilities, 23 - Construction, 31-33 - Manufacturing, 41 - Wholesale Trade. 44-45 - Retail Trade, 48-49 - Transportation and Warehousing, 51 - Information and Cultural Industries, 52 - Finance and Insurance, 53- Real Estate and Rental and Leasing, 54 - Professional, Scientific and Technical Services, 55 - Management of Companies and Enterprises, 56 - Administrative and Support, Waste Management and Remediation Services, 61 - Educational Services, 62 - Health Care and Social Assistance, 71 - Arts, Entertainment and Recreation, 72 - Accommodation and Food Services, 81 - Other Services (except Public Administration), 91 -Public Administration



## 2.2 Business Counts Assessment

Statistics Canada’s Canadian Business Counts Data provides a record of business establishments by industry and size. This data is collected from the Canada Revenue Agency (CRA). The business data collected for Eastern Ontario includes all businesses that meet at least one of the three criteria: Have an employee workforce for which they submit payroll remittances to the CRA; or Have a minimum of \$30,000 in annual sales revenue; or Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The Canadian Business Counts Data records business counts by “Total”, “Indeterminate” and “Subtotal” categories. The establishments in the “Indeterminate” category include the self-employed (i.e. those who do not maintain an employee payroll but may have a workforce consisting of contracted workers, family members or business owners). Tables 9 to 11 provide a snapshot of Eastern Ontario’s Business Counts Assessment.

In 2018, there were 102,729 businesses in Eastern Ontario. From December 2014 to 2018, Eastern Ontario saw a growth of 7,064 businesses, predominantly in businesses that were either unclassified or self-employed. Business establishments with employees grew by 770. The municipalities with the largest business growth of establishments with employees were Quinte West (86.27%), Peterborough County (20.82%), and Leeds and Grenville (20.57%). The municipalities with the largest business growth of establishments without employees were Quinte West (113.53%), Kingston (24.50%), and Peterborough County (22.23%). The municipalities that experienced a decline in establishments with employees include Smiths Falls (-21.45%), Brockville (-16.74%) and Hastings (-16.72%).

In terms of employee size, Eastern Ontario is home to 589 establishments that employ over 100 people and 32,645 establishments that employ between 1 to 49 people, suggesting that the regional economy is driven by small-medium enterprises.

With regards to business establishments by industry, the Accommodation and Food Services industry witnessed the largest growth in total businesses, followed by industries classified as Information and Cultural and Professional, Technical and Scientific Services. Figure 20 provides a graphic overview of the share of establishments by industry across Eastern Ontario. Figure 20 highlights the decline in manufacturing, wholesale trade and agriculture in favour of health care, construction and accommodation and food service industries.

**Table 9: Eastern Ontario’s Number of Business Establishments (2014-2018)**

County	Without Employees (2018)	Without Employees (2014)	2014-2018 Change (Net)	2014-2018 Change (%)	With Employees (2018)	With Employees (2014)	2014-2018 Change (Net)	2014-2018 Change (%)
Stormont, Dundas and Glengarry*	4418	4330	88	2.03%	1930	1889	41	2.17%
Cornwall	2054	1900	154	8.11%	1189	1221	-32	-2.62%
Prescott and Russell	6139	5715	424	7.42%	2528	2476	52	2.10%
Leeds and Grenville*	4476	3779	697	18.44%	2028	1682	346	20.57%



County	Without Employees (2018)	Without Employees (2014)	2014-2018 Change (Net)	2014-2018 Change (%)	With Employees (2018)	With Employees (2014)	2014-2018 Change (Net)	2014-2018 Change (%)
Prescott**	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Brockville	1126	1203	-77	-6.40%	741	890	-149	-16.74%
Gananoque	320	309	11	3.56%	215	217	-2	-0.92%
Lanark*	3854	3359	495	14.74%	1701	1593	108	6.78%
Smiths Falls	457	634	-177	-27.92%	304	387	-83	-21.45%
Frontenac*	1348	1348	0	0.00%	532	529	3	0.57%
Kingston	8512	6837	1675	24.50%	4364	4009	355	8.86%
Lennox and Addington	1889	1975	-86	-4.35%	881	983	-102	-10.38%
Hastings*	2553	2823	-270	-9.56%	1195	1435	-240	-16.72%
Belleville	2491	2714	-223	-8.22%	1592	1910	-318	-16.65%
Quinte West	2620	1227	1393	113.53%	1492	801	691	86.27%
Prince Edward	2021	1800	221	12.28%	837	802	35	4.36%
Northumberland	5186	4749	437	9.20%	2153	2062	91	4.41%
Peterborough*	3811	3118	693	22.23%	1729	1431	298	20.82%
Peterborough	4550	4330	220	5.08%	2425	2636	-211	-8.00%
Kawartha Lakes	5276	4618	658	14.25%	2108	1929	179	9.28%
Haliburton	1314	1188	126	10.61%	684	658	26	3.95%
Renfrew*	4364	4216	148	3.51%	2117	2193	-76	-3.47%
Pembroke	716	696	20	2.87%	489	514	-25	-4.86%
<b>Total</b>	<b>69495</b>	<b>63201</b>	<b>6294</b>	<b>9.96%</b>	<b>33234</b>	<b>32464</b>	<b>770</b>	<b>2.37%</b>

Source: Canadian Business Counts. December 2018.

\*Business counts for these counties exclude the number of the separate cities within the census division.

\*\*Calculation unavailable due to data suppression.



**Table 10: Eastern Ontario's Number of Business Establishments by Employment Size (2018)**

County	Without employees	Total, with employees	1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500 + Employees
Stormont, Dundas and Glengarry*	4418	1930	1102	404	230	128	41	18	7	0
Cornwall	2054	1189	491	271	213	139	41	20	11	3
Prescott and Russell	6139	2528	1367	546	307	213	58	28	5	4
Leeds and Grenville*	4476	2028	1144	476	231	112	40	16	6	3
Prescott**	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Brockville	1126	741	302	198	115	82	22	12	7	3
Gananoque	320	215	110	41	33	19	7	4	1	0
Lanark*	3854	1701	946	335	255	108	31	20	5	1
Smiths Falls	457	304	126	69	59	29	11	6	3	1
Frontenac*	1348	532	353	100	47	25	6	1	0	0
Kingston	8512	4364	2116	883	706	450	120	47	30	12
Lennox and Addington	1889	881	462	213	110	59	22	10	4	1
Hastings*	2553	1195	724	235	147	59	22	6	1	1
Belleville	2491	1592	680	343	292	168	66	21	14	8
Quinte West	2620	1492	723	344	212	142	32	32	6	1
Prince Edward	2021	837	460	175	125	56	13	7	1	0
Northumberland	5186	2153	1177	444	278	164	50	23	16	1
Peterborough*	3811	1729	959	379	223	118	31	12	6	1
Peterborough	4550	2425	1097	540	413	237	83	29	18	8
Kawartha Lakes	5276	2108	1193	452	264	136	36	18	6	3
Haliburton	1314	684	400	141	81	46	14	2	0	0
Renfrew*	4364	2117	1099	463	295	157	57	29	13	4
Pembroke	716	489	202	129	85	38	22	5	4	4
<b>Total</b>	<b>69495</b>	<b>33234</b>	<b>17233</b>	<b>7181</b>	<b>4721</b>	<b>2685</b>	<b>825</b>	<b>366</b>	<b>164</b>	<b>59</b>

Source: Canadian Business Counts. December 2018.

\*Business counts for these counties exclude the number of the separate cities within the census division.

\*\*Business counts unavailable due to data suppression.





**Table 11: Eastern Ontario's Number of Business Establishments with Employees by Industry (2014, 2018)**

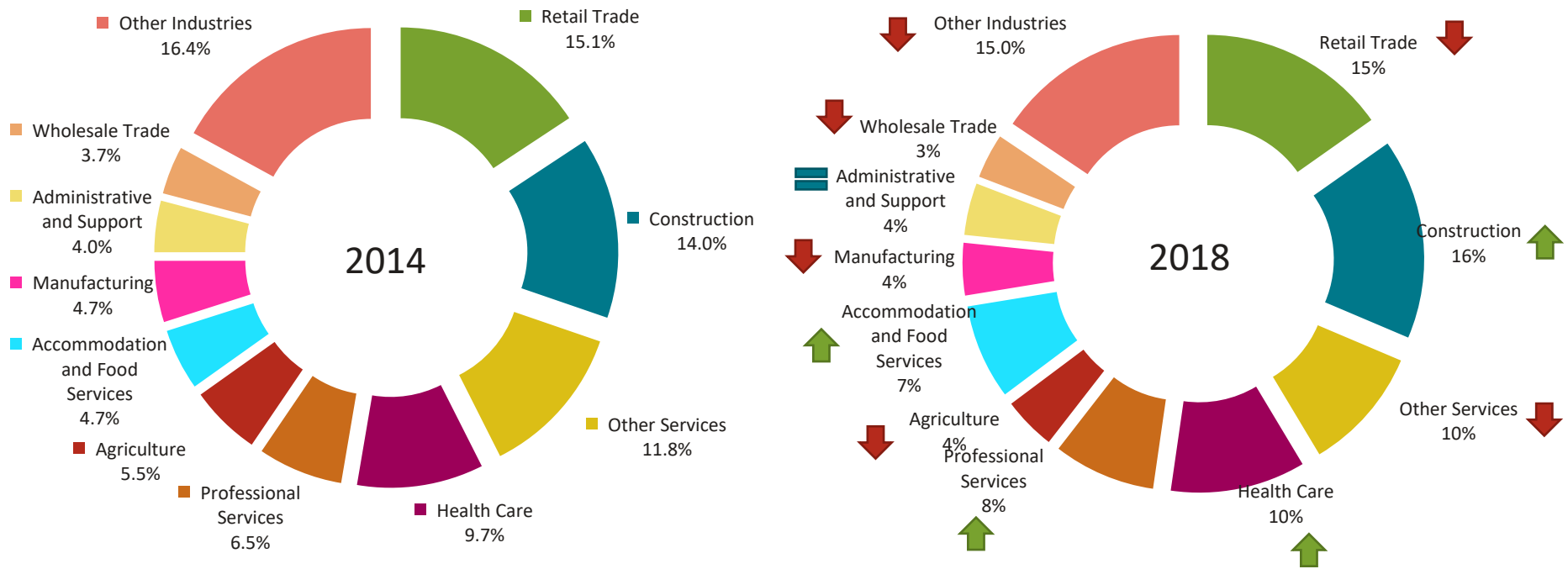
NAICS	2018	2014	2014-2018 Change (Net)	2014-2018 Change (%)
11	1365	1772	-407	-22.97%
21	87	100	-13	-13.00%
22	64	68	-4	-5.88%
23	5171	4545	626	13.77%
31-33	1347	1533	-186	-12.13%
41	1153	1205	-52	-4.32%
44-45	4873	4912	-39	-0.79%
48-49	1082	1151	-69	-5.99%
51	455	357	98	27.45%
52	1118	1163	-45	-3.87%
53	1078	1114	-36	-3.23%
54	2633	2126	507	23.85%
55	94	236	-142	-60.17%
56	1340	1287	53	4.12%
61	290	295	-5	-1.69%
62	3479	3163	316	9.99%
71	544	604	-60	-9.93%
72	2448	1537	911	59.27%
81	3206	3841	-635	-16.53%
91	152	237	-85	-35.86%
Unclassified	1255	1218	37	3.04%
<b>Total</b>	<b>33234</b>	<b>32464</b>	<b>770</b>	<b>2.37%</b>

Source: Canadian Business Counts. December 2014. December 2018.

NAIC Categories: 11 - Agriculture, Forestry, Fishing and Hunting, 21 - Mining, Quarrying, and Oil and Gas Extraction, 22 – Utilities, 23 – Construction, 31-33 – Manufacturing, 41 - Wholesale Trade. 44-45 - Retail Trade, 48-49 - Transportation and Warehousing, 51 - Information and Cultural Industries, 52 - Finance and Insurance, 53- Real Estate and Rental and Leasing, 54 - Professional, Scientific and Technical Services, 55 - Management of Companies and Enterprises, 56 - Administrative and Support, Waste Management and Remediation Services, 61 - Educational Services, 62 - Health Care and Social Assistance, 71 - Arts, Entertainment and Recreation, 72 - Accommodation and Food Services, 81 - Other Services (except Public Administration), 91 -Public Administration.



Figure 20: Share of Eastern Ontario's Business Establishments with Employees by Industry (2014, 2018)\*



Source: Canadian Business Counts. December 2014. December 2018.

Other Industries: 21 - Mining, Quarrying, and Oil and Gas Extraction, 22 – Utilities, 48-49 - Transportation and Warehousing, 51 - Information and Cultural Industries, 52 - Finance and Insurance, 53- Real Estate and Rental and Leasing, 55 - Management of Companies and Enterprises, 61 - Educational Services, 71 - Arts, Entertainment and Recreation, 91 -Public Administration

\*Does not include unclassified industries.



## 2.3 Industry Input-Output Models from EMSI Analyst

This section contains data from Emsi's Input-Output model. It is based on data from Statistics Canada's National Symmetric Input-Output table; National Household Survey commuting flows, Canadian Business Counts, and several Emsi in-house data sets.

Table 12 highlights Eastern Ontario's in-region purchases and percentage of imported purchases. In terms of industry purchases, the Manufacturing industry has the largest impact on Eastern Ontario's GDP. The manufacturing industry in 2014 had a total purchase power of close to \$12 billion, with approximately 66% of the purchases being made between Eastern Ontario businesses.

**Table 12: Eastern Ontario Industry In-Region Purchases and Imported Purchases, 2 Digit NAICS, 2014**

Purchases from	Total Purchases	In-region Purchases		Imported Purchases	
		\$	%	\$	%
Manufacturing	\$11,967,044,429	\$7,867,442,796	65.7%	\$4,099,601,632	34.3%
Mining, quarrying, and oil and gas extraction	\$2,452,987,162	\$157,782,796	6.4%	\$2,295,204,366	93.6%
Professional, scientific and technical services	\$2,297,362,075	\$925,458,158	40.3%	\$1,371,903,917	59.7%
Transportation and warehousing	\$2,072,058,333	\$1,019,187,169	49.2%	\$1,052,871,164	50.8%
Agriculture, forestry, fishing and hunting	\$1,823,894,484	\$1,034,880,770	56.7%	\$789,013,714	43.3%
Wholesale trade	\$1,509,686,128	\$769,061,209	50.9%	\$740,624,919	49.1%
Finance and insurance	\$1,403,550,706	\$552,213,037	39.3%	\$851,337,669	60.7%
Administrative and support, waste management and remediation services	\$1,317,881,526	\$833,074,445	63.2%	\$484,807,081	36.8%
Real estate and rental and leasing	\$1,295,194,110	\$602,097,603	46.5%	\$693,096,507	53.5%
Health care and social assistance	\$1,272,248,356	\$1,139,640,808	89.6%	\$132,607,548	10.4%
Information and cultural industries	\$859,200,752	\$342,381,051	39.8%	\$516,819,701	60.2%
Utilities	\$670,373,634	\$399,598,063	59.6%	\$270,775,571	40.4%
Retail trade	\$602,197,031	\$470,880,621	78.2%	\$131,316,410	21.8%
Construction	\$572,999,961	\$379,856,822	66.3%	\$193,143,138	33.7%
Other services (except public administration)	\$451,443,704	\$261,990,908	58.0%	\$189,452,796	42.0%
Public administration	\$419,944,630	\$333,961,392	79.5%	\$85,983,238	20.5%



Purchases from	Total Purchases	In-region Purchases		Imported Purchases	
Accommodation and food services	\$371,227,374	\$244,231,709	65.8%	\$126,995,665	34.2%
Management of companies and enterprises	\$277,408,277	\$63,163,630	22.8%	\$214,244,647	77.2%
Educational services	\$116,242,364	\$97,112,063	83.5%	\$19,130,301	16.5%
Arts, entertainment and recreation	\$100,972,008	\$61,409,848	60.8%	\$39,562,160	39.2%

Source: Emsi Analyst, Adapted by MDB Insight

Table 13 provides further clarity on the specific sub-sectors that account for the majority of purchasing power in the Eastern Ontario region. Chemical manufacturing, professional, scientific and technical services and farms are the top three sub-sectors in the region. Opportunities exist to expand businesses in the region for the sectors as they have a high proportion of purchases being made in the region. Although mining and quarrying (except oil and gas) account for a billion dollars in purchases, the majority of these are imported purchases, indicating that money is leaving the region.

**Table 13: Eastern Ontario Industry In-Region Purchases and Imported Purchases, 3 Digit NAICS Sub-sectors, 2014**

Purchases from	Total Purchases	In-region Purchases		Imported Purchases	
		\$	%	\$	%
Chemical manufacturing	\$2,729,350,586	\$1,544,604,619	56.6%	\$1,184,745,967	43.4%
Professional, scientific and technical services	\$2,297,362,075	\$925,458,158	40.3%	\$1,371,903,917	59.7%
Farms	\$1,666,797,165	\$945,337,916	56.7%	\$721,459,250	43.3%
Primary metal manufacturing	\$1,603,977,090	\$1,406,383,968	87.7%	\$197,593,123	12.3%
Petroleum and coal product manufacturing	\$1,253,765,559	\$413,719,567	33.0%	\$840,045,992	67.0%
Administrative and support services	\$1,167,911,949	\$741,885,361	63.5%	\$426,026,587	36.5%
Mining and quarrying (except oil and gas)	\$1,111,599,340	\$126,747,760	11.4%	\$984,851,580	88.6%
Food manufacturing	\$1,055,697,806	\$740,957,569	70.2%	\$314,740,236	29.8%

Source: Emsi Analyst, Adapted by MDB Insight



Table 14 highlights the total number of dollars spent by businesses in importing and exporting products and services. In 2014, Eastern Ontario businesses exported \$45.2 billion and imported \$54.25 billion. This suggests that Eastern Ontario is a net importer and might have a deficit in its local and regional supply chains. From 2011 to 2014, total exports in Eastern Ontario grew from \$40.94 Billion to \$45.2 Billion.

The manufacturing sector accounted for the majority of imports with \$18.6 billion (34% of total imports in the region). The sector also accounted for the majority of exports with \$20.9 billion (46% of total exports in the region).

**Table 14: Eastern Ontario Industry Imports and Exports, 2014**

Industry	Imports (2014)	Exports (2014)
Agriculture, Forestry, Fishing And Hunting	\$1,571,257,053	\$1,198,978,161
Mining, Quarrying, And Oil And Gas Extraction	\$3,016,393,275	\$313,542,516
Utilities	\$522,274,956	\$456,196,162
Construction	\$3,464,942,220	\$987,962,799
Manufacturing	\$18,646,801,768	\$20,930,062,227
Wholesale Trade	\$1,887,020,484	\$980,616,603
Retail Trade	\$822,197,983	\$862,389,867
Transportation And Warehousing	\$2,209,660,911	\$1,195,337,099
Information And Cultural Industries	\$1,446,426,120	\$255,833,295
Finance And Insurance	\$2,829,726,881	\$563,382,105
Real Estate And Rental And Leasing	\$1,896,596,011	\$364,455,299
Professional, Scientific And Technical Services	\$2,181,539,430	\$787,165,716
Management Of Companies And Enterprises	\$223,513,835	\$27,851,897
Administrative And Support, Waste Management And Remediation Services	\$722,004,656	\$717,833,976
Educational Services	\$2,203,130,959	\$2,794,806,394
Health Care And Social Assistance	\$2,832,197,937	\$4,288,208,196
Arts, Entertainment And Recreation	\$315,778,322	\$132,257,592



Industry	Imports (2014)	Exports (2014)
Accommodation And Food Services	\$831,666,303	\$611,592,192
Other Services (except Public Administration)	\$711,452,201	\$305,223,770
Public Administration	\$5,915,857,289	\$7,427,219,629
Total	\$54,250,438,594	\$45,200,915,495

Source: Emsi Analyst, Adapted by MDB Insight

Table 15 shows the top exporting industry sub-sectors in the Eastern Ontario region. Chemical manufacturing accounted for the majority of exports for the region at 14%, followed by federal government public administration. The federal government public administration includes establishments of the federal government primarily engaged in government programs, taxation, national defence, immigration services and foreign affairs among others.

**Table 15: Eastern Ontario Exports, 3 Digit NAICS Sub-sectors, 2014**

Industry	Exports	% of Total Exports
Chemical manufacturing	\$6,347,872,896	14.0%
Federal government public administration	\$3,320,737,623	7.3%
Primary metal manufacturing	\$3,079,012,509	6.8%
Educational services	\$2,794,806,394	6.2%
Provincial and territorial public administration	\$2,561,334,252	5.7%
Food manufacturing	\$2,485,619,806	5.5%
Transportation equipment manufacturing	\$1,854,287,720	4.1%
Hospitals	\$1,786,212,783	4.0%
Electrical equipment, appliance and component manufacturing	\$1,489,943,323	3.3%
Local, municipal and regional public administration	\$1,475,747,733	3.3%
Plastics and rubber products manufacturing	\$1,170,109,576	2.6%
Farms	\$1,152,931,494	2.6%
Ambulatory health care services	\$1,139,931,305	2.5%

Source: Emsi Analyst, Adapted by MDB Insight