



**GRAVENHURST**  
GATEWAY TO MUSKOKA

# COMMUNITY ANALYSIS

for the **Town of Gravenhurst**



**McSWEENEY**  
inspiring economic sustainability®



# GRAVENHURST

## GATEWAY TO MUSKOKA

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## Community Analysis

for the Town of Gravenhurst

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June 2024



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## Executive Summary

This Gravenhurst Situational Analysis is being completed as part of the Town of Gravenhurst Economic Development Strategy. This report is an informational piece crafted in 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 Town – input from the community matters and will help to supplement the rest of the story.

This Community Analysis begins with an assessment of the people (socio-demographics) that make up Gravenhurst to provide a snapshot of the local population and highlight potential future opportunities. This data can be used to inform decision-making; for example, Gravenhurst has a sizable population of residents over the age of 60 (i.e., nearing retirement or retired), which, if this demographic remains, suggests the Town may soon require an increase in seniors' amenities.

Next, by profiling housing and income levels, a snapshot is created of the Town's current "livability". Notably, although Town residents have slightly lower median and average salaries compared to their Ontario counterparts, affordability in Gravenhurst is better. This is seen by only 20% of residents spending over 30% of their income on housing, compared to 28% of Ontario residents doing the same.

Section 3 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 4 of the Situational Analysis reviews the Town'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, Section 5 presents the same information as is highlighted in Section 4 but focuses on Gravenhurst's Economic Region (the area where residents commute into and out of Gravenhurst consistently for work) rather than **just** Gravenhurst.

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

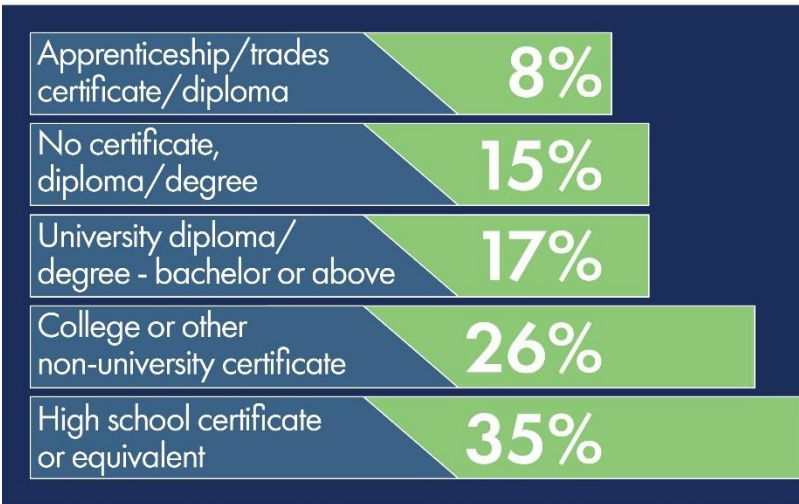


# Town of Gravenhurst Demographic Snapshot



## Population Profile

MEDIAN	AVERAGE
Region Age <b>52</b>	Region Age <b>48</b>
Ontario Age <b>41</b>	Ontario Age <b>42</b>



## Highest Education

Population ages 25-64



**35%**  
*Secondary*

**51%**  
*Post-secondary*

## Household & Earnings

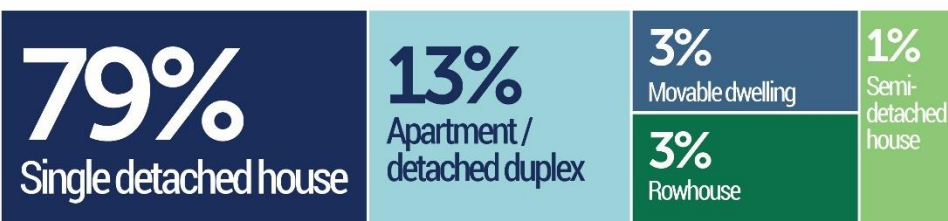


**20%** **ONTARIO 28%**

of Gravenhurst's population spends 30% or more of total household income on shelter costs.



Average Dwelling Value **\$789,411**  
Median Dwelling Value **\$699,851**



Total number of households

**5,814**



# Town of Gravenhurst Demographic Snapshot



## Labour Force & Local Economy

Median Employment Income | Average Employment Income

**\$41,466** | **\$55,020**

ONTARIO MEDIAN  
**\$43,942**

ONTARIO AVERAGE  
**\$60,007**

### PARTICIPATION RATE

ONTARIO  
66.0%

**58.3%**

### EMPLOYMENT RATE

ONTARIO  
62.4%

**55.0%**

### UNEMPLOYMENT RATE

ONTARIO  
5.4%

**5.6%**

## Top 5 Sectors by Industry\*\*



Retail Trade



Construction



Health Care &  
Social Assistance



Accommodation &  
Food Services



Public  
Administration

## Top 5 Sectors by Occupation\*\*



Sales & Service



Trades, Transport  
& Equipment  
Operators



Business, Finance  
& Administration



Education,  
Law & Social,  
Community &  
Government Services



Health  
Occupations

\*\* by labour force employment for people living in Gravenhurst.

All data sourced from Manifold SuperDemographics 2023, unless otherwise specified.



# Town of Gravenhurst Community Assets

The Town of Gravenhurst is home to community services, schools, the Gravenhurst Public Library, trails, parks, and beautiful beaches. This section presents information on key services and assets across the Town. For further information on all that Gravenhurst has to offer, please visit the Town's website.

## Emergency Services

### *OPP – Muskoka Branch*



690 Cedar Lane  
Bracebridge, ON  
P1L 0H2

### *Town of Gravenhurst Fire Department*



190 Harvie Street, Unit One  
Gravenhurst, ON  
P1P 1S9

### *South Muskoka Memorial Hospital*



75 Ann Street  
Bracebridge, ON  
P1L 2E4

### *Huntsville District Memorial Hospital*



100 Frank Miller Drive  
Huntsville, ON  
P1H 1H7

### *Orillia Soldiers' Memorial Hospital*



170 Colborne Street West  
Orillia, ON  
L3V 2Z3

## Schools and Libraries



Public education in Gravenhurst is provided by the Trillium Lake-lands District School Board and the Simcoe Muskoka District Catholic School Board.

### *Elementary Schools*

Gravenhurst Public School  
301 Mary St South  
Gravenhurst, ON  
P1P 1X6

K.P. Manson Public School  
1017 Graham Road  
Severn Bridge, ON  
P0E 1N0

Muskoka Beechgrove Public School  
395 Muskoka Beach Road  
Gravenhurst, ON  
P1P 1R7

### *Secondary Schools*

Gravenhurst High School  
325 Mary St South  
Gravenhurst, ON  
P1P 1X7

St. Dominic Catholic Secondary School  
955 Cedar Lane  
Bracebridge, ON  
P1L 0A1

Patric Fogarty Catholic Secondary School  
15 Commerce Road  
Orillia, ON  
L3V 0Z2

### *Alternative Education and Training Centre*

A New Start  
325 Mary St South  
Gravenhurst, ON  
P1P 1X7



### Gravenhurst Public Library

The Gravenhurst public library's mission is to be a place where the community comes together to learn, communicate and engage. The Gravenhurst Public Library offers programs, information, and entertainment resources for many age groups including kids, teens, adults and seniors.



## Quality of Life

### Winter Activities

Experience Gravenhurst's natural beauty in winter, over hundreds of groomed snowmobile trails, along skiing and snowshoeing trails, or while skating on two outdoor ice surfaces at the Muskoka Wharf.



### Gravenhurst Opera House

Billed as "the birth place of Canadian Summer Theatre"!



### Music on the Barge

Sit lakeside and watch the sunset while serenaded by bands playing on a barge set in the lake, for one of Ontario's most unique outdoor concert series.



### Muskoka Steamships

Board The Segwun North America's oldest operating coal-fired steamship or the Wenonah II, Canada's newest passenger steamship!



### Appreciating our History

Immerse yourself in Gravenhurst's history, through the Heritage Walking Tour, the boat museum at the Muskoka Discovery Centre, or the Bethune Memorial Historic Site.





## Parks, Trails and Beaches

Gravenhurst is one of Ontario's top biking destinations, offering a great way to experience the beauty of Muskoka. Home to twelve community parks and playgrounds, and nine recreational trails, for a total of 35 kilometres of walking and hiking trails, including Brydons Bay Trail, Devil's Gap Trail, and Peninsula Trail.

### Bass Lake Park



Bass Lake  
1015 Loft Road  
Gravenhurst, ON  
P1P 1R3

- Swimming area
- Unsupervised
- Public Washrooms
- Picnic Tables

### Ungerman Gateway Park



Lake Muskoka  
9 Gateway Drive  
Gravenhurst, ON  
P1P 0A9

- Swimming area
- Unsupervised
- Picnic Tables
- Dogs Allowed

### Franklin Park



Sparrow Lake  
1615 Kilworthy Road  
Kilworthy, ON  
P0E 1G0

- Swimming area
- Unsupervised
- Public Washrooms
- Picnic Tables
- Boat Launch
- Public Docking

### Muskoka Bay Park



Lake Muskoka  
700 Muskoka  
District Road 169  
Gravenhurst, ON  
P1P 1R2

- Swimming area
- Unsupervised
- Public Washrooms
- Picnic Tables
- Baseball facilities
- Tennis Court

### Gull Lake Rotary Park



Gull Lake  
405 Brock Street  
Gravenhurst, ON  
P1P 1H4

- Swimming area
- Seasonally Guarded
- Public Washrooms
- Picnic Tables
- Playground
- Beach Volleyball Court
- Snack Bar
- Public Docking

### Muskoka Beach Park



Lake Muskoka  
1141 Muskoka  
Beach Road  
Gravenhurst, ON  
P1P 1R1

- Swimming area
- Unsupervised
- Picnic Tables
- Public Washrooms

## 2. Demographic Analysis

### 2.1. Population Growth

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

Table 1 illustrates population changes in Gravenhurst from 2011 to 2033, compared to Ontario. From 2006 to 2016 the local population grew at a slower rate than the provincial average, however from 2016 to 2021 it surpassed provincial rates. This quicker rate of growth is expected to continue, with the Town projected to rise to slightly above 15,000 residents by 2033, averaging slightly higher growth than Ontario as a whole over that period.

Table 1: Population Change, Gravenhurst and Ontario, 2011-2032.

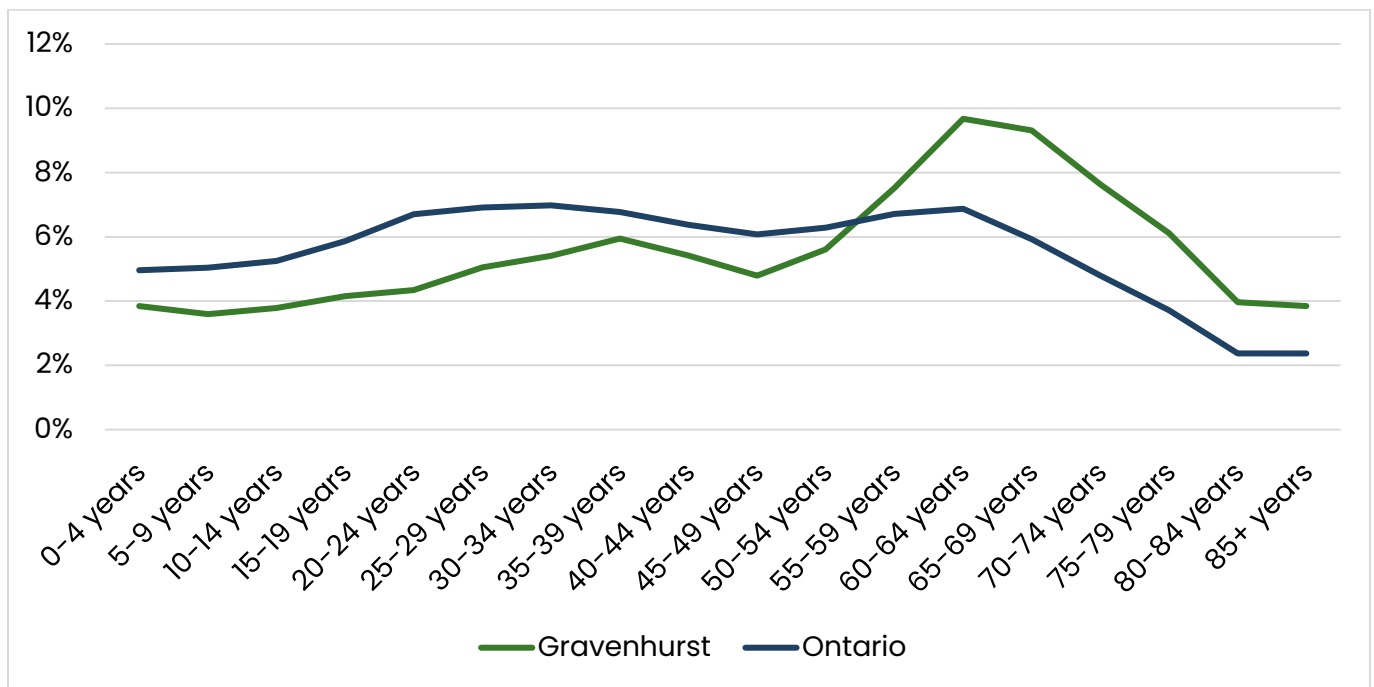
	2011	2016	2021	2023	2028	2033
<b>Gravenhurst Population Count</b>	12,055	12,311	13,157	13,914	14,803	15,675
<b>% Change</b>	<b>1.3%</b>	<b>2.1%</b>	<b>6.9%</b>	<b>n/c</b>	<b>6.4%</b>	<b>5.9%</b>
<b>Ontario Population Count</b>	12,851,821	13,448,494	14,223,942	15,479,114	16,355,232	17,228,601
<b>% Change</b>	<b>5.7%</b>	<b>4.6%</b>	<b>5.8%</b>	<b>n/c</b>	<b>5.7%</b>	<b>5.3%</b>

Source: Statistics Canada Census Profiles 2011-2021; Manifold SuperDemographics 2023-2033.

**The population in Gravenhurst is projected to rise above 15,000 residents by 2033.**

Figure 1 contrasts the age profile of residents in Gravenhurst and Ontario, in 2023. Gravenhurst 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, Gravenhurst residents aged 55 and over represent nearly half (48%) of the local population compared to a third (33%) of all Ontario residents.

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



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

Overall, Gravenhurst' working-age population (ages 15-64, 57.9%) is lower than Ontario's (65.6%). Similarly, Gravenhurst' median (48, compared to 41 for Ontario) and average (52, compared to 42 for Ontario) ages are higher than Ontario's.<sup>1</sup>

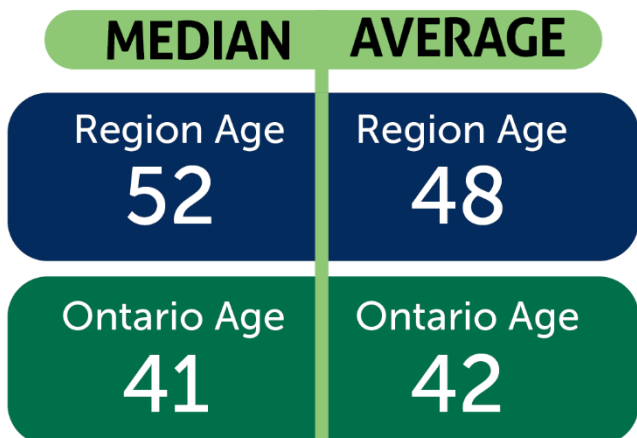
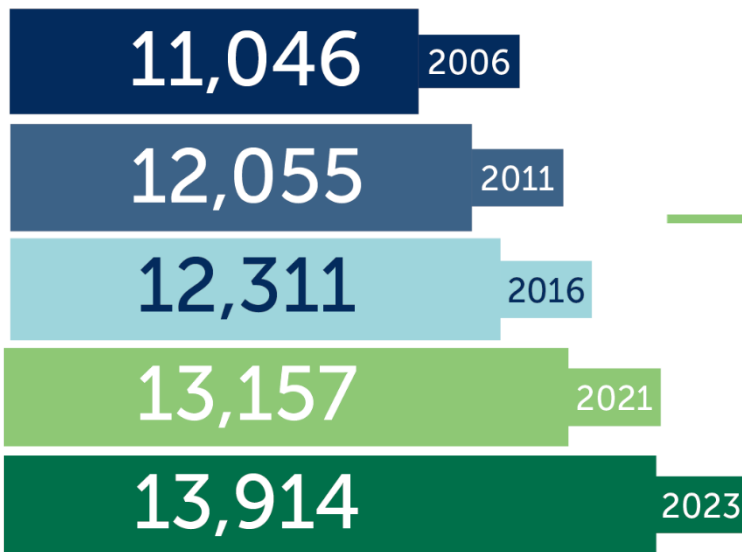
<sup>1</sup> Please note, throughout the document various totals may not add up to 100%, and subtotals may not add up to broader totals. These discrepancies are due to methodological rounding.

Table 2: Gravenhurst and Ontario Age Profile, 2023.

Age Group	Gravenhurst	Ontario
0-14	11.2%	15.3%
15-64	57.9%	65.6%
65+	30.9%	19.2%

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

## THE BOTTOM LINE



- After a decade of slow growth, the Town’s population is seeing growth rates higher than that of the provincial mark, **a trend that is expected to continue through 2033.**
- Gravenhurst has a current population that is significantly older than Ontario’s (median age of 48 compared to 41 in Ontario).
- The Town has a lower relative population of youth (11% of residents are ages 0-14, compared to 15% in Ontario) and middle aged individuals (26% of residents are ages 20-44, 33% provincially).

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## 2.2. Income, Households and Attainability

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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 made<sup>2</sup>:

- In 2022, Gravenhurst' median employment income was **\$41,466**, 6.0% lower than in Ontario (\$43,942).
- In 2022, the average employment income for Gravenhurst residents was **\$55,020**, 9.1% lower than Ontario's (\$60,007).

Figure 2 illustrates the distribution of household incomes. Approximately 66.1% of households in Gravenhurst earn less than \$100,000, compared to 54.8% in Ontario.

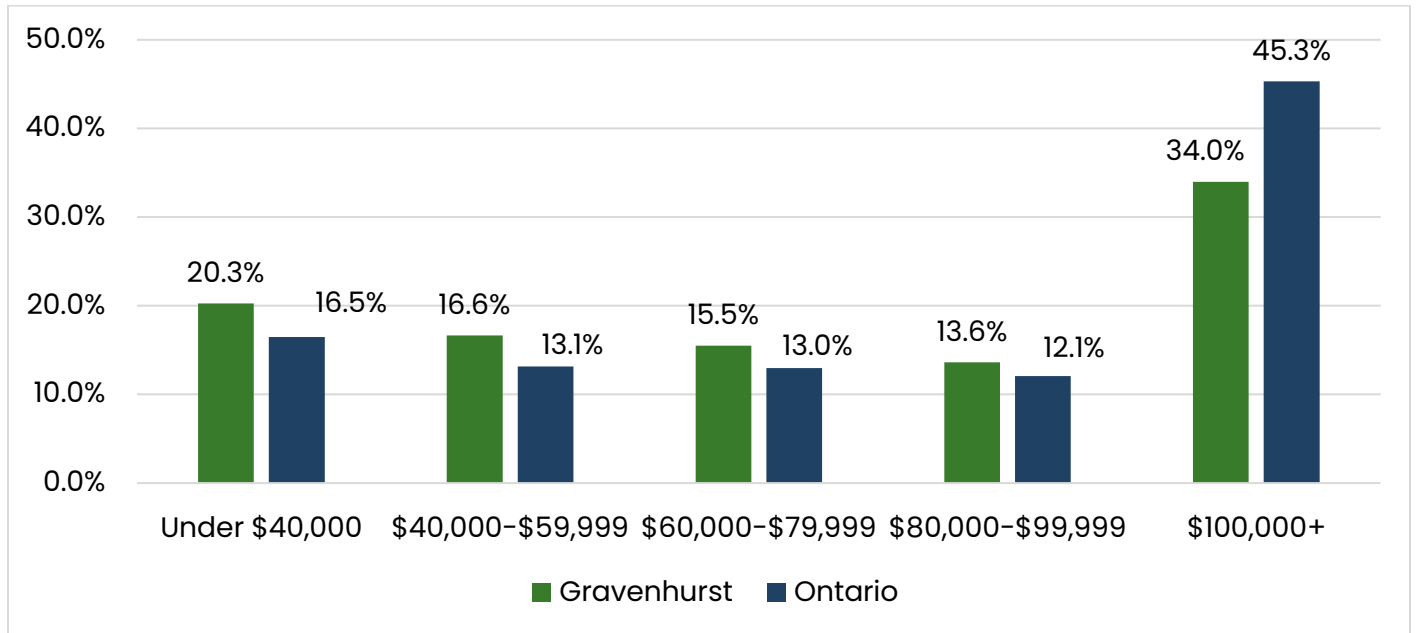
- Median household total income in Gravenhurst: **\$85,162** vs. \$96,552 in Ontario.
- Average household total income in Gravenhurst: **\$104,364** vs. \$123,610 in Ontario.

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



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



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

Residents in Gravenhurst have slightly lower levels of employment and household income compared to Ontario. The Town, though, offers more favourable costs of living, with lower dwelling values and monthly shelter costs. Table 3 and Figure 3 highlight key housing characteristics—compared to Ontario. Gravenhurst 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.

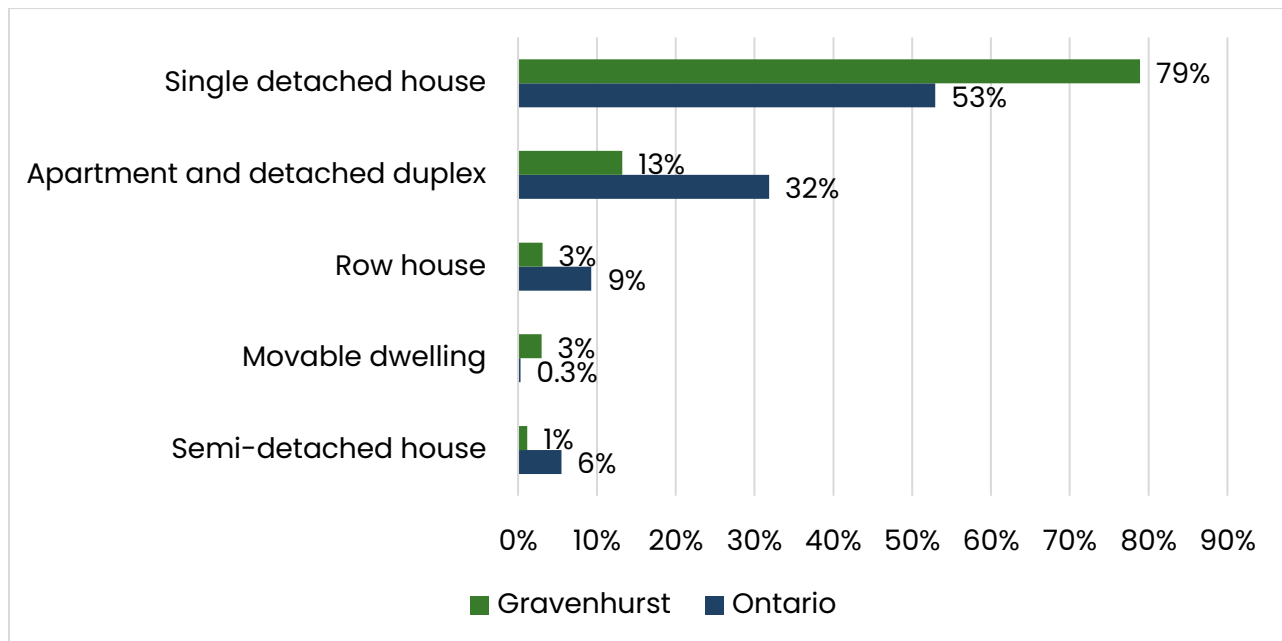


Table 3: Households and Dwelling Attainability, 2023.

Housing Characteristics	Gravenhurst	Ontario
<b>Total Number of Households</b>	<b>5,814</b>	<b>5941308</b>
Average value of dwelling (\$)	\$789,411	\$934,642
Median value of dwellings (\$)	\$699,851	\$797,175
Median monthly shelter costs for owned dwellings	\$1,121	\$1,477
Average monthly shelter costs for owned dwellings	\$1,300	\$1,748
% of households owned	79%	70%
% of households rented	21%	30%
Median monthly shelter costs for rented dwellings (\$)	\$1,031	\$1,108
Average monthly shelter costs for rented dwellings (\$)	\$1,107	\$1,220
Average number of persons in private households	2.2	2.6
Population spending 30% or more of household total income on shelter costs	20%	28%

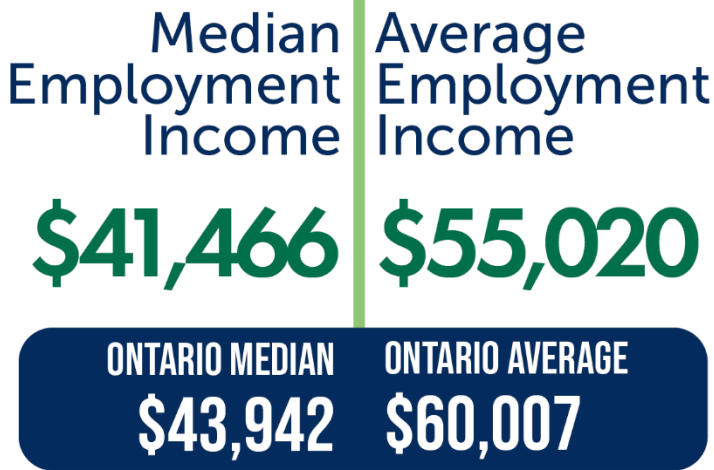
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics. 2023.

Figure 3: Occupied Dwellings by Structure Type, 2023.



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

# THE BOTTOM LINE



**20%**

ONTARIO  
28%

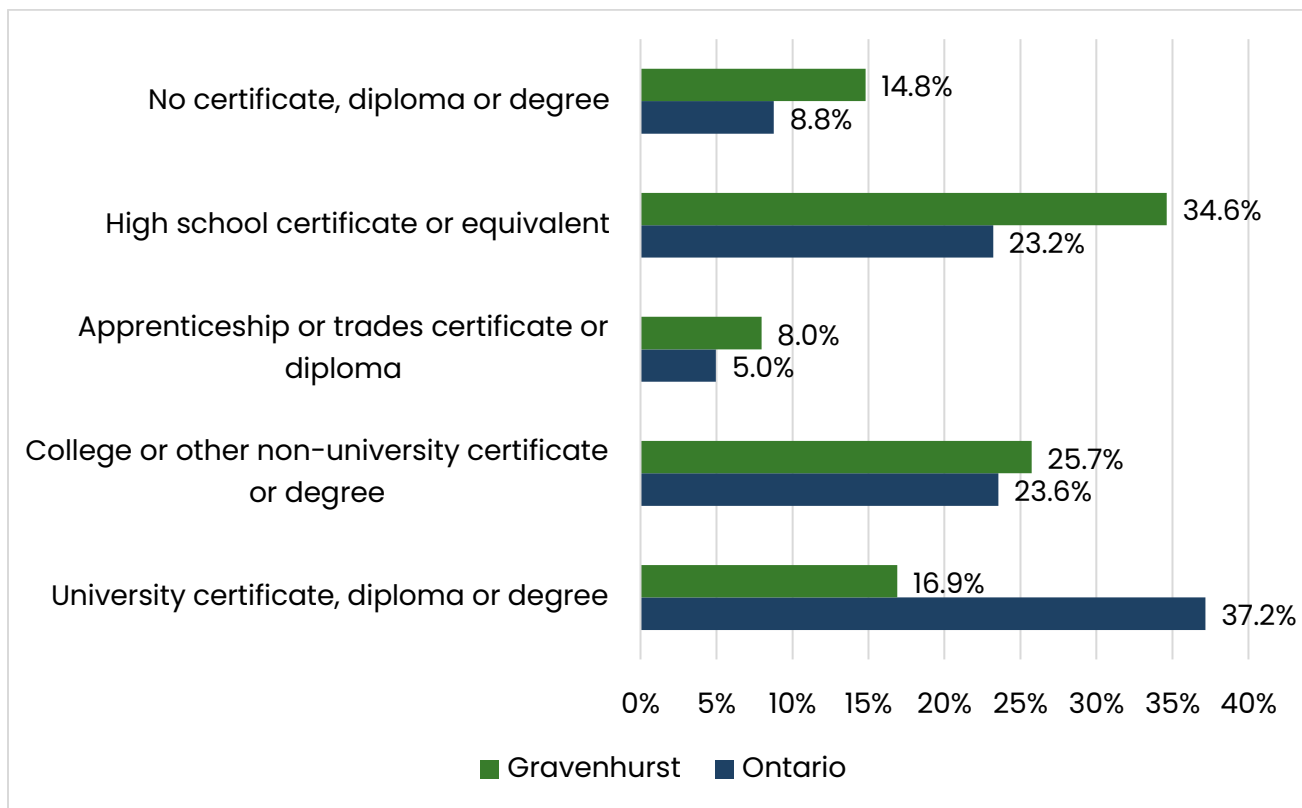
Of Gravenhurst's population spends 30% or more of total household income on shelter costs.

- In 2022 Gravenhurst residents had lower median and average incomes than their Ontario counterparts.
- This difference was offset by Gravenhurst's more comparative affordability. **Only 20% of residents are spending 30% or more of total income on shelter costs**, compared to 28% of Ontario residents.
- This suggests that while Gravenhurst residents earn slightly less than Ontario residents as a whole, **their quality of life and affordability is higher.**
- A high percentage of household ownership may suggest that those who cannot afford home ownership (and therefore rent) may struggle finding stable housing opportunities.

## 2.3. Education, Skills and Training

This subsection reviews the level of education and major fields of study for residents of Gravenhurst and Ontario. Figures 4 and 5 outline the education levels obtained by Gravenhurst residents ages 25–64, as compared to Ontario.<sup>3</sup>

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



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

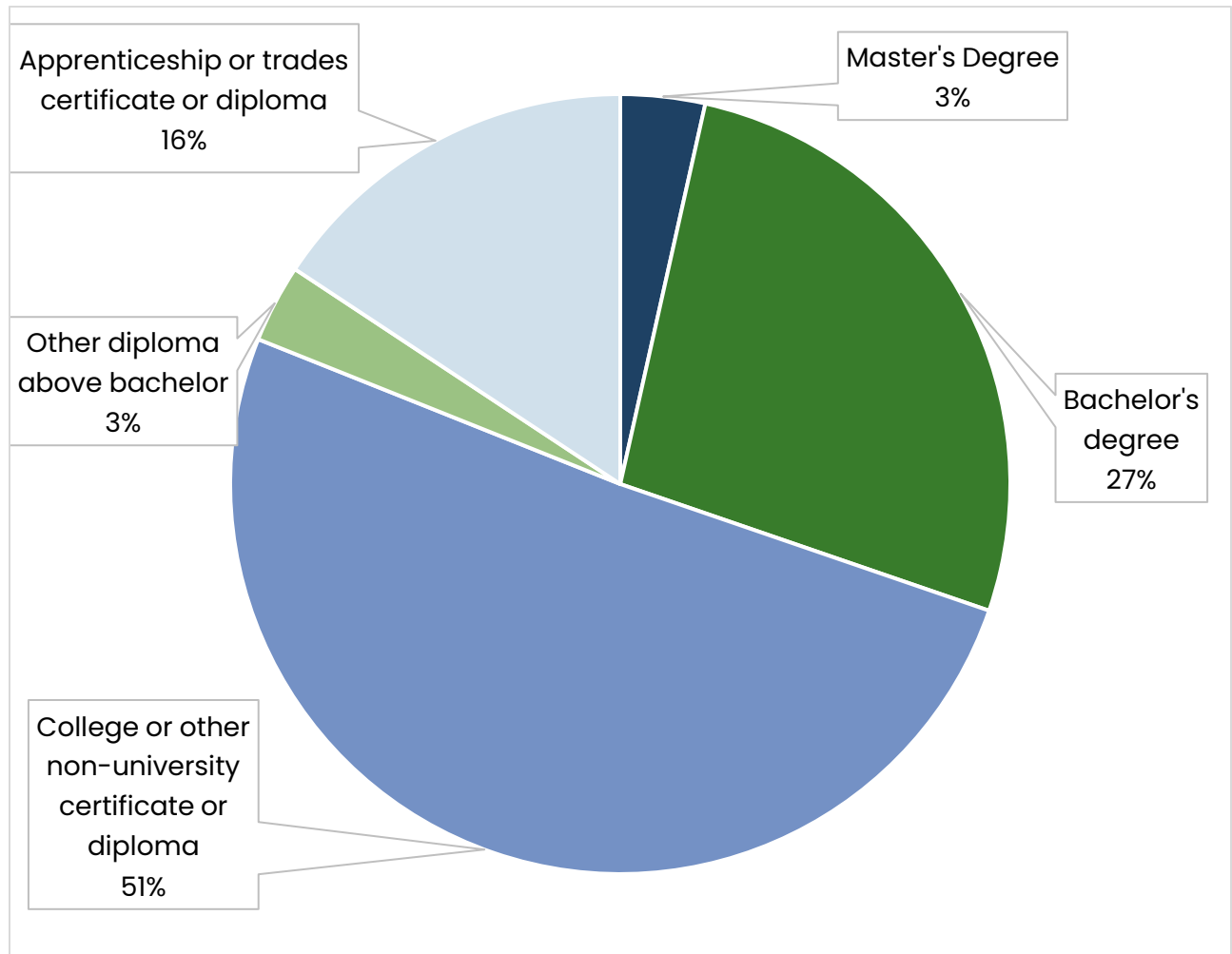
<sup>3</sup> 'High school diploma or equivalent' includes persons who have graduated from a secondary school or equivalent. It excludes persons with a post-secondary certificate diploma or degree. 'Apprenticeship or trades certificate or diploma' includes Registered Apprenticeship certificates.

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

- A total of 3,476 residents aged 25 to 64 have post-secondary education.
- **For those people with a post-secondary education**, a college degree is the most common type of education; attained by just over half - 51% - (attained by 1,769 residents), aged 25 to 64.
- Just over one out of four residents (27%) **with post-secondary attainment**, aged 25 to 64, has a bachelor's degree.

Figure 5: Type of Degree, by 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 study<sup>4</sup> 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.'<sup>5</sup>

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

Classification of Instructional Programs (CIP)	Total	Female	Male
<b>Total</b>	<b>12,354</b>	<b>6,015</b>	<b>6,338</b>
No postsecondary certificate, diploma or degree	6,559	2,987	3,571
Business, management, marketing and related support services	960	596	364
Health professions and related programs	874	778	96
Construction trades	474	4	471
Mechanic and repair technologies/technicians	346	3	343
Education	300	207	93
Family and consumer sciences/human sciences	252	247	4
Security and protective services	235	79	155
Personal and culinary services	230	150	79
Visual and performing arts	226	172	54
Engineering technologies and engineering-related fields	215	13	202
Social sciences	167	76	90
Psychology	153	95	59
Agriculture, agriculture operations and related sciences	120	60	60
Computer and information sciences and support services	115	15	99
Liberal arts and sciences, general studies and humanities	95	70	24
Precision production	92	1	91
Biological and biomedical sciences	84	17	68

<sup>4</sup> '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](http://www.statcan.gc.ca/concepts/classification-eng.htm).

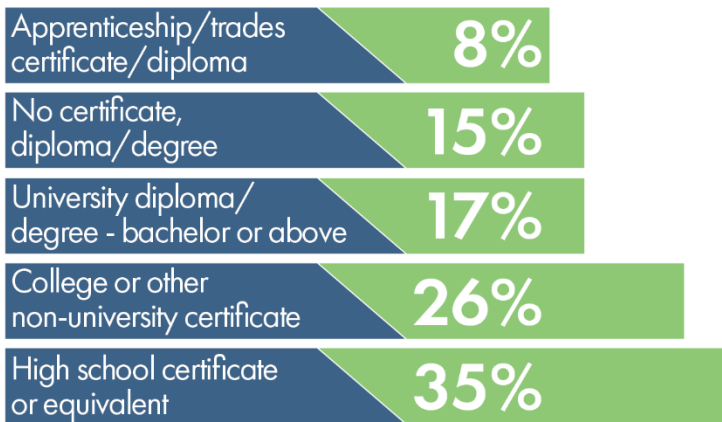
<sup>5</sup> Please note, throughout the document various totals may not add up to 100%, and subtotals may not add up to broader totals. These discrepancies are due to methodological rounding.

Classification of Instructional Programs (CIP)	Total	Female	Male
Legal professions and studies	82	67	15
Parks, recreation, leisure and fitness studies	82	42	40
Public administration and social service professions	82	75	8
History	68	40	28
Engineering	67	4	63
English language and literature/letters	67	33	35
Communication, journalism and related programs	65	55	10
Architecture and related services	64	10	54
Transportation and materials moving	52	10	43

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



## THE BOTTOM LINE



- Gravenhurst residents aged 25–64 are more likely to have a high school certificate, apprenticeship or trades certificate, or college or other non-university certificate or degree compared to Ontario residents.
- This suggests that businesses relying on more technical skills learned at non-university post-secondary institutions or those who rely on on-the-job training are more likely to find relevant skills and educational levels among the available labour pool.

## 3. Labour Force Profiling and Analysis

### 3.1. Key Indicators

Gravenhurst has a labour force of **7,205** individuals. Gravenhurst has lower participation (58.3% compared to 66.0%) and employment (55.0%/62.4%) rate, and a comparable unemployment rate (5.6%/5.4%) relative to Ontario. This is to be expected given the general older population in Gravenhurst, as it suggests that many residents are outside the labour force (lower participation rate). A similar unemployment rate does suggest that those individuals who are looking for work are finding it at a similar rate than their Ontario counterparts.

Table 5: Key Labour Force Statistics by Gender, Gravenhurst, 2023.

Labour Force Activity	Gravenhurst			Ontario		
	Total	Male	Female	Total	Male	Female
Total population 15 years and over	12,354	6,338	6,015	13,118,324	6,382,104	6,736,220
In the labour force	7,205	3,986	3,219	8,651,221	4,482,628	4,168,593
Employed	6,800	3,700	3,100	8,188,673	4,251,439	3,937,235
Unemployed	405	286	119	462,547	231,189	231,358
Not in the labour force	5,148	2,352	2,796	4,467,103	1,899,476	2,567,627
Participation rate %	<b>58.3</b>	<b>62.9</b>	<b>53.5</b>	<b>66.0</b>	<b>70.2</b>	<b>61.9</b>
Employment rate %	<b>55.0</b>	<b>58.4</b>	<b>51.5</b>	<b>62.4</b>	<b>66.6</b>	<b>58.5</b>
Unemployment rate %	<b>5.6</b>	<b>7.2</b>	<b>3.7</b>	<b>5.4</b>	<b>5.2</b>	<b>5.6</b>

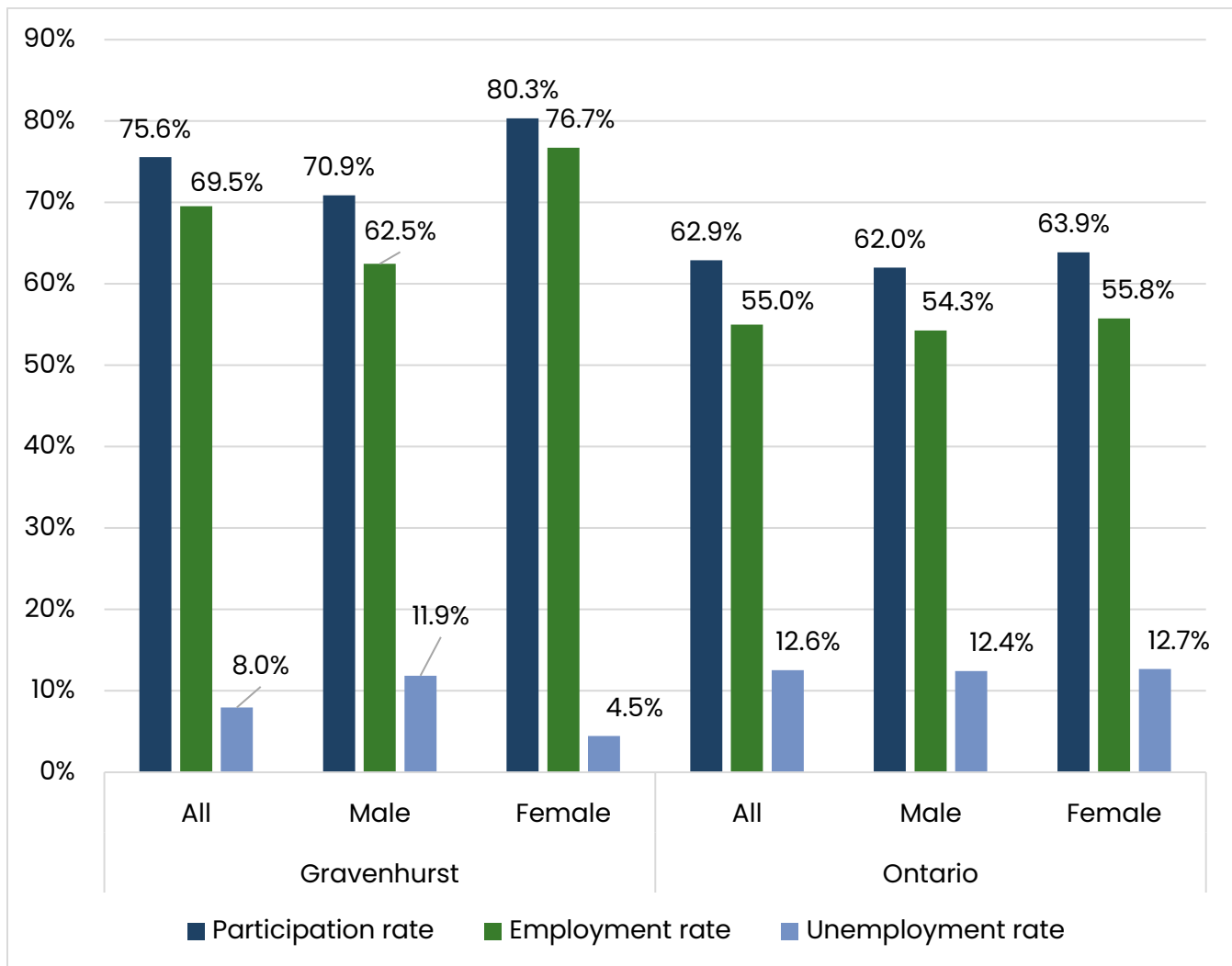
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2023.

**Gravenhurst has a lower participation rate than Ontario, suggesting some older residents may not be active in the workforce.**



Key labour force indicators are broken down by age and gender in Figure 6 and used to highlight underemployed/underutilized labour groups. Gravenhurst has a higher youth participation rate, suggesting that Gravenhurst' youth are significantly interested in engaging in the labour force. The gap is wider for females (16.4% higher than the provincial rate) than for males (still 8.0% higher). Altogether, this information suggests that local youth are quite interested in entering the labour force, with three out of four (75.6%) participating in the economy.

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



Source: Manifold SuperDemographics 2023.

Table 6 illustrates labour force characteristics for youth (15 to 24) and mature adults (25 and older) in Gravenhurst, benchmarked against Ontario data.

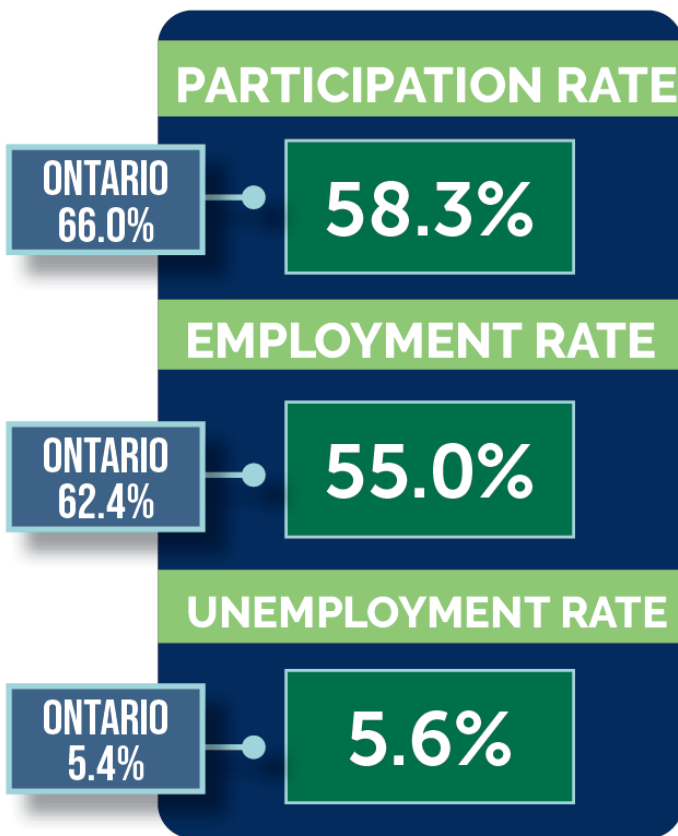
Table 6: Labour Force Characteristics by Age and Gender, 2023.

Population 15 to 24 years old:						
	Gravenhurst			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	75.6	70.9	80.3	62.9	62.0	63.9
Employment rate (%)	69.5	62.5	76.7	55.0	54.3	55.8
Unemployment rate (%)	8.0	11.9	4.5	12.6	12.4	12.7
Population 25 years and over:						
	Gravenhurst			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	56.5	62.1	50.6	66.5	71.8	61.6
Employment rate (%)	53.5	58.0	48.8	63.7	68.9	58.9
Unemployment rate (%)	5.3	6.6	3.6	4.2	4.0	4.3

Source: Manifold SuperDemographics, 2023.



# THE BOTTOM LINE



- Gravenhurst’s participation rate is lower than their provincial counterparts (58.3% compared to 66.0%).
- **This is likely explained by Gravenhurst’s higher average and median ages.** That is, it is likely that a much larger percentage of Gravenhurst’s 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 much higher than their provincial counterparts (75.6% in Gravenhurst, 62.9% provincially).



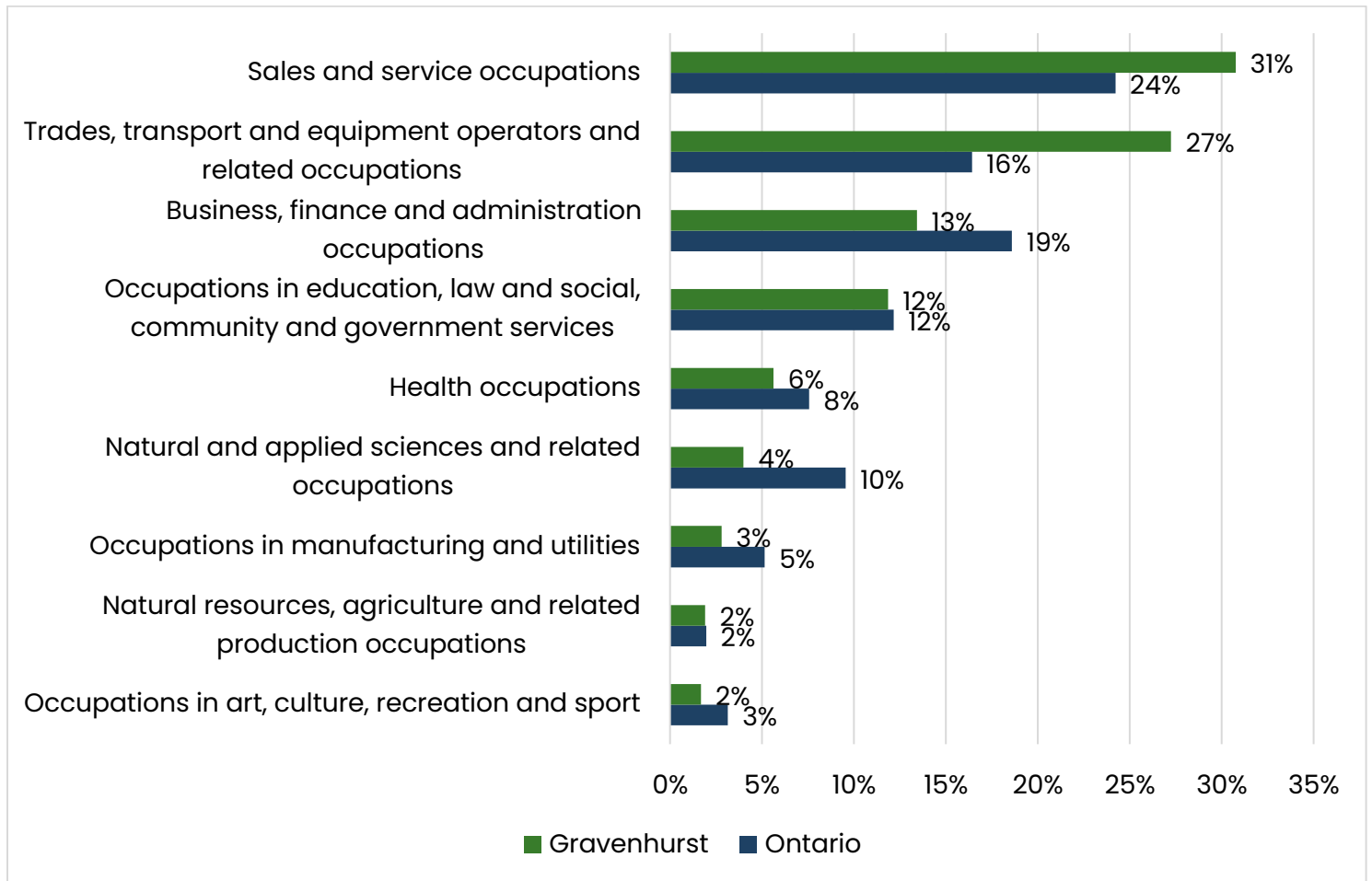
## 3.2. Labour Supply in Gravenhurst

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 Gravenhurst residents most commonly work in:

- Sales and service occupations.
- Trades, transport and equipment operators and related occupations.

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



Source: Manifold SuperDemographics 2023.

The number of part-time and full-time workers also helps identify potential labour force engagement and supply. In Gravenhurst, 49.4% of employed individuals typically worked full-time while 50.6% 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 7: Percentage of Employed Individuals by Full-Time or Part-Time Status, 2023.

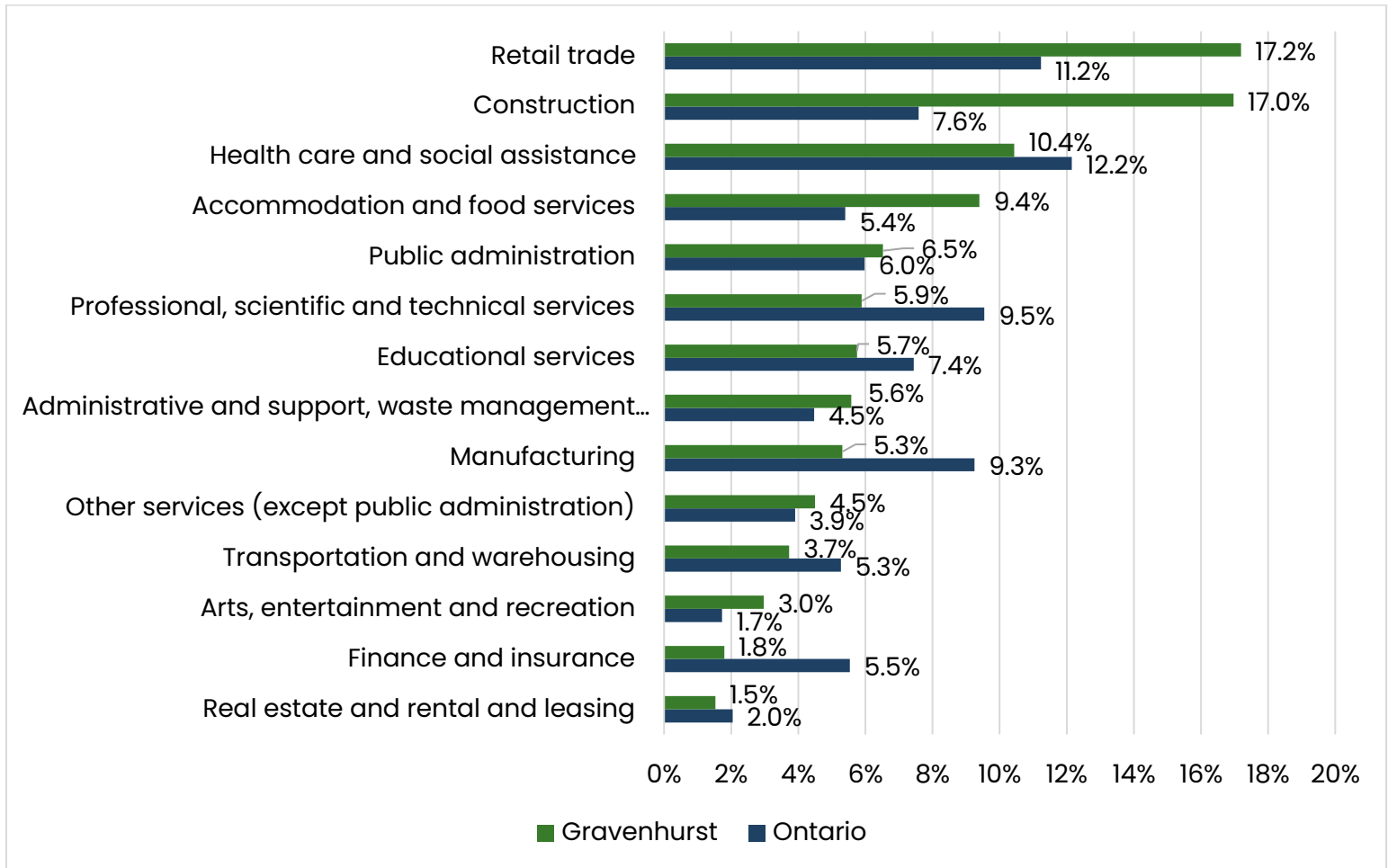
Status	Gravenhurst	Gravenhurst %	Ontario %
Full-Time	3,426	49.4%	54.5%
Part-Time	3,514	50.6%	45.5%

Source: Manifold SuperDemographics 2023.

Figure 8 illustrates the industries in Gravenhurst that represent at least 1.0% of all local employment. Gravenhurst has larger labour concentrations relative to Ontario in several sectors, but most prominently in retail trade (17.2% locally compared to 11.2% across Ontario) and construction (17.0% locally, 7.6% across Ontario). Concentrations (Location Quotient) are explored in Sections 4.5 and 5.5.



Figure 8: Labour Force by Industry, 2023.



Source: Manifold SuperDemographics 2023.

## THE BOTTOM LINE

- Nearly three in five (58%) of Gravenhurst residents are working in either sales and service occupations or trades, transport and equipment operators and related occupations.
- Gravenhurst residents are slightly less likely to have worked full-time in 2023 compared to Ontario residents. Just under half of working residents worked full-time.

### 3.3. Labour Market Gaps/Surpluses

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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 Gravenhurst and the number of workers living in Gravenhurst that worked/work in that occupation (i.e., local supply). There are approximately 10.7% more workers than jobs in Gravenhurst, making the area a net exporter of labour. Specifically, in Gravenhurst, there is a net surplus of approximately **698 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 Gravenhurst, three occupations have labour surpluses of over 100 workers:

- Trades, transport and equipment operators and related occupations (511 more residents working in the sector, compared to the number of jobs).
- Sales and service occupations (294).
- Occupations in education, law and social, community and government services (107).

In Gravenhurst, there are **no occupations** with a labour market gap over 100 individuals – where there are over 100 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 8 indicate the direction and magnitude of local labour market imbalances<sup>6</sup>.

Table 8: Labour Market Gaps/Surpluses by Occupation, 1-digit NOCs, 2023.

Occupation Group (1-digit NOCs code)	Gravenhurst Residents Working in Occupation	Jobs in Gravenhurst	Gap (-)/ Surplus (+)
Legislative and senior management occupations	47	26	21
Business, finance and administration occupations	958	962	-4
Natural and applied sciences and related occupations	285	383	-98
Health occupations	401	369	32
Occupations in education, law and social, community and government services	846	739	107
Occupations in art, culture, recreation and sport	120	195	-75
Sales and service occupations	2,194	1,900	294
Trades, transport and equipment operators and related occupations	1,943	1,432	511
Natural resources, agriculture and related production occupations	136	129	7
Occupations in manufacturing and utilities	200	287	-87

<sup>6</sup> As a reminder subtotals may not add up to broader totals due to methodological rounding.

Occupation Group (1-digit NOCs code)	Gravenhurst Residents Working in Occupation	Jobs in Gravenhurst	Gap (-)/ Surplus (+)
N/A or Unclassified	75	86	-11
<b>Total Labour Force 15 years and older</b>	<b>7,205</b>	<b>6,507</b>	<b>698</b>

Source: Lightcast Analyst 2024.1 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 9) are:

- Retail trade (404 more workers than jobs).
- Construction (255).
- Professional, scientific and technical services (181).
- Educational services (164).
- Transportation and warehousing (137).



Table 9: Labour Market Surplus by Sector, 2023.

Sectors	Gravenhurst Residents Working in industry	Jobs in Gravenhurst	Gap (-)/ Surplus (+)
Agriculture, forestry, fishing and hunting	11	9	2
Mining, quarrying, and oil and gas extraction	11	0	11
Utilities	52	34	18
Construction	1,210	955	255
Manufacturing	379	382	-3
Wholesale trade	61	163	-102
Retail trade	1,226	822	404
Transportation and warehousing	266	129	137
Information and cultural industries	37	43	-6
Finance and insurance	128	99	29
Real estate and rental and leasing	109	110	-1
Professional, scientific and technical services	420	239	181
Management of companies and enterprises	0	25	-25
Administrative and support, waste management and remediation services	398	395	3
Educational services	410	246	164
Health care and social assistance	744	651	93
Arts, entertainment and recreation	212	333	-121
Accommodation and food services	670	683	-13
Other services (except public administration)	321	340	-19
Public administration	465	764	-299
N/A or unclassified	75	86	-11
<b>Total Labour Force 15 years and older</b>	<b>7,205</b>	<b>6,507</b>	<b>698</b>

Source: Lightcast Analyst 2024.1 and Manifold SuperDemographics 2023.



# THE BOTTOM LINE

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- There are approximately **648 (11%) more workers in Gravenhurst across industries and occupations** compared to available jobs within the Town.
- This surplus of labour suggests that Gravenhurst provides a portion of its local labour to external communities to fulfill labour demands.





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## 3.4. Workforce Commuting Flow

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This subsection aims to identify the most probable labour force recruitment area for Gravenhurst using commuting patterns. Tables 10 and 11 show the top commuting flows for persons reporting a “usual place of work” or “place of residence” in Gravenhurst, and reveal the following trends regarding labour force commuting<sup>7</sup>:

- Just under half (47%) of residents work within the local community. For those who do not work in Gravenhurst, just under 20% commute to Bracebridge.
- Top recruitment areas for Gravenhurst are Bracebridge, Huntsville, and Orillia.
- Gravenhurst imports 45% of its total workforce with a usual place of work.

There are three 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 Lightcast Analyst data, as they are from distinct years and reflect differing methodologies.
2. This data is representative of when the Census was taken (spring 2021). As such, commuting data is impacted by COVID-19, 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 Gravenhurst). However, they likely undercount the total number of commuters to each community.

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<sup>7</sup> Tables 10 and 11 only highlight geographies where at least 50 residents commute into or out of Gravenhurst. Total resident figures include all geographies. Subtotals (male and female) also may not equal totals due to rounding and privacy issues.

- Commuting figures reflect only those people with a usual place of work. Therein, there will be fewer individuals reflected here compared to total employment, due to the proliferation of non-traditional workspaces.

Table 10: Top Places to Work for Gravenhurst Residents, 2021.

Place of Work	Total	Male	Female
Gravenhurst	1,770	755	1,015
Bracebridge	660	310	355
Orillia	215	75	145
Muskoka Lakes	160	100	65
Barrie	115	65	50
Huntsville	75	35	40
Severn	55	30	30
<b>Total residents with a usual place of work</b>	<b>3,310</b>	<b>1,490</b>	<b>1,780</b>
<b># of residents working outside of Gravenhurst</b>	1,540	735	765
<b>% of residents working outside of Gravenhurst</b>	47%	49%	43%

Source: Statistics Canada, Commuting Flows Tables 2021.

Table 11: Top Labour Recruitment Areas for Gravenhurst, 2021.

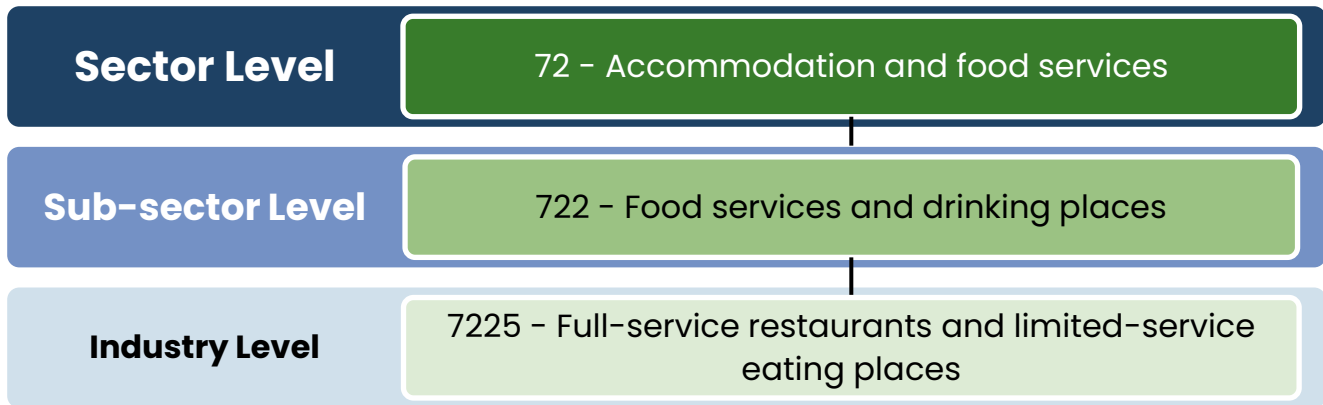
Place of Residence	Total	Male	Female
Gravenhurst	1,770	755	1015
Bracebridge	575	310	265
Huntsville	155	85	75
Orillia	155	90	65
Severn	150	70	75
Muskoka Lakes	85	50	35
Ramara	75	45	30
Barrie	65	40	25
<b>Total residents with a usual place of work</b>	<b>3,220</b>	<b>1,510</b>	<b>1,670</b>
<b># of people working inside Gravenhurst who live outside of Gravenhurst</b>	1,450	755	655
<b>% of people working inside Gravenhurst who live outside of Gravenhurst</b>	45%	50%	39%

Source: Statistics Canada, Commuting Flows Tables 2021.

## 4. Economic Base Analysis – Gravenhurst

This section investigates the local economy pertinent to Gravenhurst; 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 Town today. Section 4 presents this information specifically towards Gravenhurst, while Section 5 replicates this analysis using the Town’s “Economic Region,” influenced by Commuting Patterns. The economic region consists of the whole of Muskoka.

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:



## 4.1. Employment Profile

The primary employment sectors in Gravenhurst are construction; retail trade; and public administration. Between 2013 and 2023, the economy grew by **1,760 jobs (37%)**. Job growth in the Town was more than double that of the province, where job totals increased by 17% from 2013 to 2023, an impressive figure.

Table 12 indicates the representative size of each of these sectors.

Table 12: Employment Growth and Relative Size by Sector, Gravenhurst and Ontario, 2013-2023.

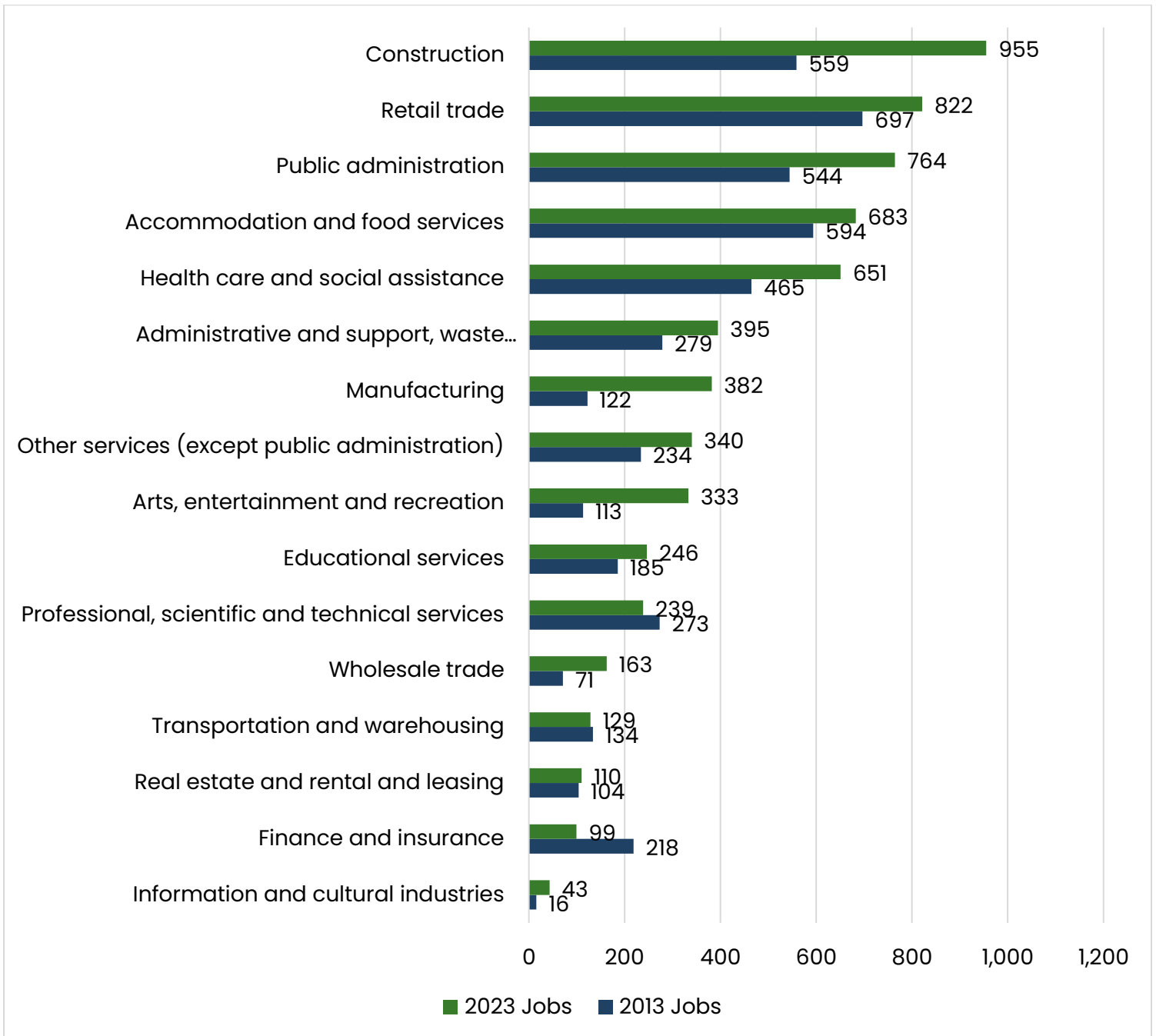
NAICS	Description	2023 Jobs	2013-2023 Change	Gravenhurst % Jobs Change	Ontario % Jobs Change
23	Construction	955	396	71%	27%
44-45	Retail trade	822	125	18%	5%
91	Public administration	764	220	40%	19%
72	Accommodation and food services	683	89	15%	14%
62	Health care and social assistance	651	186	40%	29%
56	Administrative and support, waste management and remediation services	395	116	42%	9%
31-33	Manufacturing	382	260	212%	3%
81	Other services (except public administration)	340	106	45%	-5%
71	Arts, entertainment and recreation	333	220	194%	21%
61	Educational services	246	61	33%	22%
54	Professional, scientific and technical services	239	-35	-13%	40%
41	Wholesale trade	163	92	129%	11%
48-49	Transportation and warehousing	129	-5	-4%	27%
53	Real estate and rental and leasing	110	6	6%	15%
52	Finance and insurance	99	-119	-55%	22%
X0	Unclassified	86	27	46%	32%
51	Information and cultural industries	43	27	174%	4%
22	Utilities	34	-27	-44%	12%
<b>All</b>		<b>6,507</b>	<b>1,760</b>	<b>37%</b>	<b>17%</b>

Source: Lightcast Analyst 2024.1.



To better understand how each sector supports jobs, Figure 9 shows 2013 and 2023 job counts for all industries with at least 10 jobs in 2023 in Gravenhurst.

Figure 9: Largest Industries by Number of Jobs, 2013 and 2023.



Source: Lightcast Analyst 2024.1.

Table 13 breaks job count data into further subcategories, presenting 2013 and 2023 job count figures for the top 20 four-digit industry classifications. Within private sectors, full-service restaurants and limited-service eating places employed the most individuals in Gravenhurst in both 2013 and 2023. Among these top 20 industries, other amusement and recreation industries saw the largest job increase (232 positions).

Table 13: Industry Job Counts, 2013 and 2023, Gravenhurst.

NAICS	Description	2013 Jobs	2023 Jobs	2013- 2023 Job Change	2013- 2023 % Job Change
9112	Other federal services	370	521	151	41%
7225	Full-service restaurants and limited-service eating places	280	327	47	17%
7139	Other amusement and recreation industries	83	315	232	279%
7211	Traveller accommodation	243	282	40	16%
2361	Residential building construction	131	276	145	111%
2383	Building finishing contractors	71	235	163	229%
2382	Building equipment contractors	258	224	-34	-13%
5617	Services to buildings and dwellings	210	224	15	7%
9130	Local, municipal and regional public administration	133	176	42	32%
4451	Grocery stores	199	166	-33	-17%
6111	Elementary and secondary schools	148	155	6	4%
6231	Nursing care facilities	231	142	-89	-38%
4441	Building material and supplies dealers	80	131	51	64%
4529	Other general merchandise stores	89	124	35	39%
2381	Foundation, structure, and building exterior contractors	37	116	79	213%
4543	Direct selling establishments	20	107	88	449%
3362	Motor vehicle body and trailer manufacturing	0	95	95	N/A
X000	Unclassified	59	86	27	46%
5312	Offices of real estate agents and brokers	95	86	-10	-10%
6211	Offices of physicians	44	85	41	94%

Source: Lightcast Analyst 2024.1.

## 4.2. Economic Output

This subsection highlights industries with the largest economic impact. Table 14 illustrates industries with the highest level of economic output as measured by total sales. Average wages by industry are also illustrated. The three largest private sector industries are all related to residential construction and real estate in some capacity. Those three private sector industries with the most sales in Gravenhurst are:

- Residential building construction.
- Building equipment contractors.
- Offices of real estate agents and brokers.

Table 14: Economic Output by Industry, 2021.

Industry	Sales	Average Wages
Other federal services	\$117,107,761	\$84,390
Residential building construction	\$81,909,594	\$50,981
Building equipment contractors	\$31,993,831	\$56,789
Provincial and territorial public administration	\$30,831,297	\$89,509
Offices of real estate agents and brokers	\$26,945,470	\$146,489
Local, municipal and regional public administration	\$25,933,759	\$51,512
Traveller accommodation	\$25,907,144	\$30,619
Other amusement and recreation industries	\$21,958,230	\$39,605
Electric power generation, transmission and distribution	\$20,835,325	\$96,704
Direct selling establishments	\$20,233,941	\$43,801
<b>All industries</b>	<b>\$875,440,144</b>	<b>\$53,717</b>

Source: Lightcast Analyst 2024.1, based on 2021 National Input-Output Tables by StatsCan.

## 4.3. 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 Town. In 2021, the most recent data available, total export sales from Gravenhurst amounted to just over \$600 million. Table 15 presents the largest drivers of external revenues into the Town of Gravenhurst.

Table 15: Top Export Dollars Flowing into Gravenhurst by Industry, 2021.

Industry	Total Export Sales
Other federal services	\$114,613,235
Residential building construction	\$42,705,740
Provincial and territorial public administration	\$29,341,287
Local, municipal and regional public administration	\$22,337,186
Offices of real estate agents and brokers	\$22,261,887
Direct selling establishments	\$18,714,293
Traveller accommodation	\$17,563,274
Other amusement and recreation industries	\$17,539,950
Elementary and secondary schools	\$15,800,780
Building material and supplies dealers	\$15,070,033
Building equipment contractors	\$13,250,174
Electric power generation, transmission and distribution	\$11,513,193
Nursing care facilities	\$10,650,890
<b>Total</b>	<b>\$608,284,048</b>

Source: Lightcast Analyst 2024.1, based on 2021 National Input-Output Tables by StatsCan.



## 4.4. 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 Gravenhurst. Table 16 presents the top four-digit industries in terms of total purchases made (more than \$5 million in purchases), as well as the percentage of those purchases that are made in-region and out-of-region.

Table 16: Top Industries by Purchasing Power, Gravenhurst, 2021.

Industry	Total Purchases from Sector	Percentage Purchased in the Town	Percentage Purchased Out of the Town
Lessors of real estate	\$12,762,330	10%	90%
Architectural, engineering and related services	\$9,455,917	12%	88%
Depository credit intermediation	\$9,406,108	25%	75%
Pharmaceutical and medicine manufacturing	\$8,466,779	7%	93%
Petroleum and coal product manufacturing	\$7,817,112	0%	100%
Computer systems design and related services	\$7,517,094	8%	92%
Plastic product manufacturing	\$6,511,866	0%	100%
Insurance carriers	\$6,237,437	0%	100%
Management, scientific and technical consulting services	\$6,025,532	33%	67%
Architectural and structural metals manufacturing	\$5,982,941	15%	85%
Office administrative services	\$5,616,128	0%	100%

Industry	Total Purchases from Sector	Percentage Purchased in the Town	Percentage Purchased Out of the Town
Electric power generation, transmission and distribution	\$5,116,980	45%	55%
General medical and surgical hospitals	\$5,111,421	7%	93%
Accounting, tax preparation, bookkeeping and payroll services	\$5,108,494	21%	79%

Source: Lightcast Analyst 2024.1, based on 2021 National Input-Output Tables by StatsCan.

## THE BOTTOM LINE

- Within private industries, **residential construction and related industries** are 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.**



## 4.5. Location Quotient Analysis

Location quotient (LQ) analysis compares the level of employment concentration (or specialization) in a local economy (i.e., Gravenhurst) 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 17 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 Gravenhurst 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:

- Arts, entertainment and recreation.
- Construction.
- Public administration.
- Accommodation and food services.

Table 17: Location Quotient Analysis by Sector.

Description	2022 Provincial	2022 National
	Location Quotient	Location Quotient
Arts, entertainment and recreation	2.7	2.6
Construction	2.1	2.0
Public administration	1.9	1.8
Accommodation and food services	1.7	1.6
Other services (except public administration)	1.4	1.3
Administrative and support, waste management and remediation services	1.1	1.3
Retail trade	1.3	1.2



Description	2022 Provincial Location Quotient	2022 National Location Quotient
Real estate and rental and leasing	0.7	0.8
Utilities	0.8	0.8
Health care and social assistance	0.9	0.8
Unclassified	0.9	0.8
Manufacturing	0.7	0.8
Management of companies and enterprises	0.7	0.7
Wholesale trade	0.5	0.6
Educational services	0.5	0.5
Professional, scientific and technical services	0.4	0.5
Transportation and warehousing	0.4	0.4
Information and cultural industries	0.3	0.4
Finance and insurance	0.3	0.4
Agriculture, forestry, fishing and hunting	0.1	0.1

Source: Lightcast Analyst 2024.1.





Direct selling establishments (these are typically “pop-up” short-term merchandise sellers, door-to-door salespeople, or direct fuel wholesalers) are more than 11 times more concentrated in the Town of Gravenhurst compared to both the national and provincial economies. Other amusement and recreation and traveller accommodation industries are also greater than five times more concentrated to both benchmarks, highlighting the importance of tourism businesses to the Town’s economy. This data is presented for only those industries employing at least 100 positions.

Table 18: Top 5 Location Quotient Sectors, Gravenhurst, Benchmarked to Canada.

Description	2022 National Location Quotient
Direct selling establishments	11.6
Other amusement and recreation industries	5.4
Traveller accommodation	5.2
Other federal services	4.5
Building finishing contractors	3.9

Source: Lightcast Analyst 2024.1.

Table 19: Top 5 Location Quotient Sectors, Gravenhurst, Benchmarked to Ontario.

Description	2022 Provincial Location Quotient
Direct selling establishments	13.5
Traveller accommodation	6.7
Other amusement and recreation industries	5.1
Other federal services	3.8
Building finishing contractors	3.8

Source: Lightcast Analyst 2024.1.

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## 4.6. Shift-Share Analysis

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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.

## 4.6.1. Shift-Share Analysis within the Local Economy

This subsection assesses which sectors have been most impacted by local factors. The example below applies the model to other amusement and recreation industries:

From 2013 to 2023 this sector saw an increase of 232 jobs in Gravenhurst.

- It would have been expected that the sector **increased by 14** positions based on large-scale industry factors regardless of geographic location.
- National economic growth factors would have been expected to lead to small growth (11 jobs) over the same period.
- As such, before accounting for local factors, the sector would have been **expected to gain 25 jobs**.
- Instead, the local sector grew by 232 jobs, suggesting that 207 new jobs can be applied to factors specific to Gravenhurst.

Table 20 allocates employment changes for the industries most positively impacted by local effects to national, industry and regional/local effects.

Table 20: Shift-Share Analysis: Competitive Industries, Gravenhurst, 2013-2023.

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Other amusement and recreation industries	232	14	11	207
Building finishing contractors	163	-8	10	161
Residential building construction	145	11	18	116
Motor vehicle body and trailer manufacturing	95	0	0	95
Direct selling establishments	88	-6	3	91
Foundation, structure, and building exterior contractors	79	-4	5	78
Individual and family services	63	4	2	58

Source: Lightcast Analyst 2024.1.



Conversely, Table 21 presents the five industries most negatively impacted by regional/local effects from 2013–2023.

Table 21: Shift-Share Analysis: Declining Industries, Economic Region, 2013–2023.

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Nursing care facilities	-89	40	32	-161
Activities related to credit intermediation	-88	18	12	-119
Building equipment contractors	-34	26	35	-94
Computer systems design and related services	-32	43	7	-82
Residential developmental handicap, mental health and substance abuse facilities	-41	0	11	-52

Source: Lightcast Analyst 2024.1.





## 4.7. Employer Structure

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This subsection illustrates the number and size of employers by industry in the Town. 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, Gravenhurst had 1,610 businesses as of December 2023, of which 494 (30.7%) had employees. Of these 494 businesses with employees, the majority had between one and nine employees (377 or 76.3%). Comparatively, 19 businesses (3.8%) had over 50 employees. These figures are presented in Table 22.

Table 22: Business Counts by Size, Gravenhurst, December 2023.

	1 to 9 Employees	10 to 49 Employees	50+ Employees	Indeterminate	Total
Number of Businesses	377	98	19	1,116	1,610

Source: Canadian Business Patterns December 2023 from Lightcast Analyst 2024.1.

Table 23 notes the subsectors in Gravenhurst by businesses only with employees, excluding self-employed individuals. Construction-related businesses, once again, are most represented locally.

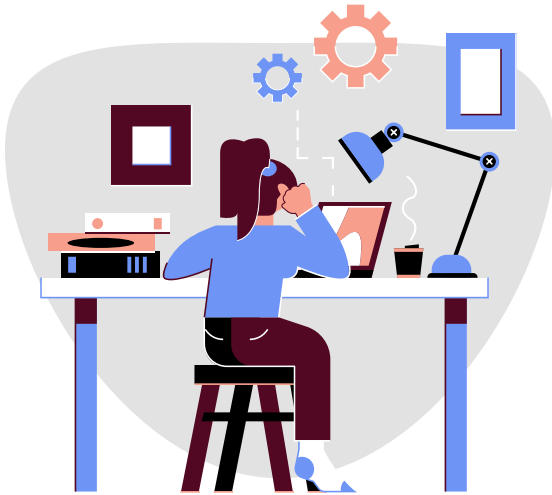
Table 23: Top 5 Sectors by Businesses with Employees, Gravenhurst, 2023.

Sector	Businesses with Employees
Residential building construction	44
Building equipment contractors	33
Full-service restaurants and limited-service eating places	29
Services to buildings and dwellings	24
Other specialty trade contractors	17
Building finishing contractors	11
Offices of physicians	10
Other amusement and recreation industries	10
Residential building construction	44
Building equipment contractors	33

Source: Canadian Business Patterns December 2023 from Lightcast Analyst 2024.1.



## THE BOTTOM LINE



- Of businesses with at least one employee, 76.3% 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.





## 5. Economic Base Analysis – Economic Region

This section investigates the local economy pertinent to Gravenhurst; that is, the jobs and businesses that drive the local economy. This section replicates the data presented in the previous section, but with a focus on the Town's **Economic Region** – the combined economy of the Census Division of Muskoka (Gravenhurst, Bracebridge, Lake of Bays, Huntsville, Muskoka Lakes, Georgian Bay, Wahta Mohawk Territory, and Moose Point 79). This geography is used due to commuting patterns suggesting it is a relatively accurate portrayal of an economic area that a new business in Gravenhurst can hope to attract talent from within at a consistent basis. The “North American Industry Classification System” (NAICS) of classifying industries is once again used.

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### 5.1. Employment Profile

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The primary employment sectors in Gravenhurst's Economic Region are again construction and retail trade. Between 2013 and 2023, the economy grew by **8,700 jobs (29%)**. Job growth in the economic region was slightly lower than in Gravenhurst, but still grew considerably faster than the province (17%). Given the larger size of the region's economy compared to the Town, this rate of growth is as impressive and a strong indicator of local success. Table 24 indicates the representative size of each of these sectors.





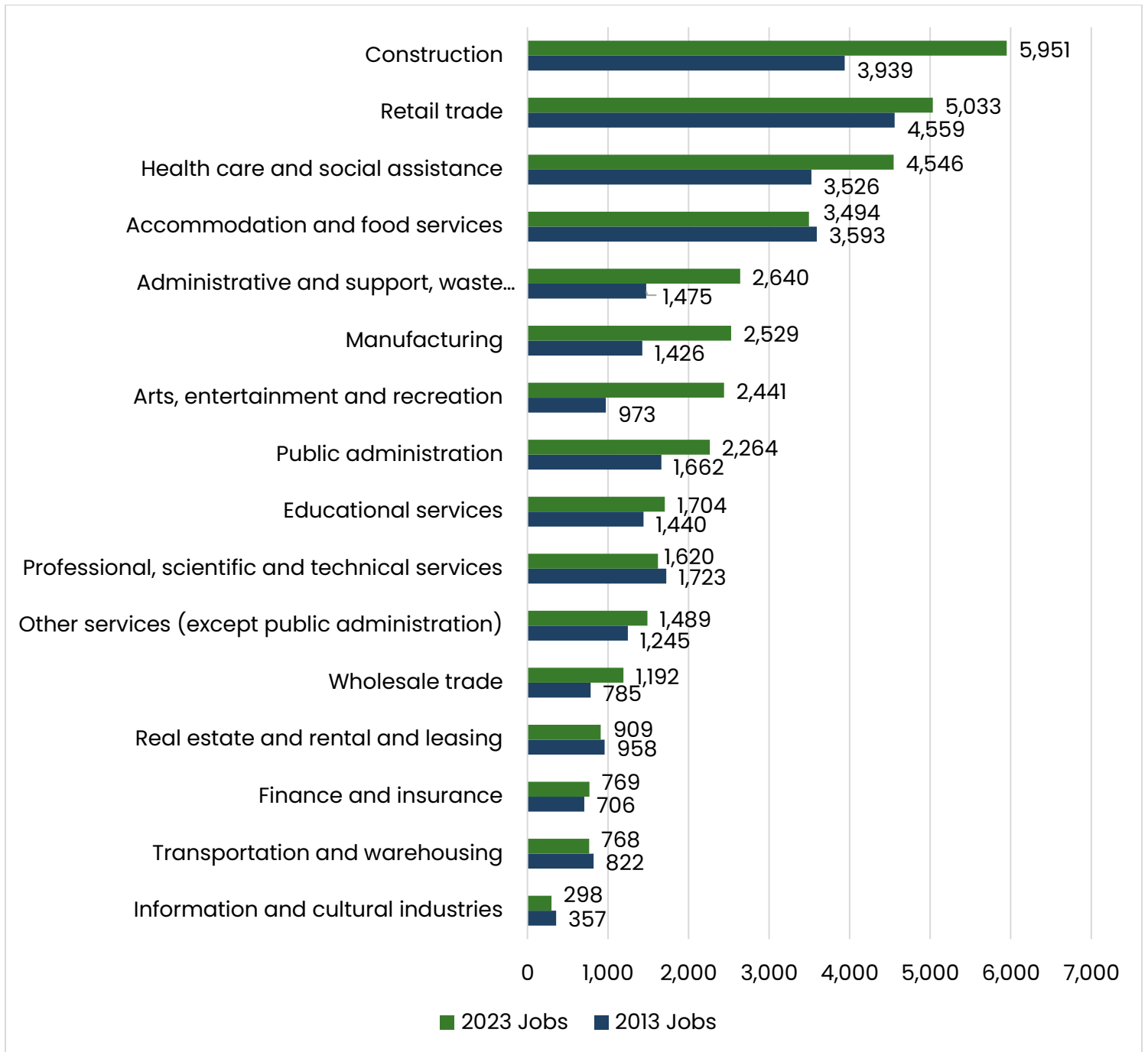
Table 24: Employment Growth and Relative Size by Sector, Economic Region and Ontario, 2013–2023.

NAICS	Description	2023 Jobs	2013–2023 Change	Muskoka % Jobs Change	Ontario % Jobs Change
23	Construction	5,951	2,012	51%	27%
44-45	Retail trade	5,033	474	10%	5%
62	Health care and social assistance	4,546	1,021	29%	29%
72	Accommodation and food services	3,494	-100	-3%	14%
56	Administrative and support, waste management and remediation services	2,640	1,165	79%	9%
31-33	Manufacturing	2,529	1,102	77%	3%
71	Arts, entertainment and recreation	2,441	1,468	151%	21%
91	Public administration	2,264	601	36%	19%
61	Educational services	1,704	264	18%	22%
54	Professional, scientific and technical services	1,620	-103	-6%	40%
81	Other services (except public administration)	1,489	244	20%	-5%
41	Wholesale trade	1,192	407	52%	11%
53	Real estate and rental and leasing	909	-49	-5%	15%
52	Finance and insurance	769	63	9%	22%
48-49	Transportation and warehousing	768	-54	-7%	27%
21	Information and cultural industries	298	-59	-17%	4%
53	Utilities	248	103	71%	12%
11	Agriculture, forestry, fishing and hunting	246	-221	-47%	-15%
<b>All</b>		<b>38,963</b>	<b>8,700</b>	<b>29%</b>	<b>17%</b>

Source: Lightcast Analyst 2024.1.

We again present 2013 and 2023 job counts in Figure 10, highlighting all industries with at least 250 jobs in 2023 in the Economic Region.

Figure 10: Largest Industries by Number of Jobs, 2013 and 2023.



Source: Lightcast Analyst 2024.1.

Table 25 breaks job count data into further subcategories, presenting 2013 and 2023 job count figures for the top 20 four-digit industry classifications. As with the Town, it is clear that tourism-related sectors and residential construction are important job creators.

Table 25: Industry Job Counts, 2013 and 2023, Gravenhurst Economic Region.

NAICS	Description	2013 Jobs	2023 Jobs	2013- 2023 Job Change	2013- 2023 % Job Change
2361	Residential building construction	1,140	2,013	873	77%
7225	Full-service restaurants and limited-service eating places	1,649	1,980	331	20%
7139	Other amusement and recreation industries	791	1,863	1,072	135%
5617	Services to buildings and dwellings	1,034	1,491	457	44%
2383	Building finishing contractors	389	1,290	901	231%
6111	Elementary and secondary schools	1,230	1,230	0	0%
9130	Local, municipal and regional public administration	914	1,168	254	28%
7211	Traveller accommodation	1,422	1,103	-319	-22%
2382	Building equipment contractors	846	1,016	171	20%
4451	Grocery stores	1,028	890	-138	-13%
6221	General medical and surgical hospitals	791	846	56	7%
4441	Building material and supplies dealers	513	637	125	24%
6231	Nursing care facilities	682	631	-51	-7%
9112	Other federal services (9112-9119)	445	605	160	36%
5312	Offices of real estate agents and brokers	552	582	30	5%
6213	Offices of other health practitioners	250	566	315	126%
2381	Foundation, structure, and building exterior contractors	763	564	-199	-26%
6211	Offices of physicians	338	523	184	54%
6241	Individual and family services	300	501	200	67%
2389	Other specialty trade contractors	232	484	252	109%

Source: Lightcast Analyst 2024.1.

## 5.2. Economic Output

This subsection highlights industries with the largest economic impact. Table 26 illustrates industries with the highest level of economic output (over \$100 million in total sales) as measured by total sales. Average wages by industry are also illustrated. The three private sector industries with the most sales in the Economic Region are:

- Residential building construction.
- Veneer, plywood and engineered wood production manufacturing.
- Provincial and territorial public administration.

Table 26: Economic Output by Industry, Economic Region, 2021.

Industry	Sales	Average Wages
Residential building construction	\$632,639,363	\$51,037
Veneer, plywood and engineered wood product manufacturing	\$231,785,787	\$60,908
Provincial and territorial public administration	\$177,695,384	\$89,610
Local, municipal and regional public administration	\$175,532,308	\$51,569
Building equipment contractors	\$149,228,189	\$56,850
Other amusement and recreation industries	\$145,791,791	\$39,644
Elementary and secondary schools	\$143,932,095	\$62,890
Other federal services	\$134,236,584	\$84,404
Traveller accommodation	\$117,358,155	\$30,652
Electric power generation, transmission and distribution	\$116,276,249	\$96,818
General medical and surgical hospitals	\$112,458,805	\$62,518
Offices of real estate agents and brokers	\$108,245,407	\$146,634
Building material and supplies dealers	\$101,640,906	\$50,253
Full-service restaurants and limited-service eating places	\$100,628,356	\$18,921
<b>All industries</b>	<b>\$6,024,431,274</b>	<b>\$50,353</b>

Source: Lightcast Analyst 2024.1, based on 2021 National Input-Output Tables by StatsCan.



## 5.3. 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 Economic Region. In 2021, the most recent data available, total export sales from Gravenhurst’s Economic Region amounted to just over \$3.6 billion. Table 27 presents the largest drivers of external revenues into the Economic Region.

Table 27: Top Export Dollars Flowing into the Economic Region by Industry, 2021.

Industry	Total Export Sales
Residential building construction	\$389,308,698
Veneer, plywood and engineered wood product manufacturing	\$195,958,699
Provincial and territorial public administration	\$167,570,610
Local, municipal and regional public administration	\$146,828,179
Other federal services	\$122,902,403
Other amusement and recreation industries	\$117,746,790
Elementary and secondary schools	\$115,390,943
Offices of real estate agents and brokers	\$80,105,045
General medical and surgical hospitals	\$75,767,899
Traveller accommodation	\$74,832,237
Building material and supplies dealers	\$71,717,878
Motor vehicle parts manufacturing	\$62,919,399
Plastic product manufacturing	\$55,835,904
Household appliance manufacturing	\$53,636,444
<b>Total</b>	<b>\$3,637,798,191</b>

Source: Lightcast Analyst 2024.1, based on 2021 National Input-Output Tables by StatsCan.

## 5.4. 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 Gravenhurst. Table 28 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.

Table 28: Top Industries by Purchasing Power, Economic Region, 2021.

Industry	Total Purchases from Sector	Percentage Purchased in the Region	Percentage Purchased Out of the Region
Lessors of real estate	\$75,658,015	25%	75%
Petroleum and coal product manufacturing	\$64,030,011	0%	100%
Architectural, engineering and related services	\$63,400,358	35%	65%
Plastic product manufacturing	\$58,260,820	59%	41%
Depository credit intermediation	\$55,790,861	38%	62%
Sawmills and wood preservation	\$49,815,567	10%	90%
Architectural and structural metals manufacturing	\$45,907,915	11%	89%
Electric power generation, transmission and distribution	\$42,654,523	59%	41%
Computer systems design and related services	\$41,302,913	32%	68%
Insurance carriers	\$41,130,175	13%	87%
Veneer, plywood and engineered wood product manufacturing	\$34,688,680	100%	0%

Industry	Total Purchases from Sector	Percentage Purchased in the Region	Percentage Purchased Out of the Region
Other wood product manufacturing	\$34,206,707	28%	72%
General freight trucking	\$33,243,931	26%	74%
Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	\$32,936,467	10%	90%
Motor vehicle parts manufacturing	\$31,487,441	85%	15%

Source: Lightcast Analyst 2024.1, based on 2021 National Input-Output Tables by StatsCan.

## 5.5. Location Quotient Analysis

Location quotient (LQ) helps to identify the strengths of the community. As a reminder, this assessment focuses on jobs in the local economic region's economy, not where residents are employed. Table 29 presents LQ data at a 2-digit level, while Tables 30 and 31 present this information at a 4-digit level. The location quotient at the broadest industry classification level indicates that Gravenhurst has the strongest specializations (an LQ of over 1.2) relative to both the rest of the province and nation in the following sectors:

- Arts, entertainment and recreation.
- Construction.
- Accommodation and food services.



Table 29: Location Quotient Analysis by Sector.

Description	2022 Provincial Location Quotient	2022 National Location Quotient
Arts, entertainment and recreation	3.3	3.2
Construction	2.2	2.1
Administrative and support, waste management and remediation services	1.2	1.4
Accommodation and food services	1.4	1.4
Retail trade	1.3	1.2
Real estate and rental and leasing	1.0	1.2
Utilities	1.0	1.0
Other services (except public administration)	1.0	0.9
Health care and social assistance	1.0	0.9
Public administration	0.9	0.9
Manufacturing	0.7	0.8
Unclassified	0.8	0.8
Wholesale trade	0.6	0.7
Educational services	0.6	0.6
Mining, quarrying, and oil and gas extraction	1.7	0.6
Professional, scientific and technical services	0.5	0.5
Finance and insurance	0.4	0.5
Transportation and warehousing	0.4	0.4
Information and cultural industries	0.4	0.4
Agriculture, forestry, fishing and hunting	0.6	0.4
Management of companies and enterprises	0.3	0.3

Source: Lightcast Analyst 2024.1.



At a four digit-NAICS level, the economic region is even more concentrated than Gravenhurst, with multiple industries having location quotients above 10.0. Manufacturing is a prevalent force with regard to concentration in the economic region, compared to provincial and national benchmarks, along with the arts, entertainment and recreation subindustries.

Table 30: Top 5 Location Quotient Sectors, Economic Region, Benchmarked to Canada.

Description	2022 National Location Quotient
Amusement parks and arcades	21.1
Audio and video equipment manufacturing	12.4
Recreational vehicle (RV) parks and recreational camps	9.9
Veneer, plywood and engineered wood product manufacturing	9.8
Motor vehicle body and trailer manufacturing	6.5

Source: Lightcast Analyst 2024.1.

Table 31: Top 5 Location Quotient Sectors, Economic Region, Benchmarked to Ontario.

Description	2022 Provincial Location Quotient
Amusement parks and arcades	16.3
Veneer, plywood and engineered wood product manufacturing	15.3
Recreational vehicle (RV) parks and recreational camps	11.8
Audio and video equipment manufacturing	10.4
Motor vehicle body and trailer manufacturing	10.2

Source: Lightcast Analyst 2024.1.

## 5.5.1. Shift-Share Analysis within the Local Economy

This subsection again looks to the past (2013) and current figures (2023) to assess which sectors have been most positively impacted by local factors. The example below applies the model to local messengers and local delivery:

Table 32 allocates employment changes for the industries most positively impacted (more than 200 jobs) by local effects to national, industry and regional/local effects.

Table 32: Shift-Share Analysis, Competitive Industries: Gravenhurst Economic Region, 2013-2023.

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Building finishing contractors	901	-42	53	889
Other amusement and recreation industries	1072	132	108	832
Residential building construction	873	94	156	624
Amusement parks and arcades	447	4	2	442
Services to buildings and dwellings	457	-30	141	346
Community care facilities for the elderly	251	19	10	223
Motor vehicle body and trailer manufacturing	207	0	0	207
Other specialty trade contractors	252	14	32	207

Source: Lightcast Analyst 2024.1.

Conversely, Table 33 presents the five industries most negatively impacted by regional/local effects from 2013–2023.

Table 33: Shift-Share Analysis: Declining Industries, Gravenhurst Economic Region, 2013–2023.

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Computer systems design and related services	-68	218	37	-322
Traveller accommodation	-319	-247	194	-266
Nursing care facilities	-51	119	93	-263
Accounting, tax preparation, bookkeeping and payroll services	-142	54	48	-244
Foundation, structure, and building exterior contractors	-199	-73	104	-230

Source: Lightcast Analyst 2024.1.



## 5.6. Employer Structure

This subsection illustrates the number and size of employers by industry in the Economic Region. The data in this section again comes from Statistics Canada’s Canadian Business Registry dataset. For a detailed breakdown of Canadian Business Registry, see Section 4.7.

According to the Canadian Business Registry, the Economic Region had 9,502 businesses as of December 2023, of which 3,125 (32.9%) had employees. Of these 3,125 businesses with employees, once again the majority had between one and nine employees (2,332, or 74.6%), though at a slightly lesser rate than Gravenhurst specifically had. Once again, a small percentage of businesses (3.9%, or 121), had over 50 employees. These figures are presented in Table 34.

Table 34: Business Counts by Size, Muskoka, June 2023.

	1 to 9 Employees	10 to 49 Employees	50+ Employees	Indeterminate	Total
Number of Businesses	2,332	672	121	6,377	9,502

Source: Canadian Business Registry December 2023 from Lightcast Analyst 2024.1.

Table 35 completes this section by noting the subsectors in Gravenhurst’s economic region with the most businesses with employees, excluding self-employed individuals. Construction-related businesses, full-service restaurants, and farming businesses are most typically represented locally. As was the case within Gravenhurst, sectors related to residential building are once among most commonly represented.



Table 35: Top 5 Sectors by Businesses with Employees, Muskoka, 2023.

Sector	Businesses with Employees
Residential building construction	284
Services to buildings and dwellings	158
Building equipment contractors	153
Full-service restaurants and limited-service eating places	120
Building finishing contractors	117
Other specialty trade contractors	98
Foundation, structure, and building exterior contractors	79
Offices of physicians	76
Other amusement and recreation industries	75
Offices of real estate agents and brokers	65
Traveller accommodation	61
Lessors of real estate	60

Source: Canadian Business Registry December 2023 from Lightcast Analyst 2024.1.



## Appendix A: 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.
- Lightcast Analyst 2024.Q1.

### Canadian Business Registry (CBR)

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

### Manifold Projection Method

Production of 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.



## Lightcast Analyst

Lightcast 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 Town of Gravenhurst of 2001 is the same as the Town of Gravenhurst of 2024. 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.

Lightcast 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.

