

Community & Situational Economic Analysis

City of Elliot Lake





Community and Situational Economic Analysis

for the **City of Elliot Lake**

May 2026

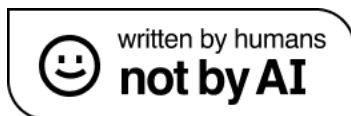


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Introduction

This Elliot Lake Community and Situational Analysis has been prepared as part of the City's new Economic Development Strategy. Completed in spring 2026, the report is intended to serve as an informational resource rather than a prescriptive document. It offers a statistical view of the City within its wider local context. While the data provides useful insight, it does not fully reflect the complete story of the City or the surrounding area. Although the data presents a helpful overview of the economy, local conditions and on-the-ground realities remain important factors to consider.

The Analysis begins with a review of the people who make up the City, providing a socio-demographic profile of the local population and identifying potential areas of opportunity. Section 2 then explores housing and income levels to outline current conditions related to livability in the community. Section 3 shifts to an examination of the local labour force, presenting key indicators such as participation, employment, and unemployment rates across different population groups.

Section 4 considers the local economy from a different angle. Rather than focusing on residents regardless of where they work, this section examines industry and employment activity located within Elliot Lake itself, regardless of where workers reside. Industry-level analysis is used to identify key sectors and employment concentrations that may support future community priorities, and to assess how these align with existing and emerging economic drivers.

Section 5 repeats this analysis from Section 4, but focuses on the "labour recruitment area," consisting of Blind River, Elliot Lake, Huron Shores, Sables-Spanish Rivers, Spanish, and the North Shore. This area was defined based on commuter patterns and input from City staff.

Subsequent reports, prepared as part of the broader Strategy, will identify opportunities informed by this quantitative analysis alongside qualitative insights gathered through engagement with local stakeholders.

11,549

2006

11,348

2011

10,741

2016

11,372

2021

12,246

2025

Population Profile

Ages 0-14 **1,250 (10%)**

Ages 15-29 **1,510 (12%)**

Ages 30-44 **1,692 (14%)**

Ages 45-64 **2,661 (22%)**

Ages 65+ **5,133 (42%)**

Apprenticeship/trades certificate/diploma **8%**

University diploma/degree - bachelor or above **13%**

No certificate, diploma/degree **19%**

College or other non-university certificate **25%**

High school certificate or equivalent **36%**

Highest Education

Population ages 25-64



36%
Secondary

45%
Post-secondary

Household & Earnings



20%

Ontario
25%

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



Average Dwelling Value

\$246,268

Median Dwelling Value

\$233,031

45%
Single detached house

26%
Apartment/
detached duplex

19%
Semi-detached House

10%
Rowhouse

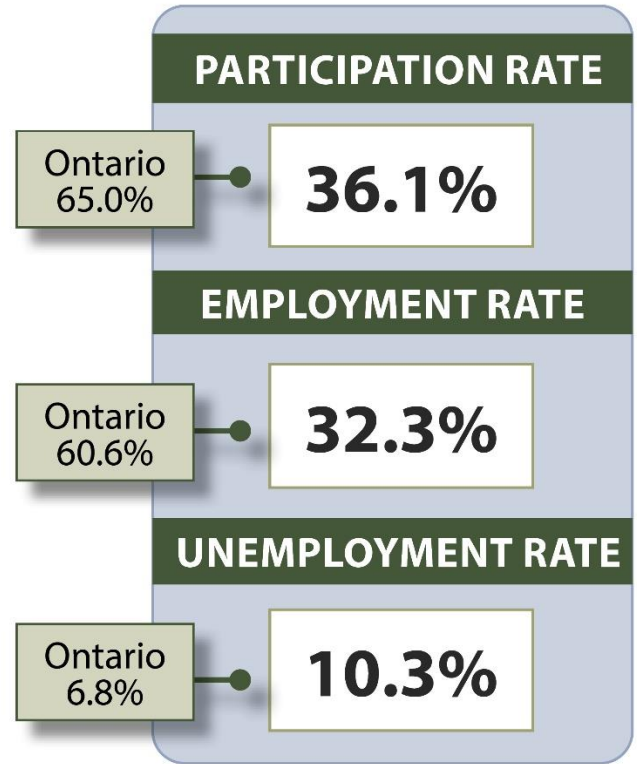
Total number of households

6,221

City of Elliot Lake Demographic Snapshot



Labour Force & Local Economy



Top 5 Sectors by Industry*

*By labour force employment for people living in Elliot Lake.



Health Care & Social Assistance



Retail Trade



Construction



Educational Services



Mining, Oil and Gas Extraction

Top 5 Sectors by Occupation*

*By labour force employment for people living in Elliot Lake.



Sales & Service



Trades, Transport & Equipment Operators



Education, Law & Social, Community & Govt. Services



Health Occupations



Business, Finance & Administration

Elliot Lake is a city in the Algoma District, located north of Lake Huron and is midway between the cities of Sudbury and Sault Ste Marie. Elliot Lake is a clean, modern compact city that combines the hospitality of a small town with the services and amenities of larger urban centres.

This section presents information on key services and assets across the city. For further information on all that Elliot Lake has to offer, please visit elliotlake.ca.

Emergency and Health Services



OPP – East Algoma Detachment

47 Hillside Drive North
Elliot Lake, Ontario, P5A 1X5



Elliot Lake Fire Department

55 Hillside Drive North
Elliot Lake, Ontario, P5A 1X5



Algoma District Paramedic Services

49 Hillside Drive North
Elliot Lake, Ontario, P5A 1X5

Algoma EMS provides 24-hour on-site coverage in Elliot Lake with one paramedic crew on-duty at all times.

Monday to Friday from 0800-1600 hrs, paramedics staff a second ambulance to provide additional emergency coverage and patient transfer services to centralized healthcare facilities in Sudbury.

This facility houses three ambulances.



St Joseph's General Hospital Elliot Lake

70 Spine Road
Elliot Lake, Ontario, P5A 1X2



St Joseph's Manor

70 Spine Road
Elliot Lake, Ontario, P5A 1X2



The Oaks Centre

9 Oakland Boulevard
Elliot Lake, Ontario, P5A 2Z2



Family Health Team

31 Nova Scotia Walk
Elliot Lake, Ontario, P5A 1Y9

St Joseph's General Hospital is the largest hospital corporation in the 3.5 hours between Sault Ste. Marie and Sudbury. With 55 hospital beds, an operating suite and emergency room, it is the only facility to include obstetrical services, intensive care, surgical services, specialists clinics, CT scanning, dialysis services, and more. The hospital also provides the largest satellite oncology program with over 500 visits annually.

Schools and Libraries



Elliot Lake is serviced by the Algoma District School Board, Huron-Superior Catholic District School Board, Conseil scolaire Catholique du Nouvel-Ontario, and Conseil scolaire public du Grand Nord de l'Ontario. Postsecondary options servicing Elliot Lake include Algoma University and Sault College in Sault Ste. Marie; Cambrian and Boréal Colleges, and Laurentian University in Sudbury; Nipissing University and Canadore College in North Bay; and Northern College in Timmins.

Algoma District School Board

Central Avenue Public School
81 Central Avenue, Elliot Lake, Ontario, P5A 2G4

Esten Park French Immersion Public School
115 Hergott Avenue, Elliot Lake, Ontario, P5A 3B4

Elliot Lake Intermediate & Secondary School
303 Mississauga Avenue, Elliot Lake, Ontario, P5A 1E8

Adult Learning Centre
2 Brunswick Walk, Elliot Lake, Ontario, P5A 2A8

Conseil scolaire Catholique du Nouvel-Ontario

École Georges Vanier
140 Hillside Drive North, Elliot Lake, Ontario, P5A 1X7

Huron-Superior Catholic District School Board

Our Lady of Fatima School
140 Hillside Drive North, Elliot Lake, Ontario, P5A 1X7

Our Lady of Lourdes French Immersion
139 Mississauga Avenue, Elliot Lake, Ontario, P5A 1E3

Conseil scolaire public du Grand Nord

École publique des Villageois
11 Edinburgh Road, Elliot Lake, Ontario, P5A 2M3

École secondaire Villa Française des Jeunes
11 Edinburgh Road, Elliot Lake, Ontario, P5A 2M3



Elliot Lake Public Library

The library is a welcoming space for residents and visitors of all ages to experience whole new worlds and learn about many different topics. Elliot Public Library delivers valuable services to the whole community. The library hosts a number of regular programs designed just for adults and seniors, including book clubs, crafts, movie screenings and tech help.

40 Hillside Drive South (Pearson Plaza), Elliot Lake, Ontario, P5A 1M7
Elliotlakelibrary.com

Quality of Life

Elliot Lake is a vibrant community offering excellent work-life balance. Quality of life is not just a buzzword; it's the city's value proposition. Living in Elliot Lake allows residents the opportunity to create their own balance of work and play. The city is compact and offers short commutes whether by car or by public transit. Work, groceries, restaurants, school, pharmacies, golf course, ski hill, and more are mere minutes apart. The city is surrounded by the rugged and breathtaking nature and scenery that Northern Ontario offers. Most importantly, Elliot Lake offers a strong sense of community where everybody is welcome.



Residents and visitors can enjoy two municipal beaches: Spruce Beach and Spine Beach. Or, the fully accessible Splash Pad at Kiwanis Park!



The Ruben Yli-Juuti Centre is the premier spot for fun and fitness with a 25-metre long pool with 6 lanes, as well as fully equipped gym!



Rogers Arena (formerly Centennial Arena) offers six dressing rooms, a canteen, and regulation-sized ice pad open from September to March.



Elliot Lake is at the heart of an incredible fishing region that contains over 4,000 lakes. These lakes hold one of the world's most prolific trout fisheries.



Mt. Dufour offers downhill skiing and snowboarding with different types of courses and trails. Snowmobiling and cross-country skiing is popular in winter.



Found just outside Elliot Lake is one of Ontario's premier, 18-hole championship golf courses - Stone Ridge.



Elliot Lake offers scenic lookouts and a wide variety of trails for hiking, biking, snow-shoeing, ATV and snowmobiles, accessible right from your own backyard.



Mississagi Provincial Park offers 80 campsites, breathtaking vistas, canoe rentals, and plenty of hiking trails!

Arts and Culture

Elliot Lake has an active, diverse, and vibrant arts and culture community. Regardless of their passions, residents can find like-minded individuals to share their time and interests.

Elliot Lake Arts & Heritage Centre

The Downtown Arts Centre, located at 14 Elizabeth Walk, is an arts and cultural hub operated by the Arts and Culture Roundtable in Elliot Lake and home to the Elliot Lake Arts Club and the Elliot Lake Model Railroad Club.



Winterfest

Elliot Lake's Winterfest is an annual celebration that brings the community together for a weekend filled with winter-themed activities and entertainment. Typically held in late February, the festival offers a diverse lineup of events catering to all ages. Past festivities have included youth dances, scenic hikes, snowshoeing, cross-country skiing, free public skates and swims, sled-box and ski racing, beach bonfires, and games!



Arts on the Trail

Arts on the Trail is an annual, self-guided art tour held on the last Saturday of September in Elliot Lake. This event showcases the work of a variety of artists across multiple venues throughout the city, offering visitors a unique opportunity to engage with a diverse range of artistic expressions.



Heritage Days Street Dance

Elliot Lake's annual Street Dance is a highlight of the summer, bringing the community together for a night of live music, dancing, and celebration. Held during Heritage Days, this outdoor event transforms downtown into a lively festival atmosphere, featuring performances from local and headlining bands. With a dynamic mix of musical genres, food vendors, and an energetic crowd, the Street Dance is a must-attend event for residents and visitors alike.



2. Demographic Analysis

2.1. Population Growth

This subsection illustrates population characteristics for the city of Elliot Lake. The wider demographic landscape is explored by using **Ontario as a benchmark**.

Table 1 illustrates population changes in Elliot Lake from 2011 to 2035 compared to Ontario. The census population in the City decreased from 2006 to 2016, most notably between 2011 and 2016 due in part to the collapse of the City's mall and the subsequent impact on quality of life and the local economy. However, the population has since rebounded and is expected to continue its growth in line with provincial projections through 2035.

Table 1: Population Change, Elliot Lake and Ontario, 2011-2035.

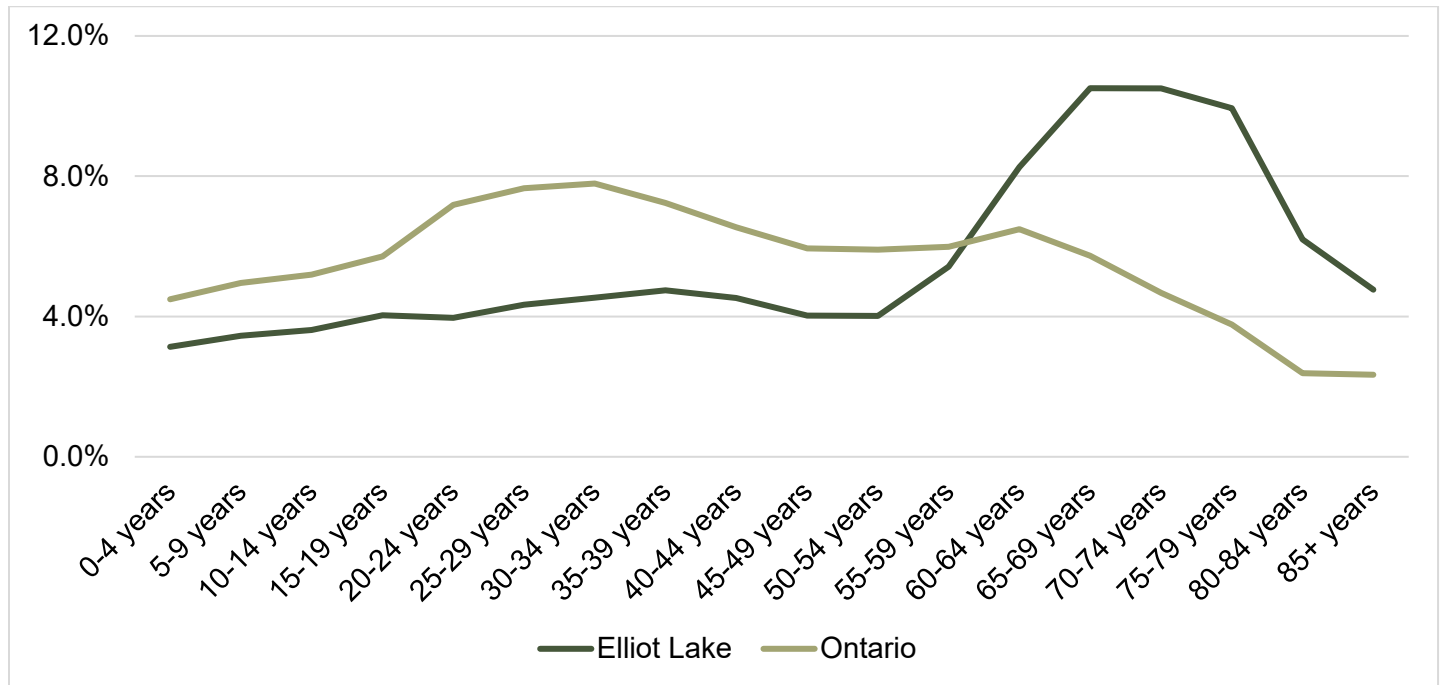
	2011	2016	2021	2025	2030	2035
City Population Count	11,348	10,741	11,372	12,246	12,984	13,652
% Change	-1.7%	-5.3%	5.9%	n/c	6.0%	5.1%
Ontario Population Count	12,851,821	13,448,494	14,223,942	16,579,143	17,698,235	18,747,740
% Change	5.7%	4.6%	5.8%	n/c	6.8%	5.9%

Source: Statistics Canada Census Profiles 2011-2021; Manifold SuperDemographics 2025-2035. 2025 % change are not applicable because the 2021 and 2025 data sources use different methodologies. Data changes are therefore reflective of these methodological differences more than actual population growth/decrease.

The population in Elliot Lake is projected to approach 14,000 by 2035.

Figure 1 contrasts the age profile of residents in Elliot Lake and Ontario, in 2025. The City has a much higher percentage of older adults and those entering retirement (60+), a reflection of its brand and economic focus over the last number of decades. There has been a slight percentage increase in the number of youth and young adults over the past ten years, though it is still minor.¹

Figure 1: Percent Population by Age, Elliot Lake vs. Ontario, 2025.



Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2025.

Table 2: Elliot Lake and Ontario Age Profile, 2025.

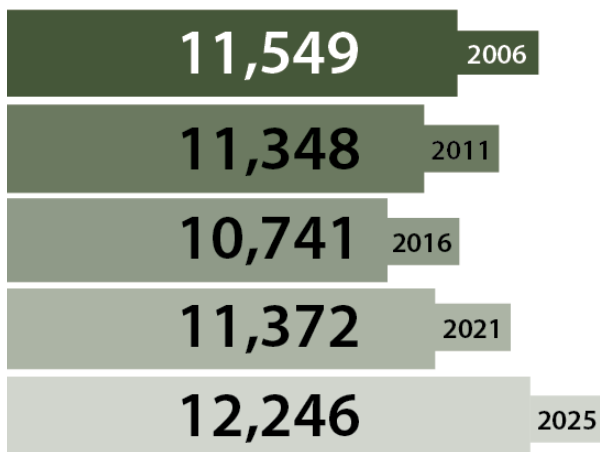
Age Group	Elliot Lake	Ontario
0-14	10%	15%
15-29	12%	21%
29-44	14%	22%
45-64	22%	24%
65+	42%	19%

Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2025.

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

The Bottom Line

- After a period of minor decline (from 11,549 residents in 2006 to 10,741 in 2016), Elliot Lake is projected to approach **14,000 residents by 2035**, with projected future growth rates comparable to the province.
- The City has focused on attracting those nearing retirement, or of retirement age, and this is borne out in the population cohort data, showing that the City has a much higher percentage of retirement-aged individuals than the province as a whole.
- Economic opportunities exist to attract more youth and young adults (supporting more northern mining camps, tech sector, healthcare opportunities, etc.) if the City desires, but would require a shift in brand and attraction.



MEDIAN	AVERAGE
City Age 53	City Age 60
Ontario Age 42	Ontario Age 40

2.2. Income, Households and Attainability

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

- In 2024, the city's median employment income was **\$33,230**, 37.2% lower than in Ontario (\$45,590).
- In 2024, the average employment income for residents was **\$43,349**, 45.6% less than Ontario's (\$63,116).

Figure 2 illustrates the distribution of household incomes. Approximately 81.1% of households in Elliot Lake earn less than \$100,000, compared to 54.1% in Ontario.

- Median household total income in Elliot Lake: **\$56,883** vs. \$99,999 in Ontario.
- Average household total income in Elliot Lake: **\$73,815** vs. \$129,969 in Ontario.

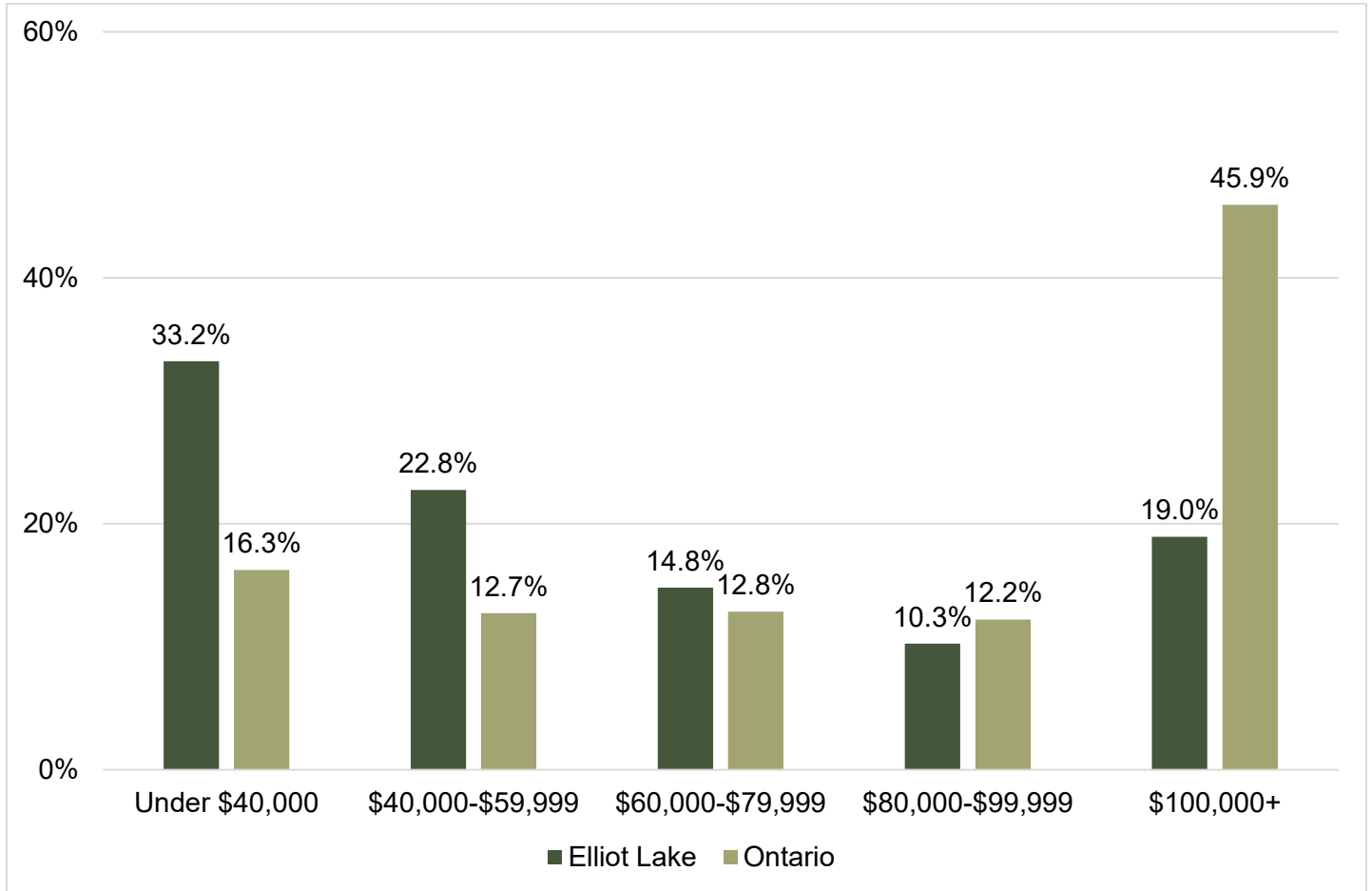
Though Elliot Lake's income figures lag behind provincial marks, this is again (as with the population breakdown) largely a result of deliberate marketing of the community. Given the age breakdown, there are likely a number of individuals earning part-time incomes as they transition to retirement. With part-time employment for older residents becoming more of a fixture across Ontario communities, older communities are seeing average incomes lower compared to historic figures.

Additionally, income data does not account for the net wealth of retirements, with many older retirees in Elliot Lake benefiting from increased purchasing power through RIFS, pensions, and other asset-derived spending power.

Quality of life metrics, profiled below, speak to the reality that although incomes are lower in Elliot Lake, cost of living is similarly lower and net wealth is high, leading to residents maintaining a strong quality of life compared to their Ontario counterparts who may earn higher incomes.

² All income data uses the year previous; 2025 data use 2024 incomes.

Figure 2: Household Income Levels by Percentage of the Population, 2024.



Source: Manifold Data Mining Inc. 2025 (2024 incomes).

As can be seen, households in the City generally have notably lower levels of employment and household income compared to Ontario. However, as alluded to above, the City also has significantly lower average and median dwelling values, with monthly dwelling costs 50-60% of provincial marks. These figures are profiled in Table 3 and Figure 3 on the following page.

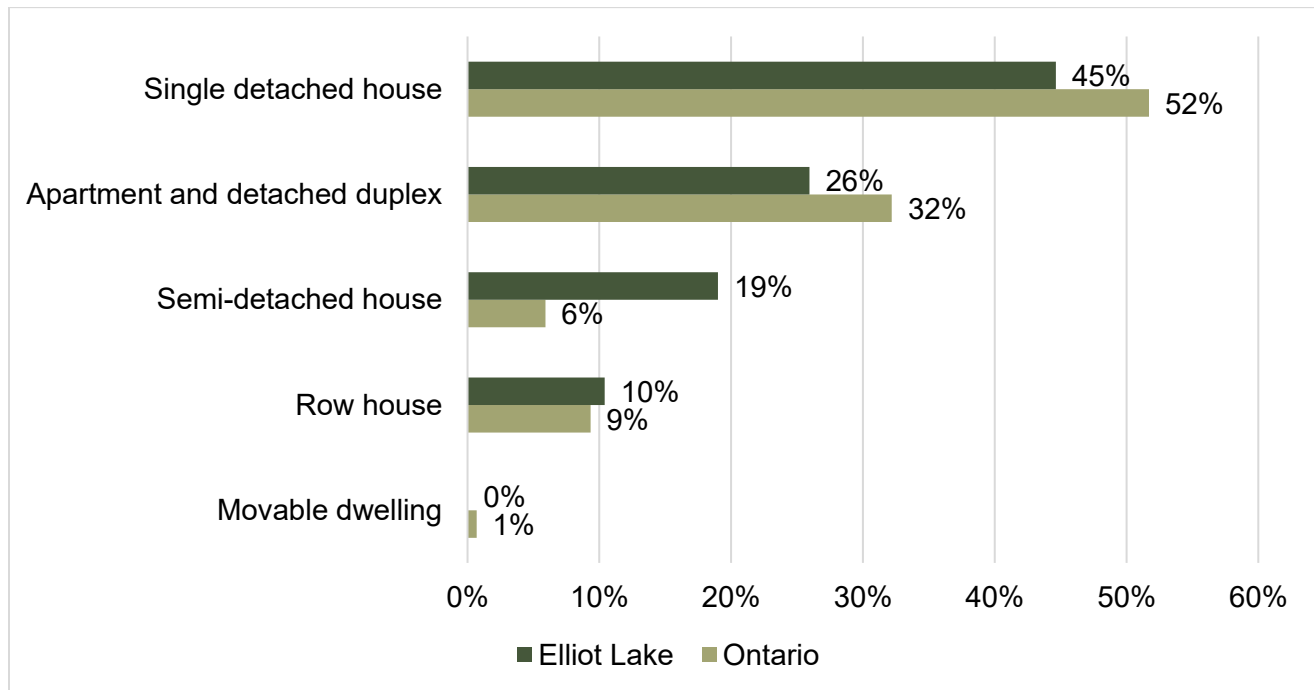
Within Table 3, it can also be seen that only 20% of Elliot Lake residents are spending 30% or more of income on shelter costs, a traditional measure of affordability. This compares with 25% of the province spending that amount of income on shelter, suggesting that even with lower wages on average, Elliot Lake is more affordable than the province for its residents. Table 3 and Figure 3 highlight key housing characteristics compared to Ontario.

Table 3: Households and Dwelling Attainability, 2025.

Housing Characteristics	Elliot Lake	Ontario
Total Number of Households	6,221	6,362,126
Average value of dwelling (\$)	\$246,268	\$972,134
Median value of dwellings (\$)	\$233,031	\$817,075
Median monthly shelter costs for owned dwellings	\$655	\$1,565
Average monthly shelter costs for owned dwellings	\$801	\$1,852
% of households owned	60%	67%
% of households rented	40%	32%
Median monthly shelter costs for rented dwellings (\$)	\$871	\$1,458
Average monthly shelter costs for rented dwellings (\$)	\$945	\$1,588
Average number of persons in private households	1.9	2.6
Population spending 30% or more of household total income on shelter costs	20%	25%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2025.

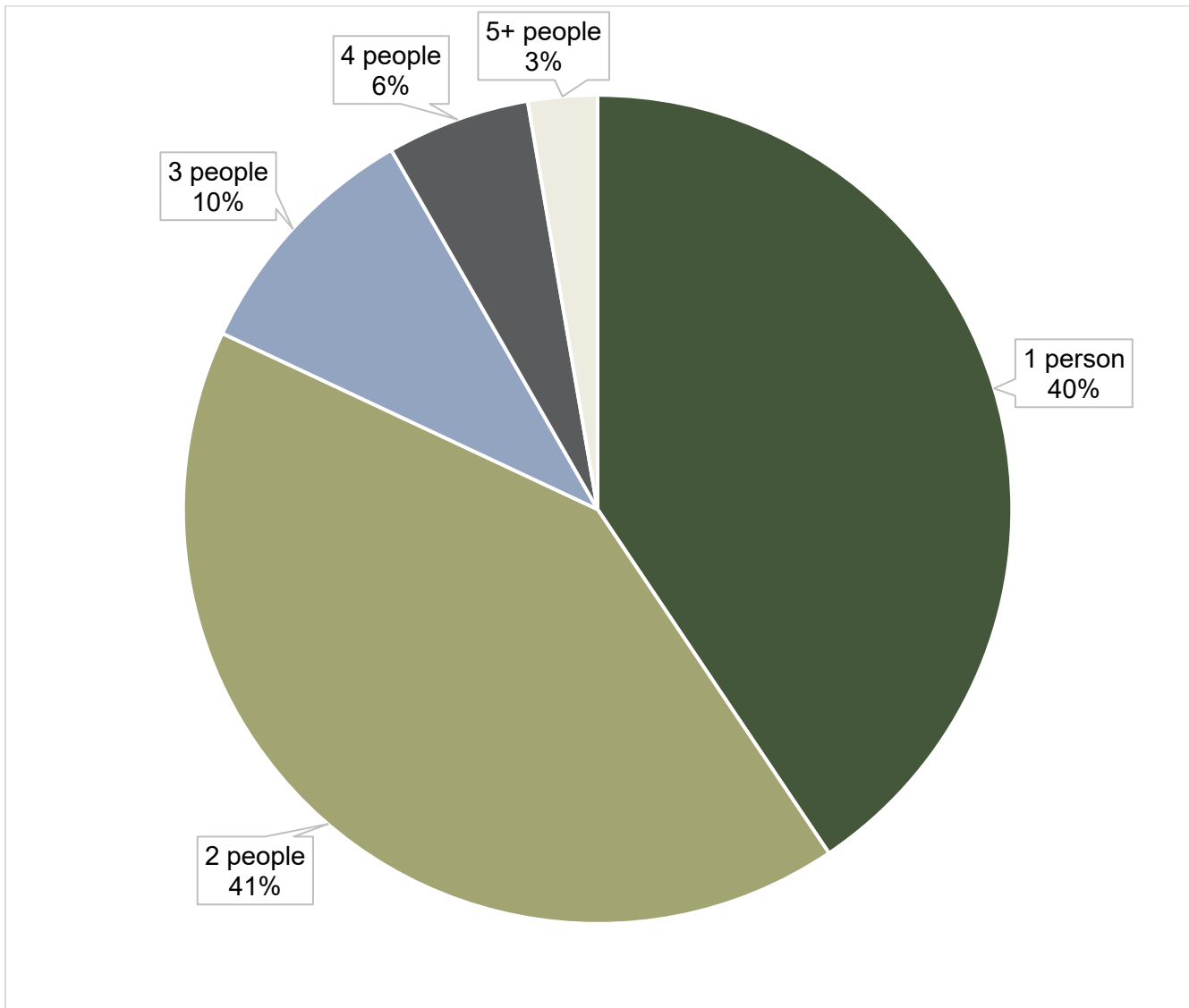
Figure 3: Occupied Dwellings by Structure Type, 2025.



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2025.

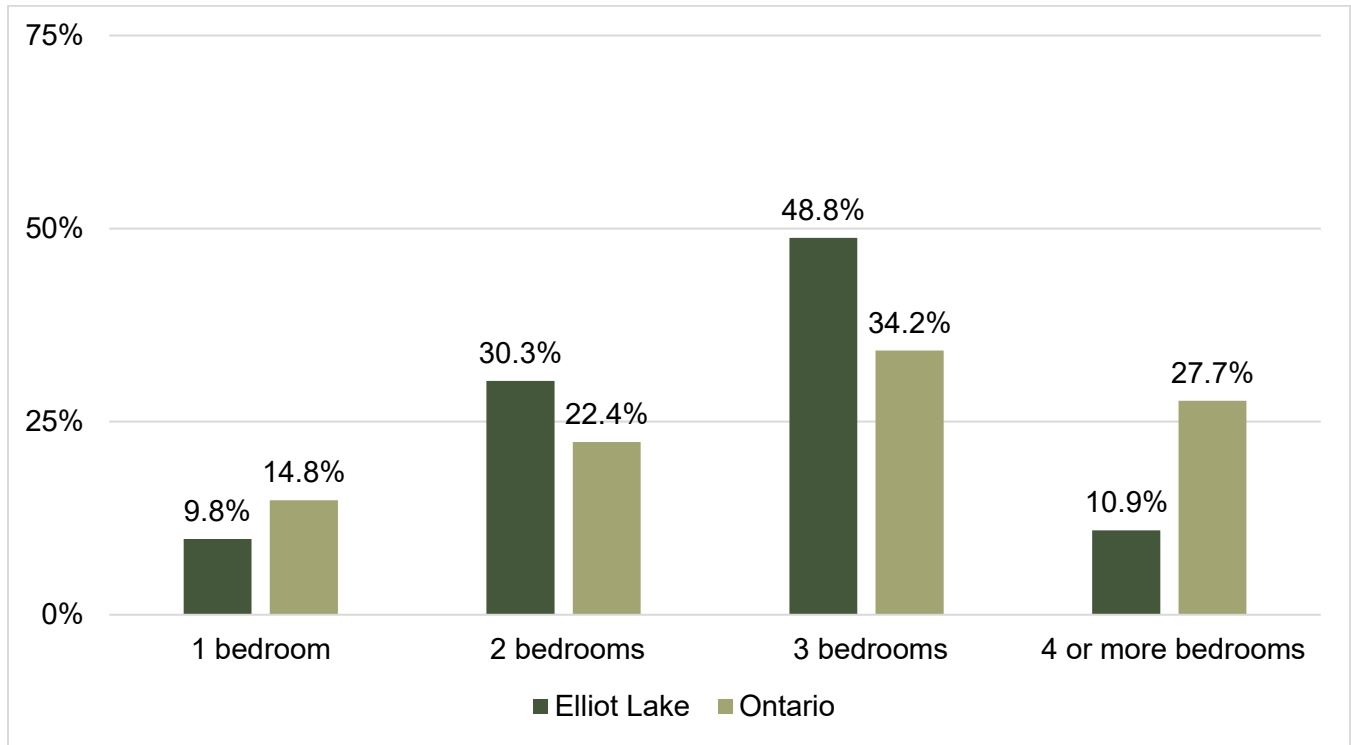
Another way to review Elliot Lake household structure is by size, by both people and physical makeup. Figure 4 presents the number of private households by size, showing that the vast majority of households (four-in-five) are either one person (40%) or two people (41%). Figure 5 then shows that the largest percentage of residences have three bedrooms (nearly half – 48.8%).

Figure 4: Private Households by Size, Elliot Lake, 2025.



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2025.

Figure 5: Bedrooms per Dwelling, Elliot Lake and Ontario, 2025



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2025.



The Bottom Line

- In 2025 Elliot Lake residents had lower incomes than their Ontario counterparts.
- However, cost of living is also considerably less than across the rest of Ontario, so local residents are able to afford a higher quality of life than other municipalities across the province.
- Discussions with staff and local residents suggests that available data does not account for the increased wealth many retirees in Elliot Lake have, with many residents having higher-than-average purchasing power when compared to other communities.
- To that end, fewer residents (**20%**) are **spending 30% or more of total income on shelter costs** compared to Ontario (25%), a positive indicator.
- The majority of dwellings are inhabited by either one (40%) or two people (41%), while nearly half of dwellings have three bedrooms (48.8%). This might suggest an oversupply of larger dwellings, though that may be due to resident demand for extra bedrooms.



20%

Ontario
25%

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

Median
Employment
Income

\$33,230

ONTARIO MEDIAN

\$45,590

Average
Employment
Income

\$43,349

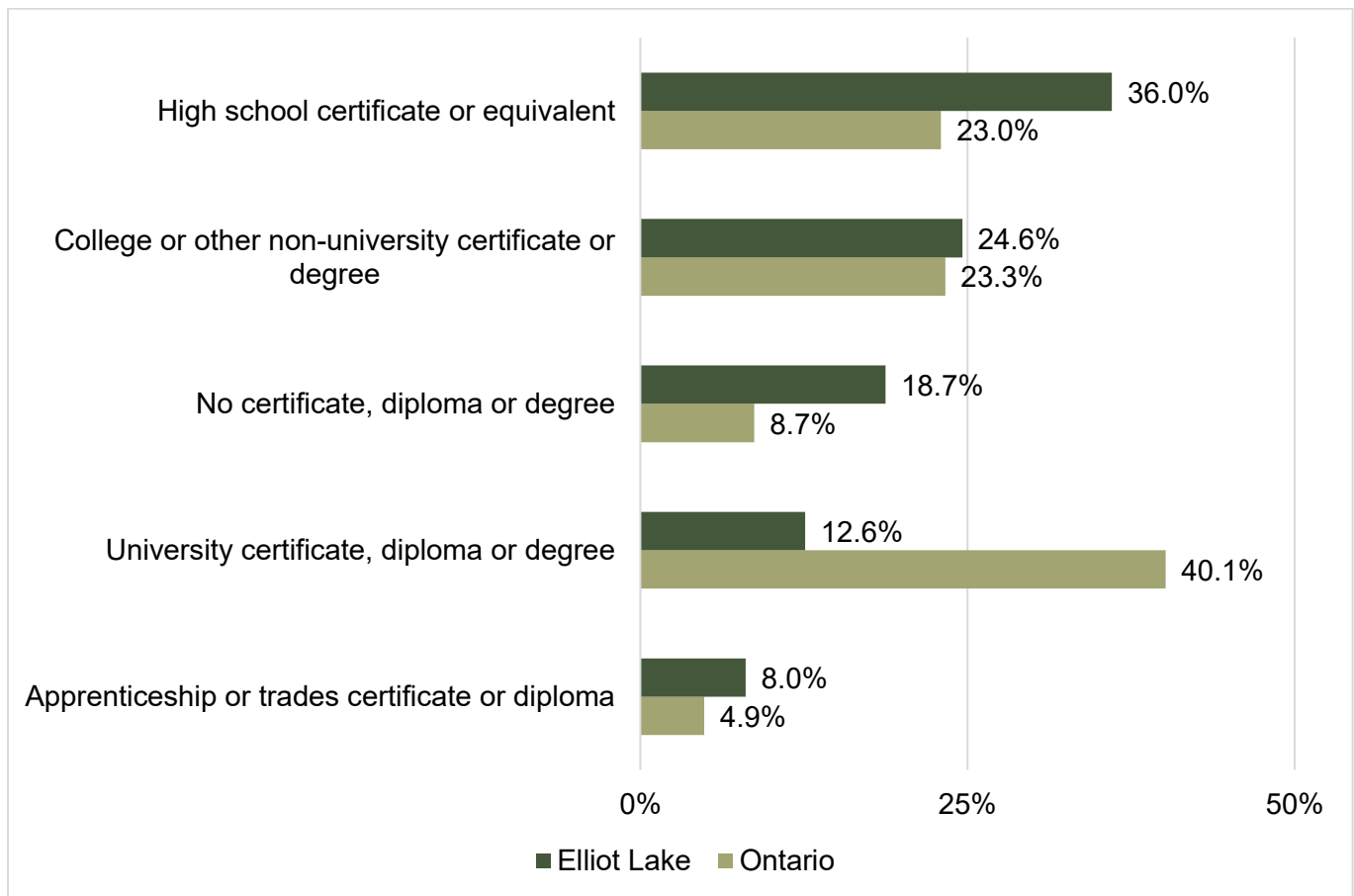
ONTARIO AVERAGE

\$63,116

2.3. Education, Skills and Training

This subsection reviews the level of education and major fields of study for residents of the City and Ontario. Please note it is specific to residents between the ages of 25 and 64 and compares to Ontario.³ A high school (36.0%) or college level certificate or degree (24.6%) are the most common types of education attained by City residents ages 25 to 64.

Figure 6: Educational Attainment Breakdown, Residents Ages 25 to 64, 2025.



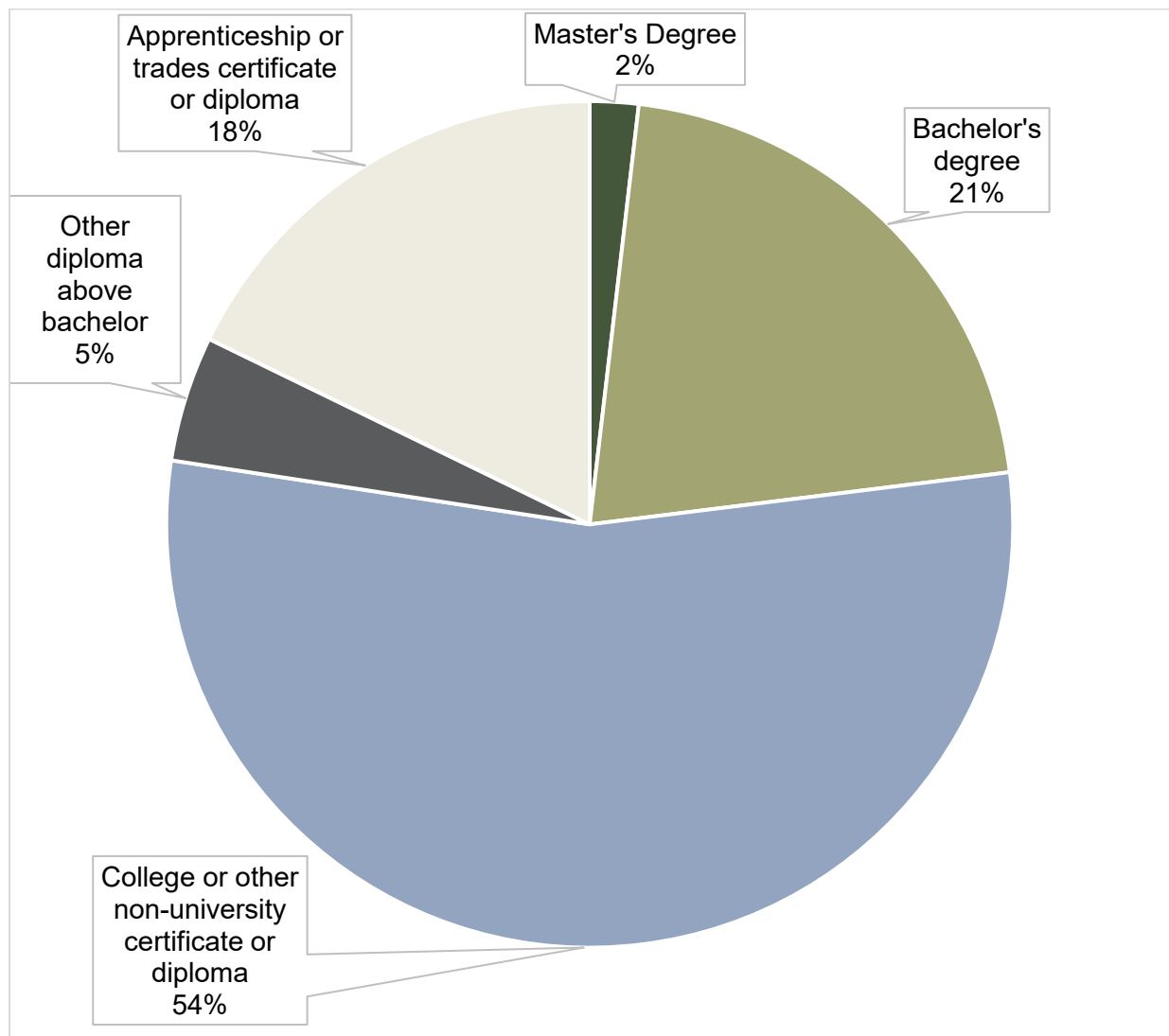
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2025.

³ 'High school certificate 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 7 illustrates the post-secondary educational attainment of residents ages 25 to 64. Post-secondary attainment suggests that:

- A total of 2,210 residents aged 25 to 64 have post-secondary education.
- A college degree is the most common type of education; attained by just over half - 54% - (1,202 residents) with a post-secondary education, aged 25 to 64.
- Approximately, two-in-five residents with post-secondary attainment, aged 25 to 64, have a bachelor's degree (21%) or apprenticeship (18%) diploma or certificate.

Figure 7: Percentage of Residents aged 24- 65 with Post-Secondary Attainment, 2025.



Source: McSweeney & Associates from Manifold SuperDemographics 2025.

Table 4 illustrates the major fields of study (those with at least 40 graduates) ⁴ for residents 15 years and older. The largest fields of study in the population are 'Health professions and related programs,' and 'Business, management, marketing and related support services,' with health professions and related programs attained by over 1,000 residents.

Table 4: Post-Secondary Major Field of Study, Elliot Lake, 2025.

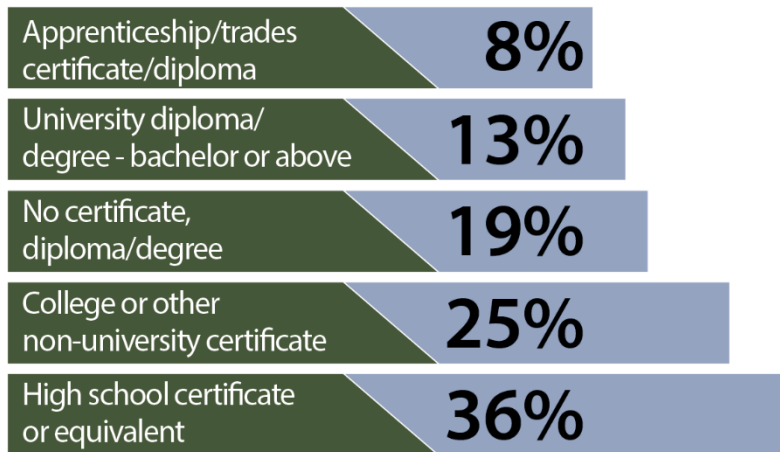
Classification of Instructional Programs (CIP)	Total	Female	Male
Total	10,997	5,650	5,347
Health professions and related programs	1,006	884	122
Business, management, marketing and related support services	622	407	242
Mechanic and repair technologies/technicians	361	11	350
Engineering technologies and engineering-related fields	356	19	336
Education	334	232	148
Personal and culinary services	239	176	63
Construction trades	214	3	211
Precision production	187	8	179
Computer and information sciences and support services	135	65	70
Social sciences	127	94	43
Family and consumer sciences/human sciences	115	107	9
Public administration and social service professions	95	93	52
Security and protective services	88	19	69
Transportation and materials moving	84	32	52
Visual and performing arts	81	10	37
Psychology	79	59	45
Engineering	76	13	63
Legal professions and studies	51	45	6
Agriculture, agriculture operations and related sciences	50	43	7
Communication, journalism and related programs	45	16	29
History	41	6	29

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2025.

⁴ 'Major Field of study' 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.

The Bottom Line

- City residents are **more likely to have a degree type other than a ‘university certificate, diploma or degree’** compared to their Ontario counterparts.
- This indicates that businesses requiring technical skills (trades; health designations) typically obtained through non-university post-secondary education are **more likely to find workers** with the appropriate qualifications **within the local labour pool**.
- This is especially notable given the prevalence of seniors’ care and health care facilities in Elliot Lake; those graduating with degrees in health care provision are sought after in Elliot Lake.



3. Labour Force Profiling and Analysis

3.1. Key Indicators

Elliot Lake, though home to nearly 11,000 residents over the age of 15, has a labour force of just under **4,000** individuals (3,969). Expectedly, given the demographic breakdown of the community, Elliot Lake has a participation and employment rate that are approximately half the provincial mark. This is expected because the age of the City's residents suggests that the vast majority of the population is not engaged in the labour force. The unemployment rate is higher than the provincial mark, and only reflects individuals actively looking for work. Therefore, that figure is not impacted by the City's demographics, and does suggest that those in the City looking for work may be having a slightly harder time than their provincial counterparts in finding work.

Table 5: Key Labour Force Statistics by Gender, Elliot Lake, 2025.

Labour Force Activity	Elliot Lake			Ontario		
	Total	Male	Female	Total	Male	Female
Total population 15 years and over	10,997	5,347	5,650	14,151,781	6,891,401	7,260,380
In the labour force	3,969	2,078	1,891	9,200,501	4,776,679	4,423,822
Employed	3,557	1,782	1,775	8,578,030	4,441,826	4,136,204
Unemployed	412	296	116	622,470	334,853	287,618
Not in the labour force	7,027	3,269	3,759	4,951,281	2,114,722	2,836,558
Participation rate %	36.1	38.9	33.5	65.0	69.3	60.9
Employment rate %	32.4	33.3	31.4	60.6	64.5	57.0
Unemployment rate %	10.4	14.2	6.1	6.8	7.0	6.5

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2025.

The City has participation and employment rates approximately half the provincial rates, a reflection of the City's age demographics.

Key labour force indicators are further broken down by age and gender in Table 6 to highlight potentially underemployed or underutilized segments of the workforce. Once adjusted for age, Elliot Lake's youth labour engagement is in line with provincial marks. That is, while the provincial participation rate is 59.3%, Elliot Lake's youth are slightly more engaged at 60.7%. Once again, though, when considering the entirety of the population over the age of 25, Elliot Lake lags behind again simply due to its large retirement-aged population.

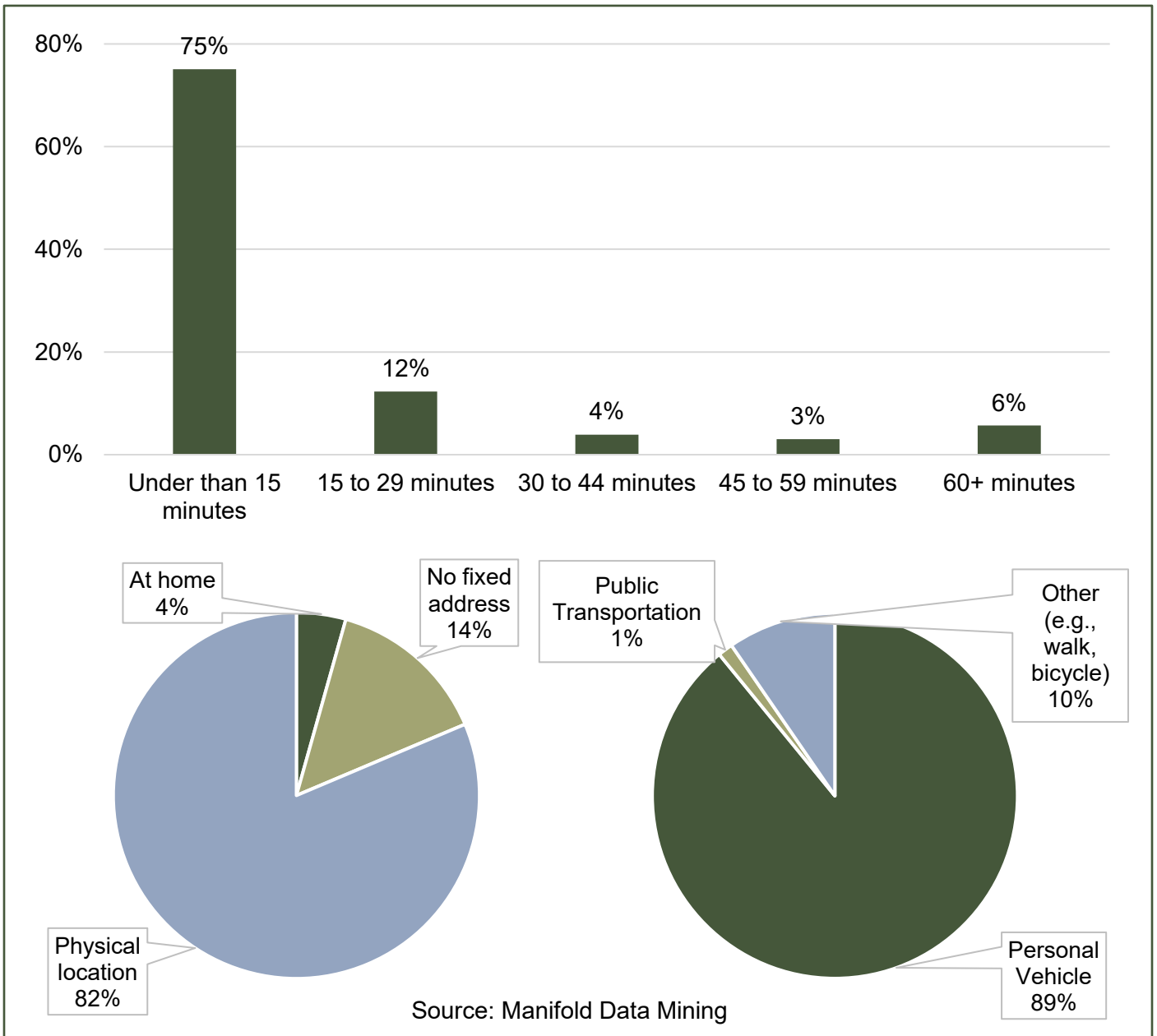
Table 6: Labour Force Characteristics by Age and Gender, 2025.

Population 15 to 24 years old:						
	Elliot Lake			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	60.7	64.0	56.7	59.3	58.4	60.2
Employment rate (%)	51.6	54.4	48.1	50.2	49.6	50.9
Unemployment rate (%)	15.1	15.0	15.1	15.3	15.2	15.5
Population 25 years and over:						
	Elliot Lake			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	33.7	36.1	31.5	66.0	71.4	61.1
Employment rate (%)	30.5	31.0	30.0	62.5	67.3	58.0
Unemployment rate (%)	9.6	14.1	4.8	5.4	5.7	5.0

Source: Manifold SuperDemographics, 2025.

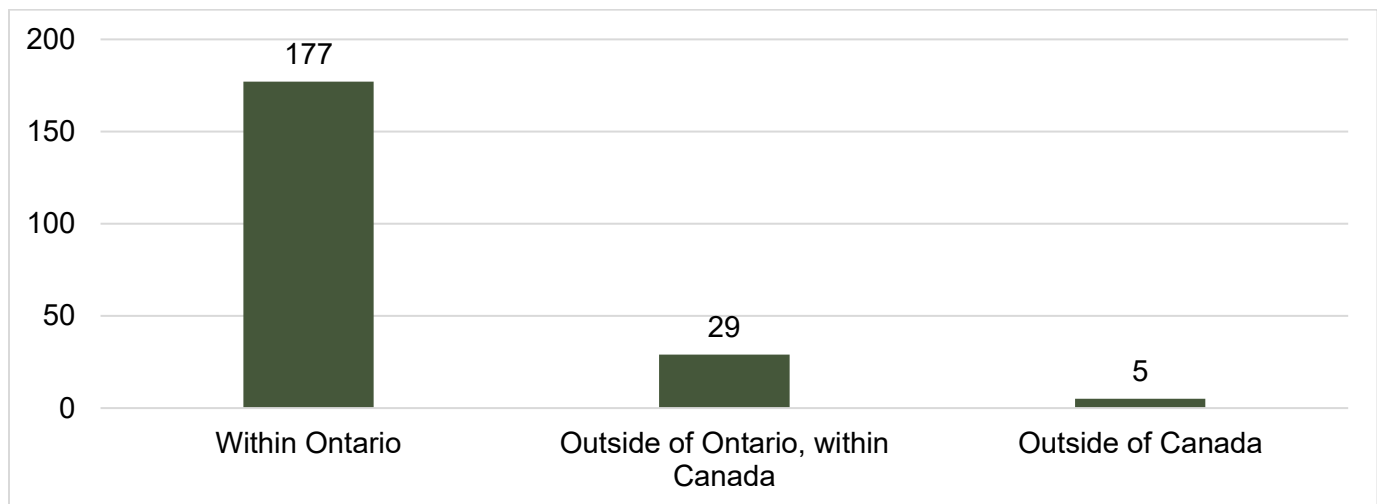
Furthering the discussion on workforce, commuting habits can also be identified for Elliot Lake residents. As can be seen below, for three-fourths (75%) of the population, their commute is under 15 minutes, speaking again to the positive quality of life in Elliot Lake. Additionally, 90% of residents use their personal vehicle to travel to work, while 10% use a form of active transportation.

Figure 8: Workforce Commuting Habits, Elliot Lake, 2025.



In early 2026, the City undertook a survey of those residents who commute at least 400 kilometres for work. The survey received 197 responses, suggesting that the number of residents commuting is significantly higher than the data findings from Statistics Canada and Manifold Data. Though unscientific, this number of responses (totaling 5% of the city's 3,969 residents in the labour force) suggests that there is likely a significantly higher number of residents commuting out of the region, as not every resident would have seen the survey. For those 197 residents who commute at least 400 kilometres for work, 177 commute within Ontario, 29 commute outside of Ontario but within Canada, and five commute outside of Canada.⁵ This response data is shown in Figure 9.

Figure 9: Commute Locations for Residents Travelling Over 400 Kilometres for Work.



Source: City of Elliot Lake.

With respect to identifying economic development opportunities, when asked whether they would be interested in using the Elliot Lake airport to commute to work, 178 individuals (91%) said yes, while only 18 individuals (9%) said they would not be able to. Notably, most individuals who responded to the survey noted that they travel every two weeks for work (113 respondents, 58%) while an additional 27 respondents noted that they travel for work **more frequently** than every other week (14%). Together, this suggests that 71.4% of respondents travel at least every other week for work, suggesting that targeted, deliberate flight options might present viable expansion opportunities out of the airport.

⁵ Respondents could select more than one response; in the event they commute to different locations at different times. Therefore, the total adds to a sum higher than the 197 respondents.

The Bottom Line



- The City's participation and employment rates are approximately half the provincial levels (36.1% compared to 65.0%, and 32.4% compared to 60.6%), skewed due to the City's large retirement-aged population.
- When adjusted for age, youth in the City are engaged and finding work at similar rates to their provincial counterparts.
- Residents overwhelmingly (89%) use their personal vehicle to travel to work, though 10% of residents do use active transportation when transiting to work.
- Speaking to the positive local quality of life offered, commute times are most commonly short (75% of residents commute under 15 minutes to work).
- Work from home (4% of residents) is still representative of only a small minority of workplace roles.

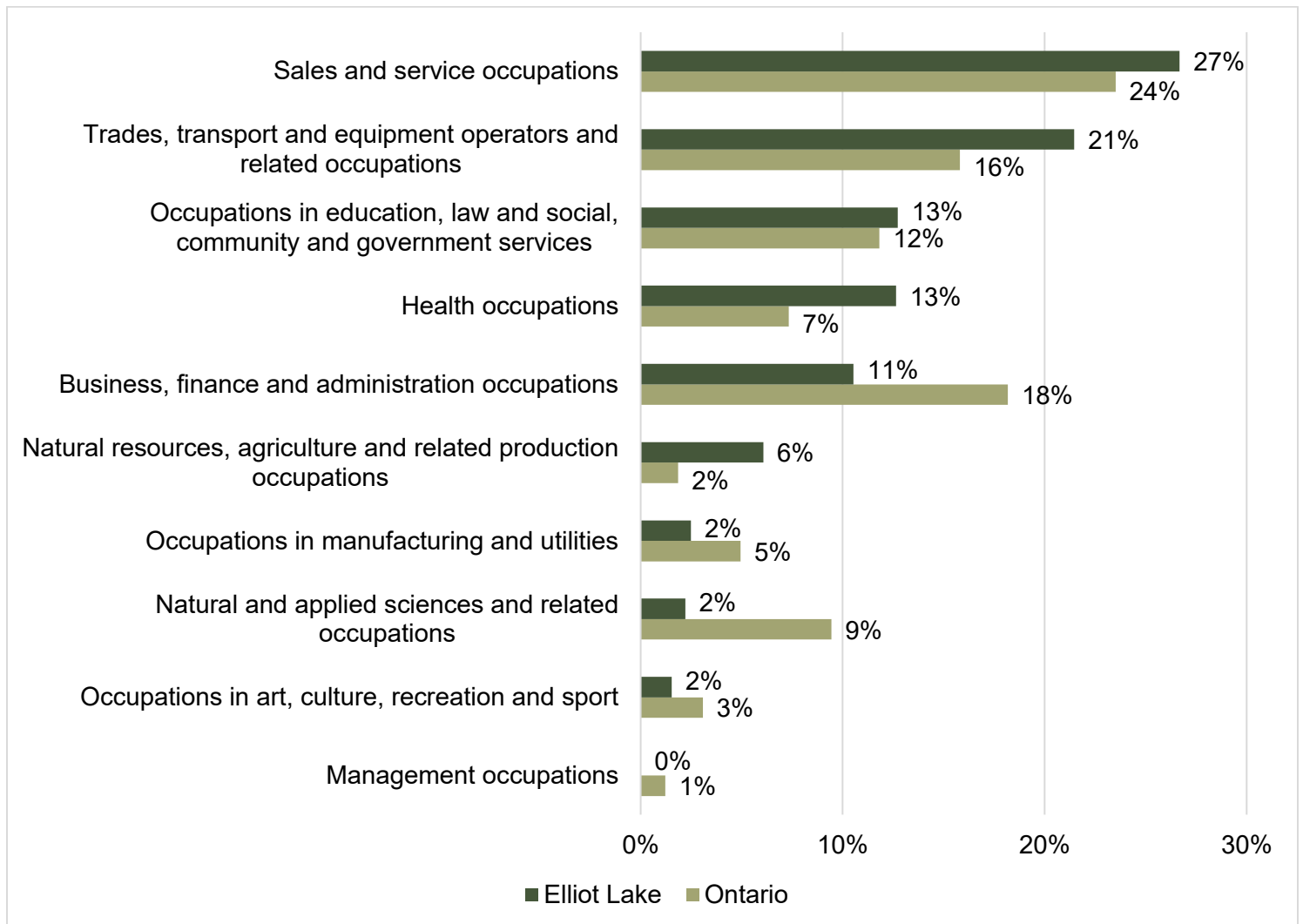
3.2. Labour Supply in Elliot Lake

Persons in the labour force can be classified using the National Occupational Classification (NOCs) codes.

Figure 10 shows that residents most commonly work in (over 20% of residents work in each occupation class):

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

Figure 10: Resident Labour Force by Occupation, 1-digit NOCs, 2025.



Source: Manifold SuperDemographics 2025.

The number of part-time and full-time workers also helps identify potential labour force engagement and supply. In the City, 44.8% of employed individuals typically worked full-time while 55.2% worked part-time. This lags slightly behind the province (54.5% of workers are employed full time across Ontario) and may be reflective of the job opportunities (service-based) or demographics (with some older residents being semi-retired and not wanting full-time employment) in Elliot Lake.

Table 7: Percentage of Employed Individuals by Full-Time or Part-Time Status, 2025.

Status	Elliot Lake	Elliot Lake %	Ontario %
Full-Time	1,803	44.8%	54.5%
Part-Time	2,226	55.2%	45.5%

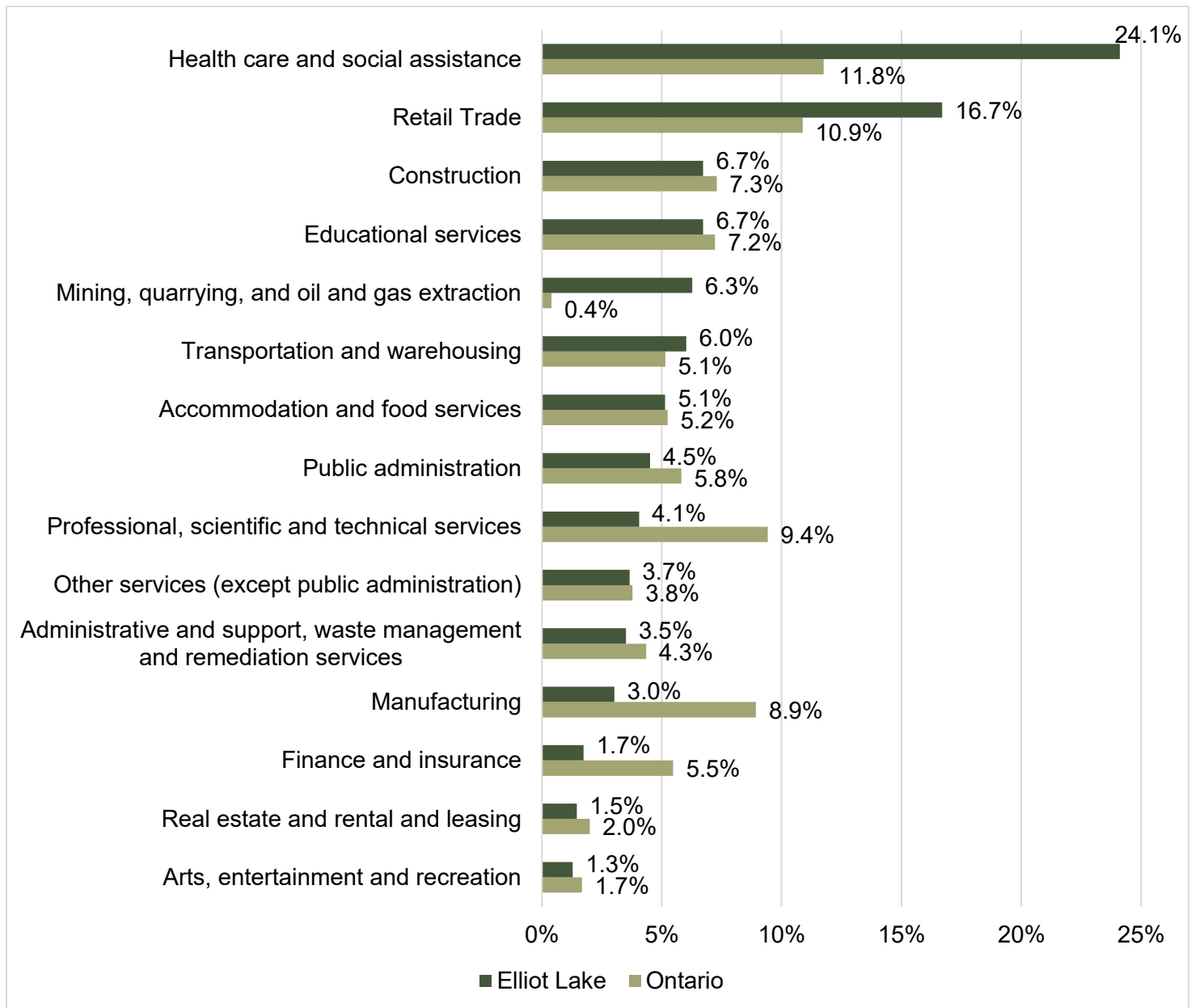
Source: Manifold SuperDemographics 2025.



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Figure 11 illustrates the industries in the City that represent at least 1.0% of all local employment. The City has a much higher concentration of residents working in health care and social assistance (nearly double the provincial level – 44.3% to 11.8%) and retail trade (16.7% locally and 10.9% provincially). Concentrations are explored in-depth in Section 4.5.

Figure 11: Labour Force by Industry, 2025.



Source: Manifold SuperDemographics 2025.

3.3. Workforce Commuting Flow

Tables 8 and 9 show the top commuting flows for persons reporting a “usual place of work” or “place of residence.”⁶ Please note 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 data, as they are from distinct years and reflect differing methodologies.
2. This data is representative of a snapshot in time of when the Census was taken (spring/early summer 2020) and are representative of only those people travelling to a usual place of work. As such, commuting data was impacted by the pandemic, leading to a decrease in residents with a “usual place of work”.
3. The tables only present geographies where at least 15 individuals commute to, or commute from. Totals presented within the tables include all geographies and therefore the subtotals will not add up to the total figures.
4. To attempt to adjust for the challenges with Census commuting data, the City of Elliot Lake conducted a resident survey to gather commuting information, which was profiled in section 3.1.

Table 8: Top Places to Work for Elliot Lake Residents, 2021.

Place of Work	Total	Male	Female
Elliot Lake	1,850	750	1,100
Blind River	55	20	40
Greater Sudbury / Grand Sudbury	50	35	10
Sault Ste. Marie	30	25	10
Thunder Bay	30	30	0
Algoma, Unorganized North	25	25	0
The North Shore	15	15	0
Kenora, Unorganized	15	15	0
Total residents with a usual place of work	2,150	965	1,180
# of residents working outside of Elliot Lake	300	215	80
% of residents working outside the City	14%	22%	7%

Source: Statistics Canada, Commuting Flows Tables 2021.

⁶ Please note, subtotals (male and female) may not equal totals due to rounding and privacy issues.

Table 9: Top Communities for Elliot Lake Business to Attract Labour From, 2021.

Place of Residence	Total	Male	Female
Elliot Lake	1,850	750	1,100
Blind River	25	10	20
Spanish	25	0	15
The North Shore	25	0	20
Huron Shores	20	10	10
Espanola	15	0	15
Total people working inside Elliot Lake	1,970	770	1,190
# of people working inside Elliot Lake who live outside the City	120	20	90
% of people working inside Elliot Lake who live outside the City	6%	3%	8%

Source: Statistics Canada, Commuting Flows Tables 2021.

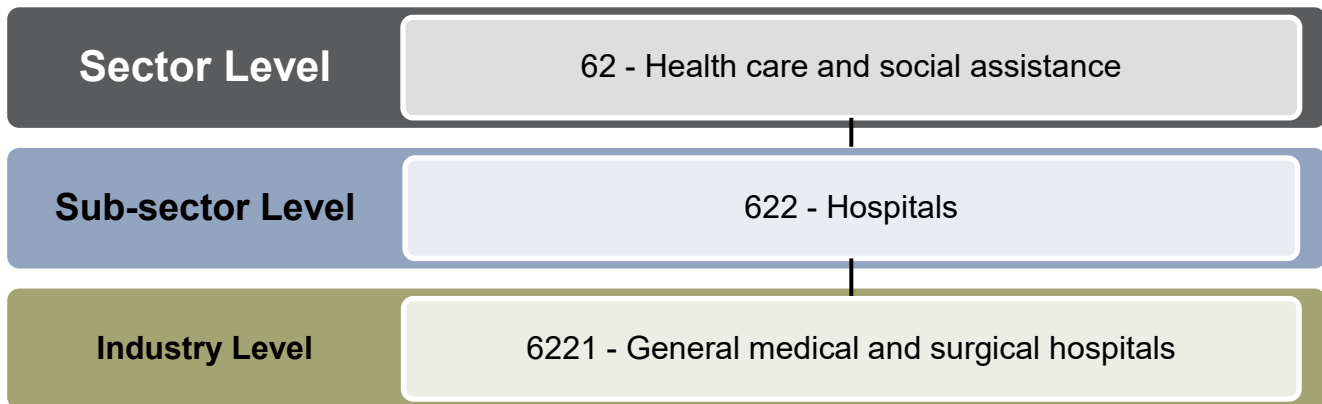


4. Economic Base Analysis

This section investigates the local economy pertinent to Elliot Lake; that is, the jobs and businesses that drive the local economy.⁷ Section 5 presents the same data for a broader economic area; Blind River, Elliot Lake, Huron Shores, Sables-Spanish Rivers, Spanish, and the North Shore. This is done to present a generalized economic picture of the business landscape that investors or potential entrepreneurs can expect to engage with. While no geography is going to perfectly capture the relevant economy in its entirety, this represents the best efforts to capture the relevant economic picture.

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

The “North American Industry Classification System” (NAICS) of classifying industries is used for this report. The largest groupings or aggregations of industry categories are called sectors, which are broken down into sub-sectors, which are then further broken down into Industries. An example of this breakdown follows: the Sector is ‘health care and social assistance’. The Sub-sector of this would be ‘hospitals’. The Industry of this sub-sector is ‘general medical and surgical hospitals’.



⁷ Discussions with staff called into question how accurately this data reflected “on the ground” realities. Challenges were noted with respect to purchasing data and business size data specifically, with uncertainty regarding the significant industry outlays and large number of businesses with over 50 employees. This data presented here reflects the most accurate and timely data available but does not replace the findings and discussions with residents, which will form the bulk of the Strategic Plan and its process.

4.1. Employment Profile

Between 2014 and 2024 Elliot Lake saw job growth of 4% (141 positions) The primary employment sectors in the City are health care and social assistance and retail trade; each employing over 500 people. However, the City has a host of sectors with a sizable contribution to the economy, as seven other industries have at least 100 residents employed. Table 10 notes the size of Elliot Lake's sectors and the rate of change from 2014-2024 of each. Please note that job counts will not reflect recent closures impacting manufacturing in the community.

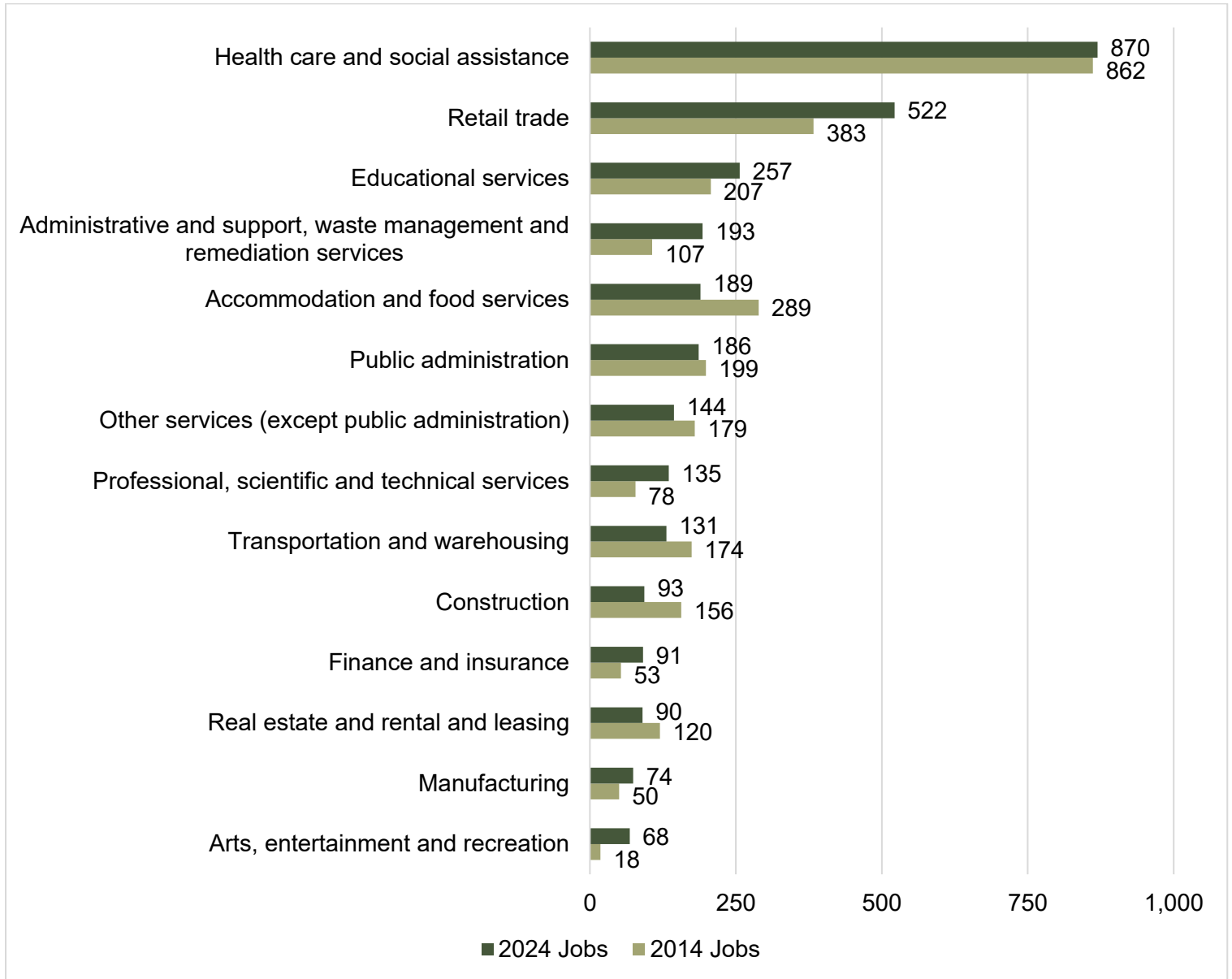
Table 10: Employment Growth by Sector, Elliot Lake and Ontario, 2014-2024.

Description	2024 Jobs	2014-2024 Change	City % Jobs Change	Ontario % Jobs Change
Health care and social assistance	870	8	1%	32%
Retail trade	522	138	36%	3%
Educational services	257	50	24%	22%
Administrative and support, waste management and remediation services	193	86	81%	6%
Accommodation and food services	189	-99	-34%	10%
Public administration	186	-12	-6%	25%
Other services (except public administration)	144	-35	-20%	-4%
Professional, scientific and technical services	135	57	73%	41%
Transportation and warehousing	131	-43	-25%	26%
Construction	93	-63	-40%	26%
Finance and insurance	91	37	70%	24%
Real estate and rental and leasing	90	-30	-25%	15%
Manufacturing	74	24	48%	4%
Arts, entertainment and recreation	68	50	280%	17%
Undisclosed	52	17	48%	55%
Mining, quarrying, and oil and gas extraction	31	1	4%	19%
Information and cultural industries	27	5	21%	1%
Utilities	15	15	N/A	14%
	3,169	141	4%	17%

Source: Lightcast 2025.3.

To better understand how each sector supports jobs, Figure 12 shows 2014 and 2024 job counts for all industries with over 50 jobs in 2024 in the City. Each of the top four industries by job counts in 2024 saw increases since 2014, speaking to their stability.

Figure 12: Largest Industries by Number of Jobs, Elliot Lake, 2014 and 2024.



Source: Lightcast 2025.3.

Table 11 breaks job count data into further subcategories, presenting 2024 job count figures for the top industries in the City. The importance of the full suite of health care services is seen in the Table, as a variety of services all profile highly.⁸ Employment services saw a significant increase from 0 jobs in 2014 to 111 in 2024. This change is likely due to a change in job count reporting (i.e., a shift from in-house employment to a third party employment service) for large employers in the municipality, rather than the beginning of a new, suddenly-very-large, industry.

Table 11: Industry Job Counts, 2014 and 2024, Elliot Lake.

Description	2014 Jobs	2024 Jobs	2014-2024 Job Change	2014-2024 % Job Change
General medical and surgical hospitals	372	396	25	7%
Elementary and secondary schools	160	208	49	31%
Full-service restaurants and limited-service eating places	226	183	-43	-19%
Grocery and convenience retailers	128	169	40	32%
Individual and family services	56	131	75	135%
Local, municipal and regional public administration	107	125	18	17%
Employment services	0	111	111	N/A
School and employee bus transportation	26	96	70	271%
Health and personal care retailers	83	87	4	4%
Offices of physicians	49	79	30	61%
Automotive repair and maintenance	48	75	27	57%
Nursing care facilities	125	75	-50	-40%
Lessors of real estate	99	71	-29	-29%
Services to buildings and dwellings	71	62	-9	-13%
Building equipment contractors	69	58	-10	-15%
Other miscellaneous store retailers	<10	58	N/A	N/A
Community care facilities for the elderly	79	56	-23	-29%
Child day-care services	67	52	-15	-22%

Source: Lightcast 2025.3.

⁸ Please note, N/A is reflective of either a change from 0 (i.e., an increase in “infinite” percent) or where job counts are below 10, as specific counts under 10 are not disclosed for privacy reasons.

4.2. Economic Output

Table 12 illustrates industries with the highest level of economic output as measured by total sales. Average wages by industry are also illustrated. As Health care and social assistance is the area's largest employer, it is a significant positive that average wages within the sector are also high, promoting once again a strong quality of life within the community. As above, it should be noted that the data provided here does not reflect the closure of manufacturing businesses in recent years in Elliot Lake, which will greatly impact the data.

Table 12: Economic Output by Industry, Elliot Lake, 2023.

Industry	Sales	Average Wages
Health care and social assistance	\$94,929,110	\$55,952
Manufacturing	\$59,445,856	\$64,462
Real estate and rental and leasing	\$53,293,166	\$42,215
Public administration	\$47,751,413	\$70,703
Educational services	\$31,803,707	\$63,216
Retail trade	\$30,993,458	\$29,022
Construction	\$28,169,031	\$64,315
Administrative and support, waste management and remediation services	\$19,404,099	\$39,794
Transportation and warehousing	\$15,087,410	\$34,293
Accommodation and food services	\$13,849,803	\$19,428
Professional, scientific and technical services	\$13,395,968	\$60,756
Finance and insurance	\$13,346,504	\$51,393
Mining, quarrying, and oil and gas extraction	\$11,586,935	\$99,760
Information and cultural industries	\$9,392,657	\$53,162
Other services (except public administration)	\$9,339,671	\$54,387
Arts, entertainment and recreation	\$8,999,659	\$44,114
Utilities	\$3,109,302	\$98,181
All industries	\$1,575,123,154	\$56,044

Source: Lightcast 2025.3, based on 2023 National Input-Output Tables by StatsCan.

4.3. Export Sales

Exports show the amount of money that is spent by businesses outside the City in exchange for goods or services produced by an industry located in Elliot Lake. In 2023, total export sales from the City amounted to just over \$350 million. Table 13 presents the largest drivers of external revenues into the City. As with other economic figures, health care and social assistance once again stands at the top. This is expected given the prevalence of the sector in Elliot Lake but also because the City serves as a regional hub, serving the surrounding region and bringing dollars into Elliot Lake in that way.

Table 13: Top Export Dollars Flowing into Elliot Lake by Industry, 2023.

Industry	Total Export Sales
Health care and social assistance	\$80,832,713
Manufacturing	\$49,827,054
Public administration	\$43,948,699
Real estate and rental and leasing	\$35,958,974
Educational services	\$28,473,597
Retail trade	\$16,587,047
Administrative and support, waste management and remediation services	\$14,822,970
Transportation and warehousing	\$13,697,561
Finance and insurance	\$10,333,698
Mining, quarrying, and oil and gas extraction	\$10,237,723
Professional, scientific and technical services	\$9,942,554
Construction	\$9,782,489
Arts, entertainment and recreation	\$6,757,429
Accommodation and food services	\$6,738,517
Other services (except public administration)	\$6,221,956
Information and cultural industries	\$5,526,356
Total	\$352,329,881

Source: Lightcast 2025.3, based on 2023 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 from each subsector within the City. Table 14 presents the top industries in terms of total purchases (of goods produced by that subsector), as well as the percentage of those purchases that are in-region and out-of-region. As expected, given the size of the City, most industries rely on purchasing a majority of their goods from outside Elliot Lake.

Table 14: Top Industries by Purchasing Power, Elliot Lake, 2023.

Industry	Total Purchases from Sector	% Purchased in the City	% Purchased Out of Elliot Lake
Manufacturing	\$44,491,263	10%	90%
Professional, scientific and technical services	\$14,756,175	19%	81%
Administrative and support, waste management and remediation services	\$12,795,530	31%	69%
Health care and social assistance	\$11,518,751	66%	34%
Real estate and rental and leasing	\$8,935,964	51%	49%
Finance and insurance	\$8,887,901	8%	92%
Wholesale trade	\$8,405,214	0%	100%
Transportation and warehousing	\$8,137,489	10%	90%
Construction	\$7,850,286	12%	88%
Information and cultural industries	\$5,447,391	25%	75%
Retail trade	\$3,672,525	37%	63%
Accommodation and food services	\$3,343,741	19%	81%
Utilities	\$3,336,462	5%	95%

Source: Lightcast 2025.3, based on 2023 National Input-Output Tables by StatsCan.

4.5. Location Quotient Analysis

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

Location quotient helps two economies of different sizes be compared. For example, noting that there were 870 jobs in health care and social assistance in the City in 2024 and 972,274 in Ontario does not provide any context to which is more valuable to their respective economy. It is known that there are substantially more jobs across the province, but not **how many more**, and therefore whether health care workers are more **prevalent** locally compared to provincial figures. As such, the comparison is a moot point. Location quotient overcomes this limitation, by comparing the percentage of industry jobs in a local economy with the corresponding provincial percentage.

So, to continue with the example of health care and social assistance workers, the 870 jobs in the City account for 27.4% of all local jobs. The provincial figure of 972,274 accounts for 11.8% of the total number of jobs in the province. As such, to calculate the location quotient, 27.4% is divided by 11.8%, which results in a LQ of 2.14571 (2.1).

A location quotient of less than 1.0 indicates less occupational demand than in the benchmark area(s). A location quotient greater than 1.00 indicates a higher concentration of occupational demand than in the benchmark area. Finally, a location quotient greater than 1.20 usually indicates a high concentration of occupational demand than in the benchmark area (so, an LQ of 2.1 indicates a **doubly** more concentrated industry locally).

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 15 presents LQ data at a 2-digit level compared to the national economy in both 2014 and 2024 while Table 16 presents the same data compared to the province.

The location quotient at the broadest industry classification level indicates that Elliot Lake has seen increased specialization compared to the rest of Canada in a number of service-based sectors (retail trade; arts, entertainment and recreation; and administrative and support, waste management and remediation services).

Table 15: National Location Quotient Analysis by Sector.

Description	2014 National LQ	2024 National LQ
Mining, quarrying, and oil and gas extraction	2.8	2.3
Health care and social assistance	2.7	2.0
Retail trade	1.2	1.5
Real estate and rental and leasing	1.7	1.1
Other services (except public administration)	1.3	1.0
Arts, entertainment and recreation	0.3	1.0
Administrative and support, waste management and remediation services	0.6	1.0
Educational services	1.0	1.0
Accommodation and food services	1.5	0.8
Public administration	1.1	0.8
Transportation and warehousing	1.3	0.7
Utilities	0.0	0.7
Finance and insurance	0.4	0.5
Professional, scientific and technical services	0.3	0.4
Information and cultural industries	0.3	0.4
Construction	0.8	0.4
Manufacturing	0.2	0.2
Agriculture, forestry, fishing and hunting	0.7	0.0
Wholesale trade	0.2	0.0

Source: Lightcast 2025.3.

As with the national data, Elliot Lake has again seen an increase in service-based sectors compared to the provincial economy, suggesting perhaps an expansion of local services building off the health care and social assistance hub that exists within the City.

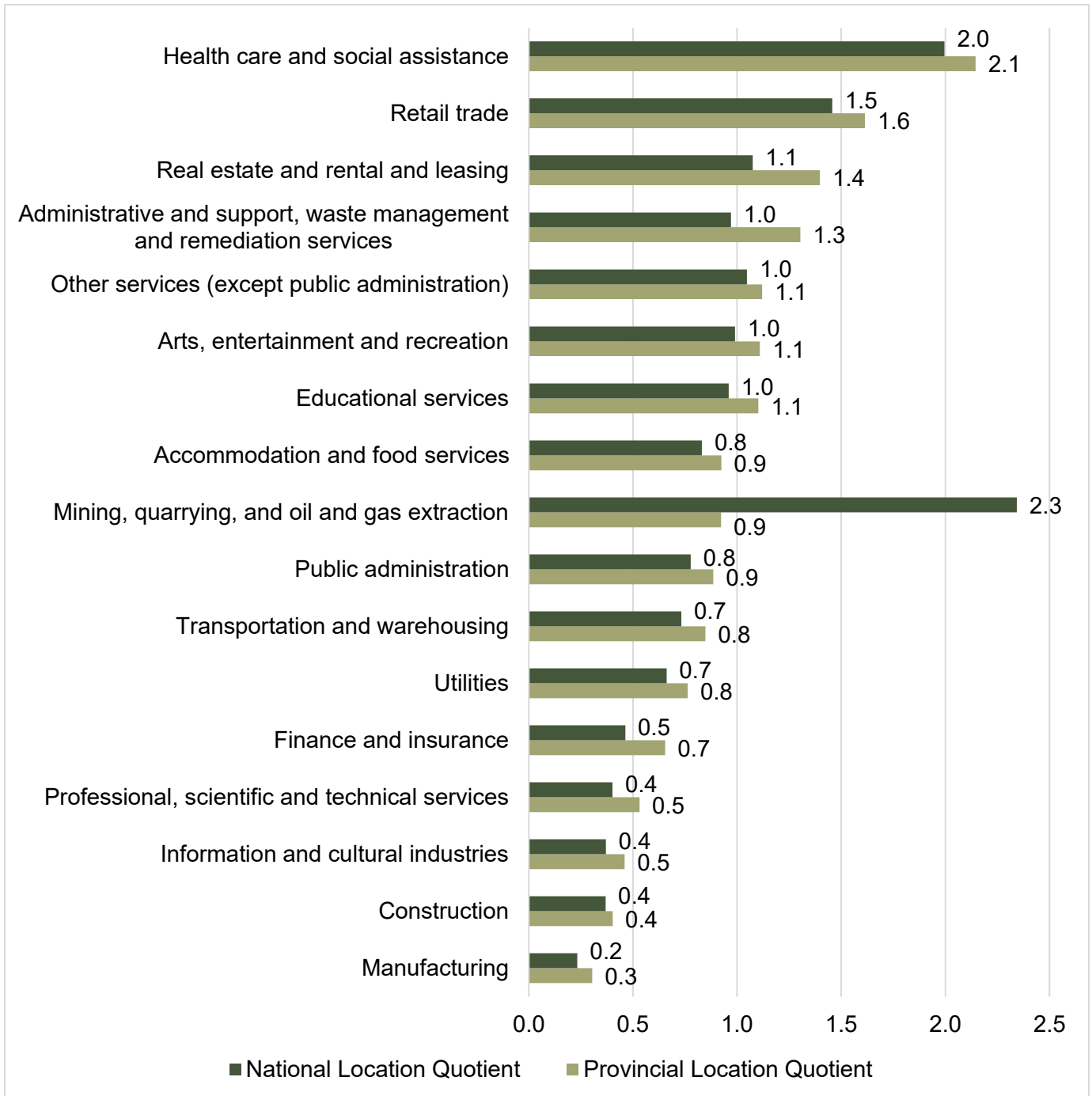
Table 16: Provincial Location Quotient Analysis by Sector.

Description	2014 Provincial LQ	2024 Provincial LQ
Health care and social assistance	2.6	2.1
Retail trade	1.1	1.6
Real estate and rental and leasing	1.8	1.4
Administrative and support, waste management and remediation services	0.7	1.3
Other services (except public administration)	1.3	1.1
Arts, entertainment and recreation	0.3	1.1
Educational services	1.0	1.1
Accommodation and food services	1.4	0.9
Mining, quarrying, and oil and gas extraction	0.7	0.9
Public administration	1.1	0.9
Transportation and warehousing	1.2	0.8
Utilities	0.0	0.8
Finance and insurance	0.4	0.7
Professional, scientific and technical services	0.4	0.5
Information and cultural industries	0.4	0.5
Construction	0.7	0.4
Manufacturing	0.2	0.3
Agriculture, forestry, fishing and hunting	0.5	0.0
Wholesale trade	0.2	0.0

Source: Lightcast 2025.3.

Figure 13 presents location quotient data once again, this time presenting data for both the province and national economies compared to Elliot Lake.

Figure 13: Provincial and National LQ, 2024, Elliot Lake Industries



Source: Lightcast 2025.3.

4.5.1. Location Quotient Analysis by Industry

The following tables list the industries that are concentrated in Elliot Lake's local economy and represent at least 1% of jobs in the City in 2024.

Table 17: Concentrated Industries, Relative to the Rest of Canada, 2014 and 2024

Description	Jobs	2014 LQ	2024 LQ
School and employee bus transportation	96	4.5	21.2
Agricultural, construction and mining machinery manufacturing	33	1.1	6.5
General medical and surgical hospitals	396	4.2	4.1
Individual and family services	131	2.3	4.0
Employment services	111	0.0	3.8
Other miscellaneous store retailers	58	0.2	3.4
Lessors of real estate	71	4.0	3.2
Automotive repair and maintenance	75	2.0	3.1
Agencies, brokerages and other insurance related activities	50	0.0	2.8
Community care facilities for the elderly	56	4.7	2.6

Source: Lightcast Analyst 2025.3.

Table 18: Concentrated Industries, Relative to the Rest of Ontario, 2014 and 2024

Description	Jobs	2014 Provincial LQ	2024 Provincial LQ
School and employee bus transportation	96	3.5	19.6
Agricultural, construction and mining machinery manufacturing	33	0.0	8.9
General medical and surgical hospitals	396	4.6	4.4
Individual and family services	131	2.2	4.0
Community care facilities for the elderly	56	4.6	3.7
Automotive repair and maintenance	75	2.2	3.6
Other miscellaneous store retailers	58	0.0	3.3
Lessors of real estate	71	4.0	3.2
Grocery and convenience retailers	169	1.9	2.8
Employment services	111	0.0	2.7

Source: Lightcast Analyst 2025.3.

4.6. Shift-Share Analysis

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

- National economic growth: regional job growth/decline that is attributable to the growth, stability, or decline of the entire Canadian economy. Industries will be impacted positively or negatively by the state of the Canadian economy and consumer spending at a national level, external to any local factors.
- Industry growth: regional job growth/decline that is attributable to the growth, stability, or decline of that economic activity in the Canadian economy (with the economic growth component removed). General industry trends are outside the influence of local actors and are therefore removed from the local impact.
- Local economic growth: local job growth/decline that is attributable to the local economy because it is growing/declining more or less quickly than jobs in the larger economy (with the Canadian economic and industry growth components removed).

This tool, when correctly interpreted, provides greater descriptive power than the location quotient method. Shift-share analysis allows the examination of changes through time (trends) versus the static snapshot of location quotients.



4.6.1. Shift-Share Analysis within the Local Economy

This subsection looks to the past (2014) and current figures (2024) to assess which sectors have been most positively impacted by local factors. The example below applies the model to the two digit sector “Retail trade”:

From 2014 to 2024 this sector saw an increase of 138 jobs in Elliot Lake.

- It would have been expected that the sector **decreased by 44** positions based on large-scale industry factors that are relevant to the sector regardless of geographic location.
- National economic growth factors and their impact on the national sector would have been expected to lead to **growth of 52 jobs** over the same period.
- As such, before accounting for local factors, the sector would have been **expected to gain 8 jobs**.
- **Instead, the local sector grew by 138 jobs**, suggesting that **130 new jobs** can be applied to factors specific to Elliot Lake.

Table 19 begins by presenting shift-share analysis for all two-digit industries in the city. Table 20 then allocates employment changes for the industries most positively impacted by local effects to national, industry and regional/local effects. Finally, Table 21 presents the five industries most negatively impacted by regional/local effects from 2014-2024.

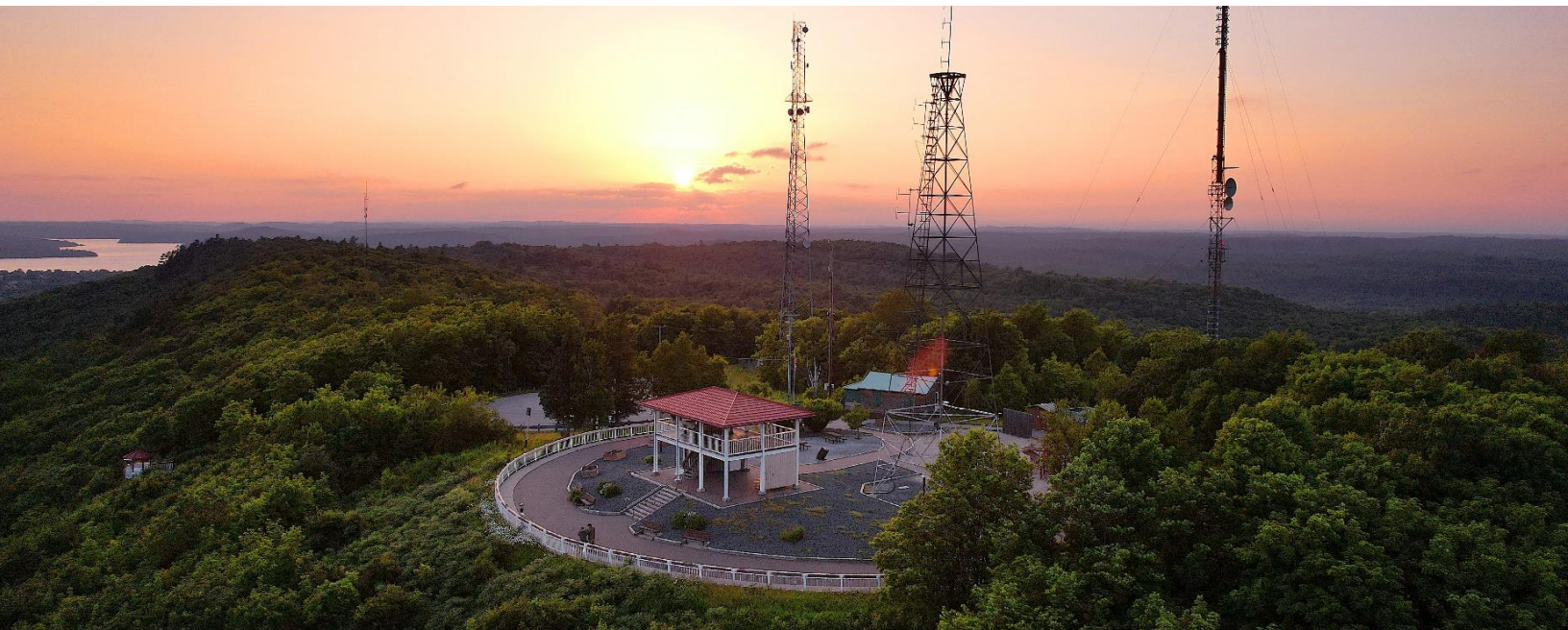


Table 19: Shift-Share Analysis: 2-Digit NAICS, Elliot Lake, 2014-2024

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Retail trade	138	-44	52	130
Administrative and support, waste management and remediation services	86	-11	15	83
Arts, entertainment and recreation	50	1	2	47
Professional, scientific and technical services	57	16	11	31
Finance and insurance	37	3	7	27
Manufacturing	24	-5	7	22
Utilities	15	0	0	15
Educational services	50	16	28	6
Mining, quarrying, and oil and gas extraction	1	-7	4	4
Information and cultural industries	5	-2	3	4
Management of companies and enterprises	0	0	0	0
Undisclosed	17	16	5	-4
Agriculture, forestry, fishing and hunting	-31	-10	4	-25
Other services (except public administration)	-35	-26	24	-34
Wholesale trade	-34	-4	5	-35
Real estate and rental and leasing	-30	-8	16	-38
Public administration	-12	20	27	-59
Transportation and warehousing	-43	9	24	-76
Construction	-63	0	21	-85
Accommodation and food services	-99	-21	39	-118
Health care and social assistance	8	160	118	-270
Total	141	104	413	-375

Source: Lightcast 2025.3.

Table 20: Shift-Share Analysis: Competitive Industries, Elliot Lake, 2014-2024.

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Employment services	111	0	0	111
School and employee bus transportation	70	-7	4	73
Other miscellaneous store retailers	55	2	0	53
Individual and family services	75	18	8	50
Agencies, brokerages and other insurance related activities	50	0	0	50
Grocery and convenience retailers	40	-17	18	40
Offices of dentists	39	3	1	35
Personal care services	36	-1	2	34
Amusement parks and arcades	31	0	0	31
Agricultural, construction and mining machinery manufacturing	27	-1	1	27

Source: Lightcast 2025.3.

Table 21: Shift-Share Analysis: Declining Industries, Elliot Lake, 2014-2024.

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Nursing care facilities	-50	29	17	-96
Full-service restaurants and limited-service eating places	-43	-5	31	-69
General freight trucking	-49	5	7	-61
Community care facilities for the elderly	-23	20	11	-53
Provincial and territorial public administration	-26	8	11	-44

Source: Lightcast 2025.3.

4.7. Employer Structure

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

- Have an employee workforce for which they submit payroll remittances to Canada Revenue Agency.
- Have a minimum of \$30,000 in annual revenue.
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

Statistics Canada divides businesses into two major groupings:

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

Businesses without employees correspond to the “indeterminate” employment category. 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).

According to the Canadian Business Registry, Elliot Lake had 519 businesses as of June 2025, of which 225 (43.4%) had employees. Of these 225 businesses with employees, the majority had between one and nine employees (159, or 70.7%). Comparatively, 14 businesses (6.2%) had over 50 employers. These figures are presented in Table 22.

Table 22: Business Counts by Size, Elliot Lake, June 2025.

	1 to 9 Employees	10 to 49 Employees	50+ Employees	Indeterminate	Total
Number of Businesses	159	52	14	294	519

Source: Canadian Business Patterns June 2025 from Lightcast 2025.3.

Table 23 breaks business count data down by sector, profiling changes in small business and total business (including those without employees) counts from 2019 to 2025. *Other services*, a unique sector including maintenance on motor vehicles, machinery, equipment and other products; providing personal care services, funeral services, laundry services and other services to individuals, (e.g., pet care); grant-making, advocating (promoting) various social and political causes, etc. is the largest sector by small business counts, again suggesting Elliot Lake's economy offers service sector growth in unique industries.

Table 23: Business Counts by Sector, 2019 and 2025, Elliot Lake

Description	Small Business (1 to 9 employees)		Total Businesses	
	2019	2025	2019	2025
Other services (except public administration)	28	24	63	59
Undisclosed	14	20	49	48
Construction	22	19	52	49
Retail trade	33	19	69	54
Health care and social assistance	13	17	41	53
Real estate and rental and leasing	14	13	91	91
Professional, scientific and technical services	13	11	31	29
Administrative and support, waste management and remediation services	6	10	15	28
Finance and insurance	8	4	22	21
Accommodation and food services	5	4	18	17
Agriculture, forestry, fishing and hunting	3	3	7	4
Manufacturing	3	3	13	11
Wholesale trade	4	3	11	6
Transportation and warehousing	1	3	21	21
Information and cultural industries	3	2	6	5
Mining, quarrying, and oil and gas extraction	1	1	3	3
Utilities	1	1	2	1
Educational services	0	1	4	4
Arts, entertainment and recreation	2	1	14	10
Management of companies and enterprises	0	0	3	2

Source: Canadian Business Patterns June 2025 from Lightcast 2025.3.

Table 24 notes the subsectors in Elliot Lake by businesses **only with employees**, excluding self-employed individuals. Within Elliot Lake, top subsectors with employees are most heavily represented by construction industries (residential building construction, finishing contractors or equipment contractors, etc.).

Table 24: Top Sectors by Businesses with Employees, Elliot Lake, June 2025.

Sector	Businesses with Employees
Services to buildings and dwellings	9
Full-service restaurants and limited-service eating places	9
Building equipment contractors	6
Depository credit intermediation	6
Lessors of real estate	6
Legal services	6
Offices of physicians	6
Building finishing contractors	5
Health and personal care retailers	5

Source: Canadian Business Patterns June 2025 from Lightcast 2025.3.



5. Economic Base Analysis – Labour Recruitment Area

This section mirrors the previous analysis in Section 4 but profiles the broader economic area of

- Blind River.
- Elliot Lake.
- Huron Shores.
- Sables-Spanish Rivers.
- Spanish.
- The North Shore.

This is done because employment areas and labour attraction geographies are fluid. Businesses do not only recruit from their “hometown” and residents do not only work within their community. As such, any new business looking to operate in Elliot Lake will make use of labour living elsewhere. Reflective of that reality and developed through discussions with Elliot Lake staff and Statistics Canada commuter patterns profiled above, the above six communities constitute Elliot Lake’s “Labour Recruitment Area” (LRA).



5.1. Employment Profile

The primary employment sectors across the labour recruitment area remain health care and social assistance and retail trade. Health care employs nearly 1,500 people while retail trade approaches 1,000 employees in the area.

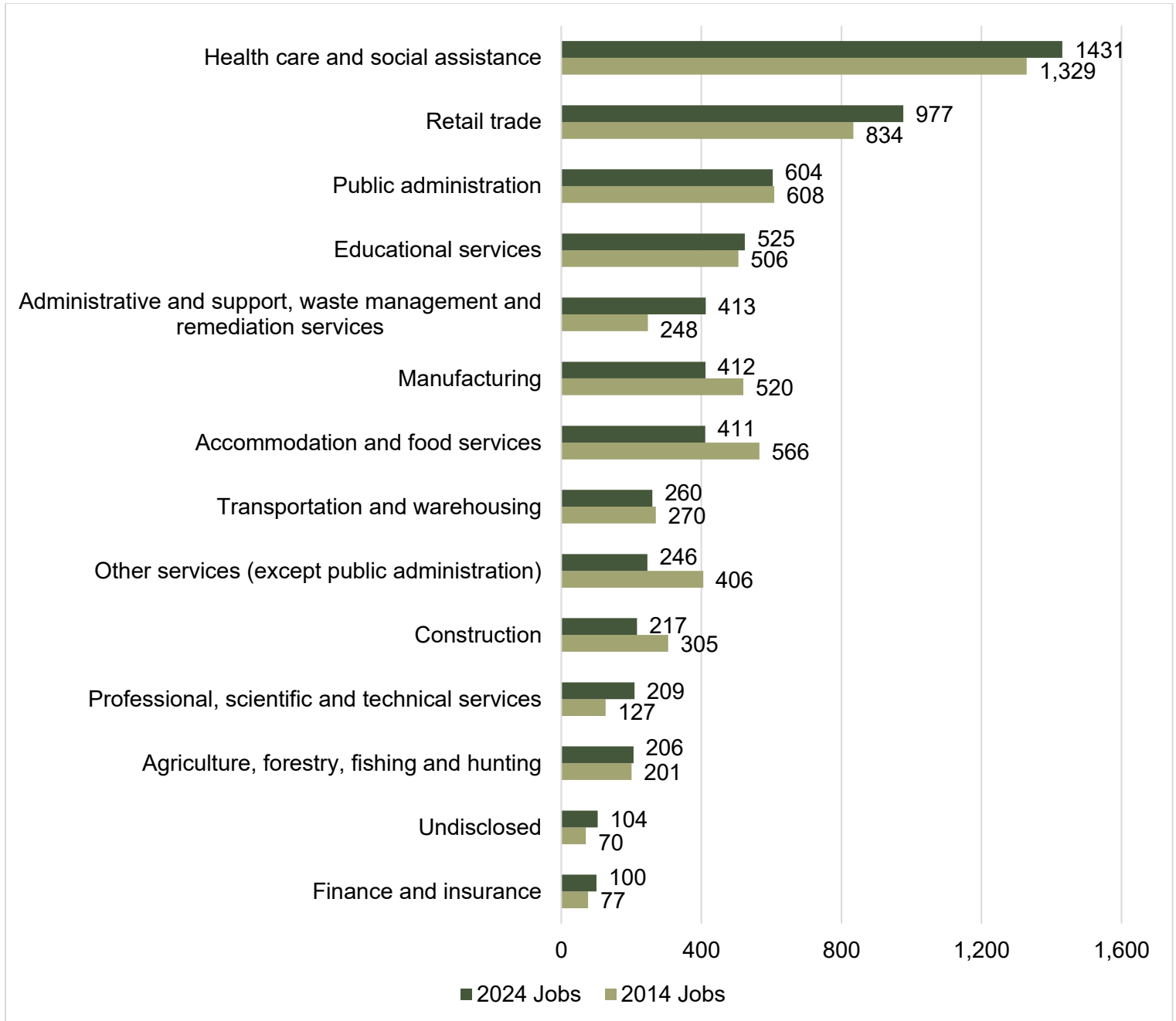
Table 25: Employment Growth by Sector, Labour Recruitment Area and Ontario, 2014-2024.

Description	2024 Jobs	2014-2024 Change	LRA % Jobs Change	Ontario % Jobs Change
Health care and social assistance	1,431	102	8%	32%
Retail trade	977	142	17%	3%
Public administration	604	-4	-1%	25%
Educational services	525	19	4%	22%
Administrative and support, waste management and remediation services	413	165	67%	6%
Manufacturing	412	-109	-21%	4%
Accommodation and food services	411	-154	-27%	10%
Transportation and warehousing	260	-10	-4%	26%
Other services (except public administration)	246	-160	-39%	-4%
Construction	217	-89	-29%	26%
Professional, scientific and technical services	209	83	66%	41%
Agriculture, forestry, fishing and hunting	206	5	3%	-9%
Undisclosed	104	34	48%	55%
Finance and insurance	100	24	31%	24%
Real estate and rental and leasing	100	-29	-23%	15%
Mining, quarrying, and oil and gas extraction	96	54	128%	19%
Arts, entertainment and recreation	76	36	92%	17%
Wholesale trade	55	-63	-54%	8%
All	6,531	62	1%	17%

Source: Lightcast 2025.3.

To again better understand how each sector supports jobs, Figure 14 shows 2014 and 2024 job counts for all industries with at least 100 jobs in 2024 in the labour recruitment area.

Figure 14: Largest Industries by Number of Jobs, LRA, 2014 and 2024.



Source: Lightcast 2025.3.

Table 26 breaks job count data into further subcategories, presenting 2024 job count figures for the top 20 four-digit industry classifications in the labour recruitment area. Healthcare, education, and government services are the most notably industries by job counts in the area.

Table 26: Industry Job Counts, 2014 and 2024, Labour Recruitment Area.

Description	2014 Jobs	2024 Jobs	2014-2024 Job Change	2014-2024 % Job Change
General medical and surgical hospitals	523	636	113	22%
Elementary and secondary schools	458	452	-6	-1%
Local, municipal and regional public administration	203	296	93	46%
Full-service restaurants and limited-service eating places	417	277	-139	-33%
Grocery and convenience retailers	255	261	6	2%
Services to buildings and dwellings	148	200	52	35%
Individual and family services	146	199	53	37%
Farms	157	183	27	17%
Indigenous public administration	231	166	-65	-28%
Child day-care services	99	145	46	47%
Health and personal care retailers	133	134	1	1%
Automotive repair and maintenance	126	134	8	6%
Basic chemical manufacturing	22	128	105	469%
School and employee bus transportation	73	126	53	73%
Out-patient care centres	57	122	64	112%
Traveller accommodation	113	114	1	1%
Automobile dealers	60	113	53	89%
Employment services	0	111	111	Insf. Data
Offices of physicians	60	110	51	85%
Building material and supplies dealers	69	108	39	56%

Source: Lightcast 2025.3.

5.2. Economic Output

Table 27 illustrates industries with the highest level of economic output as measured by total sales (sales of at least \$15 million), with average wages again presented. Average wages for the top producing industries are quite strong across the region, with five of the top six sectors by sales having wages above \$55,000.

Table 27: Economic Output by Industry, Labour Recruitment Area 2023.

Industry	Sales	Average Wages
Manufacturing	\$503,104,475	\$71,909
Health care and social assistance	\$162,562,688	\$56,564
Public administration	\$142,681,217	\$64,079
Mining, quarrying, and oil and gas extraction	\$71,930,278	\$83,775
Retail trade	\$66,335,429	\$30,955
Educational services	\$61,896,562	\$63,229
Real estate and rental and leasing	\$58,114,070	\$41,858
Construction	\$49,096,710	\$65,710
Administrative and support, waste management and remediation services	\$47,660,603	\$43,222
Accommodation and food services	\$42,592,154	\$21,182
Transportation and warehousing	\$33,104,434	\$37,606
Agriculture, forestry, fishing and hunting	\$27,238,192	\$42,978
Utilities	\$23,592,228	\$91,023
Other services (except public administration)	\$21,195,019	\$49,916
Professional, scientific and technical services	\$19,372,605	\$60,347
All industries	\$1,382,158,255	\$51,641

Source: Lightcast 2025.3, based on 2023 National Input-Output Tables by StatsCan.

5.3. Export Sales

In 2023, total export sales from the Labour Recruitment Area generated nearly \$1.1 billion dollars, with nearly half (40.1%) being generated by manufacturing businesses. Though again, recent manufacturing business closures will not be reflected in this data.

Table 28: Top Export Dollars Flowing into the LRA by Industry, 2023.

Industry	Total Export Sales
Manufacturing	\$442,682,024
Health care and social assistance	\$134,724,941
Public administration	\$133,747,029
Mining, quarrying, and oil and gas extraction	\$66,622,730
Educational services	\$55,070,362
Administrative and support, waste management and remediation services	\$34,350,405
Retail trade	\$31,855,713
Real estate and rental and leasing	\$27,354,150
Transportation and warehousing	\$25,928,388
Accommodation and food services	\$22,566,938
Agriculture, forestry, fishing and hunting	\$20,048,323
Construction	\$16,797,518
Professional, scientific and technical services	\$13,195,964
Utilities	\$12,742,872
Other services (except public administration)	\$12,046,365
Finance and insurance	\$10,569,954
Wholesale trade	\$8,347,492
Arts, entertainment and recreation	\$6,697,176
All industries (including those not in the above rows)	\$1,081,328,627

Source: Lightcast 2025.3, based on 2023 National Input-Output Tables by StatsCan.

5.4. Industry Supply Chain Analysis

Table 29 presents the top industries in terms of total purchases, and the percentage that are in-region and out-of-region. As expected, manufacturing dominates the purchasing accounts, and much of it is purchased outside of the region (a reality that is unlikely to change due to the global nature of manufacturing businesses).

Table 29: Top Industries by Purchasing Power, LRA, 2023.

Industry	Total Purchases from Sector	% Purchased in the LRA	% Purchased Out of the LRA
Manufacturing	\$170,356,137	29%	71%
Transportation and warehousing	\$39,990,036	11%	89%
Professional, scientific and technical services	\$32,492,100	16%	84%
Agriculture, forestry, fishing and hunting	\$32,419,635	9%	91%
Administrative and support, waste management and remediation services	\$29,925,326	39%	61%
Mining, quarrying, and oil and gas extraction	\$26,755,746	12%	88%
Wholesale trade	\$25,803,617	4%	96%
Health care and social assistance	\$24,259,235	62%	38%
Finance and insurance	\$21,398,227	7%	93%
Utilities	\$20,522,604	19%	81%
Real estate and rental and leasing	\$19,607,317	36%	64%
Construction	\$15,269,287	16%	84%
Information and cultural industries	\$11,572,896	17%	83%
Retail trade	\$10,001,089	38%	62%
Other services (except public administration)	\$9,172,223	25%	75%
Public administration	\$8,675,269	43%	57%
Accommodation and food services	\$7,140,185	44%	56%

Source: Lightcast 2025.3, based on 2023 National Input-Output Tables by StatsCan.

5.5. Location Quotient Analysis

As a reminder, a location quotient of less than 1.0 indicates less occupational demand than in the benchmark area(s). A location quotient greater than 1.00 indicates a higher concentration of occupational demand than in the benchmark area(s). Finally, a location quotient greater than 1.20 usually indicates a high concentration of occupational demand than in the benchmark area(s).

Table 30 presents LQ data at a 2-digit level compared to the national economy and Table 31 presents the same LQ data compared to the provincial economy.

Table 30: National Location Quotient Analysis by Sector, LRA, 2014 and 2024.

Description	2014 National LQ	2024 National LQ
Agriculture, forestry, fishing and hunting	1.4	2.0
Health care and social assistance	1.9	1.7
Retail trade	1.1	1.5
Public administration	1.5	1.4
Mining, quarrying, and oil and gas extraction	0.5	1.4
Administrative and support, waste management and remediation services	0.7	1.4
Utilities	0.5	1.3
Educational services	1.1	1.1
Accommodation and food services	1.3	1.0
Other services (except public administration)	1.3	0.9
Manufacturing	1.0	0.8
Transportation and warehousing	0.9	0.8
Real estate and rental and leasing	0.9	0.8
Arts, entertainment and recreation	0.3	0.6
Construction	0.6	0.5
Professional, scientific and technical services	0.3	0.4
Finance and insurance	0.3	0.4
Information and cultural industries	0.4	0.3
Wholesale trade	0.4	0.2

Source: Lightcast 2025.3.

Table 31: Provincial Location Quotient Analysis by Sector, LRA, 2014 and 2024.

Description	2014 Provincial LQ	2024 Provincial LQ
Mining, quarrying, and oil and gas extraction	1.8	4.0
Agriculture, forestry, fishing and hunting	2.3	2.9
Health care and social assistance	2.0	1.9
Retail trade	1.2	1.5
Public administration	1.5	1.4
Utilities	0.5	1.3
Administrative and support, waste management and remediation services	0.6	1.2
Educational services	1.1	1.1
Accommodation and food services	1.3	1.0
Other services (except public administration)	1.4	1.0
Transportation and warehousing	0.9	0.8
Manufacturing	0.8	0.7
Real estate and rental and leasing	0.9	0.7
Arts, entertainment and recreation	0.3	0.6
Construction	0.7	0.5
Professional, scientific and technical services	0.3	0.4
Information and cultural industries	0.3	0.3
Finance and insurance	0.2	0.3
Wholesale trade	0.4	0.2

Source: Lightcast 2025.3.

5.6. Shift-Share Analysis

Table 32: Shift-Share Analysis: 2-Digit NAICS, LRA, 2014-2024

Industry (NAICS classification)	Growth/ Decline	Industry Effect	National Effect	Regional / Local Effect
Administrative and support, waste management and remediation services	165	-26	34	157
Retail trade	142	-95	114	124
Mining, quarrying, and oil and gas extraction	54	-10	6	58
Agriculture, forestry, fishing and hunting	5	-64	27	42
Professional, scientific and technical services	83	25	17	40
Arts, entertainment and recreation	36	1	5	30
Utilities	31	0	3	28
Finance and insurance	24	4	10	9
Management of companies and enterprises	-1	0	0	-1
Undisclosed	34	33	10	-9
Information and cultural industries	-13	-5	7	-15
Real estate and rental and leasing	-29	-8	18	-39
Transportation and warehousing	-10	14	37	-61
Wholesale trade	-63	-13	16	-67
Educational services	19	38	69	-89
Manufacturing	-109	-51	71	-129
Construction	-89	1	42	-131
Public administration	-4	61	83	-149
Other services (except public administration)	-160	-59	55	-156
Accommodation and food services	-154	-41	77	-191
Health care and social assistance	102	247	181	-327
Total	62	55	883	-876

Source: Lightcast 2025.3.

Table 33: Shift-Share Analysis: Competitive Industries, LRA, 2014-2024.

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Employment services	111	0	0	111
Basic chemical manufacturing	105	1	3	102
Other miscellaneous store retailers	91	4	1	86
School and employee bus transportation	53	-20	10	64
Veneer, plywood and engineered wood product manufacturing	64	1	2	61
Local, municipal and regional public administration	93	5	28	61
Farms	27	-52	21	57
Metal ore mining	54	3	1	50
Agencies, brokerages and other insurance related activities	50	0	0	50
Automobile dealers	53	-4	8	49

Source: Lightcast 2025.3.

Table 34: Shift-Share Analysis: Declining Industries, LRA, 2014-2024.

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Non-ferrous metal (except aluminum) production and processing	-364	-124	50	-290
Full-service restaurants and limited-service eating places	-139	-9	57	-187
Indigenous public administration	-65	65	31	-162
Residential facilities for persons with an intellectual or developmental disability, a mental health or substance use condition	-87	6	12	-105
Elementary and secondary schools	-6	25	63	-94

Source: Lightcast 2025.3.

5.7. Employer Structure

Finally, this subsection illustrates the number and size of employers by industry in the labour recruitment area. As a reminder, businesses without employees correspond to the “indeterminate” employment category.

According to the Canadian Business Registry, the labour recruitment area had 1,259 businesses as of June 2025, of which 482 (38.3%) had employees. Of these 482 businesses with employees, 343 (71.2%) were small businesses and 25 (5.2%) had over 50 employees. These figures are presented in Table 35.

Table 35: Business Counts by Size, LRA, June 2025.

	1 to 9 Employees	10 to 49 Employees	50+ Employees	Indeterminate	Total
Number of Businesses	343	114	25	777	1,259

Source: Canadian Business Patterns June 2025 from Lightcast 2025.3.



Again, business counts are broken down to provide an industry-by-industry review of small business and total business changes since 2019.

Table 36: Business Counts by Sector, 2019 and 2025, Labour Recruitment Area

Description	Small Business (1 to 9 employees)		Total Businesses	
	2019	2025	2019	2025
Construction	58	50	145	131
Retail trade	75	47	167	128
Other services (except public administration)	59	45	146	119
Accommodation and food services	37	34	91	85
Health care and social assistance	31	27	82	91
Undisclosed	31	26	118	119
Agriculture, forestry, fishing and hunting	30	18	117	94
Real estate and rental and leasing	20	16	174	161
Professional, scientific and technical services	21	15	72	61
Administrative and support, waste management and remediation services	13	15	38	51
Transportation and warehousing	17	12	74	58
Finance and insurance	17	10	51	50
Manufacturing	7	6	34	28
Wholesale trade	9	6	28	15
Information and cultural industries	8	5	14	8
Arts, entertainment and recreation	6	5	32	24
Utilities	2	2	11	8
Public administration	2	2	16	15
Mining, quarrying, and oil and gas extraction	2	1	5	6
Educational services	2	1	11	5

Source: Canadian Business Patterns June 2025 from Lightcast 2025.3.

Once again, Table 37 notes the subsectors in the labour recruitment area by businesses **only with employees**, excluding self-employed individuals.

Table 37: Top Sectors by Businesses with Employees, LRA, June 2025.

Sector	Businesses with Employees
Full-service restaurants and limited-service eating places	23
Residential building construction	19
Traveller accommodation	16
Automotive repair and maintenance	15
Services to buildings and dwellings	14
Offices of physicians	12
Grocery and convenience retailers	11
Building equipment contractors	10
Logging	10

Source: Canadian Business Patterns June 2025 from Lightcast 2025.3.



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) – June 2025.
- SuperDemographics 2025 from Manifold Data Mining Inc.
- Lightcast 2025.Q3.

Canadian Business Registry (CBR)

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

Manifold Projection Method

Production of 2025 Demographic data estimates are 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:

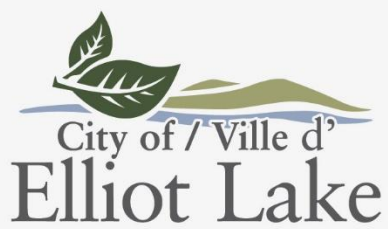
Manifold data sources include Statistics Canada, Health Canada, real estate boards/companies, Canadian Bankers Association, Bank of Canada, Canada Post Corporation, consumer and business directories books, flyer distribution associations, regional health ministries, Citizenship and Immigration Canada,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

Lightcast

Lightcast (formerly EMSI Analyst) 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 Elliot Lake of 2001 is the same as the Elliot Lake 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.



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