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Employment in Ontario's Industrial Heartland: Evidence of Economic Decline in a Mid-Sized Industrial City

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Résumé de l'article

As the "second wave" of globalization commenced in the late 1970s and early 1980s, countries around the world underwent economic restructuring. Canada, as one of the nodes in an integrated global economy, was no exception. In particular, the province of Ontario, which was and still is the biggest manufacturing hub in Canada, experienced a decline in terms of manufacturing employment. Inevitably, for London, a mid-sized industrial city located in Southwestern Ontario, this transition had major implications, a reality that it shared with several other cities in the southwest. As closely integrated with the broader North American economy, London's loss of jobs due to outsourcing and other technological and global forces was certainly not unique. Yet as demonstrated in this paper, London's labour market has performed particularly poorly since 2001 relative to most other census metropolitan areas (CMAs) across Ontario, or for that matter, across Canada. This is true in terms of overall levels of job creation, as well as growth in the types of jobs that are generally considered desirable in the 21st century, i.e. jobs in higher skilled occupational categories.

EMPLOYMENT IN ONTARIO'S INDUSTRIAL HEARTLAND: EVIDENCE OF ECONOMIC DECLINE IN A MID-SIZED INDUSTRIAL CITY

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Abstract : As the "second wave" of globalization commenced in the late 1970s and early 1980s, countries around the world underwent economic restructuring. Canada, as one of the nodes in an integrated global economy, was no exception. In particular, the province of Ontario, which was and still is the biggest manufacturing hub in Canada, experienced a decline in terms of manufacturing employment. Inevitably, for London, a mid-sized industrial city located in Southwestern Ontario, this transition had major implications, a reality that it shared with several other cities in the southwest. As closely integrated with the broader North American economy, London's loss of jobs due to outsourcing and other technological and global forces was certainly not unique. Yet as demonstrated in this paper, London's labour market has performed particularly poorly since 2001 relative to most other census metropolitan areas (CMAs) across Ontario, or for that matter, across Canada. This is true in terms of overall levels of job creation, as well as growth in the types of jobs that are generally considered desirable in the 21st century, i.e. jobs in higher skilled occupational categories.

Keywords: Employment; Population Change

INTRODUCTION

As the "second wave" of globalization commenced in the late 1970s and early 1980s, countries around the world underwent economic restructuring. Canada, as one of the nodes in an integrated global economy, was no exception. In particular, the province of Ontario, which was and still is the biggest manufacturing hub in Canada, experienced a decline in terms of manufacturing employment (Mowat Center, 2014; Hutton & Vinodrai, 2015; Vinodrai, 2020). Inevitably, for London, a mid-sized industrial city located in Southwestern Ontario, this decline in manufacturing had major implications, a reality that it shared with several other cities in the southwest (Morissette, 2020; Bradford, 2010).

As closely integrated with the broader North American economy, London's loss of jobs due to outsourcing and other technological and global forces was certainly not unique. Yet as demonstrated in this paper, London's labour market has performed particularly poorly, particularly since the 2008 recession relative to most other census metropolitan areas (CMAs) across Ontario, or for that matter, across Canada. This is true in terms of overall levels of job creation, as well as growth in the types of jobs that are generally considered desirable in the 21st century, i.e. jobs in higher skilled occupational categories. On this basis, we suggest that this economic stagnation characterizing this mid-sized CMA, among a few others in Central Canada, has been somewhat neglected in public discussions of Canada's economic performance.[1] While this generalization can arguably be applied to several other mid-sized cities that fall outside of Toronto and Montreal's direct orbit, few CMAs across Canada have seen as dramatic decline as observed in London.

POPULATION AND EMPLOYMENT GROWTH ACROSS ONTARIO CMAS

In reference to the latter 20th century, Bourne & Rose (2001) characterized Canada as experiencing "highly uneven geographies of population and social change." In particular, with several transformations rippling through Canada's social fabric and urban landscape, Canadian cities and regions were experiencing widening economic-geographic gaps. Bradford (2018) has more recently outlined how many of the country's major public policy challenges converge most profoundly in its cities, yet in a context whereby there has been a widening economic and demographic gap between a handful of superstar cities and many other mid-sized and smaller regional cities that often struggle to maintain population and employment growth. In the context of Ontario with its 15 CMAs, the overwhelming bulk of its population growth has occurred in the Toronto CMA, and to a secondary extent, in the National Capital Region of Ottawa. Several cities appear to have been completely by-passed by this growth, whereas others have seen only moderate growth (Statistics Canada, 2020).

This is well documented in Table 1, which provides both population and employment estimates for Ontario's 15 CMAs over the extended period 2001-2019 period. Particularly striking is the demographic dominance of Toronto, whose population grew by about 1.6 million over the 2001-2019 period. This increase comprises roughly 62 per cent of the overall growth observed across all CMAs across the province. Similarly, Toronto witnessed an even greater share of overall employment growth (roughly 64 percent), up by 956,200 persons relative to roughly 1.5 million new jobs overall. A similar sort of situation characterizes Ottawa, with more than its share of both demographic and employment growth. Overall, Toronto and Ottawa combined comprised roughly 70 percent of the total CMA demographic growth across Ontario and roughly 75 percent of overall employment growth over the 2001-2019 period.

Several other CMAs have done relatively well – as a particularly interesting example – Kitchener-Cambridge-Waterloo (K-C-W) saw its population increase by over 152,000 persons over this extended period (3rd overall in the province) and its employment increase by 78,700 persons (again, 3rd across 15 CMAs). K-C-W is particularly relevant to London – in 2001, this metropolitan area which is

Table 1. Population Increase, Employment Increase, and the Ratio of Population to Employment Increase, for Ontario CMAs, 2001-2019*

	Population Estimate			Total Employed			Ratio
	2001	2019	Increase	2001	2019	Increase	
Ottawa (Ontario part of CMA)	840,289	1,095,134	254,845	441,300	590,100	148,800	1.71
Kingston	152,774	175,708	22,934	71,500	87,500	16,000	1.43
Peterborough	115,323	131,416	16,093	48,700	61,100	12,400	1.30
Oshawa	308,599	413,936	105,337	154,200	218,600	64,400	1.64
Toronto	4,882,782	6,471,850	1,589,068	2,535,300	3,491,500	956,200	1.66
Hamilton	689,072	794,716	105,644	346,700	422,800	76,100	1.39
St. Catharines - Niagara	391,875	434,927	43,052	186,400	199,600	13,200	3.26
Kitchener - Cambridge - Waterloo	431,559	584,259	152,700	223,400	302,100	78,700	1.94
Brantford	128,504	149,018	20,514	58,700	78,700	20,000	1.03
Guelph	129,198	165,236	36,038	71,300	92,600	21,300	1.69
London	453,092	545,441	92,349	230,300	251,200	20,900	4.42
Windsor	320,946	354,917	33,971	155,700	170,400	14,700	2.31
Barrie	155,337	213,660	58,323	78,200	119,200	41,000	1.42
Greater Sudbury	161,493	172,216	10,723	72,700	85,200	12,500	0.86
Thunder Bay	126,698	127,201	503	61,600	61,700	100	5.03
All Ontario CMAs	9,287,541	11,829,635	2,542,094	4,736,000	6,232,300	1,496,300	1.70
CMA's excluding Toronto/Ottawa	3,564,470	4,262,651	698,181	1,759,400	2,150,700	391,300	1.78

*Statistics Canada periodically updates its geography on CMAs retroactively to maintain consistent geographies and definitions over time. This table is based on Statistics Canada's 2016 Census standard geography and definitions, consistent for the full 2001-2019 period (for more information on the history of these adjustments, see Usalcas and Kinack, 2017).
Source: Statistics Canada, Annual Demographic Statistics, Table: 17-10-0135-01 and Labour Force Characteristics by Census Metropolitan Area, annual, Table: 14-10-0096-01; Author's calculations.

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[1] This is not to suggest that the economic and demographic decline of midsized cities in Canada have been neglected by urban planners or geographers, as there is a substantial literature on cities experiencing slow growth and decline (e.g. Bourne and Simmons, 2003; Bunting and Filion, 2001; Meloche, Benoit, Hugueny and Tremblay, 2018, Donald and Hall, 2020).

London's closest neighbor in the southwest, actually had a slightly smaller population (at 431,559 relative to 453,092). Since this point in time K-C-W's demographic growth has far outstripped London's (up to 584,259 in 2019 relative to 545,441). As an opposite extreme in drawing comparisons across CMAs, Thunder Bay which is much closer to Winnipeg than Toronto, had both negligible population and employment growth over this same reference period.

To the extent that employment opportunities lag behind population increase, one might anticipate negative consequences, i.e. this would imply structural problems with potentially greater numbers chasing after scarce jobs, relatively speaking (Madrick, 2014). This is certainly true of London, as Table 1 documents how employment growth appears to have seriously lagged behind demographic growth – to a greater extent than virtually any other CMA in Ontario. This is reflected in the ratios provided in Table 1 comparing total population growth to total employment growth. Whereas London's overall population grew by an estimated 92,349 persons over this period, the total number of persons employed grew by only 20,900 (for a ratio of 4.42 to 1.0).

In comparing this ratio across the province, only one other CMA performs worse than London (i.e. Thunder Bay). Yet one would think that London's location in Canada's industrial heartland would have given it a competitive advantage. Home to a number of post-secondary institutions and associated research and educational assets, it would seem to be well placed in developing economic opportunities (City of London, 2015). Yet a more detailed assessment of London's employment numbers over time would show how the CMA was particularly hard hit by the 2008 recession (more so than most of Canada). To be more specific, while total employment in London grew from 230,300 in 2001 to 253,300 by 2007, since this latter point in time, London has experienced virtually no growth in its total number employed (Statistics Canada, 2020b; author's calculations). As of 2019, the total number of persons employed was remarkably 251,200, which was actually lower than its peak in employment fully 12 years earlier prior to the 2008 recession. Over this latter period, both Canada and the province of Ontario have seen relatively robust employment growth, up by 13.6 and 13.9 per cent, respectively (Statistics Canada, 2020b).

Table 2. Ranking of Employment Rates for Persons Aged 25-54 years, Canadian CMAs, 2001 and 2019

2001		Percentage		2019		Percentage
All CMA's across Canada (33)		80.9		All CMA's across Canada (33)		83.6
All CMA's across Ontario (15)		81.9		All CMA's across Ontario (15)		82.4
CMA Rank				**CMA Rank**		
1	Guelph, Ont.	86.1		1	Québec City, Que.	91.2
2	Calgary, Alta.	85.3		2	Kelowna, B.C.	88.6
3	Barrie, Ont.	85.0		3	Ottawa-Gatineau, Ont./Que.	87.1
4	Regina, Sask.	84.2		4	Guelph, Ont.	86.9
5	Winnipeg, Man.	84.1		5	Brantford, Ont.	86.1
6	K-C-W, Ont.	84.0		6	Moncton, N.B.	86.0
7	Oshawa, Ont.	83.9		7	Sherbrooke, Que.	86.0
8	Edmonton, Alta.	83.6		8	Victoria, B.C.	86.0
9	Hamilton, Ont.	82.4		9	Regina, Sask.	85.7
10	Kelowna, B.C.	82.2		10	Saguenay, Que.	85.0
11	**London, Ont.**	**82.0**		11	Hamilton, Ont.	84.7
12	Toronto, Ont.	81.8		12	Halifax, N.S.	84.6
13	Brantford, Ont.	81.8		13	Vancouver, B.C.	84.6
14	Halifax, N.S.	81.6		14	K-C-W, Ont.	84.5
15	Ottawa-Gatineau, Ont./Que.	81.6		15	Montréal, Que.	83.9
16	Saskatoon, Sask.	81.6		16	Thunder Bay, Ont.	83.9
17	St. Catharines-Niagara, Ont.	81.3		17	Abbotsford-Mission, B.C.	83.9
18	Québec City, Que.	80.8		18	Barrie, Ont.	83.8
19	Victoria, B.C.	80.6		19	Calgary, Alta.	83.8
20	Moncton, N.B.	80.4		20	Edmonton, Alta.	83.5
21	Sherbrooke, Que.	80.1		21	Greater Sudbury, Ont.	83.4
22	Kingston, Ont.	80.1		22	Winnipeg, Man.	83.4
23	Thunder Bay, Ont.	79.6		23	Oshawa, Ont.	83.3
24	Windsor, Ont.	79.2		24	Trois-Rivières, Que.	82.8
25	Peterborough, Ont.	79.0		25	Saskatoon, Sask.	82.7
26	Abbotsford-Mission, B.C.	78.9		26	Saint John, N.B.	82.6
27	Montréal, Que.	78.6		27	Kingston, Ont.	82.5
28	Vancouver, B.C.	78.1		28	Toronto, Ont.	81.4
29	St. John's, Nfld and Labr.	78.0		29	St. John's, Nfld. And Labr.	80.8
30	Greater Sudbury, Ont.	76.7		30	Peterborough, On	80.7
31	Saint John, N.B.	75.7		31	St. Catharines-Niagara, Ont.	79.9
32	Trois-Rivières, Que.	75.5		32	Windsor, Ont.	79.6
33	Saguenay, Que.	70.6		33	London, Ont.	78.0

Source: Statistics Canada, Canadian Labour Force Survey, Labour Force Characteristics by Census Metropolitan Area, annual, Table: 14-10-0096-01; Author's calculations.

LONDON'S DRAMATIC DECLINE IN ITS EMPLOYMENT TO POPULATION RATIO

In light of these comparisons, it is useful to briefly consider the employment rate (or employment to population ratio) of Canada's 33 CMAs (see Table 2). In so doing, for current purposes we focus on rates for persons of prime working age (25-54 years), and again make systematic comparisons between 2001 and 2019. By focusing on persons of prime working age, it is possible to accommodate the simple fact that CMAs can potentially differ quite a bit in terms of age structure.

Table 2 shows how London's employment rate for persons aged 25-54 was relatively robust in 2001 (82.0%), higher than both the provincial and national averages and ranking 11th across 33 CMAs. Yet by 2019, London's employment rate had fallen precipitously, down to only 78.0 per cent, i.e. with a larger decline than any other CMA in the country. London shifted from having a much better than average employment rate in 2001 to dead last in relative ranking by 2019 across 33 CMAs. Yet while London's employment rate dropped, both the national and provincial employment rates increased – a reality which was true of over three quarters of all CMAs across the country.[2]

FALLING BEHIND: CONSIDERING THE SKILL LEVEL OF LONDON'S LABOUR FORCE

While London's labour market has lagged behind other parts of the province in terms of overall job creation, so too has its success in terms of generating high skilled, well-paying jobs. To demonstrate this fact, we now turn our attention to corresponding shifts in the occupation structure of London's labour market relative to other CMAs across Ontario. For this purpose, we rely upon the skill levels identified in the National Occupational Classification (NOC), a nationally accepted taxonomy and organizational framework of occupations in the Canadian labour market (Statistics Canada, 2019). Consistent with Statistics Canada's most recent update (NOC 2016), we sorted occupations into one of four Skill Levels (A, B, C, and D), with each corresponding to the type of education and/or amount of training required to enter and perform specific occupations.

With this classification, the requirements necessary to enter occupations at the highest skill level (skill level A) at a minimum require a university degree, albeit many professional jobs in Canada require additional certification, including a graduate degree or professional training beyond the undergraduate level. Occupations at skill level B typically demand at least a community college education in English Canada or a CEGEP education in Quebec, and/or some post-secondary training (e.g. trade school) with an extended apprenticeship of several years. At skill level C, while not requiring much in terms of formal education (beyond secondary), occupations usually involve considerable "on the job" training (often several months) detailed to specific operational requirements. Skill level D on the other hand, typically requires little or no education (often thought of as the so called "Mcjobs" with less than desirable characteristics). With this latter category, an employee can quickly be up to speed on job requirements with a relatively short work demonstration. On this basis, we use the 2016 NOC classification to document shifts in occupational structure over the extended period 2001-2019.

Table 3 presents the aforementioned distribution by skill levels for 2001 and 2019, yet for current purposes, we begin here by making systematic comparisons on London, K-C-W, Toronto, Ottawa, as well as all CMAs in the province – taken as a whole. In comparing these

distributions, we compare London with Ontario's two largest CMAs (where the bulk of employment growth has occurred in the province), along with K-C-W. The latter comparison is useful for the aforementioned reason, i.e. back in 2001 K-C-W shared many similarities demographically, geographically and economically with London.

Table 3 shows how London was arguably in an advantageous situation relative to K-C-W back in 2001, with a higher proportion of its workforce in Type A occupations. In addition, London was roughly on par with the provincial average for all 4 skill levels. By 2019, London's relative situation had clearly deteriorated. With respect to Type A occupations, London witnessed a slight decline in its share over the 2001-2019 period (27.6 to 27.3 per cent). By way of contrast, K-W-C, Toronto, and Ottawa all witnessed substantial upturns. In terms of Type B occupations, a stability in their relative share was generally true of most CMAs in the province, and on this front, London does not depart from this general pattern. In terms of skill level C, London had a modest decline, yet the other CMAs in Table 3 experienced much more pronounced reductions. In terms of skill level D, London was the only CMA as reported in Table 3 to experience an upturn in its share of all occupations that involve a relatively low level of skill. In light of the impact of automation on Canada's economy, London de-

Table 3. Occupational Skill Level, for London, Kitchener-Cambridge-Waterloo (K-C-W), Toronto, Ottawa, and Other Ontario CMAs, 2001 and 2019

	Percent of Total Employed (CMA)		
	2001	**2019**	**Difference**
Type A			
London	27.6%	27.3%	-0.3%
K-C-W	23.5%	30.5%	7.0%
Toronto	30.1%	36.2%	6.1%
Ottawa	39.2%	43.2%	4.0%
All CMAs in Ontario	28.9%	34.1%	5.2%
Type B			
London	30.4%	31.6%	1.2%
K-C-W	30.1%	30.9%	0.8%
Toronto	28.9%	29.4%	0.5%
Ottawa	29.0%	30.3%	1.3%
All CMAs in Ontario	30.1%	30.9%	0.8%
Type C			
London	31.2%	29.1%	-2.1%
K-C-W	34.9%	28.1%	-6.8%
Toronto	31.8%	25.6%	-6.2%
Ottawa	23.7%	18.8%	-4.9%
All CMAs in Ontario	31.0%	25.4%	-5.6%
Type D			
London	10.7%	12.0%	1.3%
K-C-W	11.5%	10.5%	-1.0%
Toronto	9.1%	8.7%	-0.4%
Ottawa	8.1%	7.8%	-0.3%
All CMAs in Ontario	10.0%	9.5%	-0.5%

Source: Statistics Canada, Employment by census metropolitan areas and occupation, annual. Table 14-10-0314-01; Author's calculations.

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2 The justification in focusing on persons employed aged 25-54 relates to differences in age structure across CMAs. Briefly, (i) many retire prior to 65 in their latter 50s and early 60s, and (ii) a substantial proportion of young adults younger than 25 are still studying, on either a part or full time basis. Regardless, the inferences shown here also apply when focusing on other age groups across CMAs. For example, when focusing on the total population aged 15+, London here too remains second worst to only St. Catherine's Niagara in its employment rate (i.e. a CMA that has a much older age structure than London). While not presented here, for sake of brevity, the generalization of a relatively low employment rate for London is true across all age groups in the CMA.

Figure 1. Percentage Growth of Occupations Type A (Professional) for Ontario CMAs, 2001- 2019
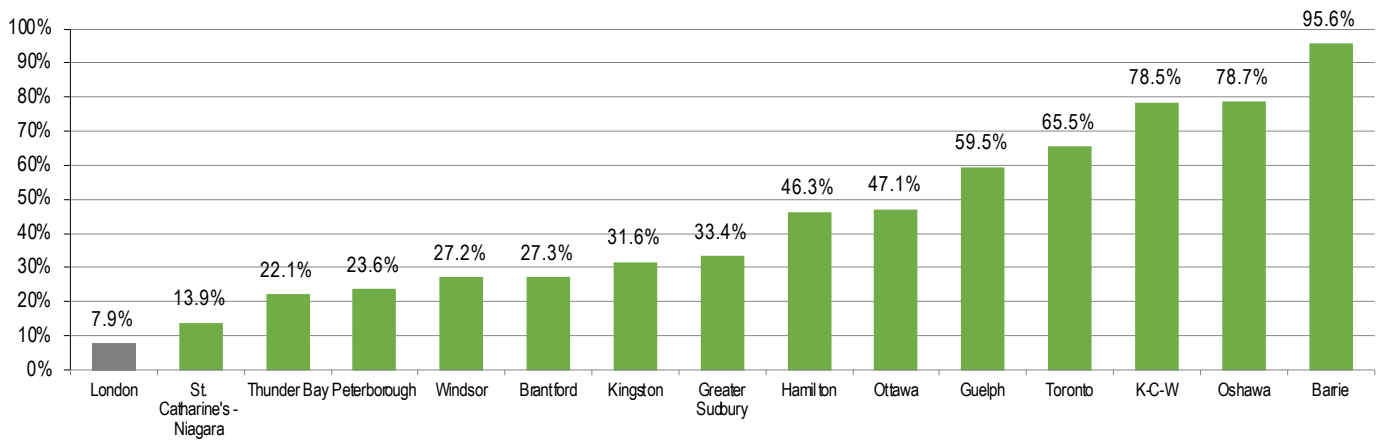
Source: Statistics Canada, Employment by census metropolitan areas and occupation, annual. Table 14-10-0314-01; Author's calculations..

parts somewhat from the general pattern as observed in more successful cities, with only a modest reduction in Type C occupations and in fact a slight upturn in Type D jobs.

With a growing emphasis both in Canada and internationally on the so-called "knowledge economy", London has not been as successful as other cities in redefining itself from its traditional manufacturing base. Briefly to further demonstrate this basic fact, Figure 1 systematically compares London with all other CMAs in the province, returning to our emphasis on high skilled Type A professional occupations. And again, on this indicator, London ranks dead last – in this case, documenting the percentage increase of Type A jobs over the same extended period for all 15 Ontario CMAs.

THINKING ABOUT THE CAUSES FOR LONDON'S DECLINE

The fact that London in late 2019 had fewer persons employed than over a decade earlier is indicative of the CMA's economic decline. Similarly, the fact that the CMA has witnessed the slowest rate of growth across all 15 Ontario CMAs in the number of persons employed in higher skilled professional type occupations is also particularly salient in understanding the current context (up by only 7.9% over the 2001-2019). Also, the manner in which the CMA's employment rate among persons of "prime working age" has fallen, down to its 2019 rank of "dead last" across all 33 Canadian CMAs is certainly indicative of serious economic difficulties. When considering persons aged 25-54, there is no obvious reason as to why persons should be any less likely to be working in London than elsewhere, beyond the simple fact that the CMA has now witnessed over a decade of torpid employment growth. The simple reality for London is that a growing segment of its population has subsequently become so discouraged as to their employment prospects that they have given up on the prospect of finding employment and dropped out of the labour force altogether.

More recent data to come out of the 2016 Census on household income and income poverty is largely consistent with these indicators. For example, London was one of only 2 CMAs across all of Canada to witness a reduction in its median household income over the last decade, after adjustment for inflation (Statistics Canada, 2018a). The 2016 Census also reported that London's rate of low income among children now ranks the CMA as third highest across all 33 CMAs across the country (Statistics Canada, 2018b). A city long noted for its relative economic prosperity has more recently found to have a disproportionate share of its population in poverty and without gainful employment. Consistent with this observation is data on Social Assistance usage in Ontario; as of 2016, roughly 1 in 10 Londoners aged 20-29 were found to be reliant on some form of social assistance, a percentage which is much higher than the provincial average (Kerr et al. 2017; Kerr, Smith Carrier, & Wang, 2019).

Well understood among urban planners is the basic observation that the contours of economic change in Canadian cities are "path-dependent", impacted by local histories, institutions, economic development strategies and regional contexts (Vinodrai, 2020). With this in mind, London's situation in Ontario's southwest is in certain ways unique, while also reflecting broader structural changes that have impacted much of urban Canada. With globalization, London lost several corporate head offices, hitting its traditional strength of financial services. Similarly, many branch plant manufacturers closed, at least partially impacted by the decline in the province's automotive assembly and parts sector. London's distance from Toronto's zone of influence is also clearly relevant, as several neighbors closer to the GTA have seen remarkable gains in employment. There is a broader literature in Canada that has pointed to these structural issues, as the new knowledge economy has concentrated primarily in large city-regions as well as areas within their zone of influence (Barnes et al, 2000; Bourne & Simmons, 2003; Vinodra, 2015; Donald & Hall, 2020). Consistent with Moretti's (2012) thesis in "The New Geography of Jobs", some cities in North America (e.g. Toronto, Ottawa, K-C-W) have benefited in the development of a highly skilled workplace that involves the production of value added products and services, whereas others (e.g. London, St. Catherine's-Niagara, Windsor) have fallen behind to the extent that they fail to redefine themselves and take advantage of new opportunities.

In explaining London's difficulties, Moffatt (2019) points to a municipal government which has been "absolutely obsessed with manufacturing", with growth plans that are dominated by industrial land strategies and attracting international investments in the building of its manufacturing base. Similarly, Bradford (2017) highlights how the city up until relatively recently neglected the need for a more "knowledge intensive economic development strategy", with an ongoing preoccupation with attracting manufacturing plants. Also neglected, in his view, has been the failure of municipal leadership to build coalitions beyond the traditional business community, not only with emerging clusters in high tech, health and life sciences, but also with local community groups and organizations that prioritize the promotion of quality employment, equitable opportunity, sustainable growth and a higher quality of life for Londoners (Bradford &

Bramwell, 2014). As a result, for decades the city has subsequently failed to attract its proportionate share of talent and investment to the city, despite being a relatively inexpensive city to live in and having one of the country's leading universities.

All of this has further aggravated the performance of the local economy. Adding further to London's decline is the basic argument that we make here: i.e. the seriousness of London's economic decline, a metropolitan area of over half a million, has never been adequately appreciated in national (or even provincial) debates on regional economic development. Spencer (2017) points to a more general issue, i.e. the policy challenge of finding a way for mid-sized city regions to increasingly participate in the global knowledge economy. In an immediate sense, London requires investment in the infrastructure and institutions that can offer greater connectivity, better approaching what is found in our largest cities. In this context, the policy challenge in London appears to be particularly acute, in a city that is only now coming to terms with its relative economic decline. Further research in terms of informing this policy challenge for this specific CMA would be useful in this context, as is true of other cities experiencing comparable economic challenges.

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