
SPECIAL REPORT

TD Economics



June 10, 2015

THE LONG AND WINDING ROAD TOWARDS ABORIGINAL ECONOMIC PROSPERITY

*Wheels of positive change in motion and socio-economic
barriers remain opportunities in disguise*

Highlights

- In 2011, we forecast that the combined income of Aboriginal households, businesses and government sectors would be \$32 billion in 2016. Since the forecast was generated, the resource and construction booms have noticeably tempered and in the case of commodity prices, severely reversed course.
- Amid these cross-currents, Aboriginal market income is expected to come in just under target, at \$30-31 billion in 2016.
- Wheels of positive change remain in motion. Aboriginal businesses are a fast-growing income source and Aboriginal partnerships with the non-Aboriginal business community continue to strengthen.
- The ongoing problems with poverty and other social challenges experienced by Aboriginal peoples persist. However, these barriers are increasingly viewed as opportunities as opposed to insurmountable obstacles.
- Public and private sector concerted efforts aim to close current labour market and income gaps between Aboriginal persons and other Canadians. Best practices – including incorporating cultural approaches into curriculum – are being implemented to help lift literacy levels. Early childhood development programs are being targeted towards Aboriginal youth to prevent a multi-generational cycle of poverty from perpetuating.

TD Economics continues to celebrate National Aboriginal Day by shining a spotlight on the many economic and social issues confronting Aboriginal peoples, businesses and communities. In this seventh Aboriginal-related article, we have chosen to refresh our forecasts surrounding the market income of Canada's Aboriginal community, leveraging the most up-to-date information available. We now expect the combined total income from Aboriginal households, businesses and government sources to reach \$30-31 billion next year, or \$1-2 billion lower than previously forecast.¹ Deflated commodity prices and lesser construction activity are two reasons why the tally will likely fall short of our prior forecast.

The small miss should be placed in broader context, as Aboriginal peoples in Canada are increasingly leaving their economic mark on the national stage. The Aboriginal business segment of the economy – including Aboriginal entrepreneurs, Economic Development Corporations and successful partnerships with the non-Aboriginal business community – are helping to create greater self-sufficiency and economic prosperity. A signal that the tide is indeed changing, Aboriginal socio-economic barriers are increasingly being viewed as opportunities not obstacles.

Estimating the size of the Aboriginal market in Canada

In a 2011 report, we calculated the combined total income of Aboriginal households, business and government sectors. Our forecast, at the time, estimated the size of the total Aboriginal income pie to be \$32 billion in 2016.

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Textbox 1: Aboriginal Population – A Demographic Overview

Aboriginal peoples are defined in the *Constitution Act*, 1982, Section 35 (2) as including the Indian, Inuit and Métis. Individuals can identify as one of these distinct groups and/or have affiliations with multiple groups. A Status Indian is a member of an Indian band or community with rights under the *Indian Act* to: live on reserve; vote for the Band council and Chief; share in band monies; and have an interest in property on reserve.³

There were 1.4 million people in Canada who identified as Aboriginal in 2011, slightly more than the population of Manitoba.⁴ The share of Aboriginal peoples in the population has steadily risen over the past decade. A case in point, in 1996, 2.8% of the Canadian population identified as Aboriginal. In 2011, the proportion had risen to 4.3%. The increase is attributed to higher fertility rates among Aboriginal peoples relative to the rest of Canada and a greater prevalence of identification.

Across the country, all provinces and territories have some Aboriginal representation. In absolute terms, Ontario and the western provinces (Manitoba, Saskatchewan, Alberta and British Columbia) were the home to the most Aboriginal peoples in 2011. In relative terms, Aboriginal peoples made up the largest shares of the population of Nunavut (86.3%) and Northwest Territories (51.9%).

Within this research paper, we use the opportunity to review our underlying methodology and refresh our estimate. To complete this task, we have leveraged recent information from the 2011 National Household Survey, the Aboriginal Peoples Survey and other sources. However, a lack of new, up-to-date information has limited our ability to refresh some of the estimates – figures on Economic Development Corporations (EDCs) chief among them. Fortunately, updated figures on EDC income will be released this autumn, at which time we will provide a new estimate of the size of the market. In the interim, we forecast that Aboriginal market income will come in at \$30-31 billion in 2016, slightly below expectations.

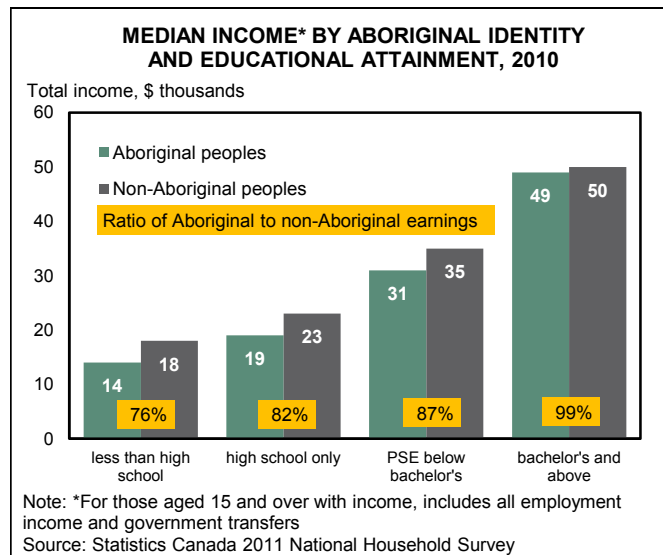
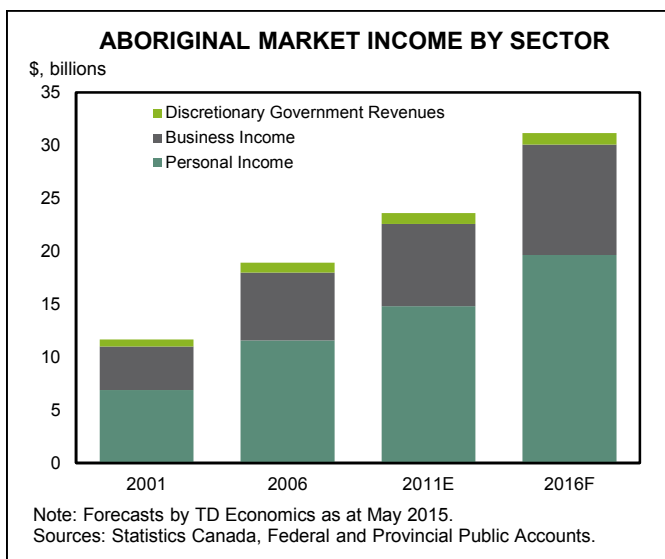
Before delving into the details and income categories, it is important to once again stress that our estimate remains conservative, as it does not include all income sources of Aboriginal individuals and communities. Primarily due to data limitations, we have omitted the interest income of

previously-settled specific land claims, corporate donations and the dollar value of impact benefit and signatory agreements from our aggregate total.

Household income

At just under \$20 billion, household income of Aboriginal peoples will continue to represent the largest income category of the total pie. Beneath the headline, household income will underperform our previous forecast:

- 2011 National Household Survey confirm that Aboriginal peoples are disproportionately employed in resource extraction and construction sectors.² The link with these industries is not only through direct employment, but also indirect jobs to service these sectors.
- During periods of tepid commodity prices and softer construction activity – such as what we are currently experiencing – Aboriginal peoples tend to have increased



Textbox 2: Data Limitations Surrounding Aboriginal Persons in Canada

Data challenges require us to make assumptions, forecasts and inferences throughout this report. For instance, it is inherently challenging to compare data on Aboriginal peoples over time, particularly in light of recent changes to the Census.⁶ Statistics Canada highlights the following factors to consider when comparing data and making conclusions between the 2006 Census and the 2011 National Household Survey (NHS)⁶:

- Differences in the wording and format of the Aboriginal questions;
- Legislative changes such as Bill C-3 in 2011 which affects definitions such as Aboriginal identity and registered Indian status; and
- Changes made to the definition of reserves and the list of the incompletely enumerated reserves.

Furthermore, Statistics Canada states that some respondents report their Aboriginal identity and/or ancestry differently from one data collection period to another which may influence the results over time.

The Aboriginal Peoples Survey is released by Statistics Canada every five years.⁷ This data source – separate from the Census – provides a glimpse of the social and economic conditions of Aboriginal peoples. Information collected on issues such as education, employment and language do not always reconcile to the Census or the NHS due to different collection periods, survey methodologies and sample sizes.

We have also leveraged data on adult literacy performance from the International Adult Literacy and Skills Survey (IALSS), last released in 2003. While the Organisation for Economic Co-operation and Development (OECD) more recently issued results from the Programme for the International Assessment of Adult Competencies (PIAAC) survey, this rendition did not shine a spotlight on Aboriginal literacy in Canada.⁸

When interpreting Aboriginal results, there are several noteworthy limitations attached to the IALSS survey.⁹ First, the survey assessed literacy levels in English and French – Aboriginal languages were not taken into consideration. Second, the data do not capture all Aboriginal peoples in Canada. Instead, the geographical focus was in the urban areas of Manitoba and Saskatchewan and selected communities in all three territories (Yukon, Northwest Territories and Nunavut).

The 2015 federal budget provided funds to launch a pilot labour force survey on reserve in order to improve available labour market information.¹⁰ Once the data become available, this source will help paint a more real-time picture of the economic and employment conditions on-reserve. The private sector is also looking to fill some of the data vacuum. Creators of the EXPORT Skills Inventory and Vendor Database have created a one-stop shop for Aboriginal workers and small businesses, educational institutions and enterprises.¹¹ Their stated goal is to simultaneously solve two problems – the high aboriginal unemployment rate and the shortage of skilled labour.

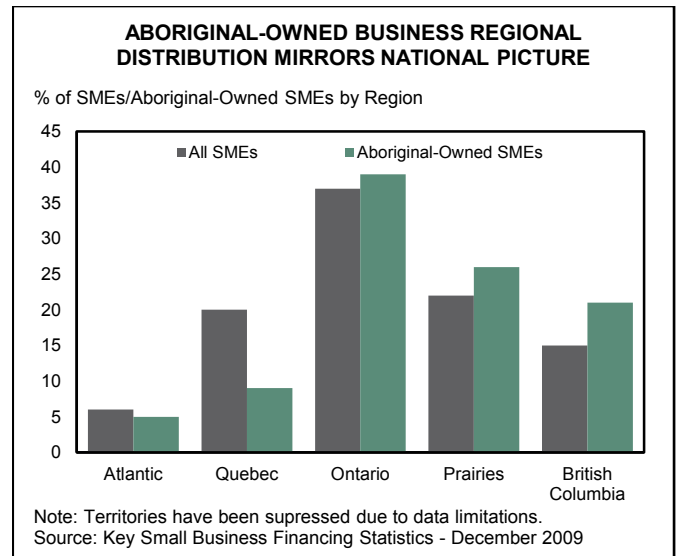
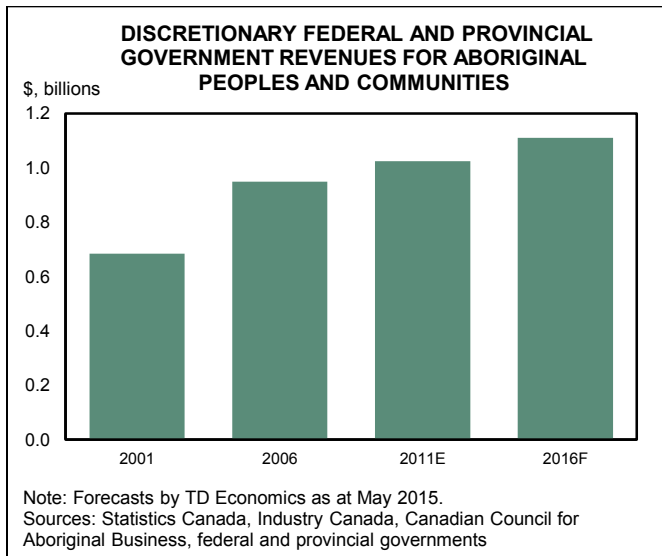
difficulty finding jobs in other sectors. Reasons include relatively lower education, less developed skills and in some cases, geographical remoteness.

- In light of recent economic developments, we have assumed fairly flat Aboriginal employment and labour force participation rates over the 2011-16 period. While this outcome is disappointing – especially given the momentum the Aboriginal community was experiencing just a few years ago – it highlights the boom and bust nature of the resource and construction sectors.
- On average, annual nominal personal income growth in Canada has ranged from 2-4% since 2011. We apply these same modest parameters to Aboriginal personal income, both on- and off-reserve.

Government income

Within this income category, we are interested in discretionary government transfers from federal, provincial and territorial sources. Discretionary expenditures are useful in our Aboriginal market income calculation because these funds need not be used for a specific purpose and therefore can be thought of as disposable income. We remain unable to accurately quantify the proportion of government funding that is discretionary. Therefore, we maintain our relatively arbitrary assumption that 10 cents out of every public sector dollar dispersed can be used at the Aboriginal community's discretion.

The share of discretionary government spending received by Aboriginal peoples in Canada is forecast to decrease from 5.9% in 2001 to 3.6% in 2011. Reasons include:

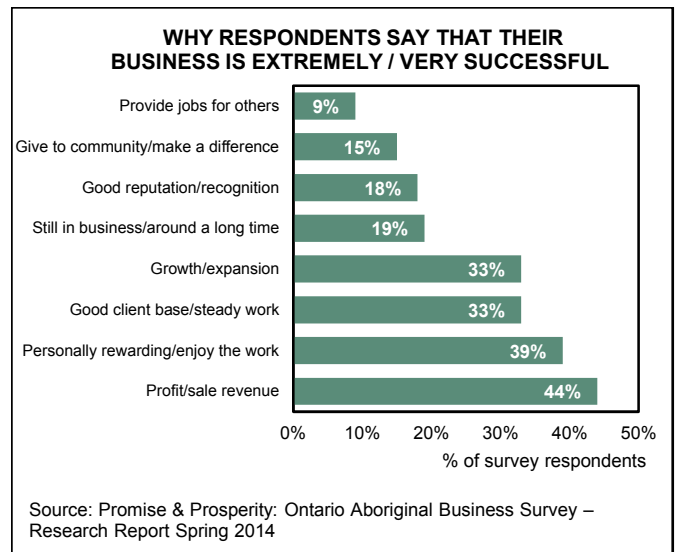
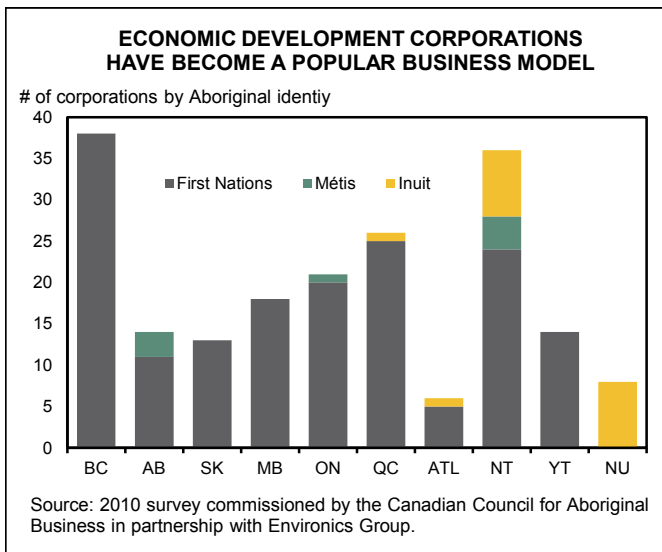


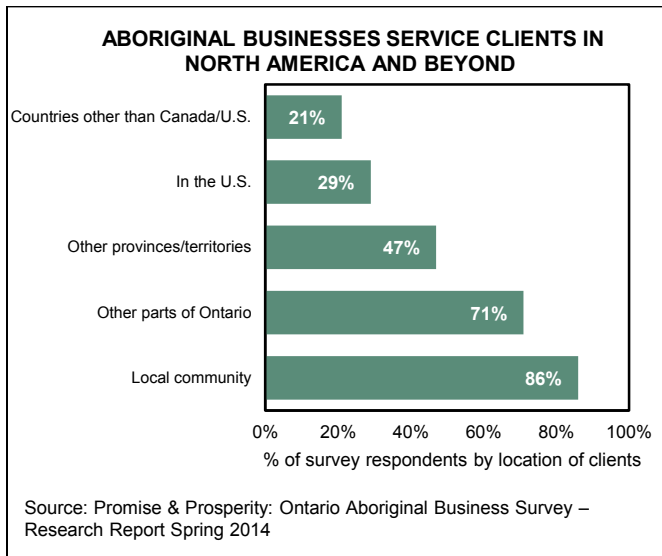
- Fewer public sector dollars:* shortly after the 2008-09 financial crisis hit, Canadian governments injected fiscal stimulus into the economy. Once the economy started to turn the corner and the recovery began taking hold, governments started to set their sights on budgetary deficit elimination. In the years since, government program expenditures have flat-lined or even declined in real terms. For example, total federal program spending has grown by just 0.7% per year over the past three years – a much slower pace than the 7% annual average recorded from 2000-08. A similar slowdown is seen for provincial and territorial government spending.
- Greater individual and community self-sufficiency:* strides made in post-secondary education attainment rates from 2006-11 and a growing business segment (see next section) are helping to put Aboriginal peoples and communities in the driver’s seat of their own futures.

Business income

The business component of Aboriginal market income remains a bright spot and a growing share of total Aboriginal income. Business income is derived from two main sources: (1) entrepreneurs and small business income; and (2) community businesses including Economic Development Corporations (EDCs).

- Small- and medium-sized enterprises:* Approximately 2% of all small and medium-sized enterprises (SMEs) are operated by Aboriginal entrepreneurs, slightly lower than the 4.3% share of Aboriginal peoples in the population.⁵ This translates into approximately 32,000 businesses, both on- and off-reserve. Based on our forecasts, Aboriginal entrepreneurs and SMEs will bring in roughly \$927 million in earnings in 2016.
- Economic Development Corporations (EDCs):* EDCs





represent the economic and business development arm of an Aboriginal government. These corporations contribute the most to total business income. The Canadian Council for Aboriginal Business (CCAB) expects to release an updated EDC National Survey in the Fall to provide researchers with a glimpse of how these entities have performed since 2010. In the interim to this release, anecdotal evidence suggests that EDCs continue to deliver overall business success. Within the past year, five new EDCs were established in Ontario. Four more are expected to be operational in Ontario within the next 12-24 months. In 2010, Ontario represented the third largest EDC market and is a good bell weather for estimating national averages. With these numbers in hand, we continue to believe that 10 net new EDCs per year across Canada is a prudent estimate.

Aboriginal businesses – wheels of positive change remain in motion

The recent scaling back in medium-term prospects surrounding resource development have represented a setback for many Aboriginal businesses. Despite this curve ball, we see some of the recent momentum within the Aboriginal business sector enduring. In turn, we devote the next few pages to highlight some of the significant business developments, taking note of the positive impacts they are having on Canada’s Aboriginal population and broader economy.

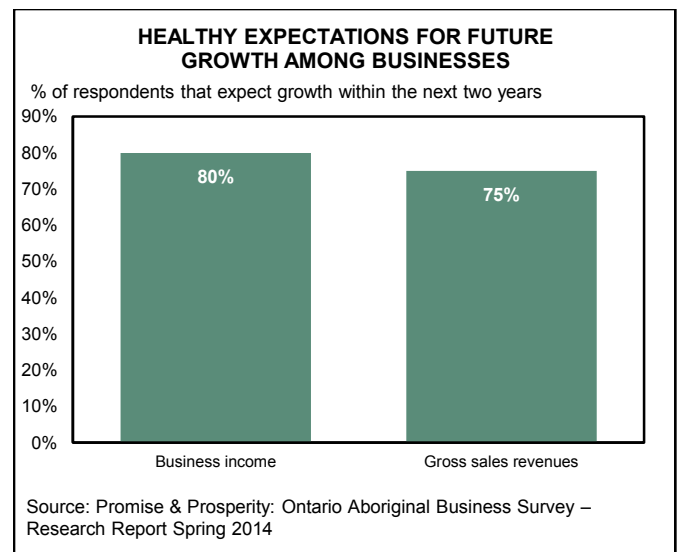
1) Aboriginal EDCs are a fast growing income source

Aboriginal community enterprises come in a variety of shapes and sizes, but in almost all cases, many spillover benefits are created for Aboriginal peoples, communities

and the broader economy. First, EDCs help strengthen ties between the Aboriginal community and the private sector, particularly in the development of energy projects (e.g., Lower Mattagami River Project).¹² Second, while these businesses typically receive start-up funding from the Band and/or government, as the enterprise matures, revenues become recurring and private financing can be accessed. Third, many EDCs hire and train community members, thereby providing access to high-quality jobs. In certain cases, EDCs pay more in taxes than their community receives in federal and provincial programming. Fourth, EDCs help disprove stereotypes often leveled against Aboriginal peoples, particularly when it comes to Aboriginal self-sufficiency and economic independence.³

In May 2013, the Canadian Council for Aboriginal Business (CCAB) released a research paper on Ontario’s EDCs.¹³ The findings give us an inside look into the types of industries EDCs are involved in, the growing pains associated with proving the relatively new business model, and some of the other key challenges faced by business leaders.

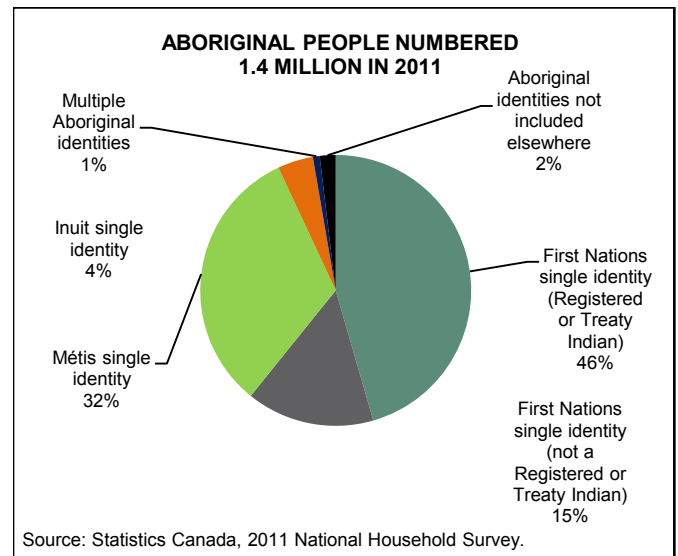
- *Business size and maturity:* the vast majority of EDCs meet Industry Canada’s definition of a small business.¹⁴ However, the maturity of the business noticeably varies – 37% of survey respondent businesses have been up and running for twenty years or more; whereas 41% have been in operation for five years or less.
- *Industry participation:* EDCs have broad industrial representation including energy, construction, services and natural resources. They also service local, domestic and international markets.



- *Community involvement:* business leaders have found it useful to build ties with other EDCs, industry organizations, and private sector firms to create a support system. Furthermore, strong ties and relationships enable the EDCs to support the community’s overall social development and share knowledge and lessons learned.
- *Critical success factors:* best practices include (1) well-documented organizational structure and corporate governance; (2) regular strategic visioning and planning; (3) concerted efforts to build ties and maintain relationships; and (4) furthering business objectives without sacrificing political and community support.
- *Business challenges:* where possible, EDC management look to private sector firms for knowledge and access to capital, but trust and confidence with these parties is a precursor. In light of this challenge, EDCs typically have a greater reliance on government and/or Band financing in their start-up phase. It is interesting to note that sufficient access to capital is frequently cited as a challenge for most small and medium-sized enterprises across Canada.¹⁵
- *Immediate needs and priorities:* education and capacity building are high priority needs for EDCs, particularly at the EDC-level (e.g., how to set up and run an EDC; corporate governance) and for the community-at-large (e.g., job and skills training).¹³ Employee retention is often a challenge, particularly when the EDC is not in a position to offer a competitive compensation package to its staff. The Canadian Council for Aboriginal Business argues that “there is also a need for greater sharing of expertise, knowledge and success stories among EDCs and other experts, to speed up the learning curve and increase the likelihood of success.”¹³

2) Renewed spirit of Aboriginal entrepreneurship

Like EDCs, entrepreneurship appears to be the air in Aboriginal communities. There is diverse representation of Aboriginal entrepreneurs across geographies and clients. Aboriginal entrepreneurs and small business owners are relatively positive about their track record, in terms of profitability and growth, but also their future prospects.¹⁶ The challenges faced by business owners are similar to other SMEs including finding qualified workers and securing access to financing. However, unique challenges exist for Aboriginal business owners including IT infrastructure. Approximately 20% of Aboriginal businesses in Ontario do



not have an Internet connection. The proportion increases to 37% on-reserve in the province. In spite of inconsistency in Internet access, most business owners have sufficient access to adequately perform marketing, e-commerce and customer relations management.

An important catalyst behind the renewed spirit of Aboriginal entrepreneurship is the growing belief that economic success can be achieved without sacrificing core values, particularly when it comes to the protection of the land and the environment.¹⁷ For example, Aboriginal entrepreneurs are setting up environmentally-focused enterprises in industries like renewable and alternative energy development.

Through the federal government’s Aboriginal Business and Entrepreneurship Development program, Aboriginal entrepreneurs are given services to help them achieve their business goals.¹⁸ The support delivered ultimately depends on the needs of the client, the availability and sources of funding, the eligibility of costs, the economic benefits, and the project viability. With these caveats in mind, individual Aboriginal entrepreneurs may receive up to \$99,999 in funding assistance. For community-owned businesses, the assistance can vary.

There is also an increased focus on building the next generation of Aboriginal entrepreneurs. For example, the Aboriginal Youth Entrepreneurship Program is a program offered by the Martin Aboriginal Education Initiative.¹⁹ The curriculum includes activities to improve Aboriginal student proficiency in subjects like business mathematics, accounting and social responsibility while supporting the acquisition of leadership skills. Financial literacy – how to develop a budget, knowledge of banking and the economy, financial projections – are emphasized and taught to program

Textbox 3 – Indspire: Enriching Canada through Aboriginal Education

Indspire is a registered charity that invests in the education of Aboriginal peoples for the long-term benefit of Aboriginal students, their families, communities, and Canada.³² The non-governmental organization – along with funding partners – disburses financial awards and delivers programs to help close the gap in Aboriginal education attainment relative to the national average. It is the largest funder of Aboriginal education, outside the federal government. Since its inception, Indspire has delivered almost \$65 million and close to 20,000 bursaries and scholarships to Aboriginal students.³³ A recent Indspire program evaluation report finds that 93% of Aboriginal students who received funding from Indspire earned a post-secondary credential, and 82% of those graduates found work.³³

In its 2015 budget, the federal government committed to \$12 million over three years to Indspire to provide post-secondary scholarships and bursaries for Aboriginal students.¹⁰ At least \$1 million of this total sum will be devoted to supporting students pursuing an education in the skilled trades. In May 2015, the Ontario government also contributed \$1.5 million to the Indspire organization.³⁴

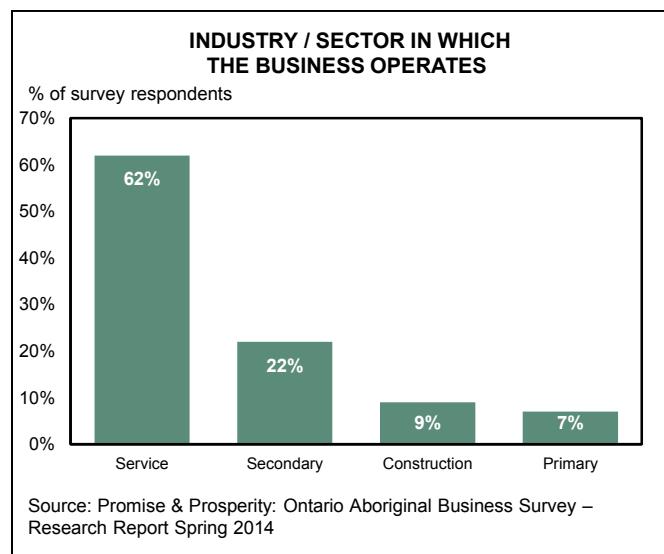
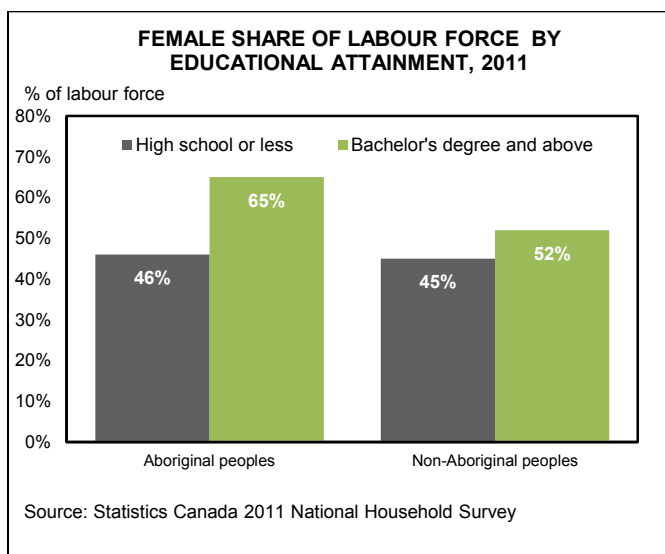
participants. Armed with this curriculum and background, students are asked to develop a product or service-based business. Some Aboriginal students are given funds for their own micro-business, helping to take a business idea from paper to reality. Furthermore, AYEP participation counts for Grade 11 and 12 secondary school credits. Completion of these courses helps the student move closer to high school completion, while potentially opening the door for business-related post-secondary studies.

As part of the Aboriginal Youth Entrepreneurship Program, Aboriginal textbooks were designed – a first of its kind initiative in Canada.²⁰ Teacher resource materials and student textbooks were created for Grade 11 and Grade 12 courses. Aboriginal-specific materials enable students to see themselves on the page, helping to bridge the gap between academia and reality. The use of Aboriginal culture and content in education curriculum was one of the best practices we listed in our research on Aboriginal literacy levels in Canada.⁹

3) Smart business for the private sector

Aboriginal Affairs and Northern Development Canada recently highlighted several strategic alliances between Aboriginal and non-Aboriginal companies as case studies of success.²¹ These partnerships, or joint ventures, have resulted in many successful business ventures including a winery in the Okanogan, a clean-energy producer on Vancouver Island, a heritage hotel on the Sunshine Coast, a forest products producer near Burns Lake, and a natural gas drilling rig near Fort Nelson.²¹ At the same time, developing strong partnerships with Aboriginal companies has proved challenging for reasons including cultural differences and the considerable diversity that exists across various Aboriginal groups.

Increasing expectations surrounding corporate social responsibility, combined with the legal requirement to consult and accommodate on resource projects, have led to budding arrangements between Aboriginal and non-Aboriginal businesses. Enhanced cultural awareness and effective gover-



nance surrounding the partnership development process are some of the elements leading to large mutual benefits. For instance, Aboriginal businesses and entrepreneurs benefit from the private sector's experience, talent and access to capital. Meanwhile, non-Aboriginal companies are increasingly recognizing the value associated with Aboriginal peoples as partners, potential employees and/or customers.¹⁷

An example of this type of Aboriginal and non-Aboriginal alliance is the Canadian Aboriginal and Minority Supplier Council (CAMSC).²² The group is a non-profit organization tasked with increasing economic development efforts and employment among Canada's Aboriginal and minority population. Initiatives include: (1) a certification process for Aboriginal and minority-owned business enterprises; (2) an advanced management education program; and (3) providing referrals to corporate buyers.

Last month, the Canadian Board Diversity Council and CCAB held joint Summits to create a national dialogue about the merits of stronger collaboration between corporate Canada and Aboriginal business leaders.²³ Dual emphasis was placed on how Aboriginal and corporate leaders can best learn from each other and how organizations can benefit from having a higher representation of diverse Board leadership. Current Corporate board representation is a meagre 0.8% for Aboriginal people, a much smaller proportion versus the 4.3% population share. A recent *The Globe and Mail* article stated that it is tougher to get Aboriginal peoples appointed to Boards relative to women.²⁴ This is because of the smaller numbers available to choose from, but also due to so few corporate directors having Aboriginal people in their social and/or professional networks.

Consultations over pipelines and foreign investment activity in the oil sands have shone a spotlight on Aboriginal community involvement in resource projects. According to research from the Public Policy Forum, over the next several years, more than 500 Aboriginal communities will find themselves in the middle of some of the largest oil, gas, forestry and mining projects Canada has seen in decades.²⁵ Successful partnerships among Aboriginal communities and the private sector have gone beyond the legal minimums associated with the duty to consult. Instead, positive relations are fostered through early and proactive engagements, community involvement and cultural sensitivity.

Barriers looked at as opportunities in disguise

The case for diversity has long been established – stronger stakeholder relationships, better decision-making,

inclusive workplaces and long-term business sustainability, among others.²⁶ While the door to inclusivity has opened a crack, we must continue to make progress towards full acceptance of diversity in all its forms. This includes identifying the barriers which currently impede success and then formulating a game plan to overcome the obstacles.

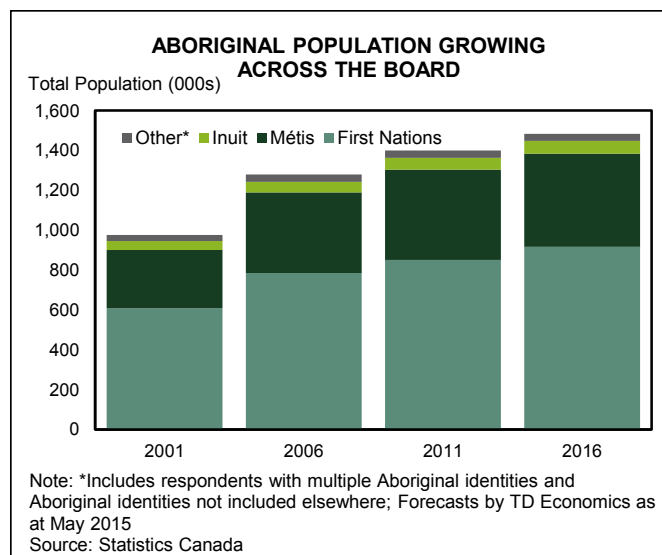
The socio-economic barriers faced by Canada's Aboriginal population are well-known. Some are structural in nature such as geographical remoteness. Others can be thought of as cultural stemming from linguistic differences and residential schooling. History and former government policies also play an important role. In tandem, each of these barriers helps explain why improving economic prosperity among Aboriginal peoples is such a complex task to undertake.

The millions of individuals in the Aboriginal community are a not only a key part of society, but they are also a considerable part of the economy. They are workers. Aboriginal youth will be workers of the future. Businesses need to be aware that the Aboriginal population segment is simultaneously a pool of labour and a customer base.

To champion this cause, we are hoping to be part of the diversity conversation. The population and income estimates demonstrate that the Aboriginal community is too large and significant to be relegated to the shadows. Furthermore, if we change our perspective, barriers are just opportunities in disguise. The sections which follow demonstrate the actions being taken to turn obstacles into opportunities.

1) Many employers are looking to Aboriginal peoples to help address structural labour shortages

As the previous section outlined, there is an increased acceptance that employing Aboriginal people and partnering



Textbox 4 – Frontier College and Aboriginal Summer Literacy Camps

Since 2005, Frontier College has partnered with over 80 First Nations, Inuit and Métis communities in British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, Québec, New Brunswick, and Nunavut to offer Summer Literacy Camps to Aboriginal children and youth between the ages of four and 16. The camps operate for three to six weeks, and are offered free of charge to participants.

The goals of the program are:

- to support student success and improve educational outcomes in Aboriginal communities by preventing summer learning loss;
- to nurture a love of reading and learning, and strengthen self-efficacy among camp participants;
- to assist in strengthening community capacity via the exchange of knowledge and expertise, and parental and community engagement; and
- building community partnerships.

Frontier College works with TD, other corporate donors, foundations and governments to provide each community with paid camp counsellors, the majority of whom are hired from the community. All camp counsellors receive extensive training from Frontier College on topics such as literacy and the stages of reading and writing; incorporating culture, languages, science and numeracy into camp activities; safety and risk management; community engagement, and evaluation. The counsellors are also given a basic camp framework and a multitude of activity ideas and resources to plan and implement unique camp programs for the children and youth of each community.

In addition, parents and caregivers, Elders, community leaders and community members are invited to participate in and contribute to camp in many ways, including leading and facilitating activities, reading with campers, and sharing their skills, knowledge and expertise. Adult participation and engagement works to foster community ownership of the camps, and sends positive signals and messages to campers about the value of learning and education. By engaging the community and parents, camp organizers are also able to integrate Aboriginal cultures, traditions, languages and approaches to learning at camp in a meaningful, respectful and holistic way that is suited to each community's identity.

In the summer of 2014 alone:

- approximately 6,000 children and youth benefitted from the summer literacy camps;
- over 150 local community members received training to deliver literacy activities;
- over 230 individuals gained employment;
- approximately 1,400 Elders, parents, community leaders, professionals and community members helped deliver activities;
- over 40,000 free books were given to children and their families; and
- campers read at least twice the amount required to combat summer learning loss;

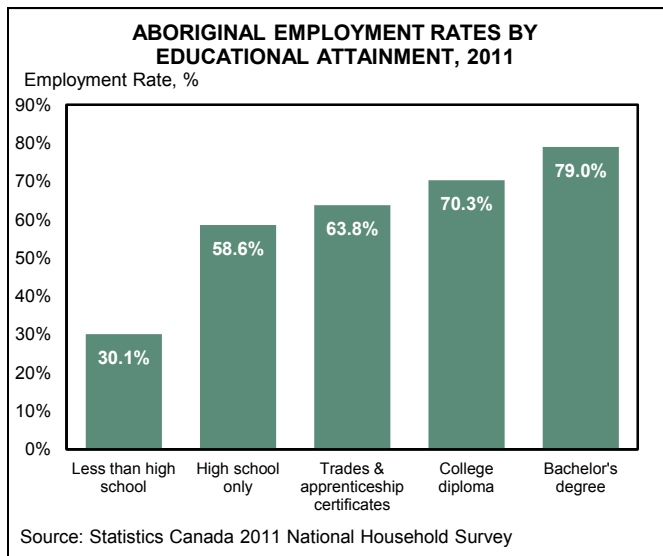
Evaluations, surveys and testimonials confirm that the camps are successful in meeting the program's goals.

In summary, Frontier College's Aboriginal Summer Literacy Camps have effectively employed all of the success factors discussed in this paper. To help foster this beneficial program, TD is proud to be a national partner of Frontier College in its Aboriginal literacy initiatives. Frontier College hopes to further expand its program over the next three years to offer literacy camps to 6,500 to 8,000 children and youth per year in 150 communities across the country, from coast to coast to coast.

with Aboriginal Communities is a smart business strategy. This is because many employers are worried about longer-term structural labour shortages, particularly as the baby boomer population exits the workforce. In turn, firms are actively looking for ways to recruit and retain highly-qualified staff and to increase the labour force participation of

traditionally under-represented populations like Aboriginal persons. It is therefore imperative that Aboriginal peoples be firmly positioned to fully participate and contribute to the knowledge-based economy.

The demographic characteristics of the Aboriginal population are particularly appealing for employers. The



Aboriginal population is relatively younger than the non-Aboriginal population. In 2011, Aboriginal children aged 14 or younger represented 28% of the total Aboriginal population. By contrast, non-Aboriginal children aged 14 and under constituted 16.5% of the total non-Aboriginal population. Furthermore, the median age of the Aboriginal population is 28 years old – 14 years younger than the median age of the non-Aboriginal population.

The growth of the working age population – those individuals aged 25 to 64 years old – are of particular relevance to labour markets. Over the next decade, roughly 400,000 Aboriginal youth will join the 900,000 Aboriginal peoples already of working age.¹⁰ This projected population growth represents a sizeable influx into the working-age population, particularly in Saskatchewan where 36% of the population is forecast to identify as Aboriginal by 2026.

Federal and provincial governments are taking steps to boost Aboriginal labour market participation, tying the pressing need to future economic prosperity challenges. Past research efforts have argued that closing the Aboriginal education gap to the national average would yield significant improvements in economic activity and government fiscal positions.²⁷ We believe that reinforcing mutual economic interests across Aboriginal people, the business community and the government sector offers significant potential for transformative change.

The 2015 federal budget capitalized on this sentiment, by recognizing the importance of Aboriginal economic participation. It stated that: “a skilled and engaged Aboriginal labour force can improve the lives of Aboriginal peoples, mitigate employment gaps due to Canada’s aging population and contribute to the growth of the Canadian economy.”¹⁰ In

response, the government provided funding for Aboriginal labour market programming, including skills development and training for Aboriginal peoples. The efforts are meant to equip Aboriginal peoples and communities for jobs in high-demand sectors of the economy, including in high-skilled occupations.

2) Creating a track record of success – tackling issues for Aboriginal post-secondary education attainment

Aboriginal peoples are under-represented in post-secondary institutions relative to the national average. More worrisome is the fact that the gap has not markedly narrowed.²⁸ However, there is an increased understanding among governments, business, faculty and administration staff surrounding the demographic, social, health, and economic challenges facing Aboriginal Canadians. In response, many steps have been taken to improve the access, retention, and success rate of Aboriginal students.²⁸

- *Improving access:* institutions are reaching out to middle and secondary school students to increase their awareness of post-secondary education. One popular way to accomplish this is to generate a positive first experience with the institution. The latter helps foster a feeling of belonging, making school a fun activity versus a chore. For example, field trips are often organized for young Aboriginal students to help them see that university is “just a big school.”²⁸ Furthermore, organizers find that field trips help the student visualize their post-secondary experience.
- *Community outreach:* as an example, Red River College, the University of Winnipeg, and the University of Manitoba travel as an outreach team to Aboriginal communities. Strong relationships have developed among the post-secondary faculty, administration staff and community leaders. Individual faculties such as law, social work and medicine run camps and tutoring services to provide positive role models, helping Aboriginal students graduate from high school.
- *Teacher education:* the Queen’s University Aboriginal Teacher Education Program (ATEP) is a community-based delivery system involving Elders, distance learning, and collaborative decision-making with the university and Aboriginal community.²⁹ According to a recent Queen’s conference report, there have been hundreds of graduates from the program.²⁸

Textbox 5 –The Model School Project

The Model School project was a four-year initiative between 2010 and 2014 to improve First Nations student achievement in both reading and writing by increasing the quality of teaching.³⁹ The program was a collaboration involving Kettle and Stony Point First Nation, Walpole Island First Nation, the Ontario Institute for Studies in Education (OISE) at the University of Toronto, and the Martin Aboriginal Education Initiative.

All participating students were enrolled in Senior Kindergarten to Grade 6 in two schools operated by First Nations during the study period. Participating teachers were engaged in continuous, intensive, on-site professional learning. Emphasis was placed on increasing expectations for both students and teachers; teaching oral language, reading and writing; and using assessments to inform teaching. New resources including assessment materials, classroom furniture and equipment were also introduced to support teaching.

During the 2010-14 study period, the percentage of students – in Senior Kindergarten to Grade 3 – identified for speech and language services decreased from 45% to 19%. As expectations and the quality of teaching increased, it became easier to distinguish between students with special needs and those students whose underachievement was due primarily to the quality of teaching. At the beginning of the project, most students did not meet Ontario provincial standards – as measured by EQAO results – in reading or writing. By contrast, at the end of four years, most students met or exceeded these same standards.

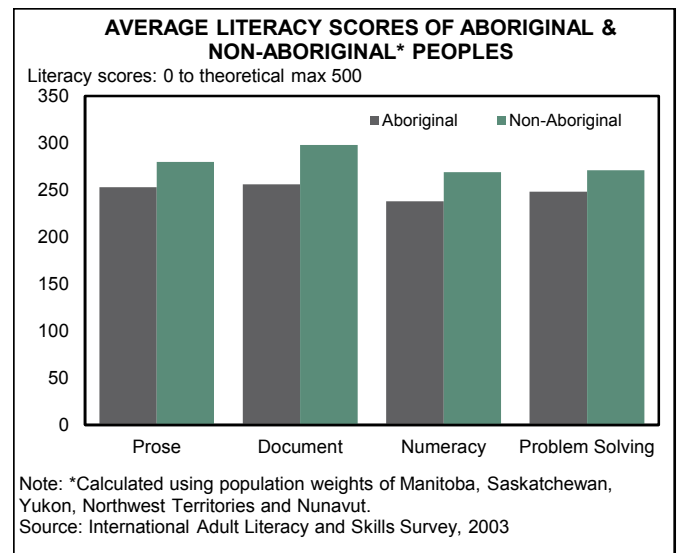
The research concludes that with effective teaching: (1) fewer First Nations students are identified with special needs; and (2) First Nations students can excel as both readers and writers.

- *Admission eligibility criteria:* post-secondary institutions are broadening admission approaches, particularly for those students in under-represented categories such as Aboriginal students. Furthermore, entrance pathways are being developed for students with atypical backgrounds.
- *Financial support:* initiatives contained within the federal government’s Economic Action Plan and increased action on the part of communities, governments, corporations, and educational institutions have alleviated some of the financial burden faced by Aboriginal persons wanting to get a good quality education. That said, limited funding – and in some cases underfunding – remains a significant issue at all tiers of the education system.
- *Transitional support and programs:* institutions recognize the importance of nurturing relationships with non-traditional students and their communities long before an application is submitted. This outreach is part of the continuum of support given to Aboriginal students.²⁸ To help with the transition from community to school and to improve the overall understanding of Aboriginal culture and community characteristics, the University of Victoria, for example, has developed an Aboriginal Awareness Camp.³⁰
- *Role models:* some post-secondary institutions have Elders on staff who can serve as role models for newly enrolled students. These mentor-like arrangements almost always mutually benefit both parties.

Separate from mainstream, post-secondary education and institutions, there are also Aboriginal-based schools, such as First Nations University of Canada.³¹ These schools bring together many of the best practices highlighted in this report under one roof. For example, First Nations University of Canada, specializes in Indigenous knowledge – providing post-secondary education for all students including those with Indigenous and non-Indigenous backgrounds – with culturally-attuned administration, faculty and curriculum.

3) Best practices have been identified to help lift Aboriginal peoples’ literacy levels

Increased literacy produces better health outcomes, high-



Textbox 6 – Aboriginal Head Start in Urban and Northern Communities

The Aboriginal Head Start in Urban and Northern Communities (AHSUNC) program first began in 1995. The initiative was established to support the spiritual, emotional, intellectual and physical development of Aboriginal children, while simultaneously supporting their parents or guardians. In its current form, AHSUNC is a community-based children’s program delivered by the Public Health Agency of Canada.⁴² The program focuses on early childhood development for First Nations, Inuit and Métis individuals and families living off-reserve. Its goal is to prioritize and accept those children most poised to benefit.

Half-day pre-school experiences for Aboriginal children focus on six program components:

- Aboriginal culture and language;
- Education and school readiness;
- Health promotion;
- Nutrition;
- Social support; and
- Parental involvement.

Program design and management is usually performed by First Nations governments in consultation with parental advisory committees and/or committees of Aboriginal representatives.⁴³ Efforts are made to hire Aboriginal staff and educators who can expose children to Aboriginal culture and languages. Early childhood educators work directly “with Elders, Aboriginal language specialists, traditional teachers, and parents to enhance the development, cultural pride and school readiness of young children.”^{43,44}

The AHSUNC program has shown that locally-controlled, early intervention strategies can provide Aboriginal children with: (1) a positive sense of themselves; (2) a desire for learning; and (3) opportunities to develop. The Public Health Agency of Canada states that AHSUNC program sites “have significantly benefited the health, well-being and school readiness of participating Aboriginal children and their families.”⁴⁵

The Aboriginal Head Start Strategic Fund is a time-limited, strategic enhancement to the AHSUNC, delivering \$3 million annually. Annual investments have been committed up to, and including, 2015. The objective of the Fund is to enhance the reach and improve the quality of AHSUNC programming. This will be achieved through increased access to accredited early childhood development courses, developing culturally and linguistically appropriate resources and developing new models of program delivery.⁴⁵

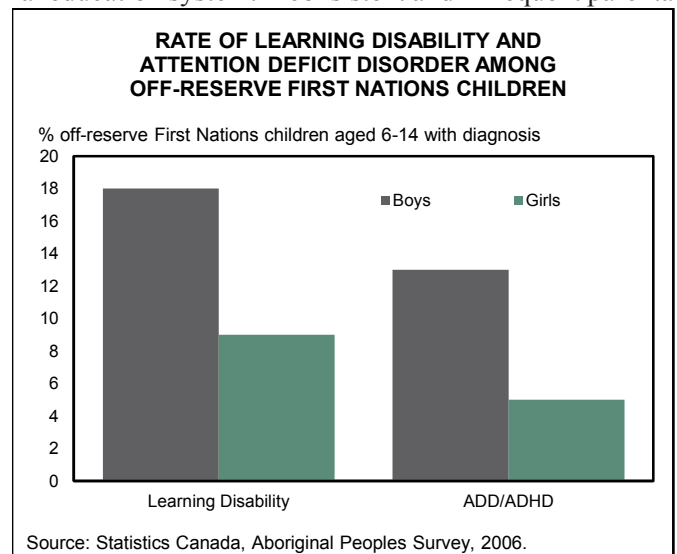
er income, and improved communications.⁹ Furthermore, the exchange of knowledge spurs debate, making communities dynamic and continuously-improving. Discouragingly, the data reveal that 60% of Aboriginal adults do not have the literacy skills to fully participate in Canada’s knowledge based economy. These adults are unable to fully understand and/or use the information around them to create a better life for themselves and their families. The share of Aboriginal adults who fall into category is ten percentage points higher than the national average.

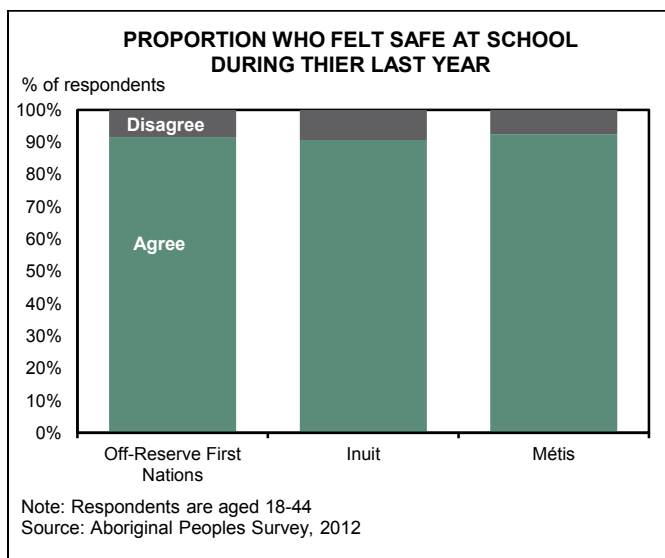
In our 2013 report⁹, we identified best practices and the steps being taken to lift Aboriginal peoples’ literacy levels.

a) Engaging parents to dispel the education stigma

In years past, education was used as a tool to assimilate Aboriginal peoples into Canadian society. The scars of this period in history remain fresh and run deep in the minds and communities of many Aboriginal peoples. With this history,

there remains a sizeable portion of Aboriginal adults who are hesitant for their own children to participate in the formal education system. Inconsistent and infrequent parental





involvement often have a direct impact on overall student success. This is because parental engagement helps create a support system for the student, while boosting school participation and attendance.

Parental engagement has been shown to improve when: (1) schools administrators seek out parental participation; (2) parents are involved in school governance such as steering committees or parent-teacher advisory councils; (3) parents are kept informed; and (4) schools incorporate Aboriginal culture and traditions into the curriculum. Action is being taken. For example, the National Committee on Inuit Education calls for a program devoted to boosting parental involvement. The Government of Manitoba has created a guide – written in Cree and Ojibwe – to help facilitate parental involvement in the education of Aboriginal students.

It is not only the student who stands to benefit from increased parental involvement – parents also reap the rewards. A case in point, findings from the Advisory Committee on Literacy and Essential Skills find that parents who are engaged in their child’s education increase their own literacy levels, have a lesser distrust in education, gain access to more parenting options, and have an improved employment status.³⁵

b) Making Aboriginal students feel valued and welcomed will lead to improved educational outcomes

In order to eradicate discrimination in Aboriginal education, those involved must recognize that it exists and create targeted efforts to address the attitudes and behaviour. The efforts must include anti-racism strategies and policies that will be used to resolve racial problems. The strategies

should involve anti-discriminatory and cultural sensitivity training for staff and students, and ought to work to include Aboriginal specific content and learning approaches within the conventional curriculum.

c) Incorporating Aboriginal approaches to learning into curriculum and teaching methods will increase the literacy levels

Throughout this report, we have stressed the importance of incorporating Aboriginal culture into schools, curriculum and programs. Research has shown that when learning preferences and culture are ignored, alienation can result, leaving the student demotivated and/or wandering aimlessly. Aboriginal youth need to know they are not alone and that the future remains bright.³⁶

d) Increasing access and targeted funding for literacy programs and supports for those Aboriginal peoples in rural, remote and northern areas

Many of Canada’s Aboriginal peoples live in remote, rural or northern areas. This geographical distribution across Canada’s vast lands makes it difficult to deliver and support high-quality, literacy programming. Furthermore, the cost to service these programs are often relatively more expensive than similar programs based in an urban centre.

These challenges are being overcome in several different ways. First, the computer and reliable Internet access are helping to bridge the gap between literacy programs and the location of the Aboriginal person or community. Second, funds are sometimes given to a local Aboriginal government or community to overcome access barriers. This solution carries with it an additional benefit – administrators can tweak the curriculum and/or program delivery to meet local needs.

e) Delivering teacher support/training ensures that literacy programs are high quality and sustainable

There is a need for positive role models, whether in Band-operated or provincially-run schools. However, it is difficult to attract and retain trained teachers, particularly on-reserve, for reasons including below-average pay and geographical remoteness.² Furthermore, when Aboriginal peoples are educators themselves, they sometimes hit a “glass ceiling” when it comes to career path and progression. Data from the 2011 National Household Survey show that Aboriginal peoples are overrepresented among elementary and secondary school teachers – relative to the non-Aboriginal average – but are under-represented among managers in education.²

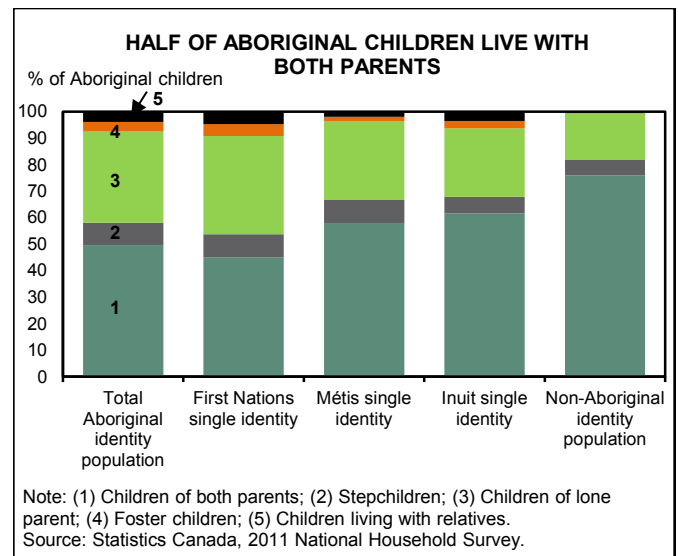
Good teacher training is the necessary underpinning of an

educational system which understands the needs of students. In mainstream curriculum, educators do not always delve on Aboriginal peoples and culture and their historical importance because the teachers themselves do not have sufficient background. To improve overall awareness, the Ontario Institute of Studies in Education at the University of Toronto has implemented the Deepening Knowledge Project. This initiative provides future teachers with an increased awareness and knowledge about Aboriginal history and culture for their future teaching careers and students-to-be.³⁷

4) Early childhood development and other programs are being targeted towards Aboriginal youth

For the Aboriginal population, the focus on children and youth is not surprising. In fact, the data surrounding Aboriginal youth are sobering, particularly given how broad-based and far-reaching the obstacles:⁴³

- 40% of Aboriginal children score poorly in language and communication skill early development instruments;⁹
- A greater proportion of Aboriginal children are born with Fetal Alcohol Spectrum Disorder, a condition which affects individual learning ability;⁹
- Less than half of First Nations children read a book every day;⁹
- In 2011, almost half of Aboriginal children aged 14 and under were living in a family with both of their parents, either biological or adoptive, compared with three-quarters of non-Aboriginal children.⁴
- About one-third of Aboriginal children live in a lone parent family compared with 17.4% of non-Aboriginal



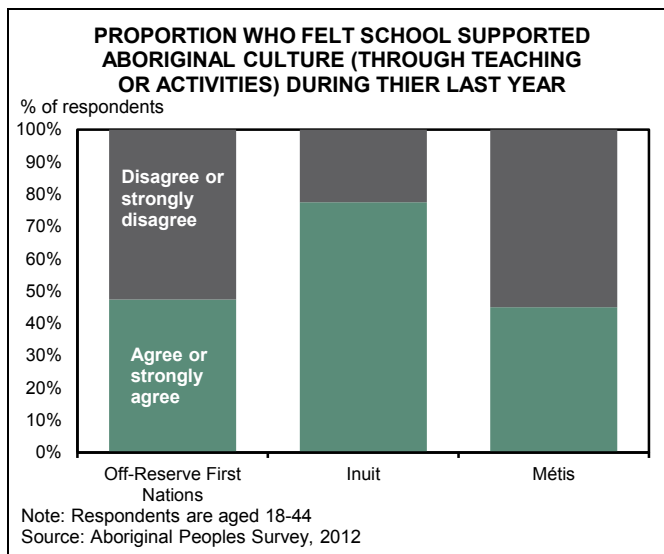
children. In addition, there is greater representation of Aboriginal children living with their grandparents or other non-parent relatives versus the non-Aboriginal population; and⁴

- Almost half of all children aged 14 and under in foster care in Canada were Aboriginal. Nearly 4% of Aboriginal children were foster children compared to 0.3% of non-Aboriginal children.⁴

Many Aboriginal children are held back straight out of the gate, making intervention that much more critical at an early age. This is because the experiences in the first five years of life are known to have a material impact on economic and social success.³⁸

Most high-income Canadians are able to afford high quality childcare, the same cannot be said for low-income families. Approximately, 70% of affluent Canadians have out-of-home care for their children. The percentage drops to 40% for low-income Canadians.³⁸ Outside of the province of Québec, parents cover roughly 50% of child care costs. This represents the fourth highest in advanced economies. Furthermore, direct public expenditure on early childhood education services in Canada is 0.25% of GDP. Even if we broaden the expenditures to include family support (child care payments, parental leave benefits, and child care support), Canada invests 17% less than most comparable industrialized economies.³⁸

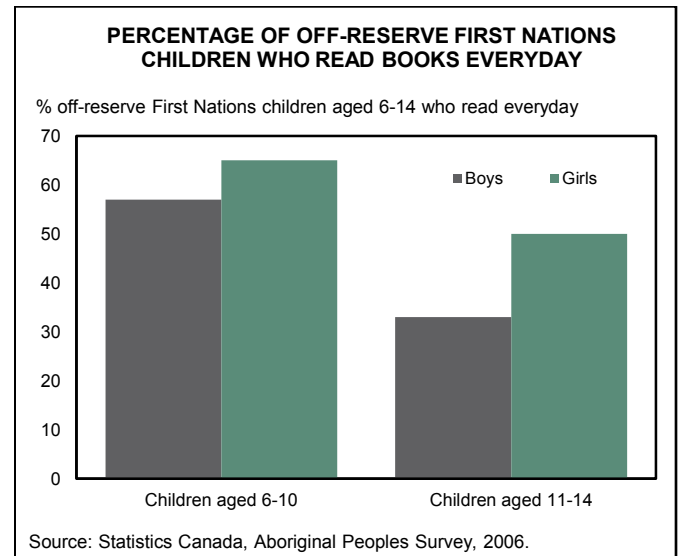
Investment in early childhood education will result in long-term benefits.³⁸ For example, a \$1 investment will generate a long-term return of \$1.50-3.00. The multiple is often higher for children in low-income households including many Aboriginal Canadians.³⁸



For the Aboriginal population, there is a lack of resources for early childhood interventions, a fact acutely felt in the Northern regions of the country.⁴³ Concerns include a lack of standards, inconsistent licensing practices, high costs to deliver services, and demand outstripping supply. It is important to note that significant strides have been made in recent years:

- Since 1995, the federal government has supported a variety of community-based programs to improve the health, wellness and educational achievement among Aboriginal children. Examples include pre-natal care, childcare, family support programs, Head Start programs (see Textbox) and family resource centres.
- Many Aboriginal communities have developed local programs and family services, helping to reinforce a positive and culturally-relevant Aboriginal identity in children and their families.
- The First Nations Early Childhood Development Council provides information and advice to First Nations leadership and communities to improve First Nations early childhood programming in British Columbia.⁴⁰ The organization has developed a Human Resource Management Best Practices Toolkit to provide guidelines and standards related to early childhood licensing, wages, and other Human Resource policies. In addition, the group is developing a training strategy to increase the number of certified staff working in First Nations licensed child care and Head Start programs.

Programs for older youth are just as important. FOXY (Fostering Open eXpression among Youth) is just one ex-



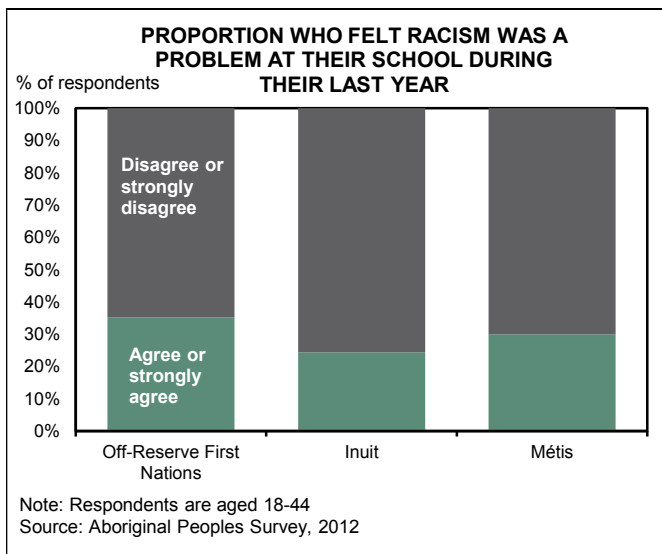
ample.⁴¹ It is a community-based project to spur dialogue about sexual health issues while giving participants the opportunity to develop leadership capabilities, make healthy life choices, and build greater self-confidence.

5) There is an enhanced understanding of the historical, social and economic importance of the 1.4 million Aboriginal peoples in Canada

Racism, discrimination and stereotyping are experienced by individuals, families, communities, and countries through every day interactions. In most cases, the experience is negative and can result in long-lasting emotional and social trauma. Additionally, attitudes and perceptions are often internalized and passed along from generation to generation.⁴⁶ Racism can affect the lives of individuals and communities quietly and covertly. In other cases, impacts are immediate and forceful.⁴⁷

There are a number of negative perceptions held about Aboriginal Canadians including: pervasiveness and cause of alcohol and drug addiction; unemployment; violence; homogeneity of culture and people across all Aboriginal groups; cultural values and traditions; and reliance on the government to oversee community affairs.⁴⁸ These incorrect assumptions can foster a degree of deep mistrust and diminished outcomes for Aboriginal peoples.⁴⁹ A greater national dialogue between Aboriginal and Non-Aboriginal Canadians can enhance collective understanding and engender a deeper appreciation for the perspectives of both parties.⁵⁰

TD’s former CEO, Ed Clark, is quoted in the 2014 TD Corporate Social Responsibility Report as saying: “we have the opportunity, through ongoing collaboration and consultation with Aboriginal peoples, to help plant the seeds



for economic growth, social advancement and long-term sustainability of Aboriginal communities.”⁵¹ Evidence-based research is just one way to start the much needed dialogue. In this regard, our series of research on the challenges faced by Aboriginal peoples have helped shine a light on the community from an economics lens. We even put together a list of myths surrounding Canada’s Aboriginal population helping to dispel some commonly-held misconceptions.³ These actions have given us a platform to learn and share information about the economic and historical importance of Aboriginal peoples in Canada.

Efforts across the public and private sector are also being made to increase overall awareness of Aboriginal issues, cultures and traditions. For example, the federal government first introduced Aboriginal Awareness Week in 1992 to honour the Aboriginal cultures in the public service and across Canada.⁵² Western University – like many other post-secondary institutions – has a similar week for faculty, staff and community partners to come together and celebrate Indigenous.⁵³ The week-long commemoration brings current and prospective students, faculty, staff, and community partners together to celebrate Indigenous peoples’ contributions to post-secondary learning through cultures, arts, and scholarship.

Parting thoughts

The Aboriginal community runs through every element of Canadian society and the economy. This is not surprising as Aboriginal peoples work in all industries and occupations. The demographic group consists of all ages, incomes, and religions. They represent many of the workers, business owners and consumers of today and into the future.

We have updated our estimates for the combined total

income of Aboriginal households, business and government sectors in 2016. We now forecast that the overall income pie will reach \$30-31 billion. The greatest source of expansion and prosperity for the overall Aboriginal market is being recorded within the business sector. We have highlighted promising developments surrounding the renewed spirit of entrepreneurship, the growing number of Economic Development Corporations and burgeoning Aboriginal business partnerships with private sector firms.

Encouragingly, the socio-economic challenges faced by the Aboriginal population are increasingly looked at as opportunities rather than barriers. Post-secondary institutions, communities, governments and private sector firms are coming together to tackle issues surrounding Aboriginal post-secondary education attainment. Best practices have been identified to help lift Aboriginal peoples’ literacy levels. Early childhood development and other programs are also being targeted towards Aboriginal youth to prevent a multi-generational cycle of poverty from perpetuating. Last, there is an enhanced understanding of the historical, social and economic importance of Aboriginal peoples in Canada, helped in part by greater awareness and research.

Continued progress on Aboriginal challenges needs to occur for sustainable prosperity. Too much is at stake for progress to stagnate. For this to happen, we must all be part of the conversation and the solution. Analytics are one way to achieve greater understanding of the trends and progress made. Additionally, improved data can enable researchers and policymakers to appreciate the differences within the Aboriginal community itself. These same decision makers and persons of influence will then be equipped to permanently conquer the social challenges faced by the Aboriginal community.

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APPENDIX: METHODOLOGICAL DETAILS

Data sources

Publicly available 2001 and 2006 Census and 2011 National Household Survey information were used to arrive at historical income and market estimates. From this database, demographic information including population counts both on- and off-reserve and in rural and urban centres, household income and labour force status were obtained. To arrive at estimates for 2011 and a forecast for 2016, we have supplemented the Census with a variety of other, more recent databases. Examples include Statistics Canada's: population projections for Aboriginal peoples (2006-31, Scenario 1) and the 2012 Aboriginal Peoples Survey. What's more, we were also given access to high-level information from the Canadian Council for Aboriginal Business on Economic Development Corporations (EDCs).

In order to provide greater transparency and clarity to our estimates, we spell out next the main assumptions and inferences made for each income sub-component.

Personal income

For this sub-component, we have split income trends into off-reserve in both rural and urban centres and on-reserve. The 2001 and 2006 Census give us employment rates, labour force participation rates, and average household income for each of these categories. Using these years as a basis, we have relied on national employment trends and the 2011 National Household Survey to assess and quantify the labour market performance of Aboriginal peoples. The national data give us a sense as to how Aboriginal peoples may have fared during the 2008-09 recession and more recently, when commodity prices receded from record highs.

In our forecast out to 2016, we have assumed that household income for Aboriginal peoples, both on and off-reserve, will grow at a rate similar to all Canadians – approximately 2.5% per year in nominal terms from 2011-16. Furthermore, we have assumed flat employment rates for on-reserve and off-reserve Aboriginal peoples over the 2011-16 period.

Business income

National small business counts were taken from Industry Canada and Statistics Canada's Business Register. These can be found at the following location: http://www.ic.gc.ca/eic/site/sbrp-rppe.nsf/eng/h_rd01252.html.

From this data source, we have assumed that most

Aboriginal-owned small businesses have less than ninety-nine employees. To arrive at the desired number of small businesses, we have taken the share of individuals who are self-employed and multiplied this with the total national business count. This rough methodology was recommended to us by Industry Canada senior analysts due to the fact that not all self-employed individuals own a small business and more than one self-employed individual (e.g., partnership) could be housed in the same business. Average weekly earnings were also taken from this same Statistics Canada data source. We have assumed a 52-week operating year and for our forecasts, have assumed that decade-long averages prevail.

Information on economic development corporations (EDCs) heavily relied on results from a 2011 survey commissioned by the Canadian Council on Aboriginal Business (CCAB). Based on anecdotal evidence and CCAB's ear on the ground, we have assumed ten new EDCs are set up per year, a fairly conservative forecast in light of Ontario's recent trends (4-5 new EDCs this year alone). Earnings for these entities are projected out to 2016 using nominal GDP as a proxy.

Government income

For federal transfers dispersed to Aboriginal communities, we have taken annual spending numbers from Departmental Reports on Plans and Priorities. This aggregate includes Aboriginal Affairs and Northern Development, Health Canada, CMHC, Solicitor General, Heritage Canada, the Department of Fisheries and Oceans, Citizenship and Immigration Canada, the Privy Council Office, and the Department of Justice. We have assumed a 1.6% year-over-year program spending increase from 2011-16.

Provincial and territorial government funding was taken from annual Public Account documents. Funding includes general transfers, subsidies and programs targeted towards Aboriginals where data were available. Annual program spending growth for our forecasts is assumed to be 2.0%.

To arrive at discretionary spending, we have assumed that roughly 10 per cent of all federal and provincial government spending is not earmarked to a specific purpose (e.g., health, education). This share is assumed constant over our forecast period.

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