

STATE OF THE NORTH

RESPONDING TO NORTHERN ONTARIO'S DEMOGRAPHIC SHIFT

SEPT 27-28, 2017, TIMMINS, ONTARIO.



Welcome!

The Growth Plan for Northern Ontario is closing in on its 5 year anniversary.

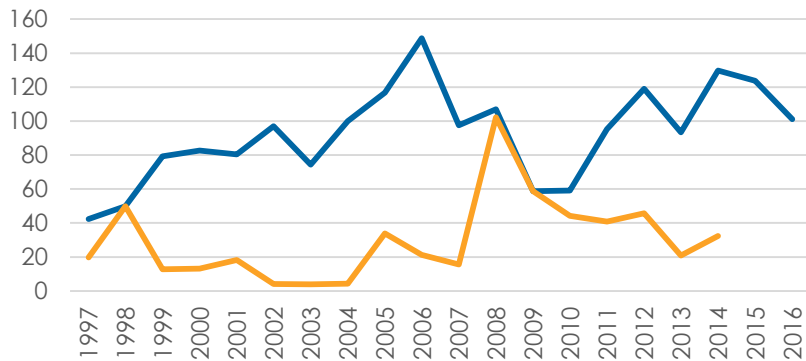
It's stated goals are to:

- Grow and diversify the economy;
- Enhance education, training and career opportunities;
- Support efficient and effective infrastructure investment and planning; and
- Ensure sustainable development and land use planning.

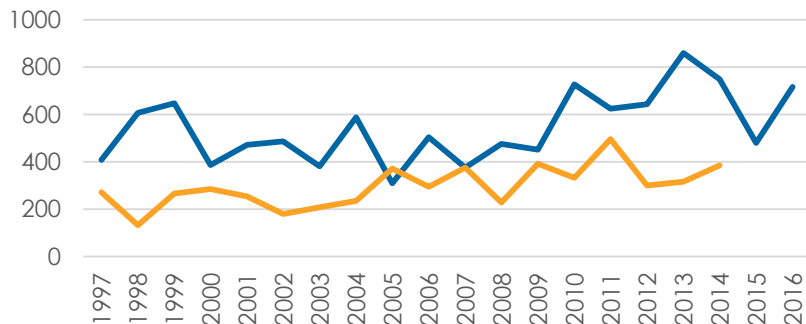
Now is a good time to
assess progress, and step
forward into **solution-based
discussions.**

GDP by Goods-Producing Industry(Chained 2007 Dollars x1,000,000)

AGRICULTURE



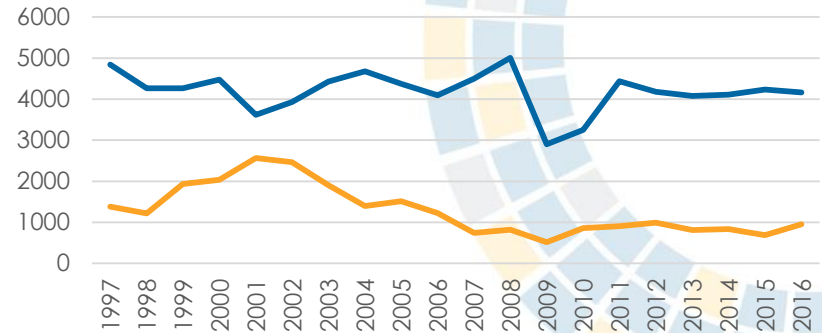
UTILITIES



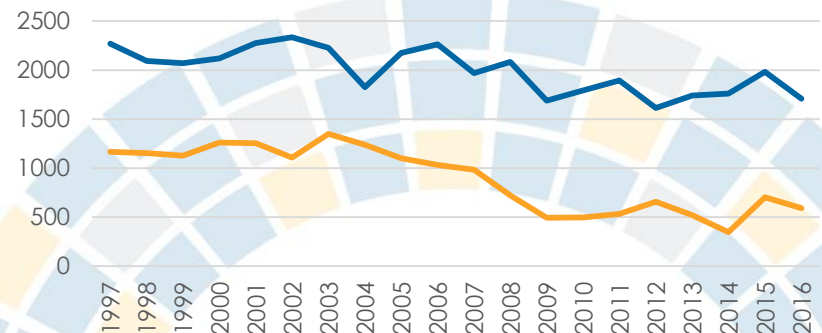
■ Northeast

■ Northwest

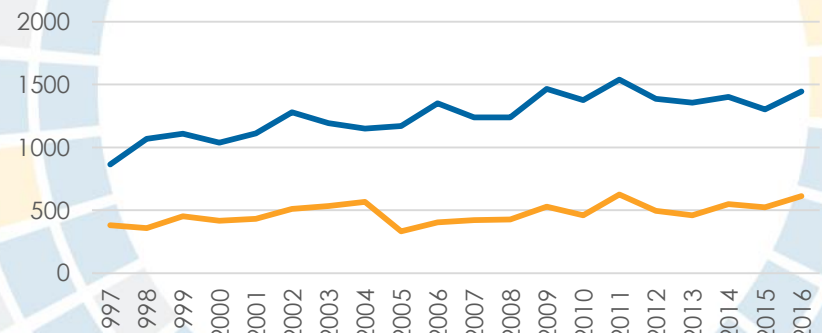
FORESTRY, FISHING, MINING, QUARRYING, OIL AND GAS



MANUFACTURING



CONSTRUCTION

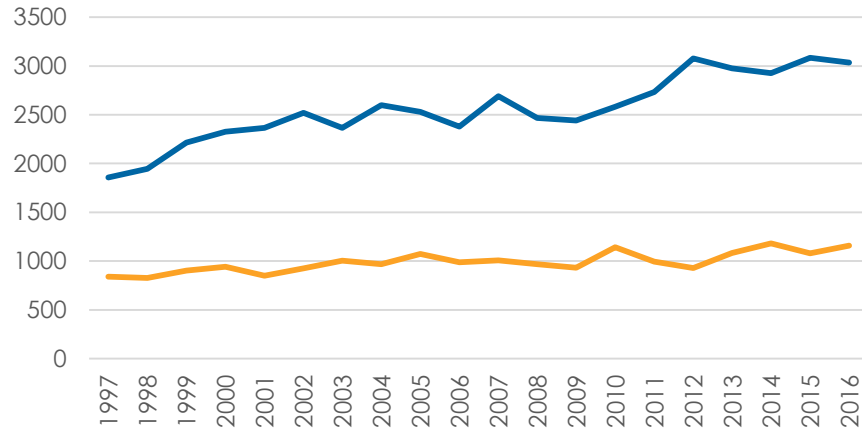


Source: Author's calculations based on Statistics Canada Labour Force Survey (Cansim Table 282-0125), and GDP estimations (382-0004)

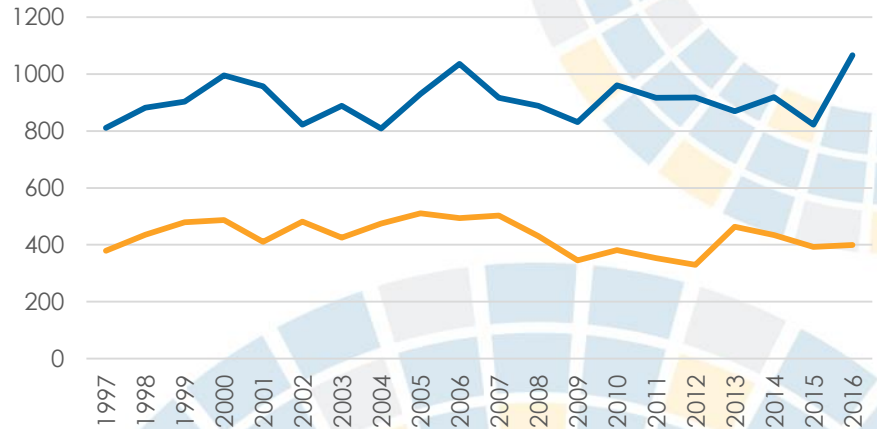
GDP by Service-Producing Industry (Chained 2007 Dollars x1,000,000) (1)

■ Northeast ■ Northwest

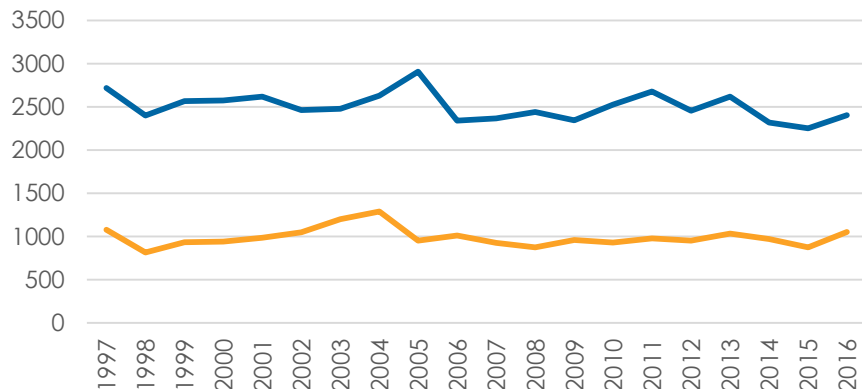
TRADE (WHOLESALE & RETAIL)



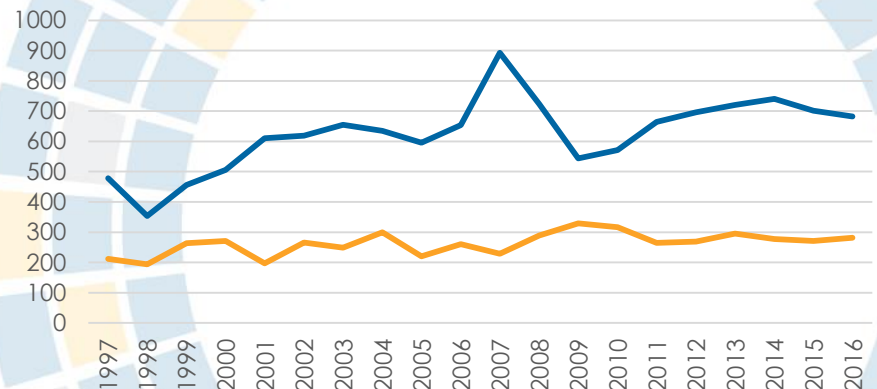
TRANSPORTATION & WAREHOUSING



FINANCE, INSURANCE, REAL ESTATE & LEASING



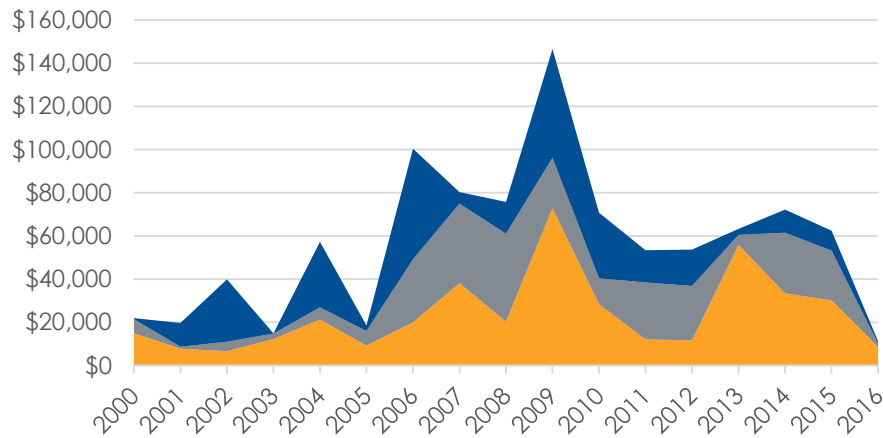
PROFESSIONAL, SCIENTIFIC & TECHNICAL SERVICES



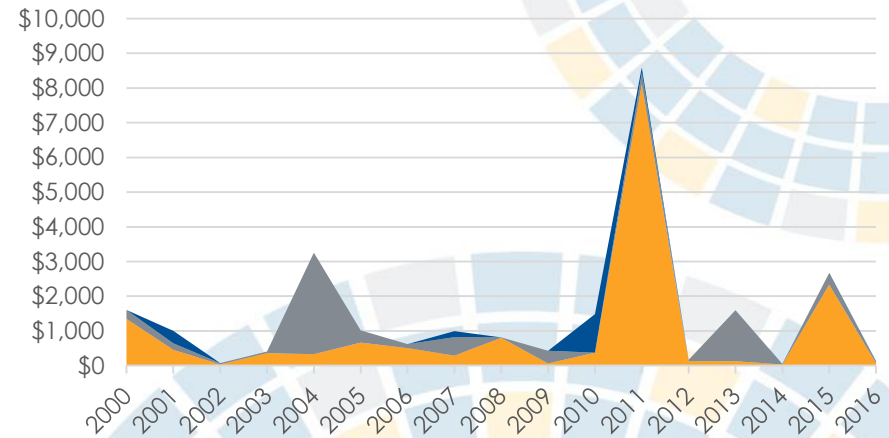
Value of Non-Residential Building Permits (In 2016 Dollars x1,000)

Commercial Industrial Institutional

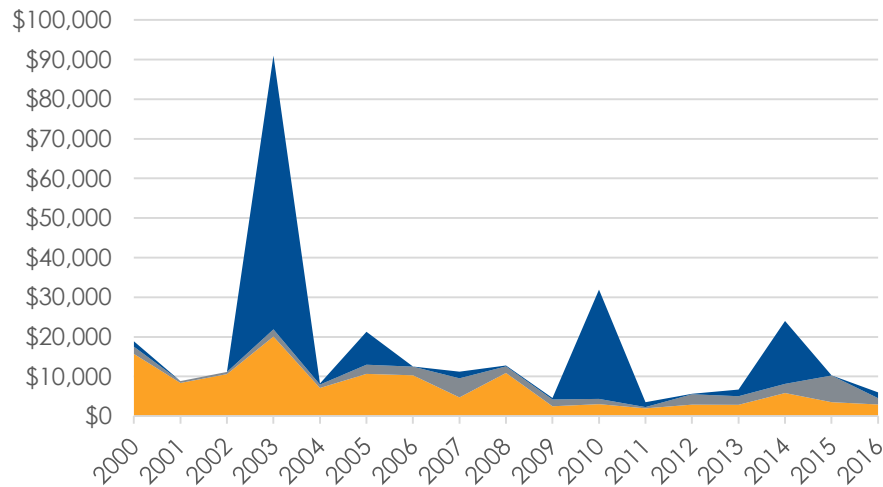
GREATER SUDBURY



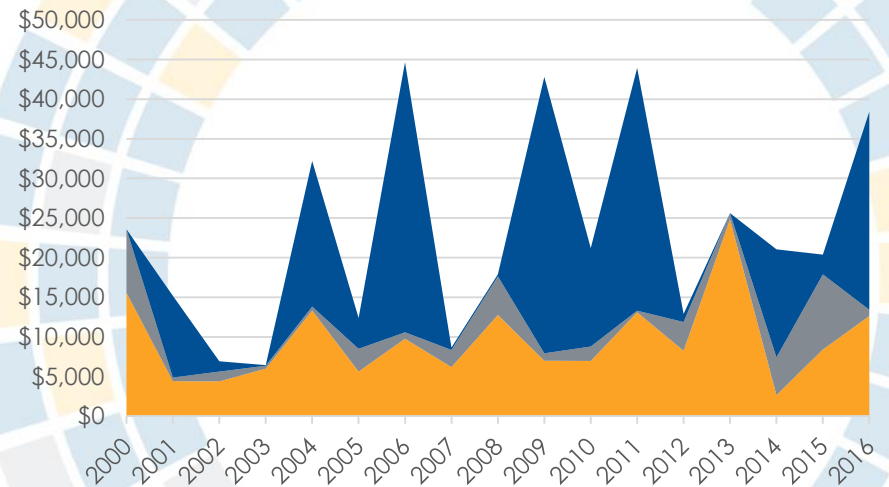
MANITOULIN DISTRICT



PARRY SOUND DISTRICT



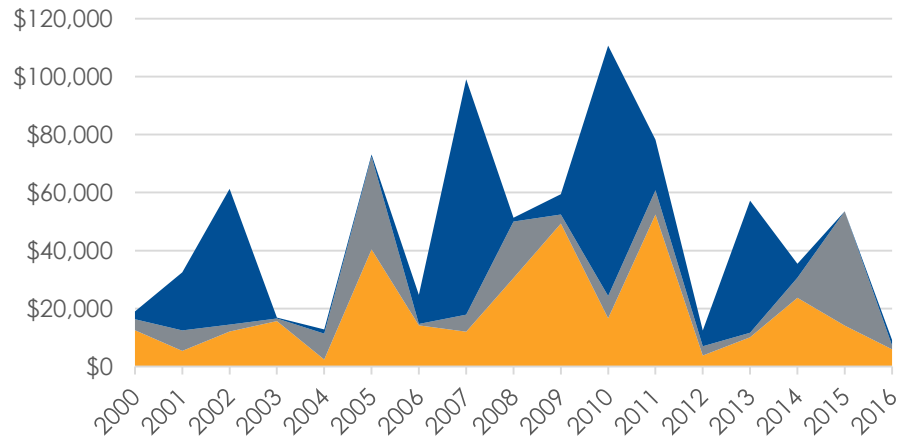
NIPISSING DISTRICT



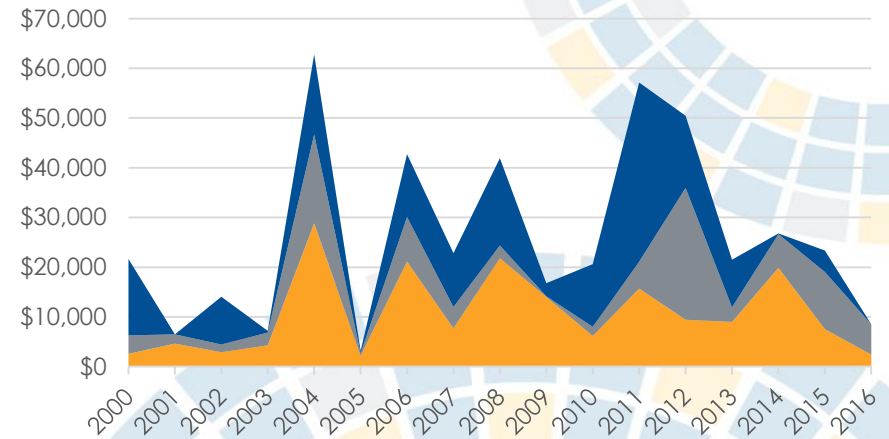
Value of Non-Residential Building Permits (In 2016 Dollars x1,000)

Commercial Industrial Institutional

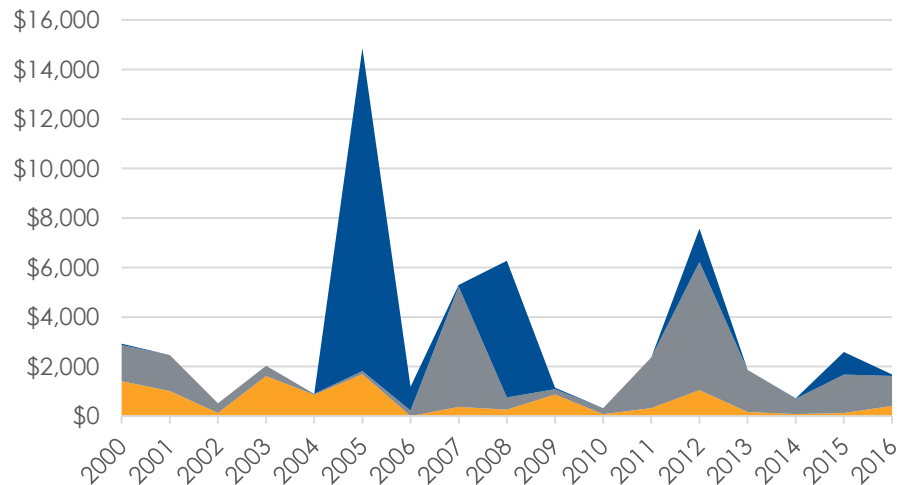
ALGOMA DISTRICT



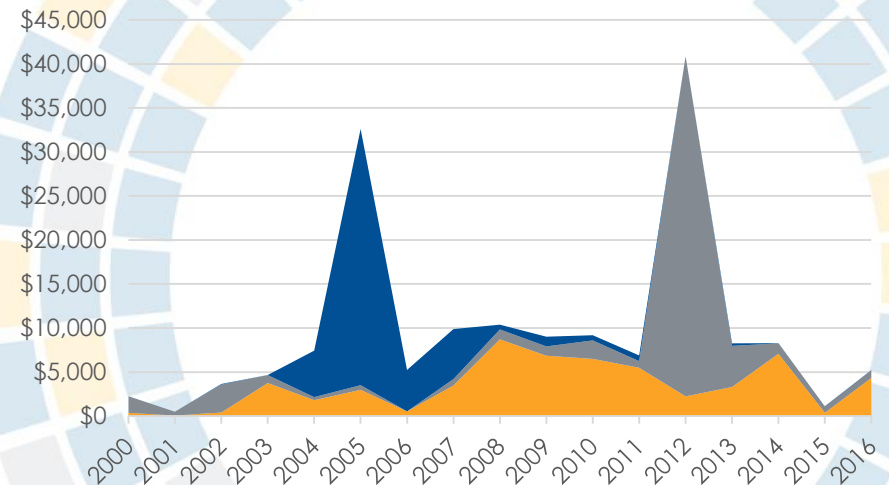
COCHRANE DISTRICT



SUDBURY DISTRICT



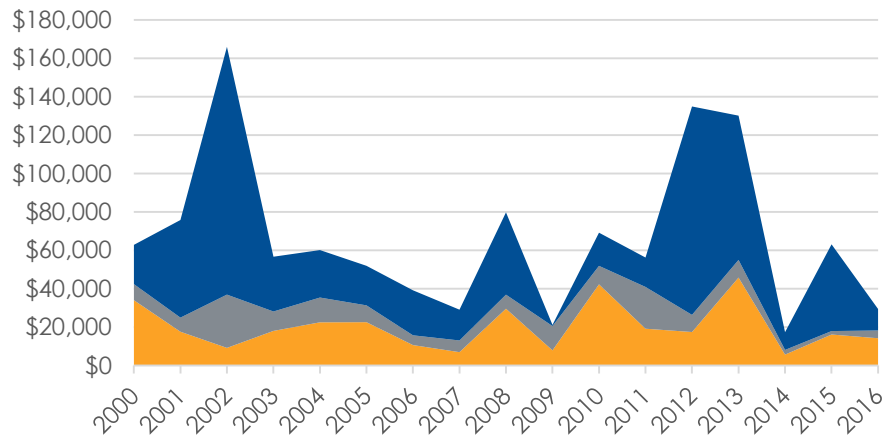
TIMISKAMING DISTRICT



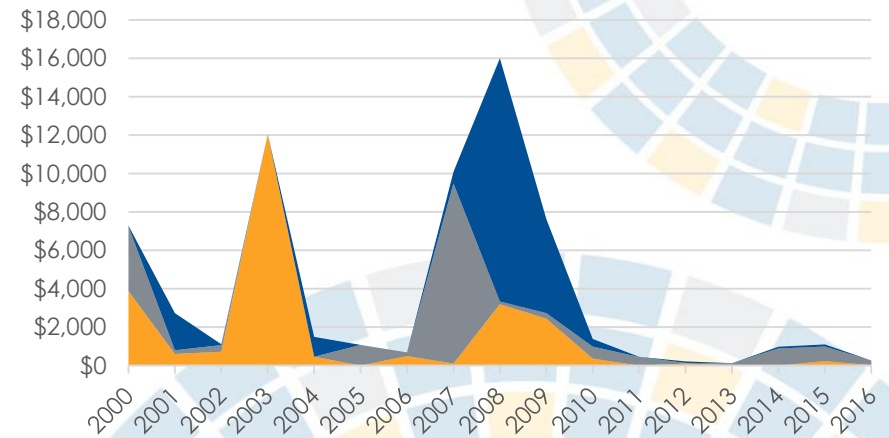
Value of Non-Residential Building Permits (In 2016 Dollars x1,000)

Commercial Industrial Institutional

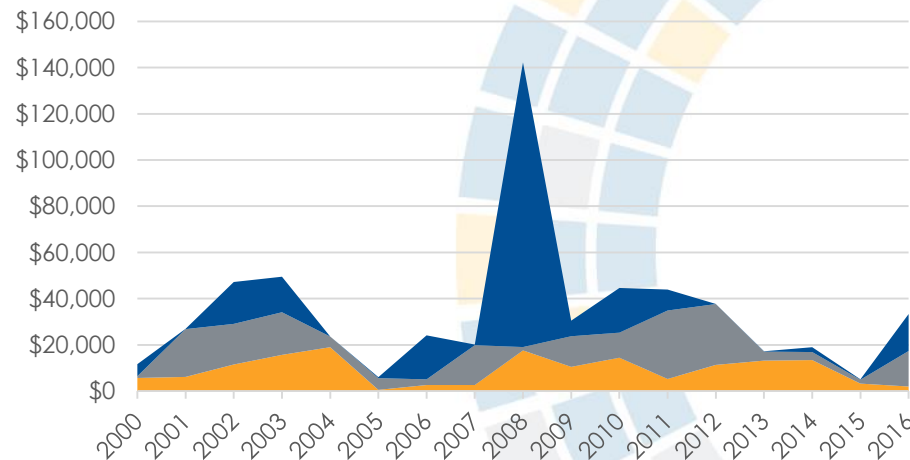
THUNDER BAY DISTRICT



RAINY RIVER DISTRICT



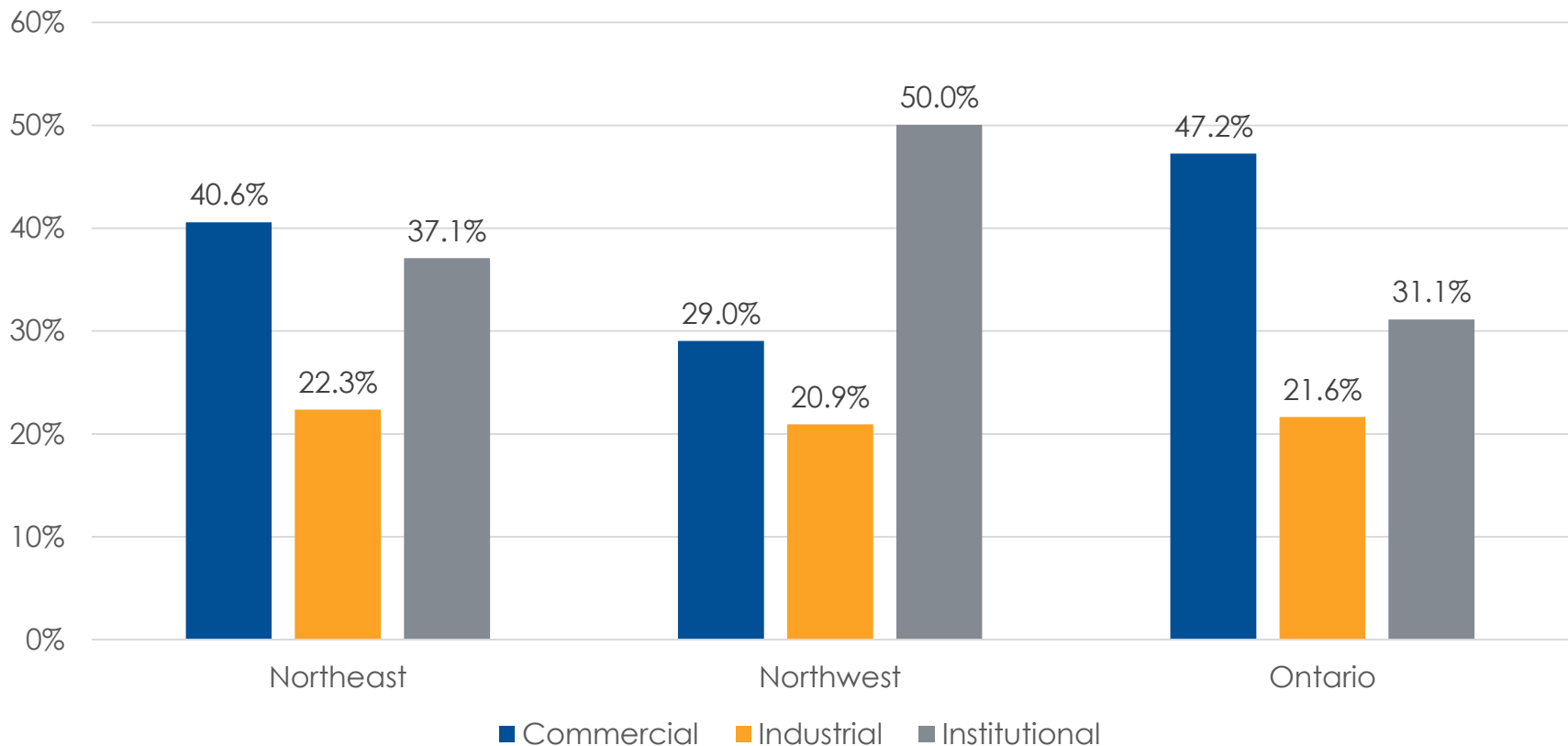
KENORA DISTRICT



Investment and Business Attraction

More Investment in Institutional Buildings, less in Commercial than Ontario

DISTRIBUTION BY TYPES OF NON-RESIDENTIAL BUILDING PERMITS (VALUE),
AVERAGE OVER THE 2000-2016 PERIOD

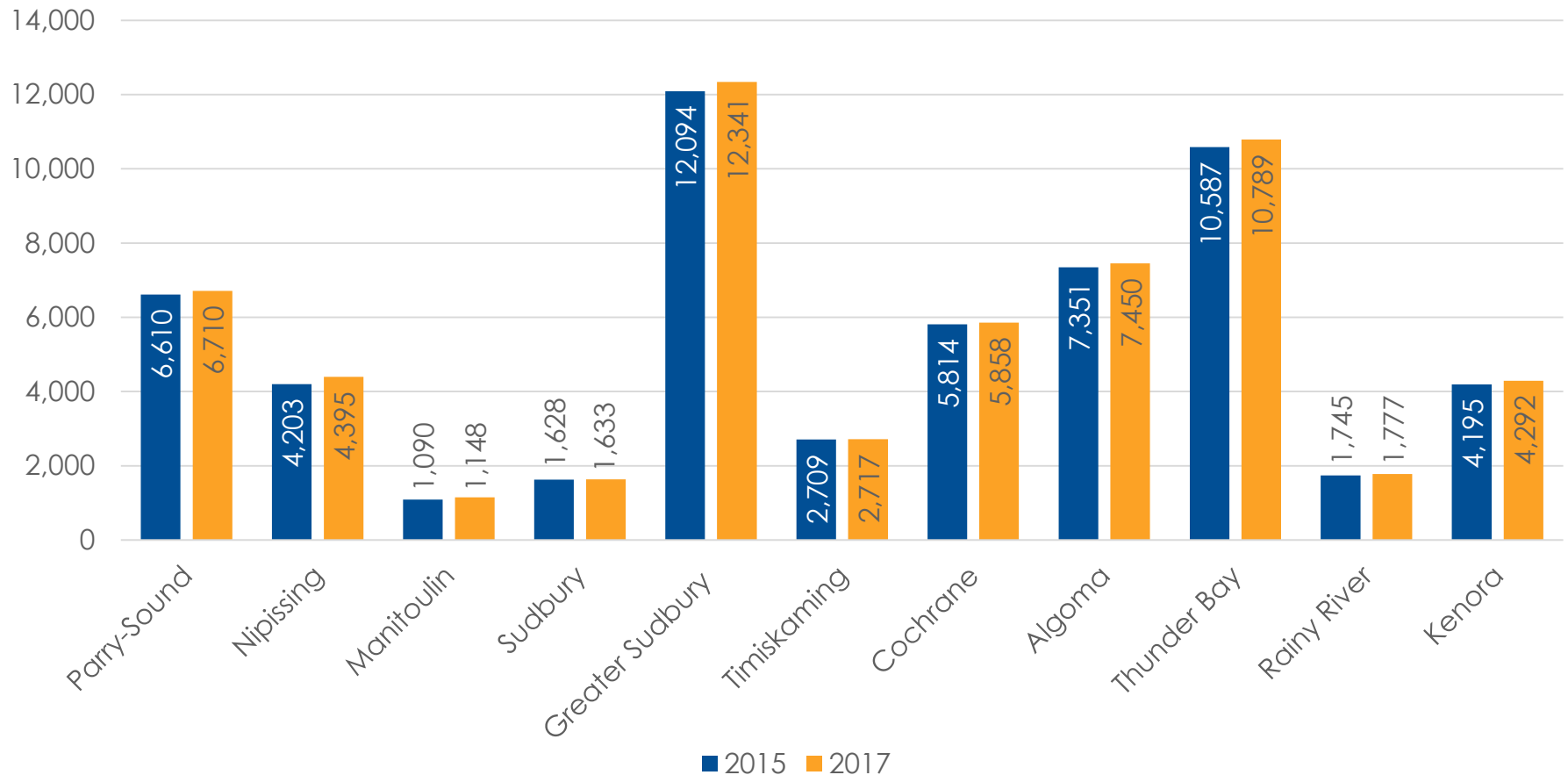


Source: Author's calculations based on Statistics Canada, Investment and Capital Stock Division, and Bank of Canada, Consumer Price Index

Investment and Business Attraction

Growth in Every District in the Total Number of Businesses

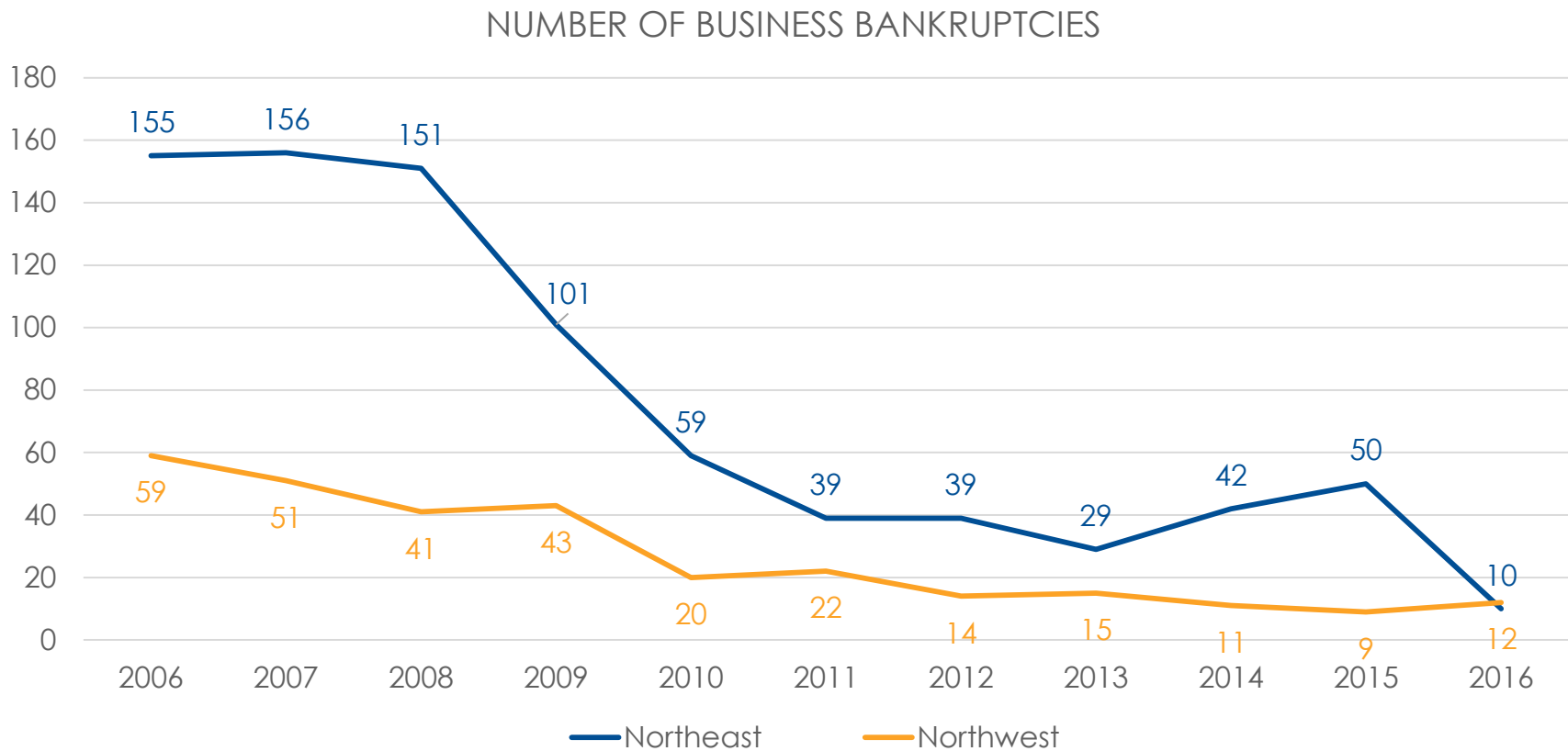
NUMBER OF BUSINESSES BY DISTRICT (JUNE OF EACH YEAR)



Source: Author's calculations based on Statistics Canada, Business Counts.

Investment and Business Attraction

A Decreasing Number of Bankruptcies

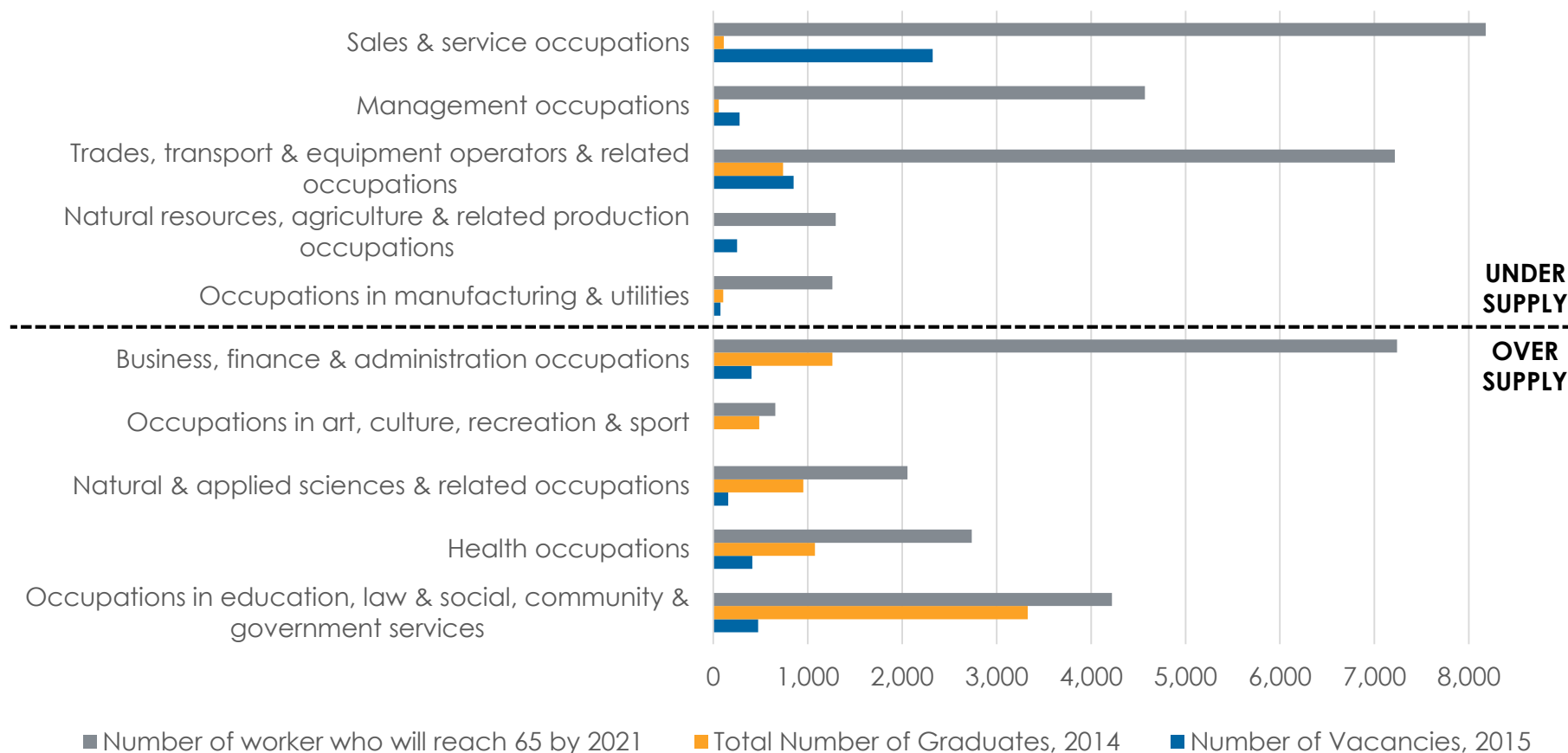


Source: Author's calculations based on Industry Canada, Office of the Superintendent of Bankruptcy.

Education and Skills

Not Enough Workers to Replace Those Who Will Retire

JOB VACANCIES IN **NORTHEASTERN ONTARIO**, NUMBER OF WORKERS REACHING RETIREMENT AGE BY 2021 AND GRADUATES BY OCCUPATION

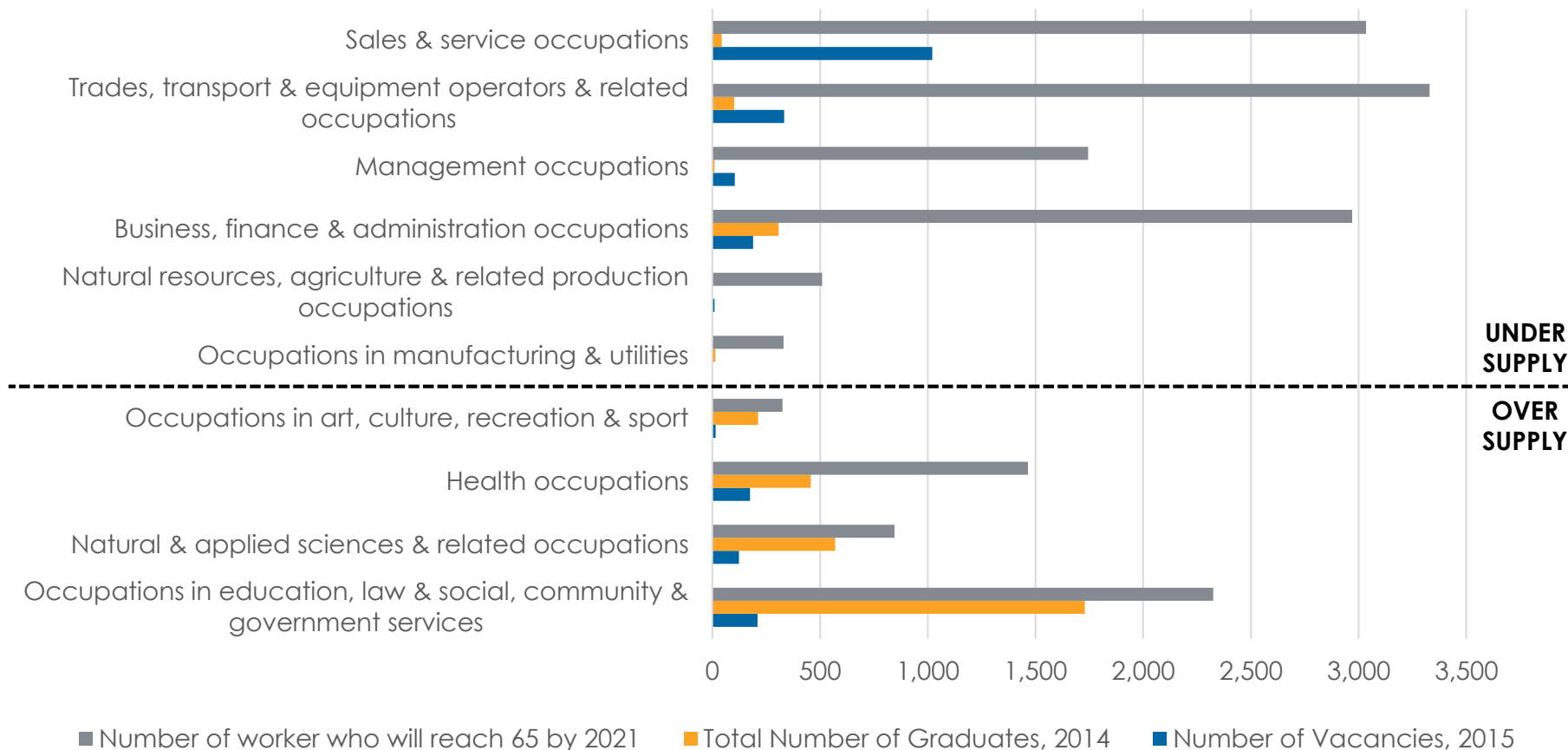


Sources: Jarrod Sundmark, "Labour Market Alignment: Education in the North" Northern Policy Institute, based on Statistics Canada Job Vacancies and Wages Survey, and CUDO/data provided by Colleges; Statistics Canada, National Household Survey, 2011. 11

Education and Skills

Not Enough Workers to Replace Those Who Will Retire

JOB VACANCIES IN **NORTHWESTERN ONTARIO**, NUMBER OF WORKERS REACHING RETIREMENT AGE BY 2021 AND GRADUATES BY OCCUPATION



Sources: Jarrod Sundmark, "Labour Market Alignment: Education in the North" Northern Policy Institute, based on Statistics Canada Job Vacancies and Wages Survey, and CUDO/data provided by Colleges; Statistics Canada, National Household Survey, 2011. 12

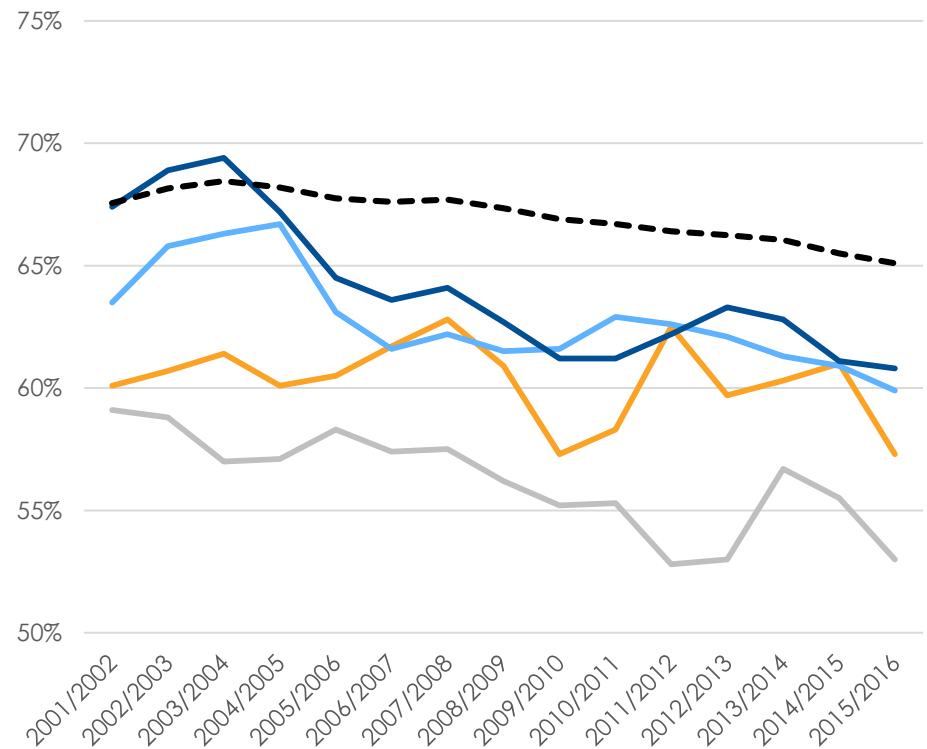
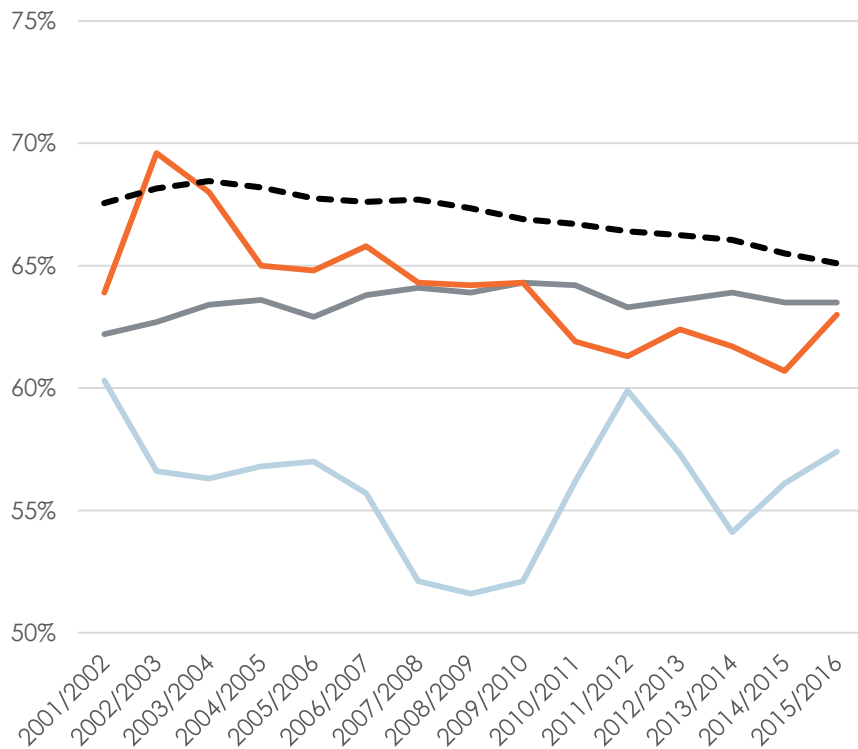
Integration in the Labour Market

Stable or Increasing Participation Rate in Greater Sudbury, Rainy River & Kenora, Manitoulin, Sudbury & Timiskaming Districts

PARTICIPATION RATE BY DISTRICT

STABLE OR INCREASING

DECREASING



Manitoulin, Sudbury, & Timiskaming Districts Sudbury Regional Municipality Cochrane District
 Rainy River & Kenora Districts Ontario Algoma District Thunder Bay District Nipissing District

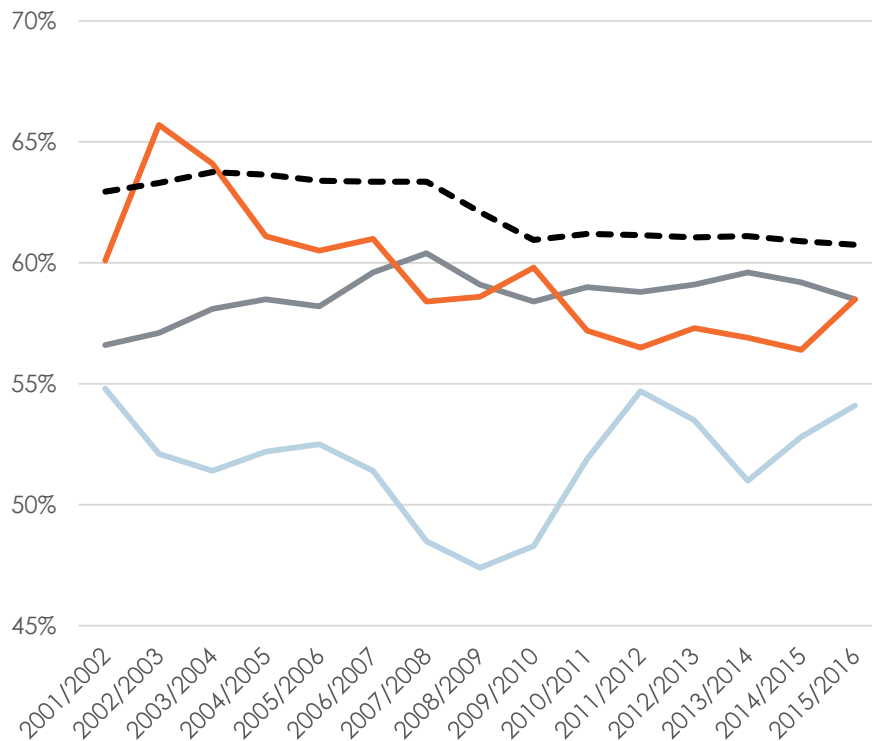
Source: Statistics Canada, Labour Force Survey, 2 years moving average, custom tabulation

Integration in the Labour Market

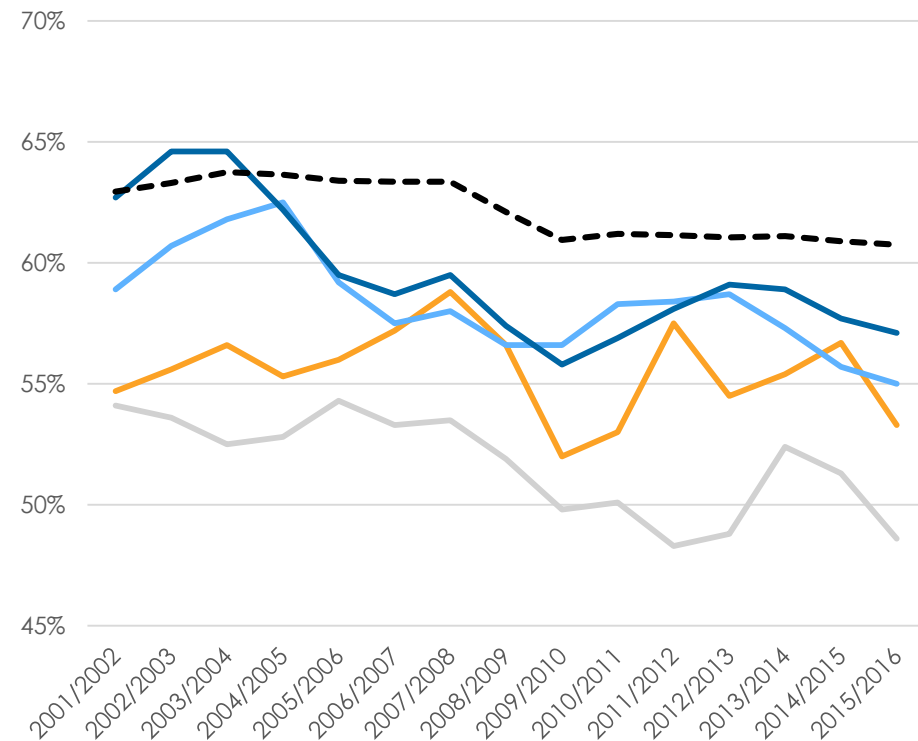
Stable or Increasing Employment Rate in Greater Sudbury, Rainy River & Kenora, Manitoulin, Sudbury & Timiskaming Districts

EMPLOYMENT RATE BY DISTRICT

STABLE OR INCREASING



DECREASING

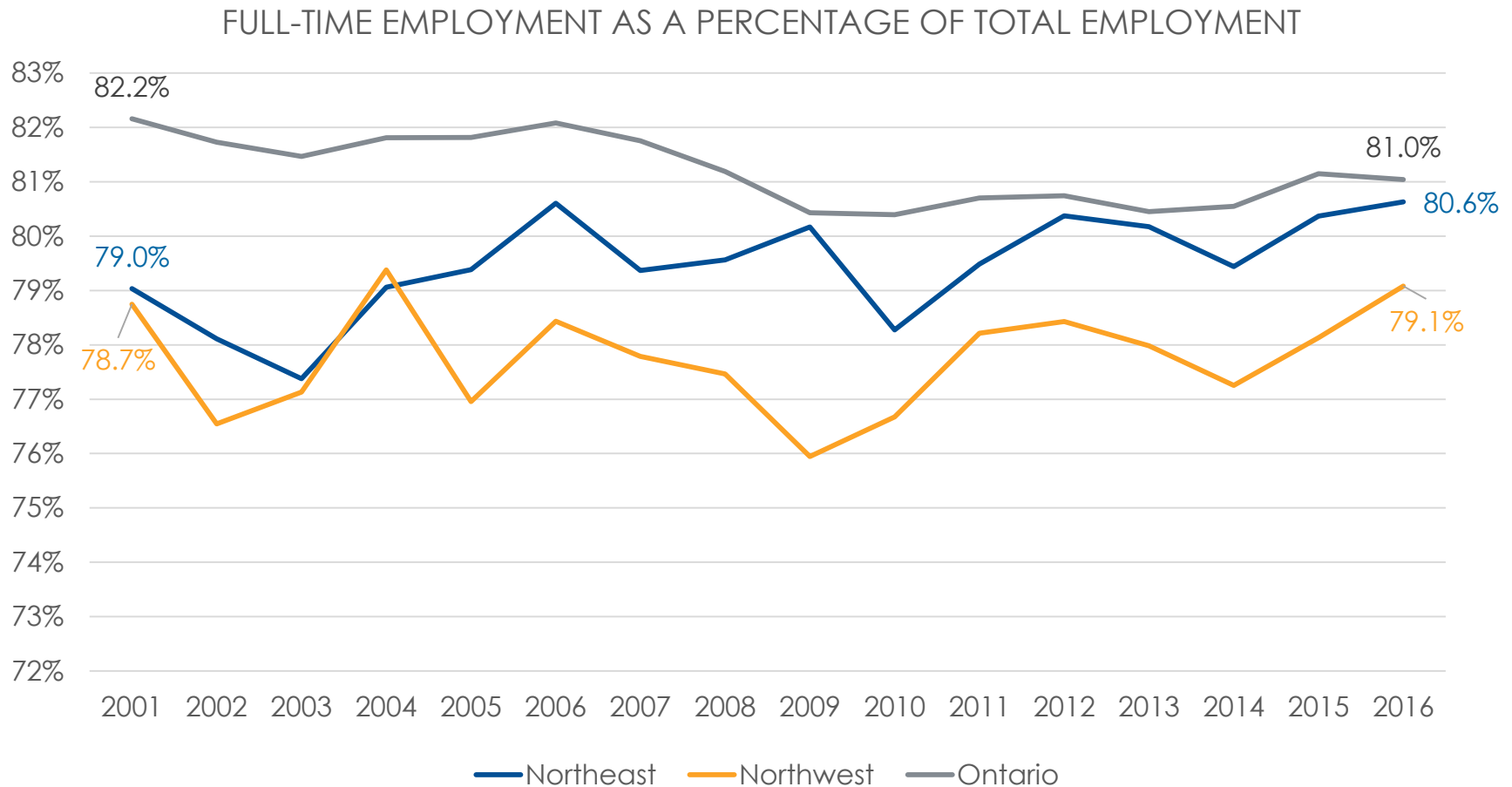


— Manitoulin, Sudbury, & Timiskaming Districts
 — Sudbury Regional Municipality
 — Cochrane District
— Rainy River & Kenora Districts
 - - - Ontario
 — Algoma District
— Thunder Bay District
— Nipissing District

Source: Statistics Canada, Labour Force Survey, 2 years moving average, custom tabulation

Integration in the Labour Market

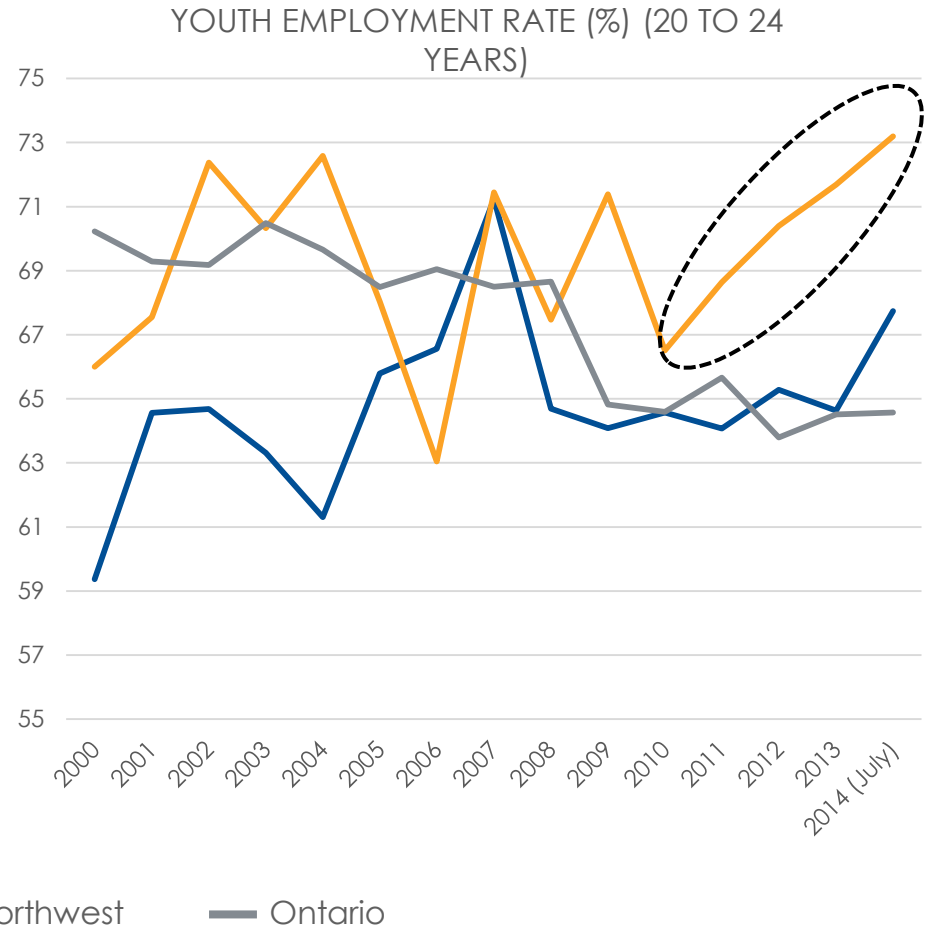
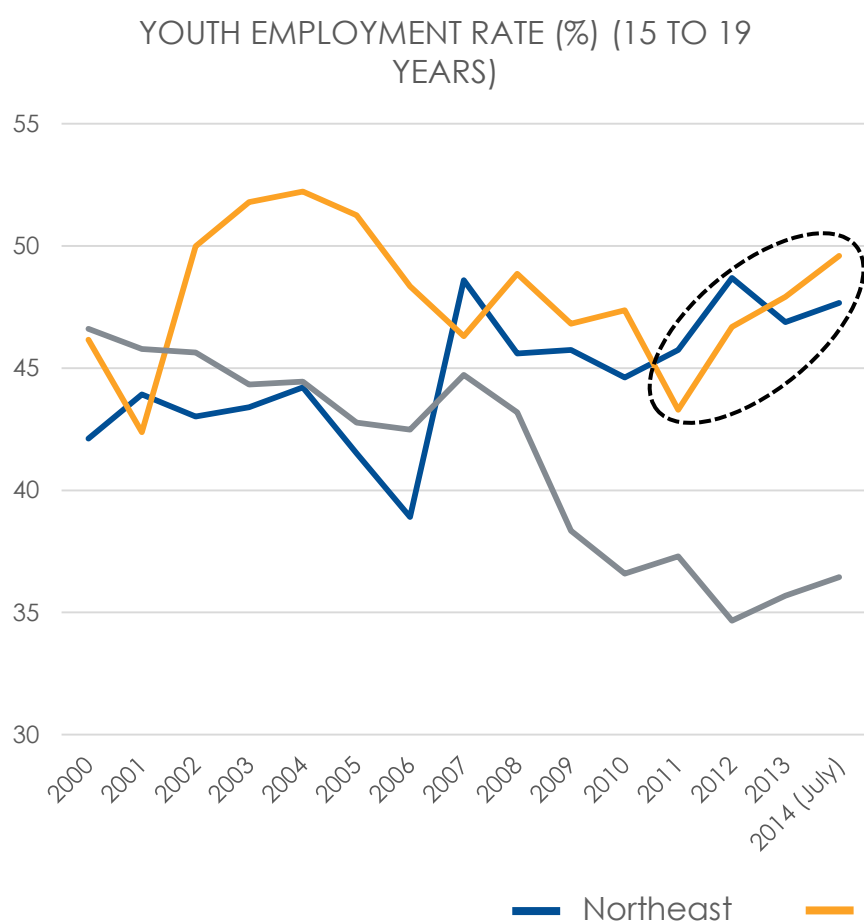
The proportion of full-time jobs increased in Northern Ontario



Source: Statistics Canada. Table 282-0123 - Labour force survey estimates (LFS), annual

Integration in the Labour Market

A Bright Spot: Youth Employment Rates

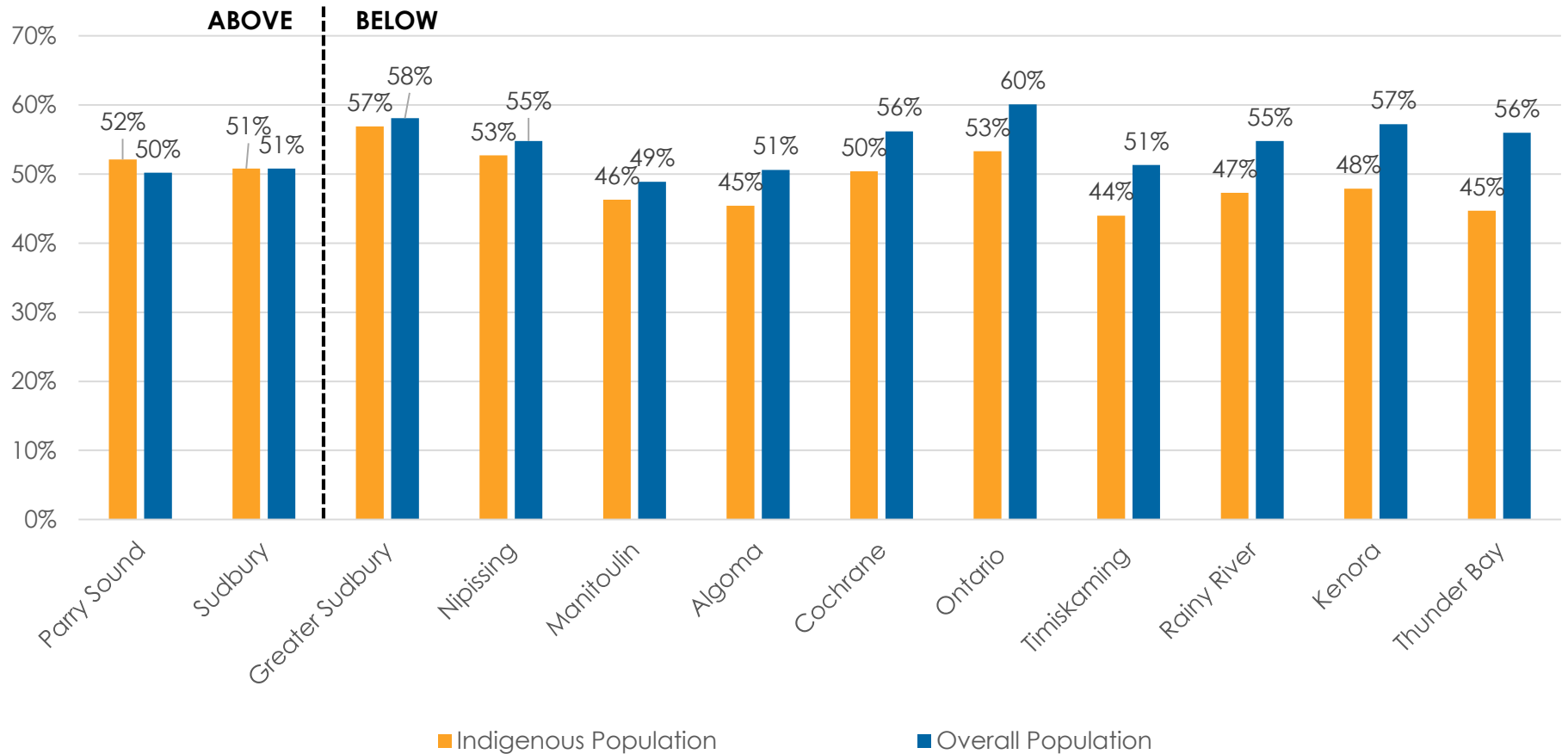


Source: Author's calculations based on Statistics Canada, Labour Force Survey, custom tabulation

Integration in the Labour Market

Indigenous Population

EMPLOYMENT RATE OF THE INDIGENOUS POPULATION COMPARED TO THAT OF THE OVERALL POPULATION, 2011

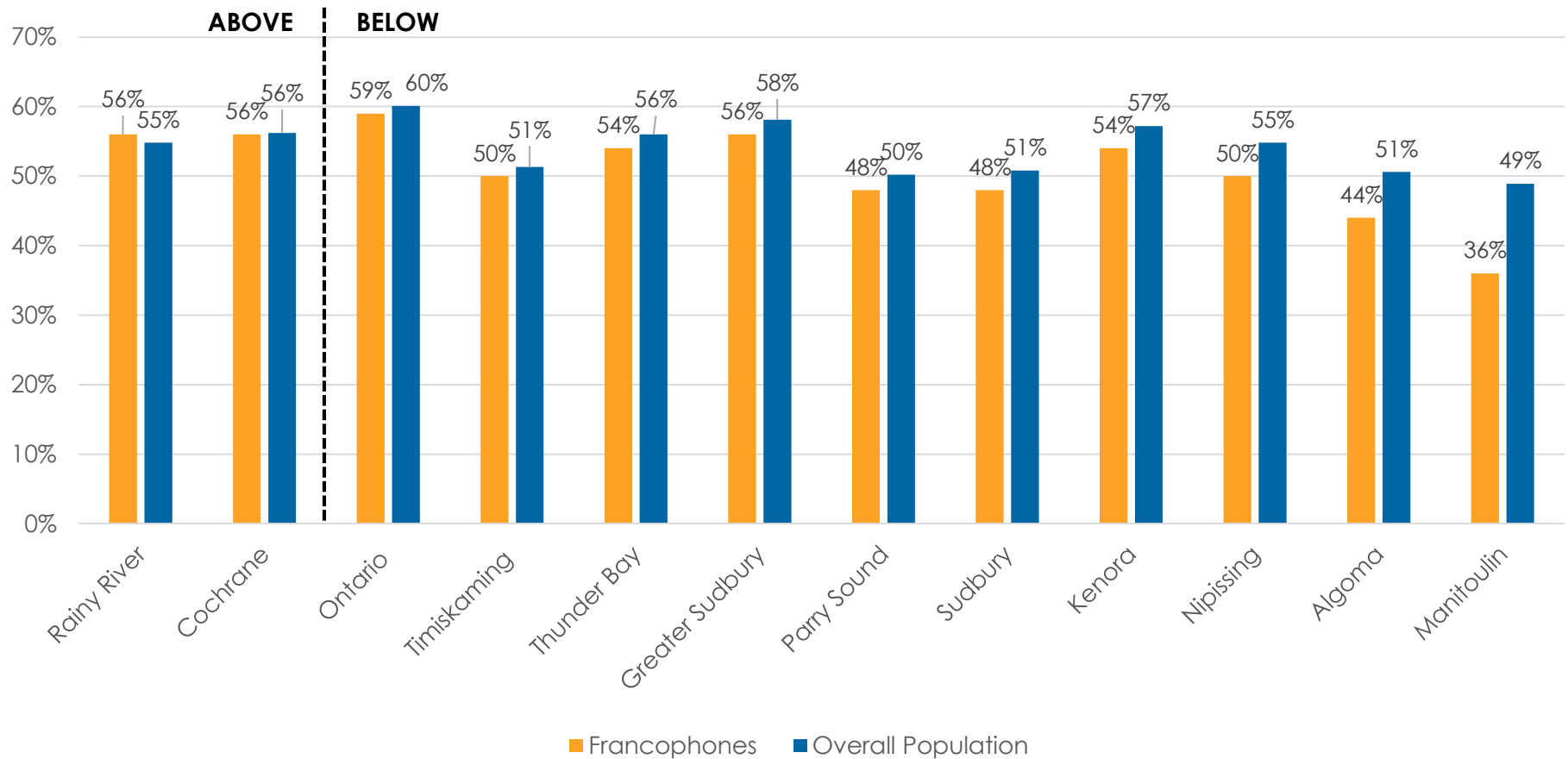


Source: Statistics Canada, National Household Survey, 2011, custom tabulation

Integration in the Labour Market

Francophone Population

EMPLOYMENT RATE OF FRANCOPHONES COMPARED TO THAT OF THE OVERALL POPULATION, 2011

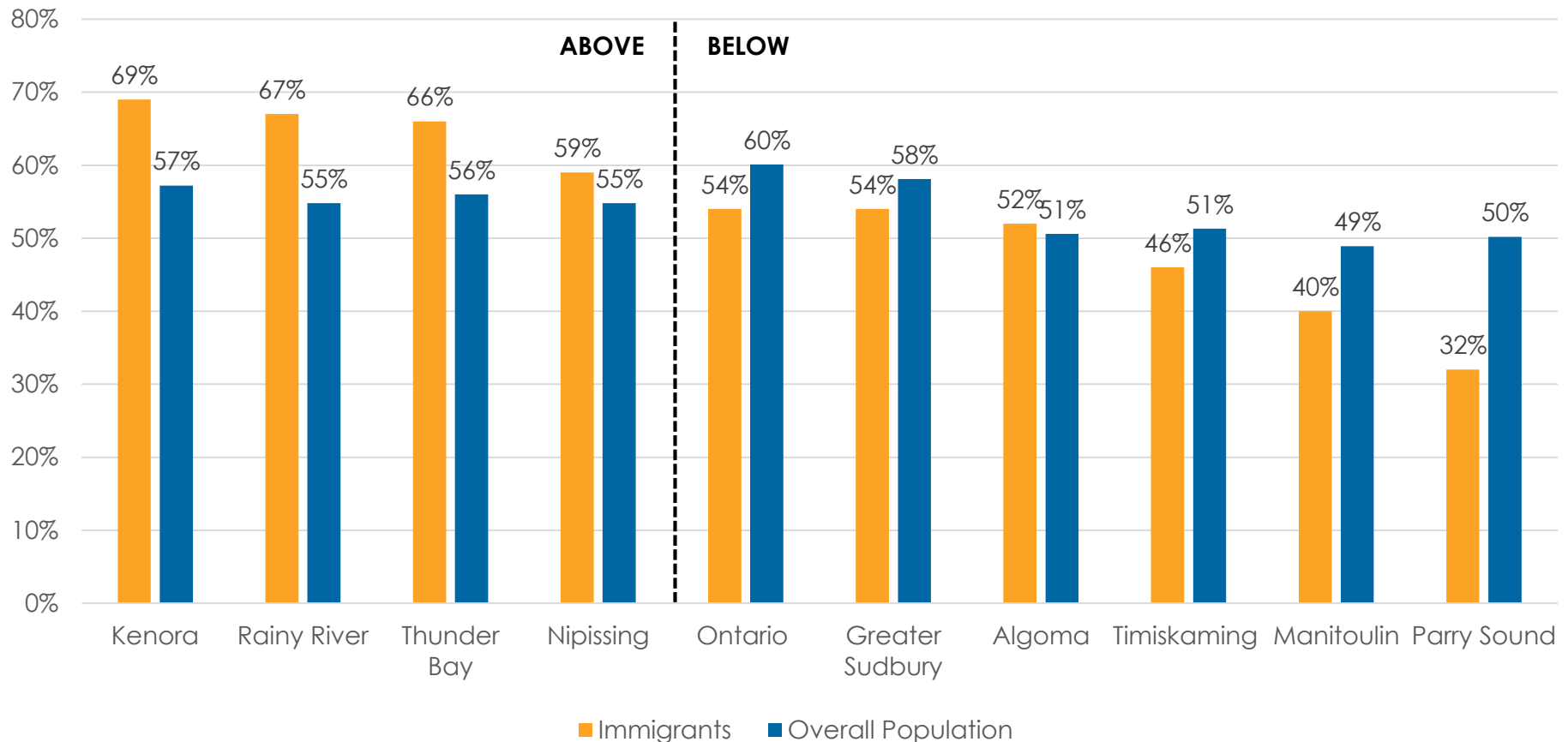


Source: Statistics Canada, National Household Survey, 2011, custom tabulation

Integration in the Labour Market

Immigrant Population

EMPLOYMENT RATE OF IMMIGRANTS COMPARED TO THAT OF THE OVERALL POPULATION, 2011



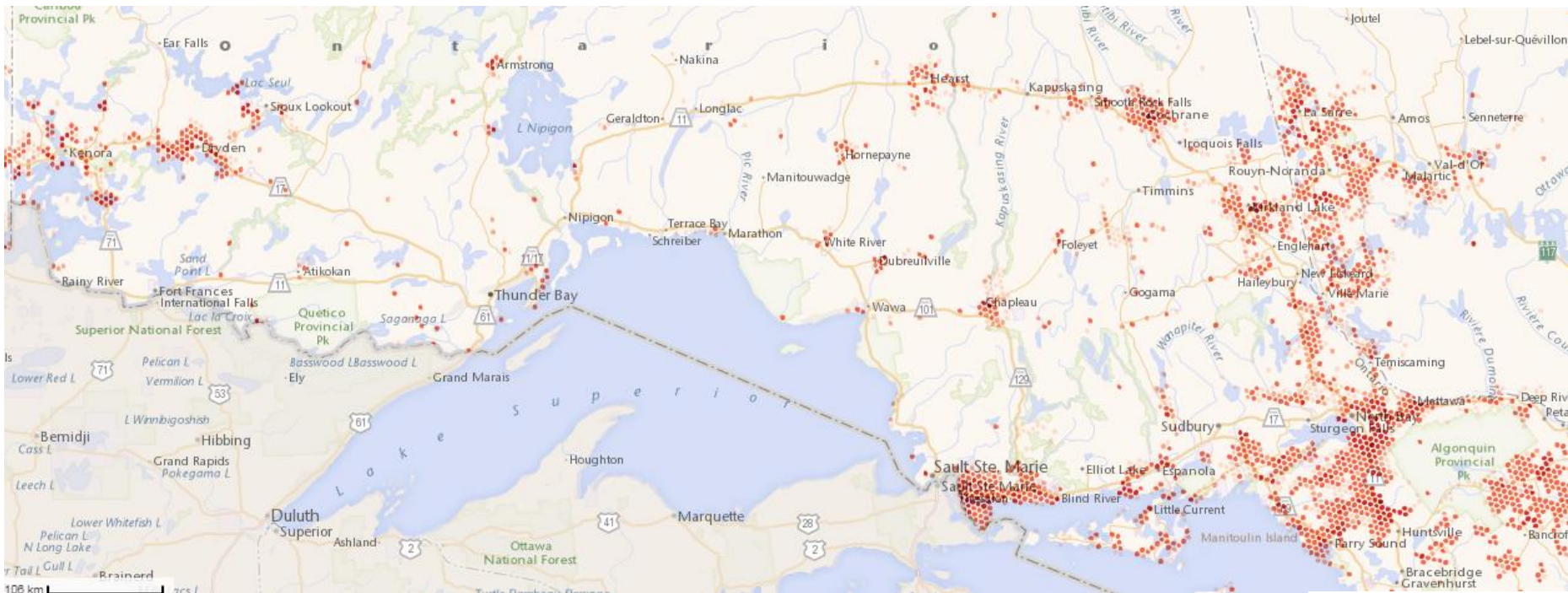
*Data for Sudbury District was not available

Source: Statistics Canada, National Household Survey, 2011, custom tabulation

Infrastructure

Many Northerners Do Not Have Access to Speedy Broadband Internet

UNSERVED OR UNDERSERVED POPULATIONS IN NORTHERN ONTARIO, 2014 (1)

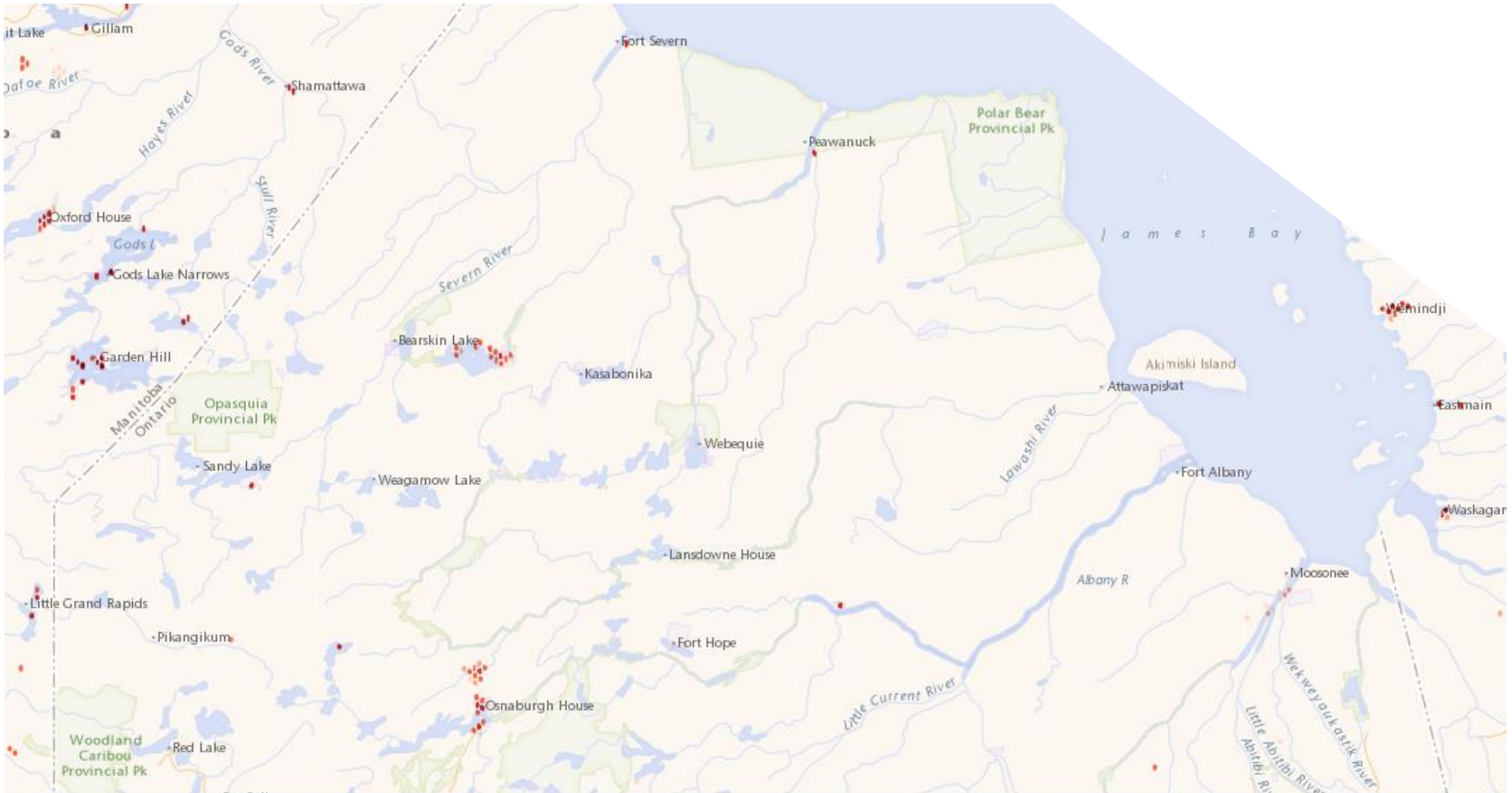


Source: Government of Canada. Canadian Radio-television and Telecommunications Commission.

Infrastructure

Many Northerners Do Not Have Access to Speedy Broadband Internet

UNSERVED OR UNDERSERVED POPULATION IN NORTHERN ONTARIO, 2014 (2)

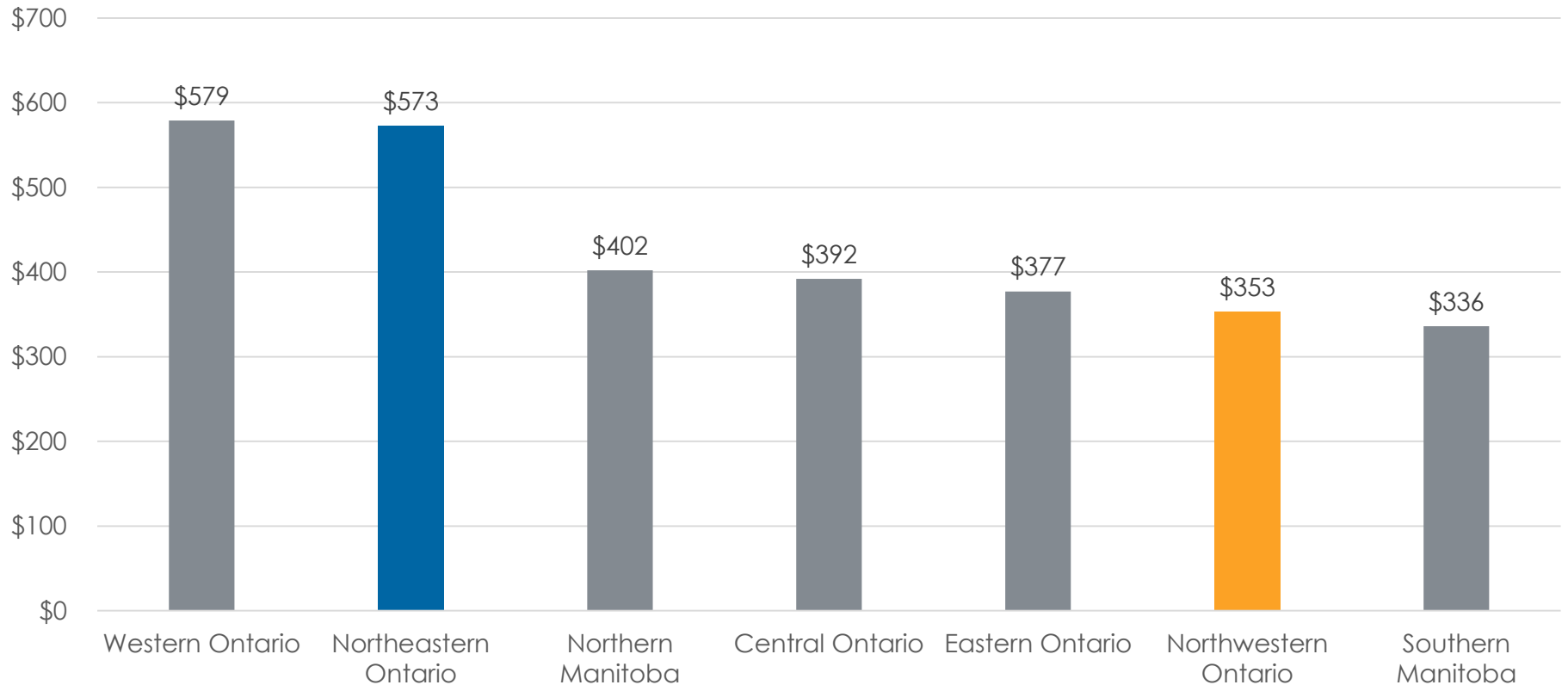


Source: Government of Canada. Canadian Radio-television and Telecommunications Commission.

Infrastructure

In Ontario, Average Cost of Highways is the Lowest in the Northwest

AVERAGE COST OF HIGHWAY PER KM (IN THOUSANDS), 2016

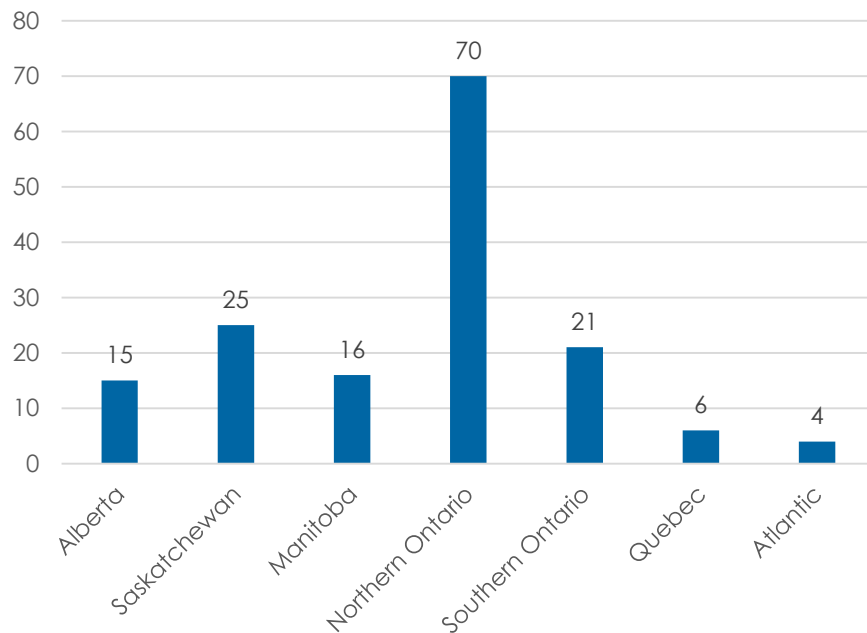


Source: Winter Lipscombe, Unpublished manuscript, Northern Policy Institute

Infrastructure

More Long-Term Drinking Water Advisories in Northern Ontario than in Canada

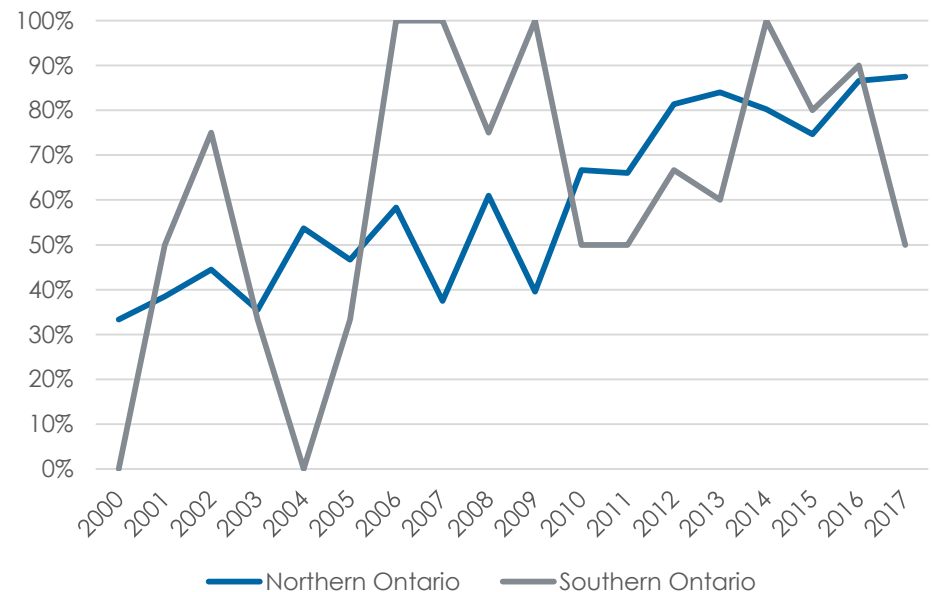
NUMBER OF LONG TERM* DRINKING WATER ADVISORIES IN FIRST NATION COMMUNITIES, 2017



*Long term = more than a year

Source: Government of Canada. 2017. Drinking Water Advisories: First Nations South of 60°

PERCENTAGE OF BOILED WATER ADVISORIES DECLARED FOR **EQUIPMENT AND PROCESS CAUSES**, IN FIRST NATION COMMUNITIES

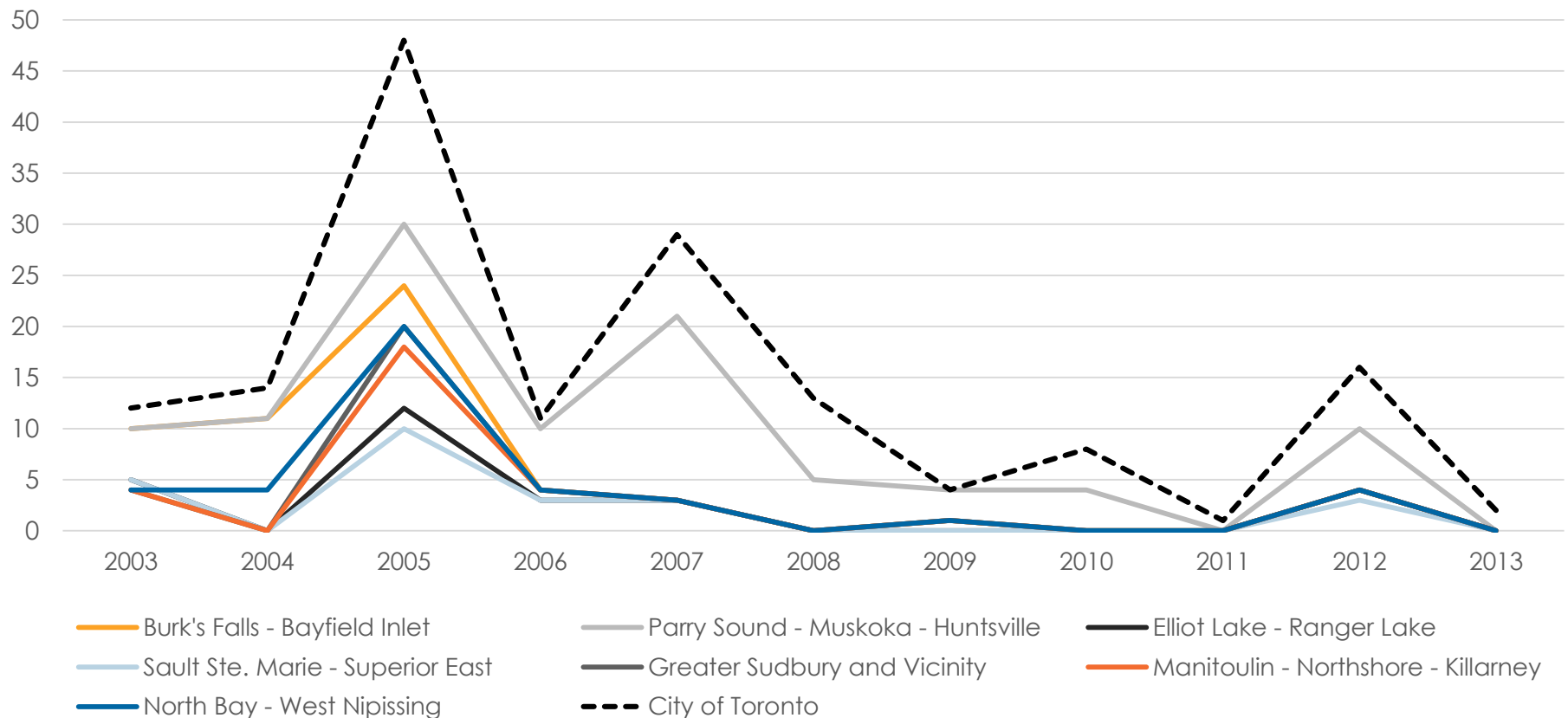


Source: Author's Calculations based on Health Canada, Drinking Water Advisories in First Nations Data

Air Quality

A Decreasing Number of Days Under Smog Advisories

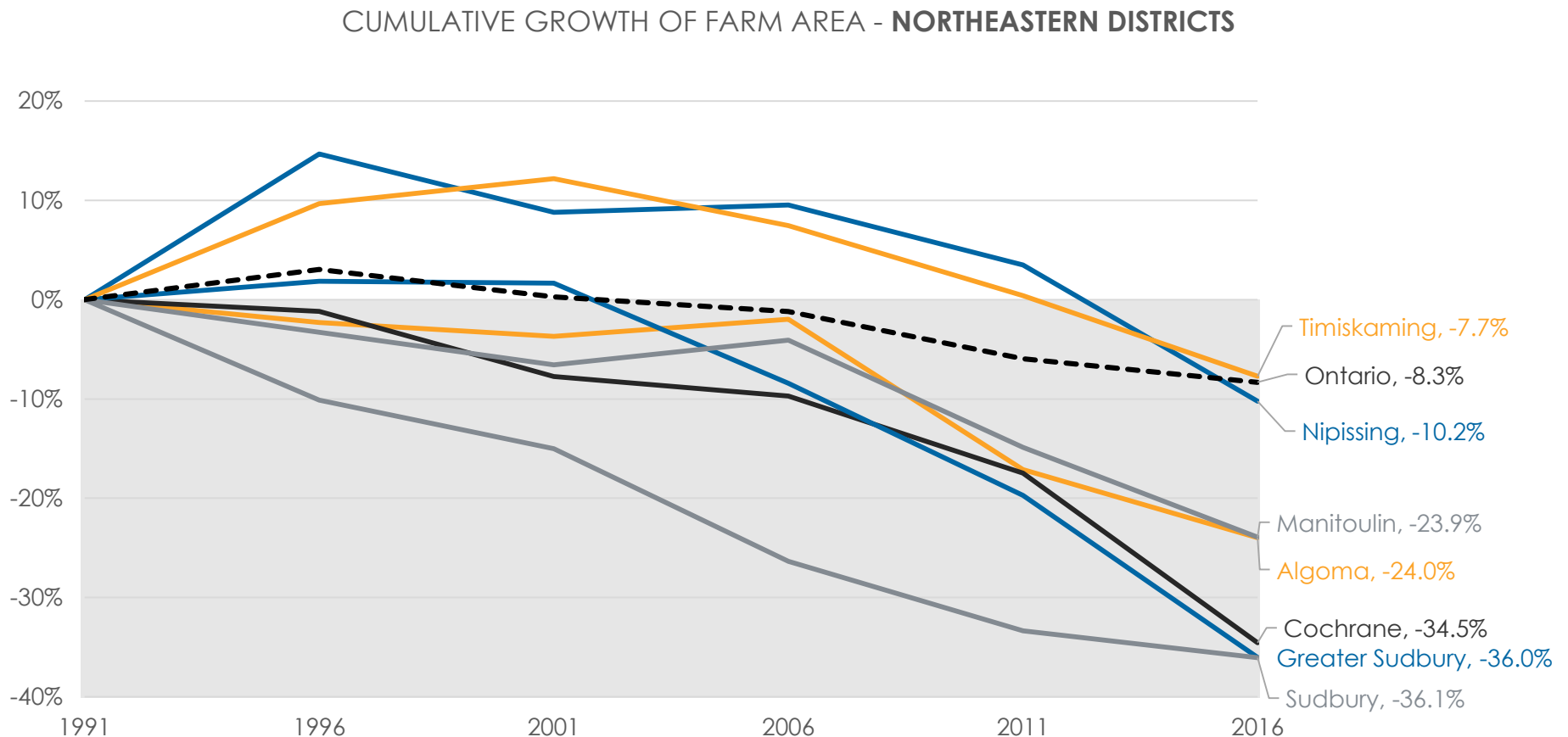
NUMBER OF DAYS UNDER SMOG ADVISORIES*



*Regions in Northern Ontario not mentioned in the graph did not experience any smog advisory over the period

Farm Area

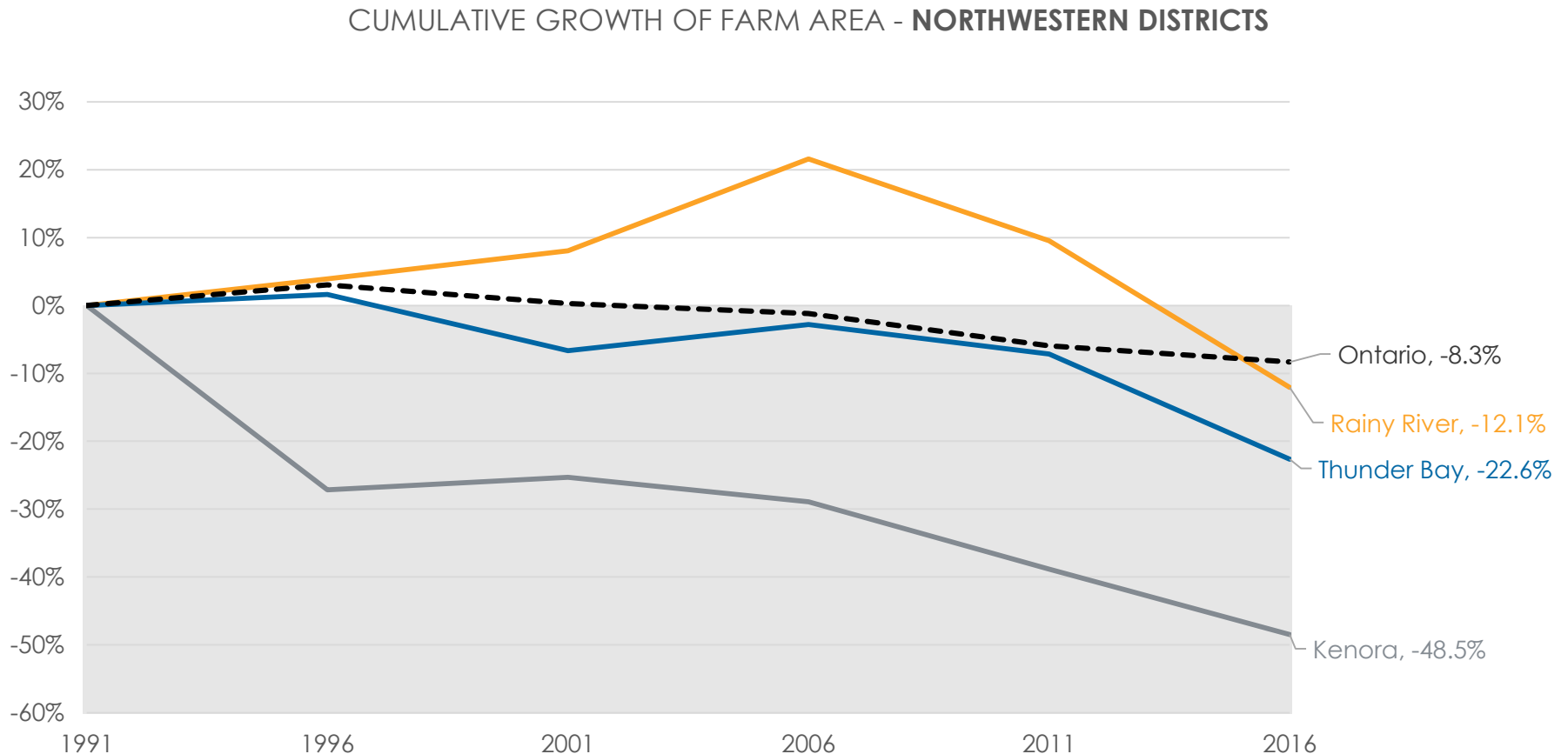
Farm Area in Timiskaming District Decreased Less Than in Ontario



Source: Author's calculations based on Ministry of Agriculture, Food and Rural Affairs, using data from Statistics Canada, Census of Agriculture

Farm Area

Farm Area in Rainy River Decreased Less Than in Other Northwestern Districts

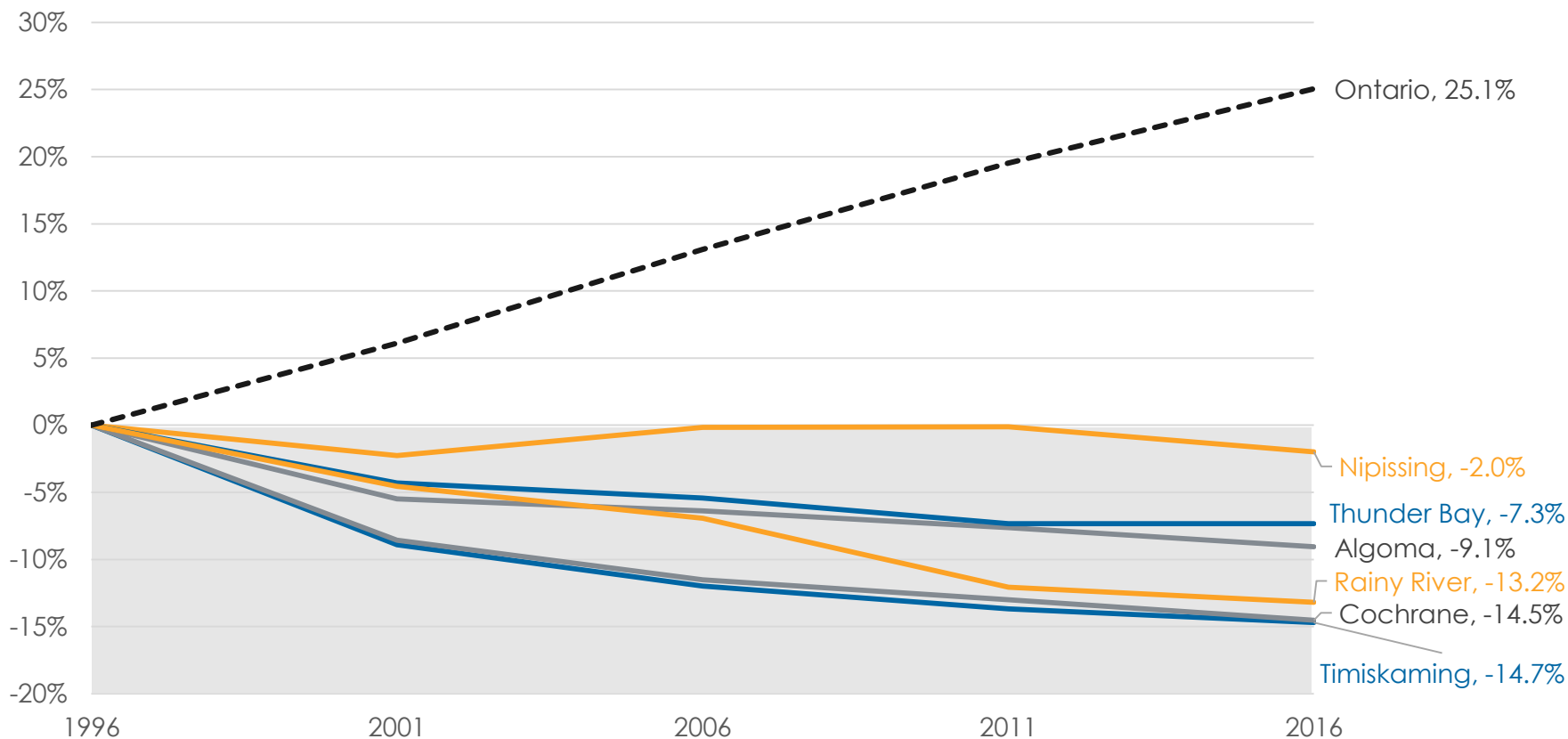


Source: Author's calculations based on Ministry of Agriculture, Food and Rural Affairs, using data from Statistics Canada, Census of Agriculture

Demographics

Negative Population Growth in Some Districts...

CUMULATIVE POPULATION GROWTH SINCE 1996 BY DISTRICT

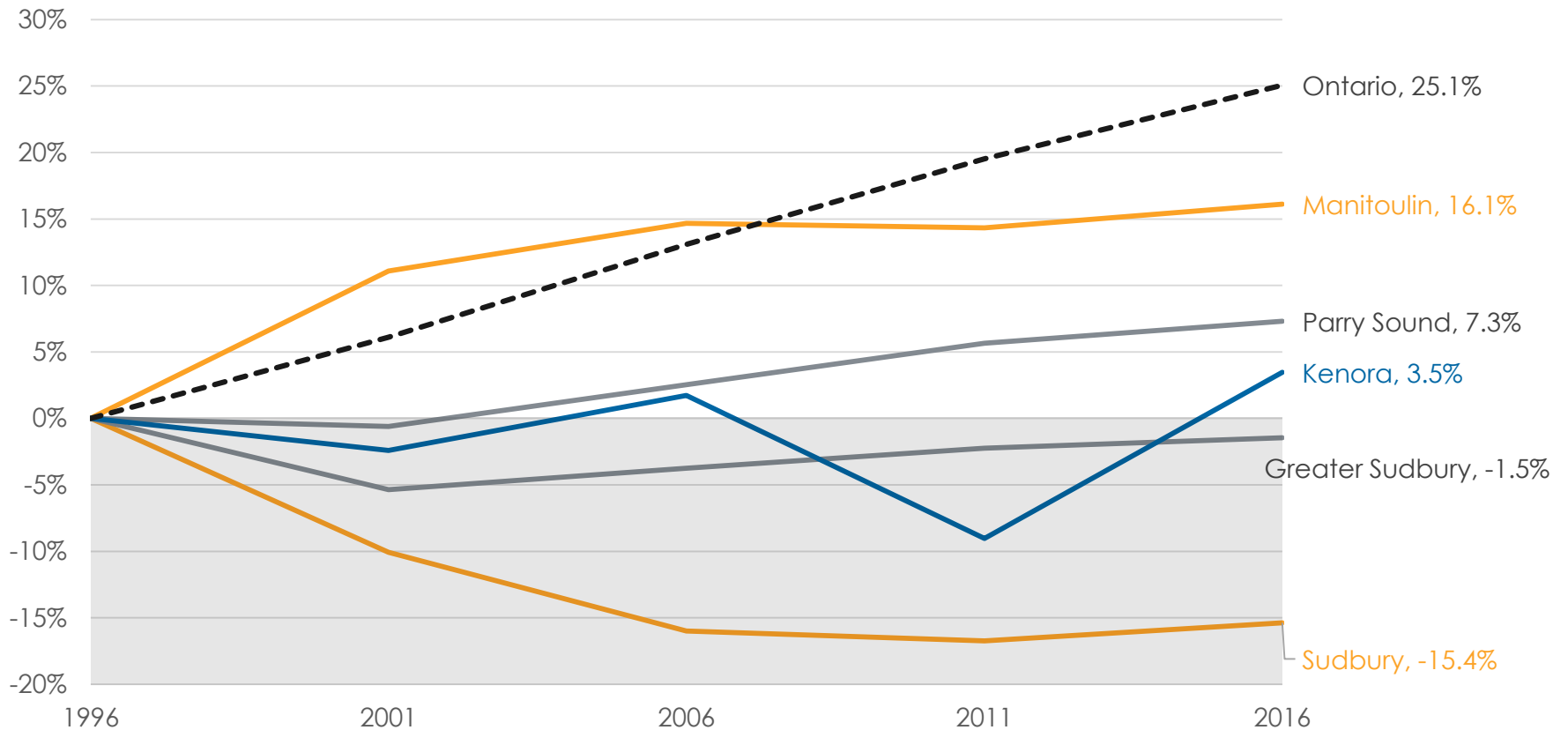


Source: Author's calculation based on Statistics Canada, Census, Various Years.

Demographics

... But Positive Growth in Others

CUMULATIVE POPULATION GROWTH SINCE 1996 BY DISTRICT

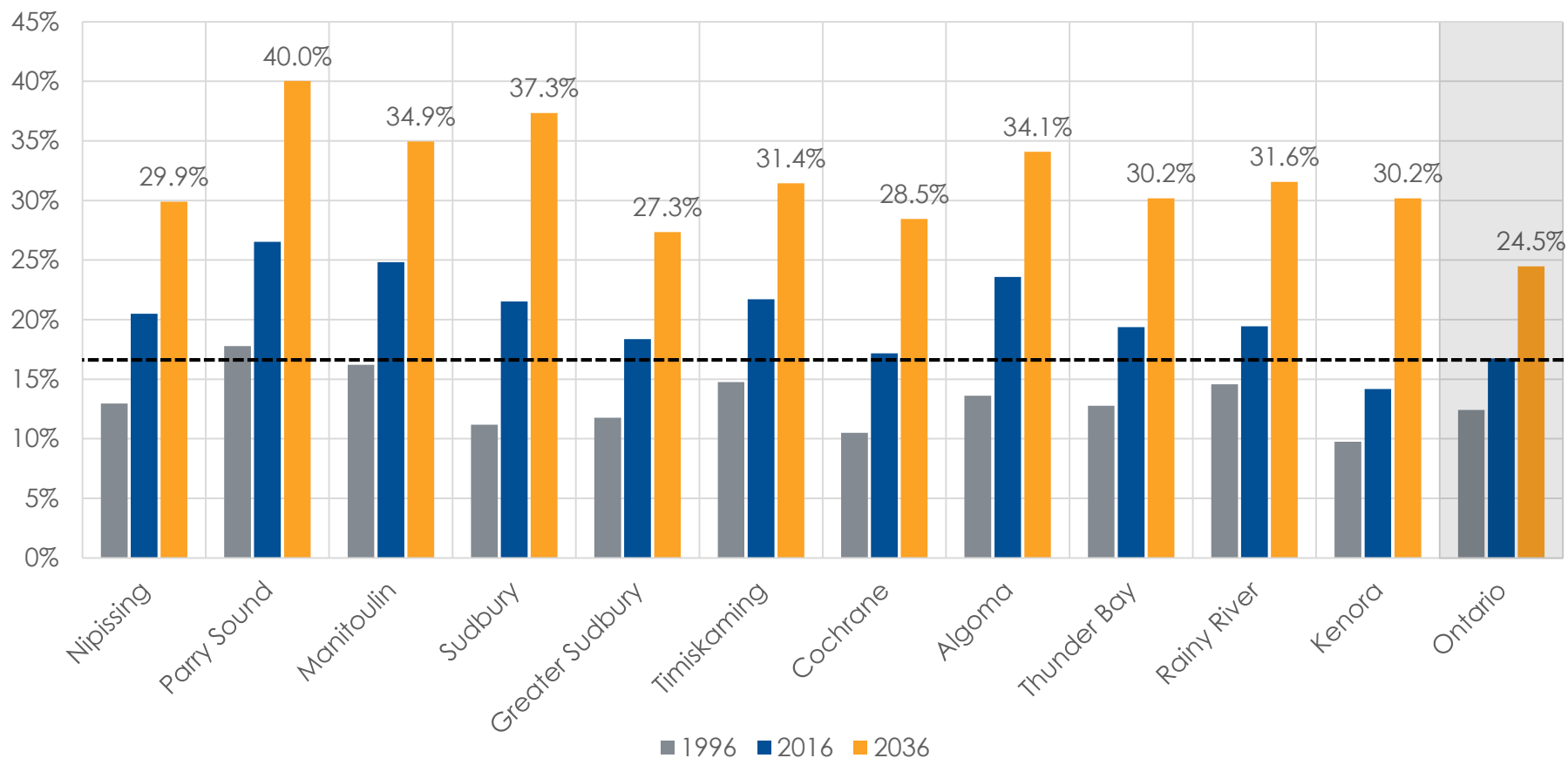


Source: Author's calculation based on Statistics Canada, Census, Various Years.

Demographics

An Aging Population in Every District

POPULATION 65 YEARS OLD AND OVER AS A PERCENTAGE OF THE TOTAL POPULATION



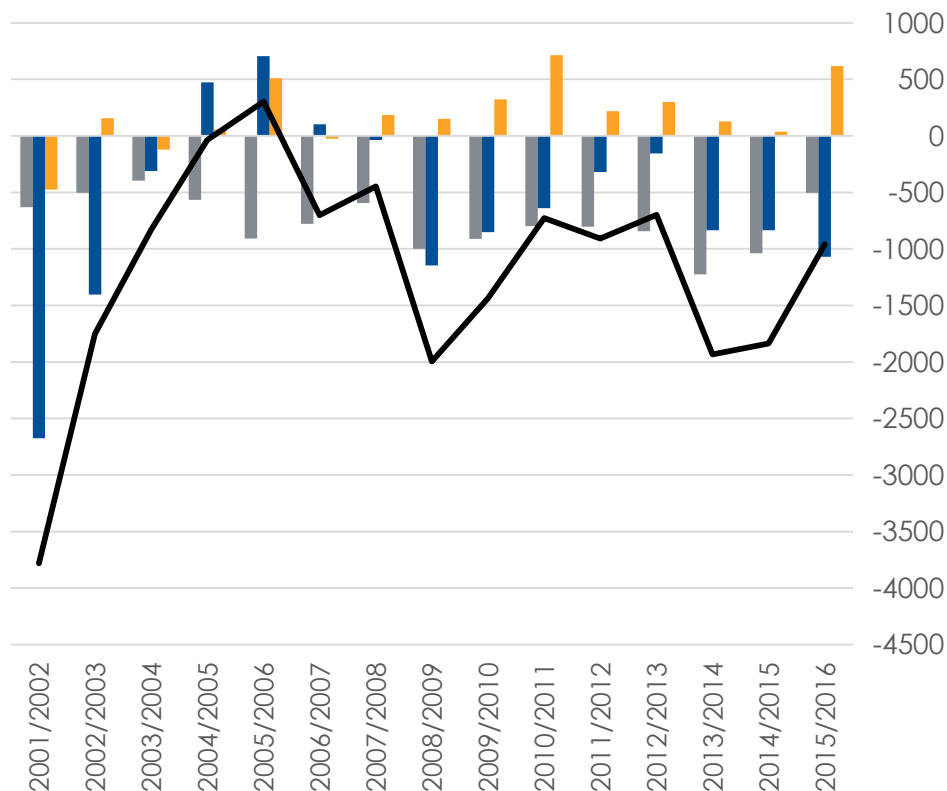
Source: Author's calculation based on Statistics Canada, Census, various years, and Ontario Ministry of Finances Population Projections

Demographics

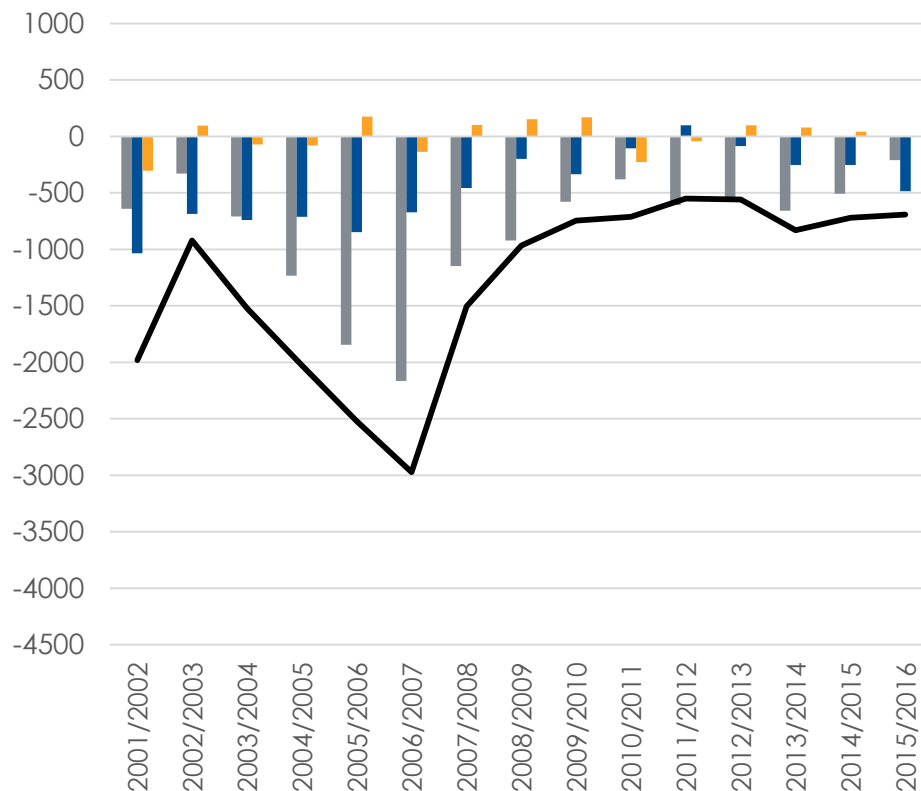
More People Leaving Northern Ontario than Coming to the Region

NET MIGRATION AND MIGRATION COMPONENTS

NORTHEAST



NORTHWEST



■ Intraprovincial Net Migration
■ International Net Migration

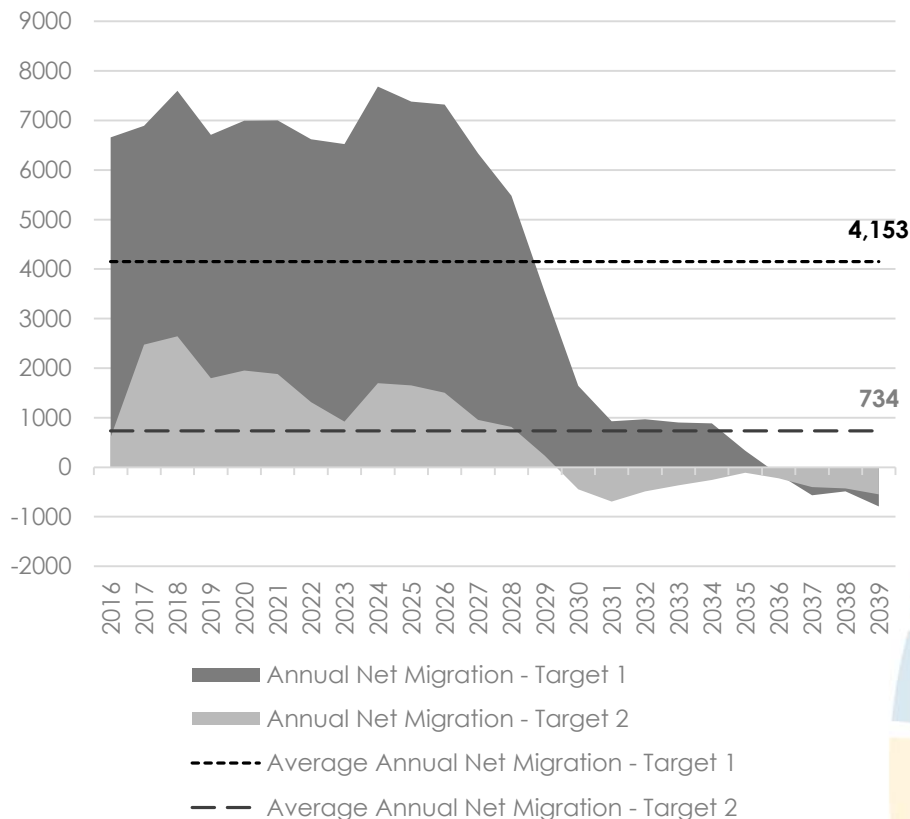
■ Interprovincial Net Migration
— Net Migration

Source: Statistics Canada. Table 051-0060 - Components of population growth by economic region; and author's calculations.

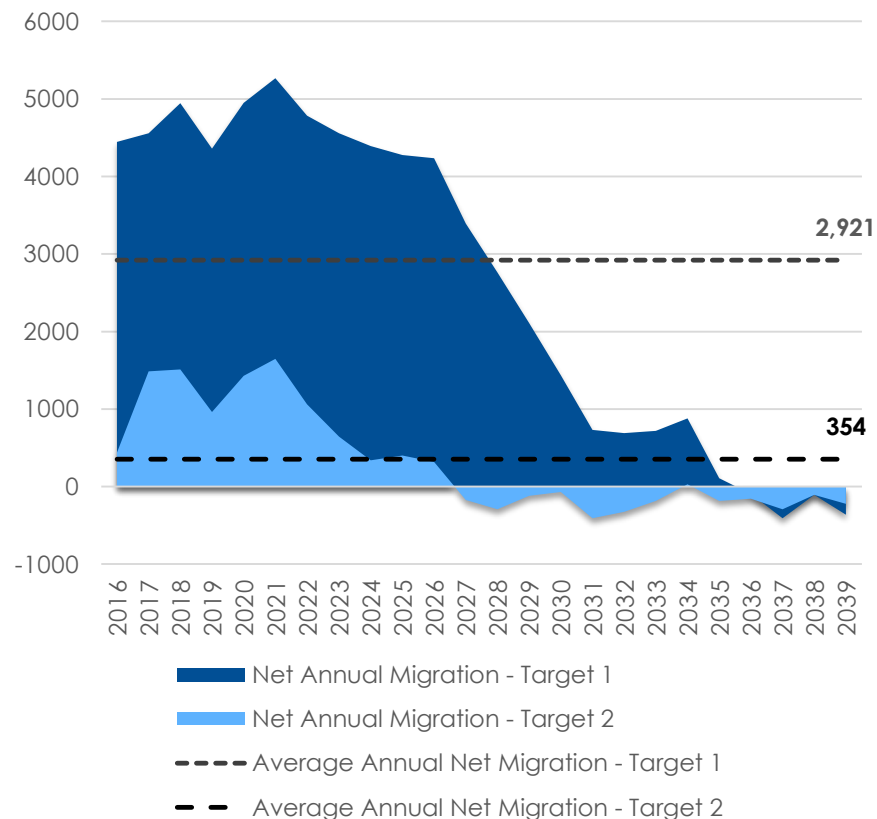
Demographic Trends in Northern Ontario

Newcomers needed by Economic Region

Required Annual Net Migration - **Northeast**



Required Annual Net Migration - **Northwest**



Source: Author's calculations based on Statistics Canada estimates for 2015, and Ontario Ministry of Finance population projections – Spring 2016

The Conference

Northern Ontario is facing a combination of a **declining and aging population**. These demographic shifts will have significant implications on Northern Ontario's economy and society, impacting the long term sustainability of all 11 districts in the region.

BUT Northern Ontario has **assets** it can use, from higher employment rates for youth to higher median income for immigrants, and from a young and growing Indigenous population to a growing number of businesses.





Enjoy the conference!

QUESTIONS OR COMMENTS?

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