

**NORTHERN**  
POLICY INSTITUTE

INSTITUT DES POLITIQUES  
**DU NORD**

# STATE OF ONTARIO'S NORTHERN **REGIONS**

SEPT 26-27, 2018, NORTH BAY, ONTARIO



# It's that time again

1) Annual Update on the State of the North:  
**How is the North doing?**

- The Environment
- The People
- Demographics
- Labour Market
- Income
- The Economy

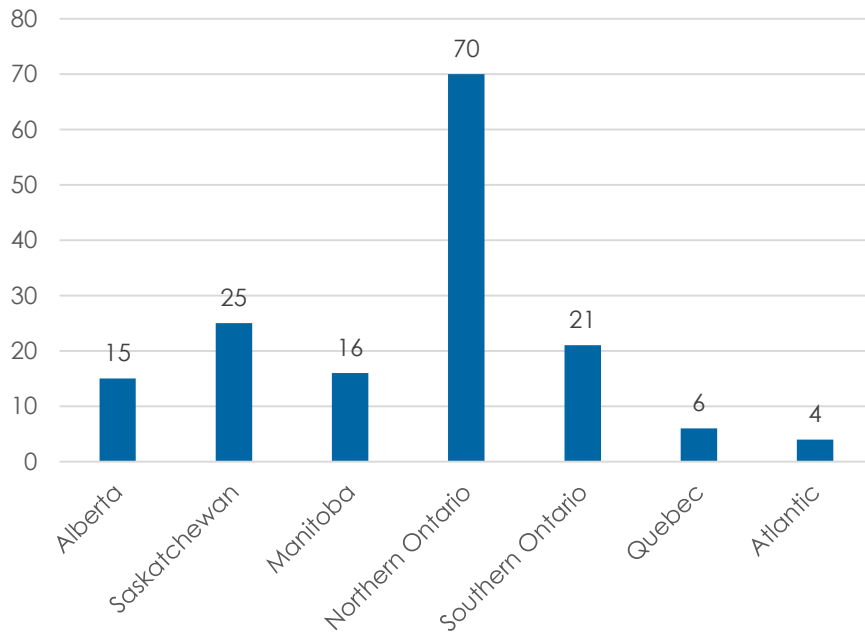
# THE ENVIRONMENT



# Infrastructure

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

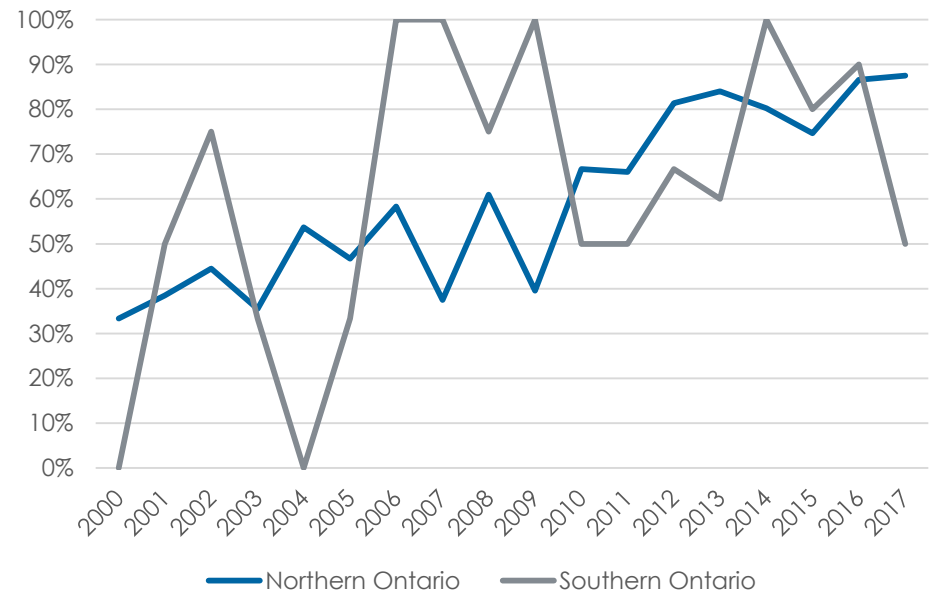
NUMBER OF LONG TERM\* DRINKING WATER ADVISORIES IN FIRST NATION COMMUNITIES, 2017



\*Long term = more than a year

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

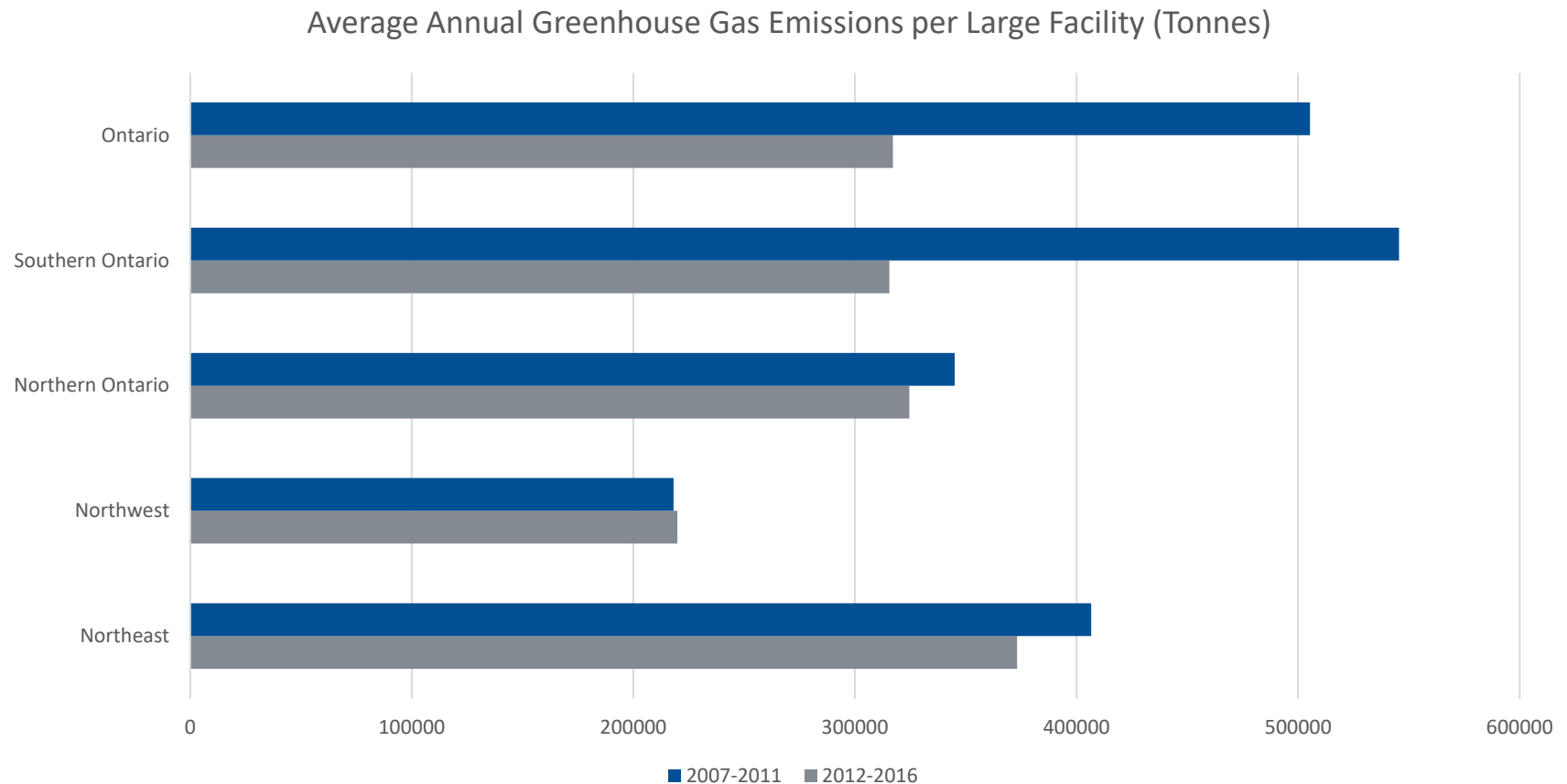
PERCENTAGE OF BOILED WATER ADVISORIES DECLARED FOR **EQUIPMENT AND PROCESS CAUSES**, IN FIRST NATION COMMUNITIES



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

# Emissions

Northern Ontario emissions per facility lower than Ontario average in 2011, but higher in 2016

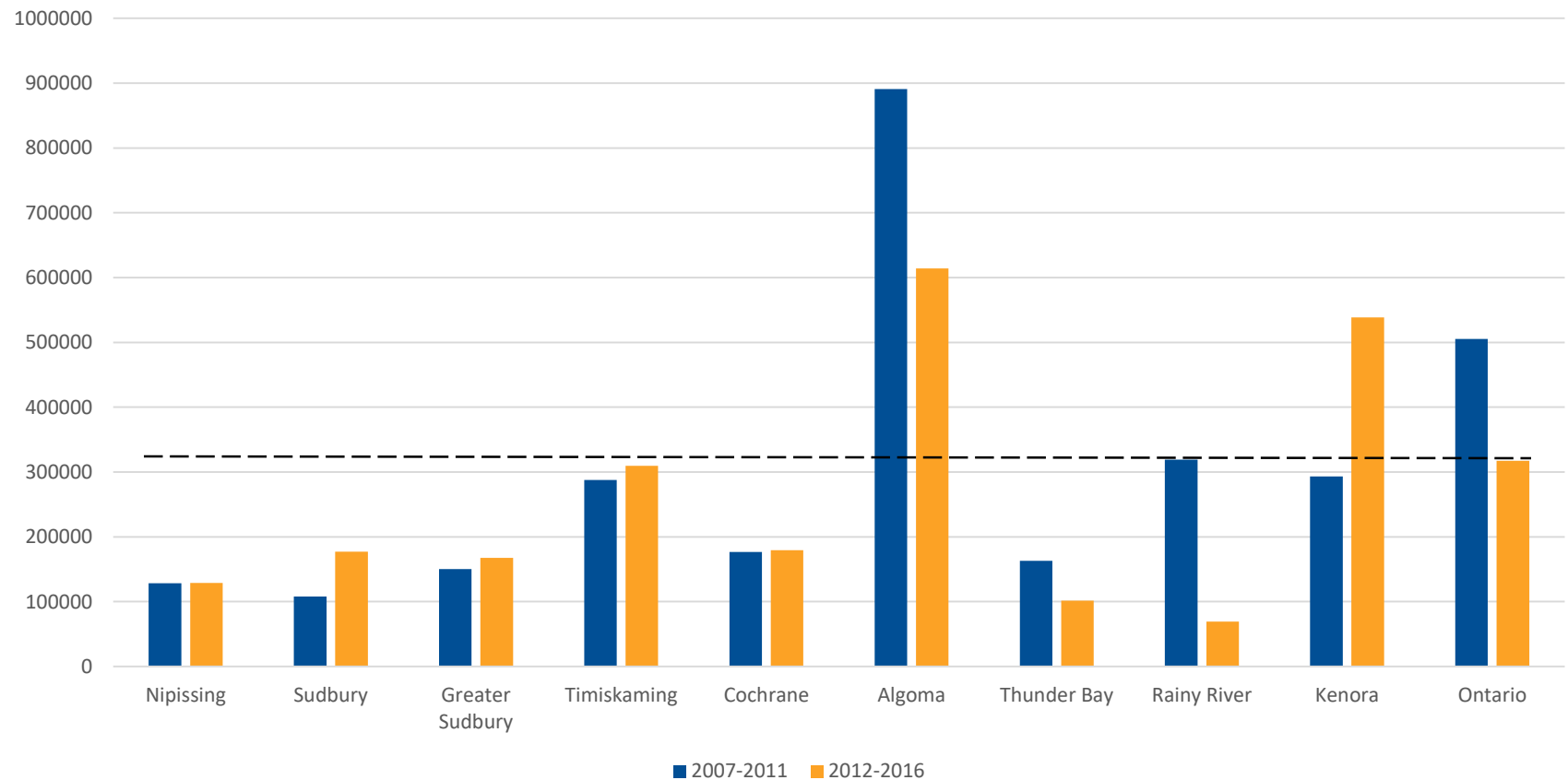


Source: Environment and Climate Change Canada  
Greenhouse Gas Reporting Program  
Note: Only "large facilities", ones that emit more than  
50,000 tonnes of GHG, must report emissions

# Emissions

Greenhouse Gas Emissions per large facility increased in some CDs and decreased in Others

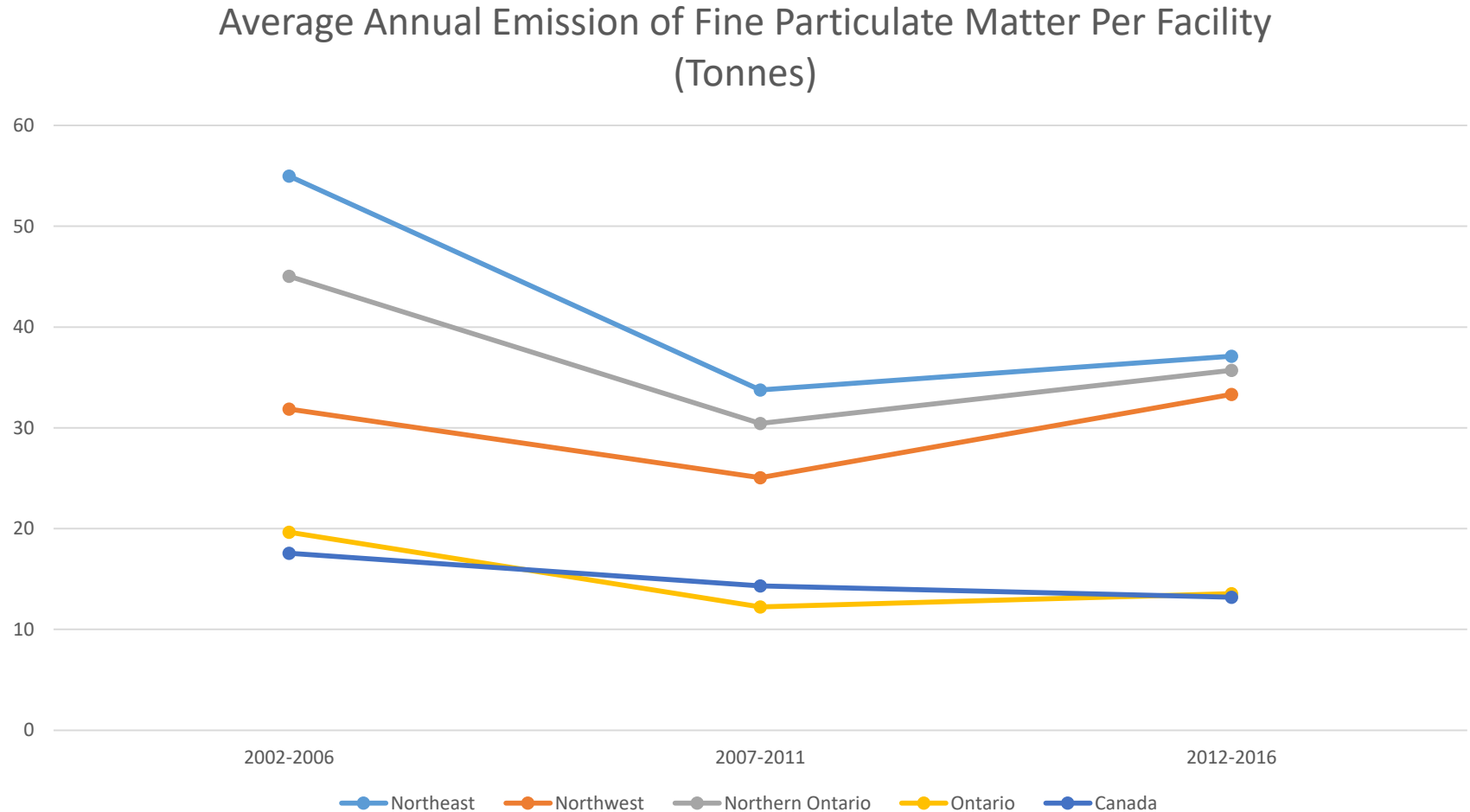
Average Annual Greenhouse Gas Emissions Per Large Facility (Tonnes)



Source: Environment and Climate Change Canada  
Greenhouse Gas Reporting Program  
Note: Only "large facilities", ones that emit more than 50,000 tonnes of GHG, must report emissions

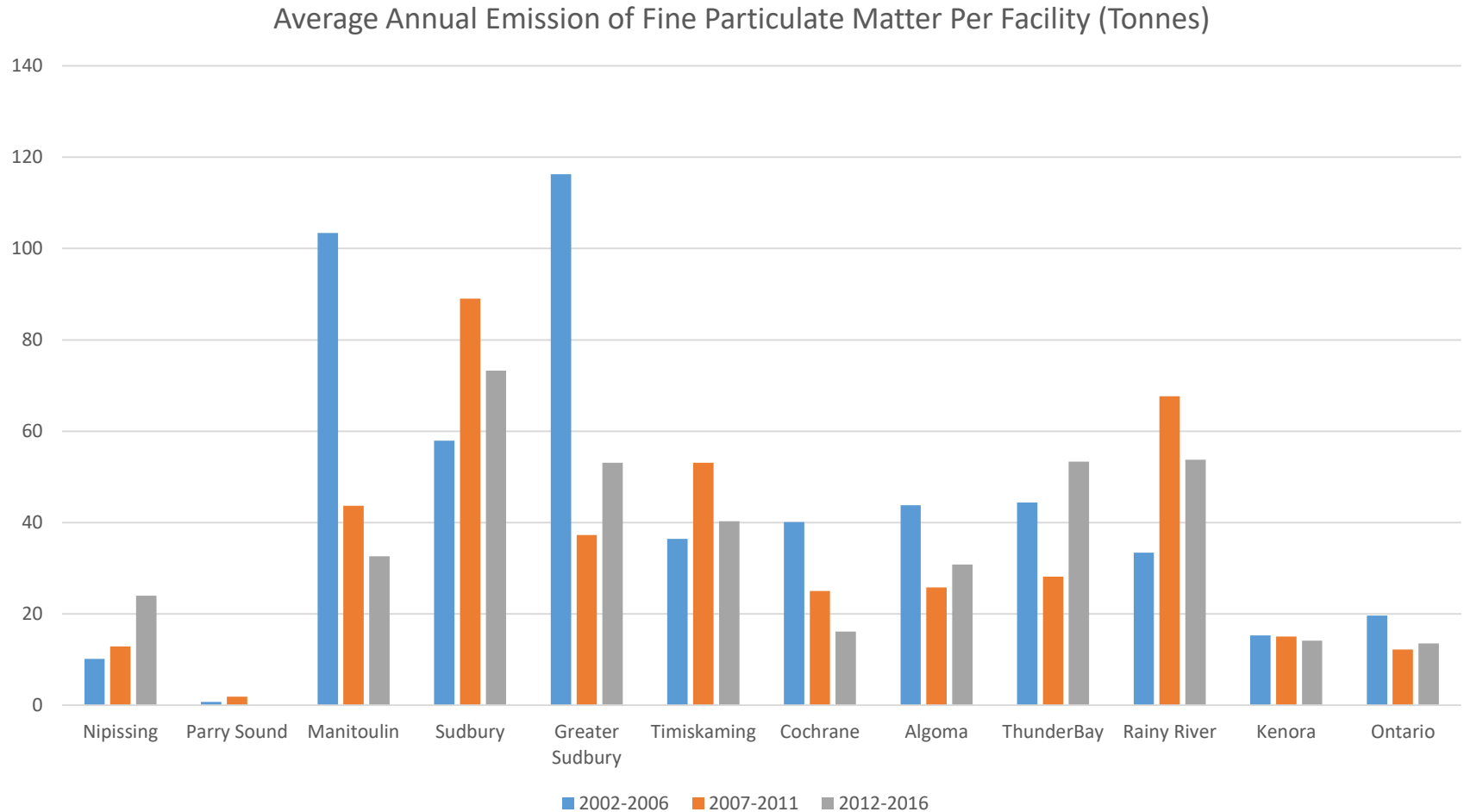
# Emissions

Emissions of Fine Particulate Matter (smog component) per facility higher in Northeast and Northern Ontario than rest of Ontario



# Emissions

Emission of Fine Particulate Matter (smog component) per facility highest in Greater Sudbury and Manitoulin



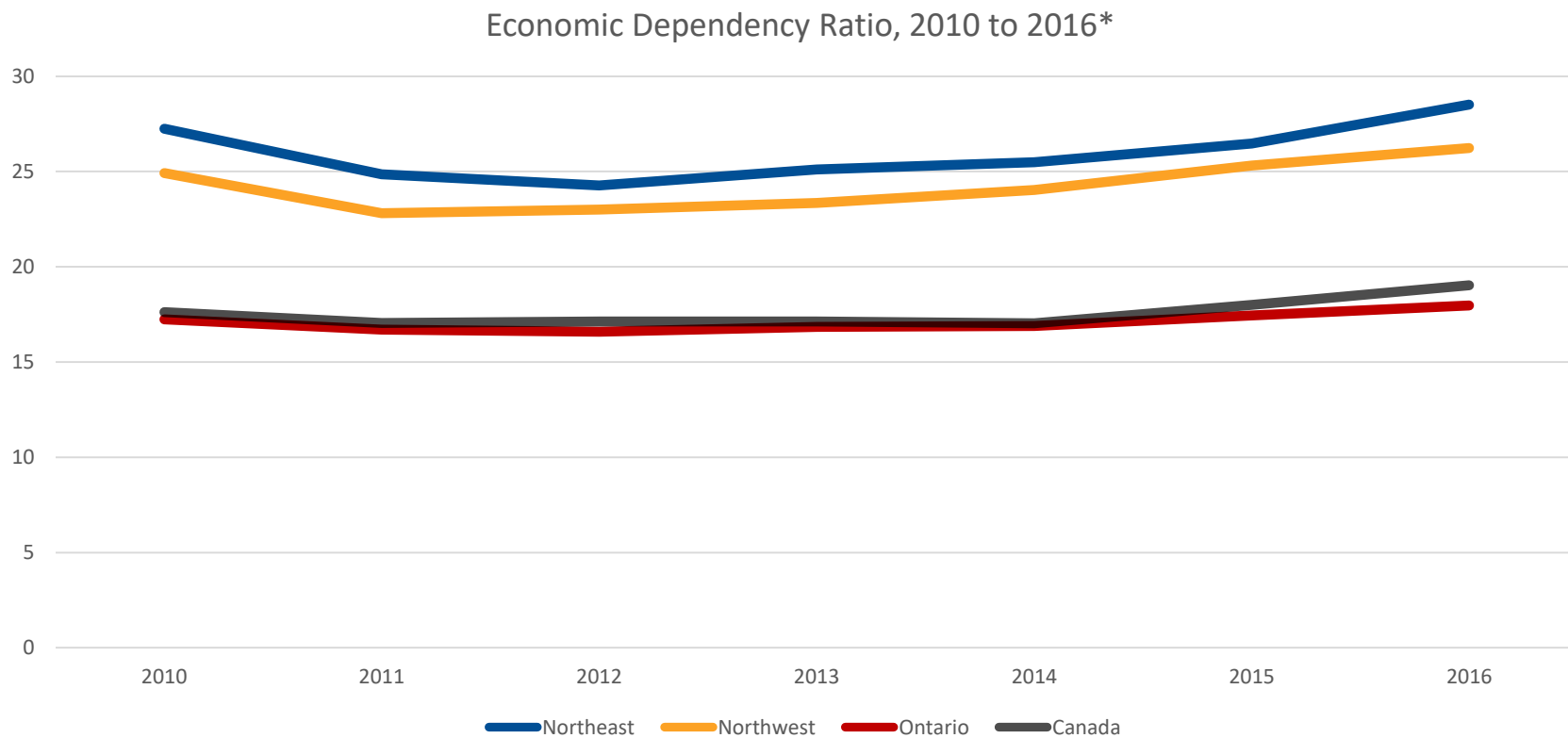


THE PEOPLE



# Economic Dependency

Higher in the Northeast than the Northwest, and increasing since 2012



\*Ratio of government transfer payment dollars per every 100 dollars of employment income

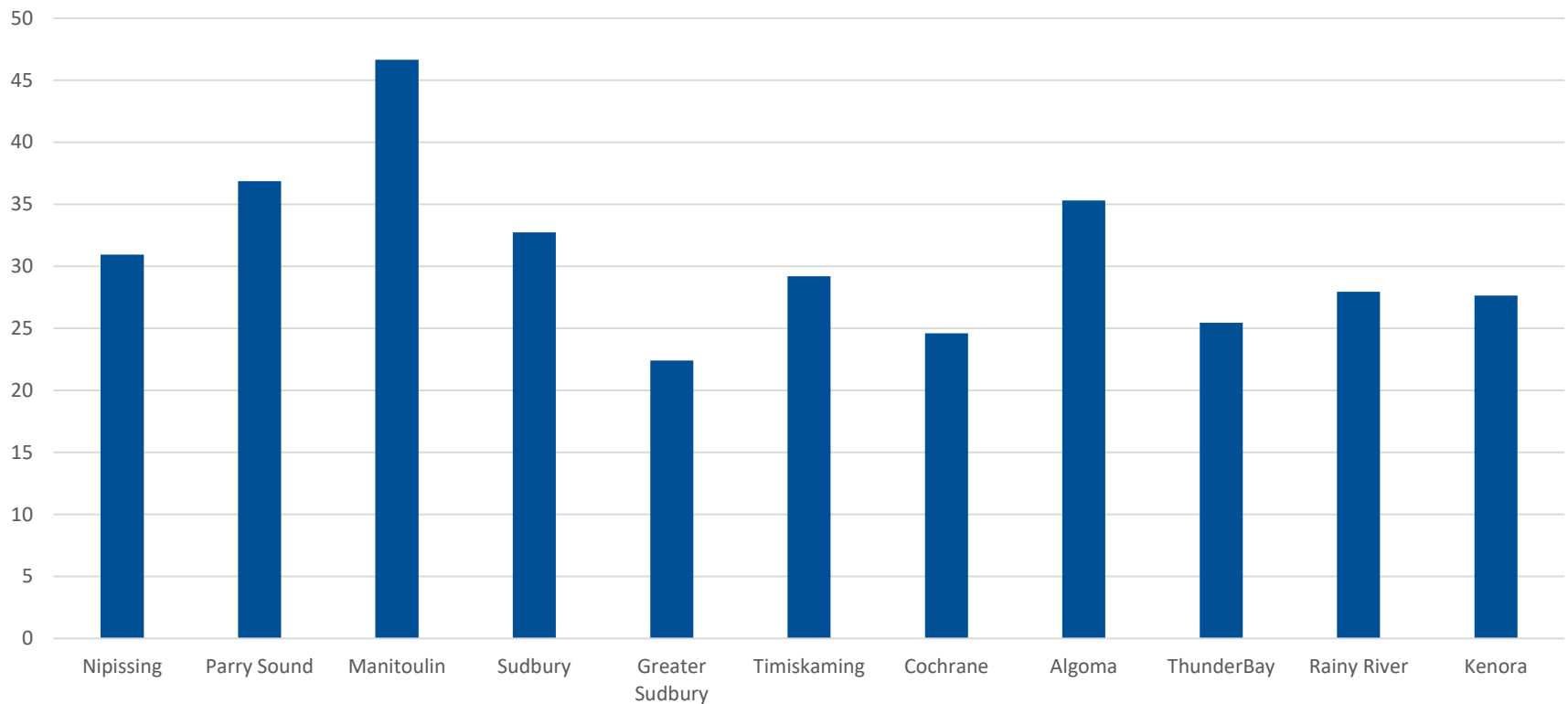
Source: Statistics Canada Taxfiler (T1FF) - Income of Individuals: N-4 - Taxfilers and Dependents with Income By Source of Income, 2010, 2011, 2012, 2013, and 2014

Statistics Canada Taxfiler (T1FF) - Income of Individuals: I-09 - Economic Dependency Profile of Individuals, 2015 and 2016

# Economic Dependency

Highest in Manitoulin, Algoma, and Nipissing Districts

Economic Dependency Ratio, 2016



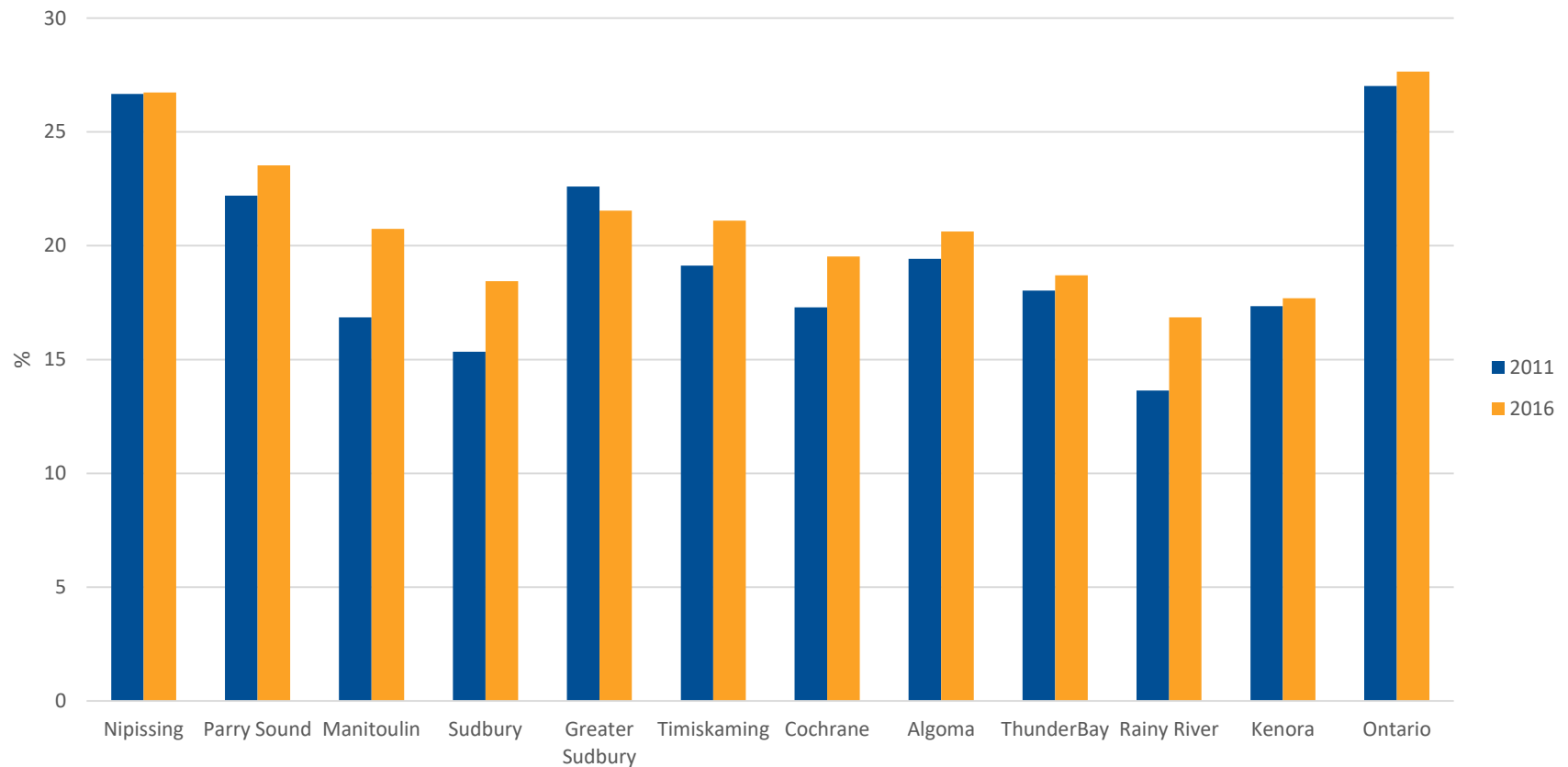
Statistics Canada Taxfiler (T1FF) - Income of Individuals: N-4 - Taxfilers and Dependents with Income By Source of Income, 2010, 2011, 2012, 2013, and 2014

Statistics Canada Taxfiler (T1FF) - Income of Individuals: I-09 - Economic Dependency Profile of Individuals, 2015 and 2016

# Spending Patterns

Lower proportion of households in the North spend 30% or more of their income on shelter costs compared to Ontario

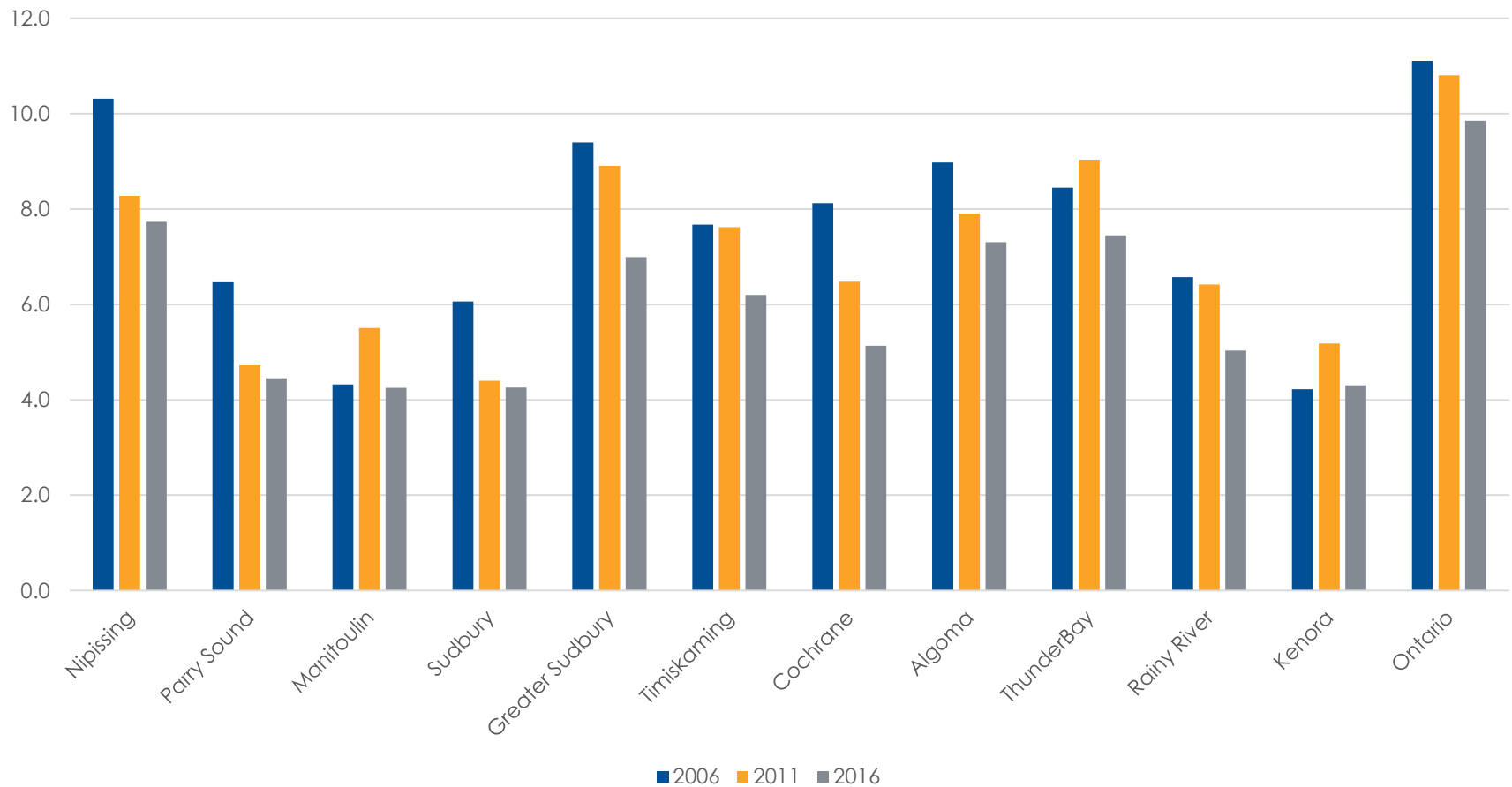
Proportion of Households Spending 30% or More of Income on Shelter, 2011 and 2016



# Poverty – Low Income Cutoff

Apparent lower instances of poverty in Northern Ontario...

Proportion of the Population in Poverty (LICO-AT)

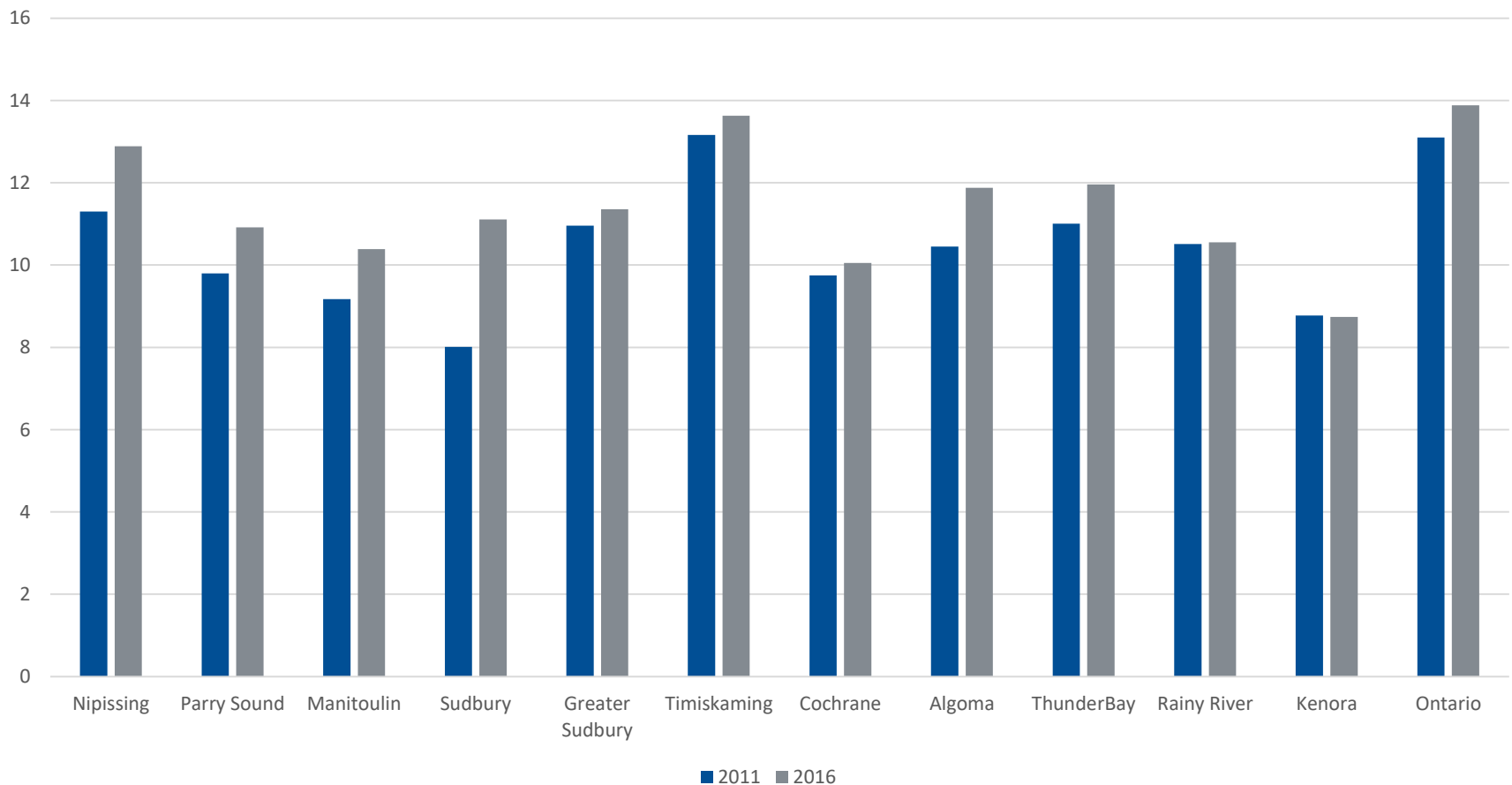


■ 2006 ■ 2011 ■ 2016

# Poverty – Market Basket Measure

...but different poverty measures yield different results

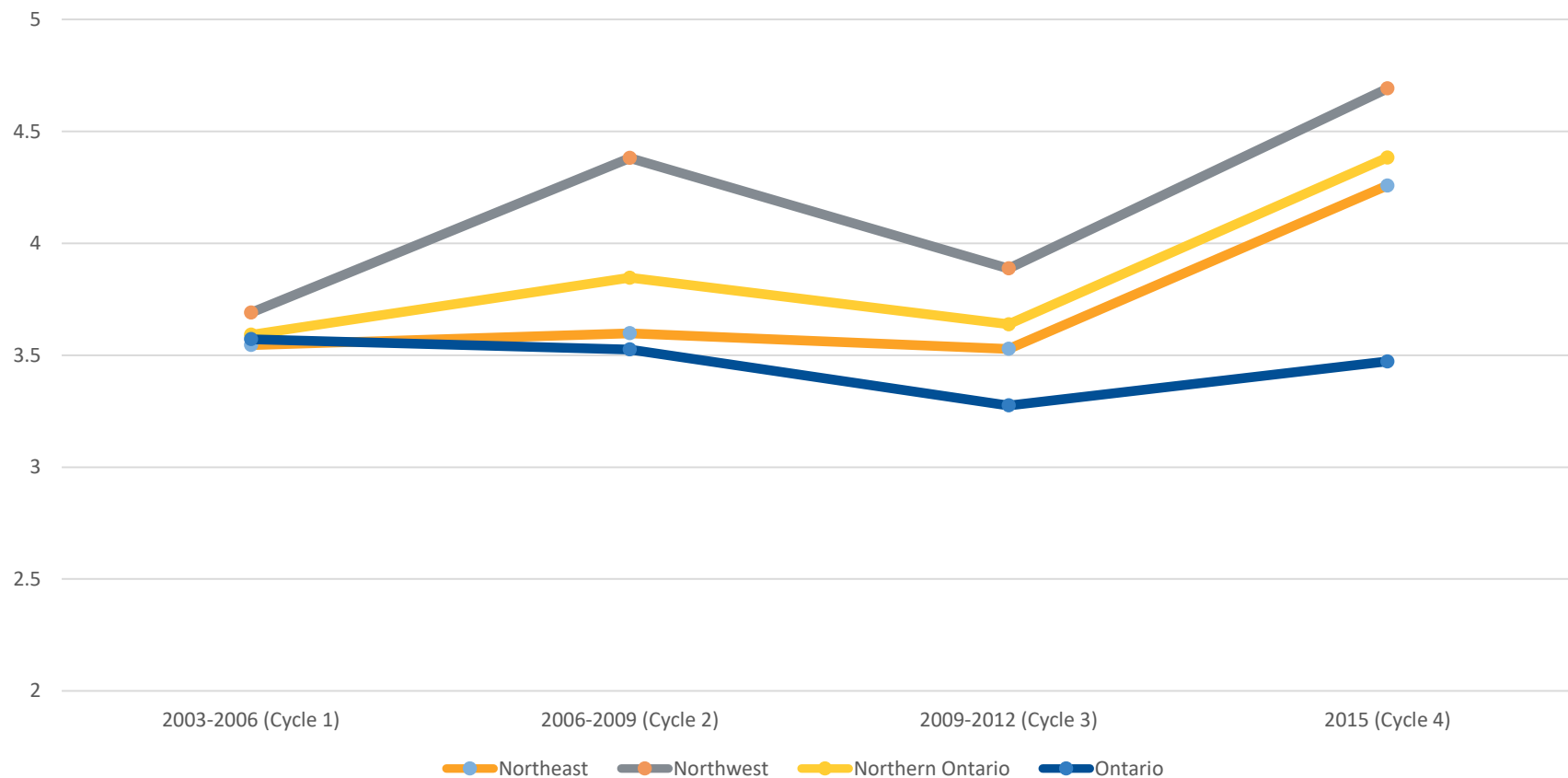
Proportion of Population in Poverty (MBM Measure)



# Growth in Number of Children Facing Challenges

## Early Development Instrument

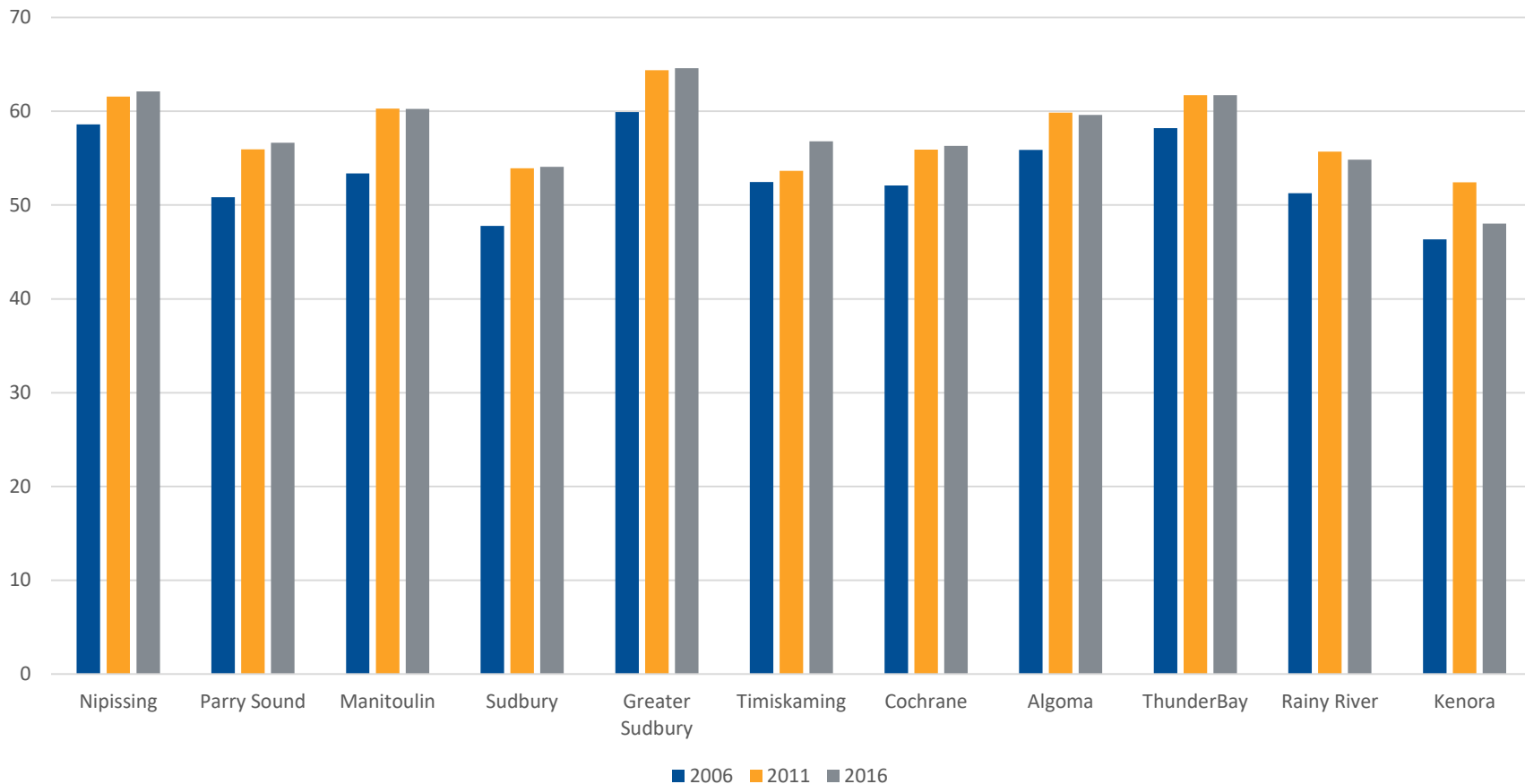
Early Development Instrument - Proportion of Children with Multiple Developmental Challenges



# But positive overall trends

Post-Secondary education levels have increased since 2006

## Proportion of Population with Post-Secondary Education





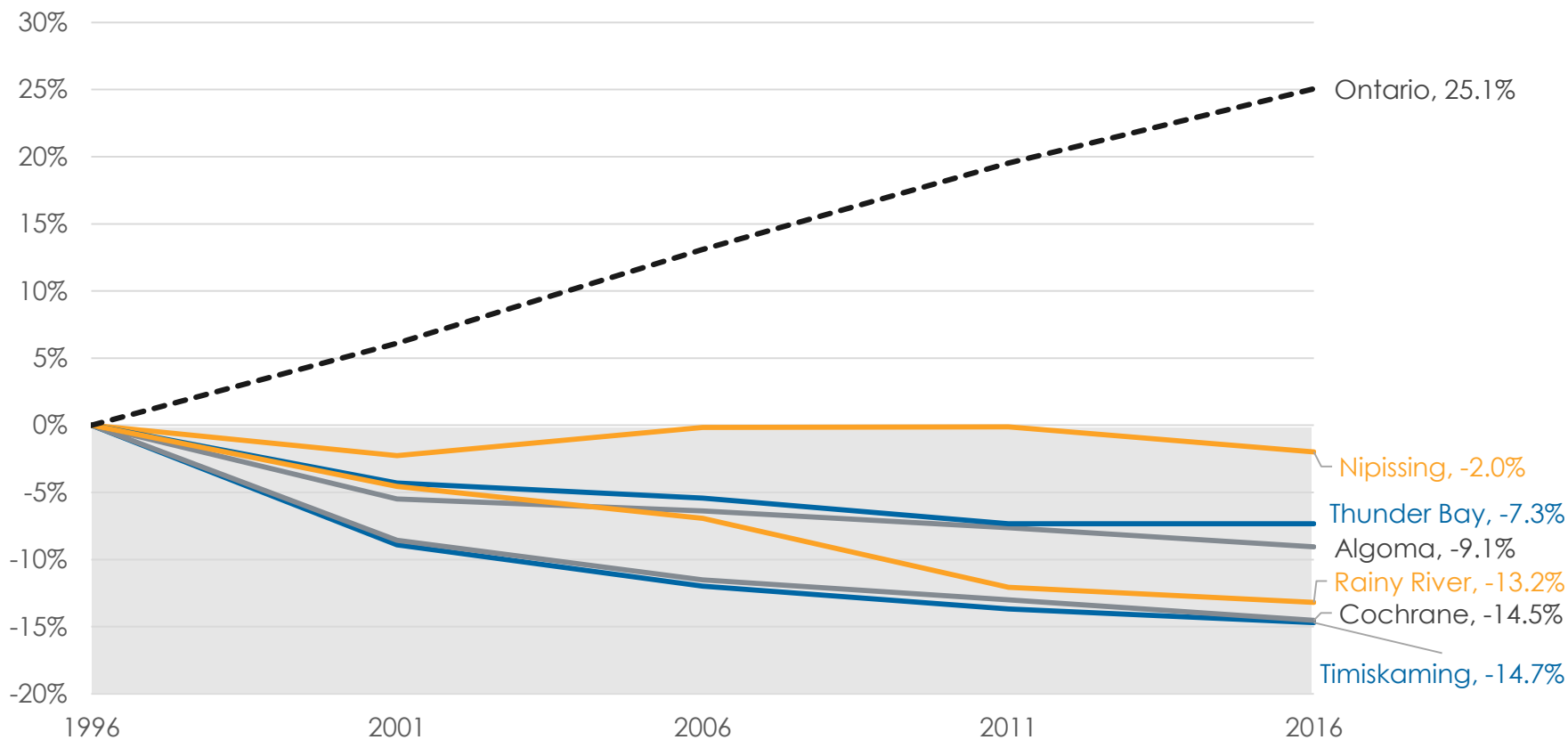
# DEMOGRAPHICS



# Demographics

## Negative Population Growth in Some Districts...

CUMULATIVE POPULATION GROWTH SINCE 1996 BY DISTRICT

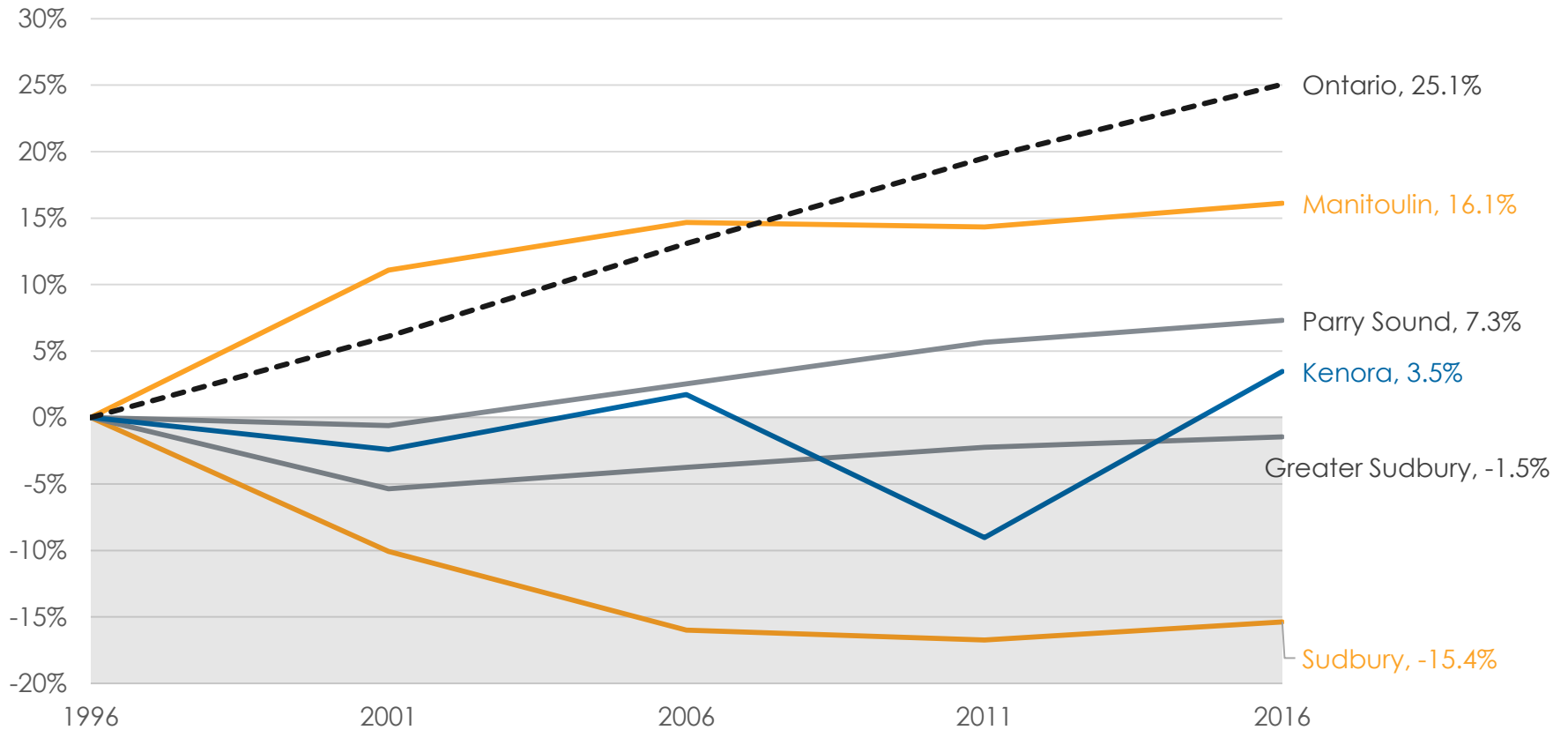


Source: Author's calculation based on Statistics Canada, Census, Various Years.

# Demographics

... But Positive Growth in Others

CUMULATIVE POPULATION GROWTH SINCE 1996 BY DISTRICT

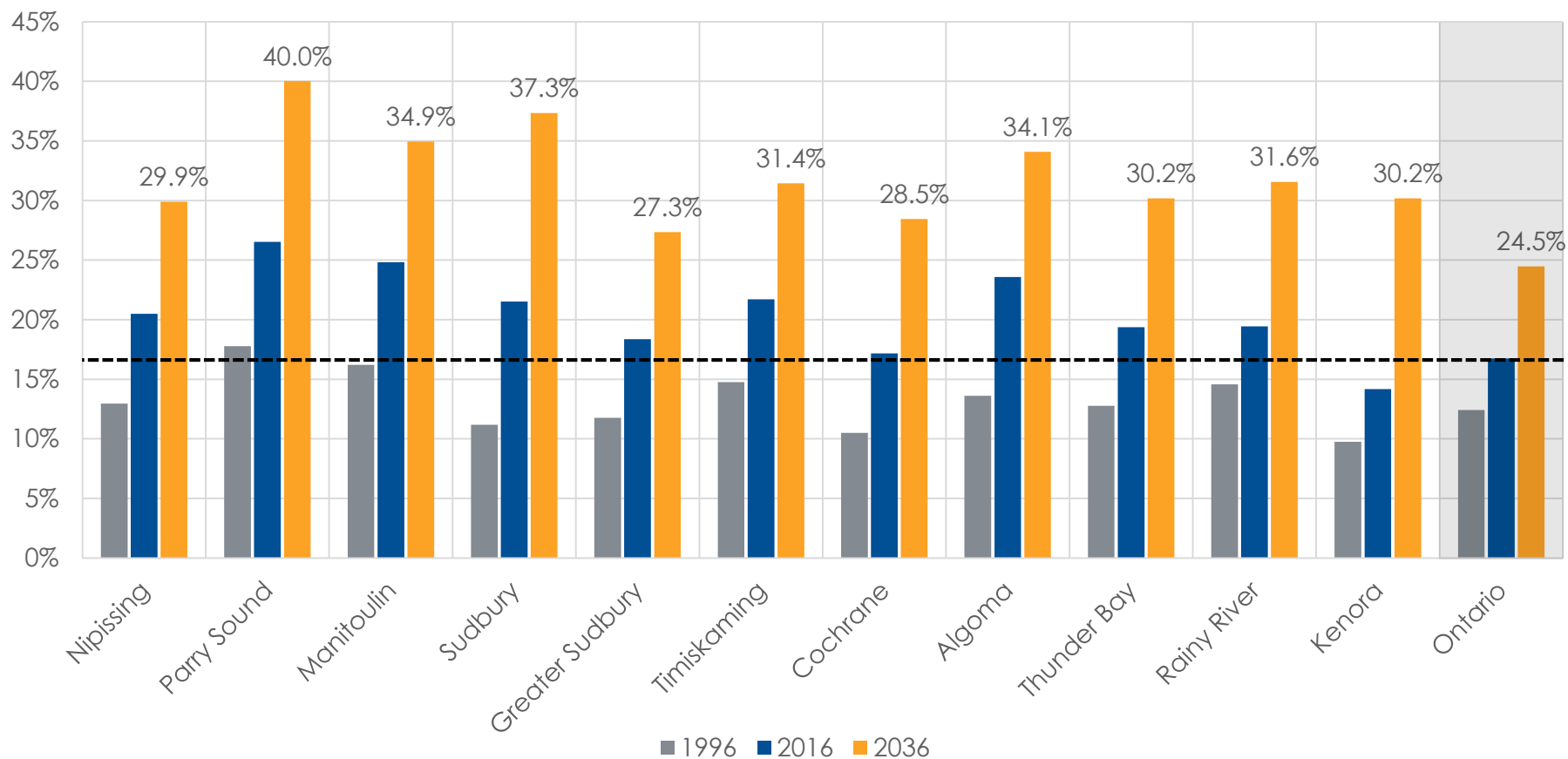


Source: Author's calculation based on Statistics Canada, Census, Various Years.

# Demographics

An Aging Population in Every District

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

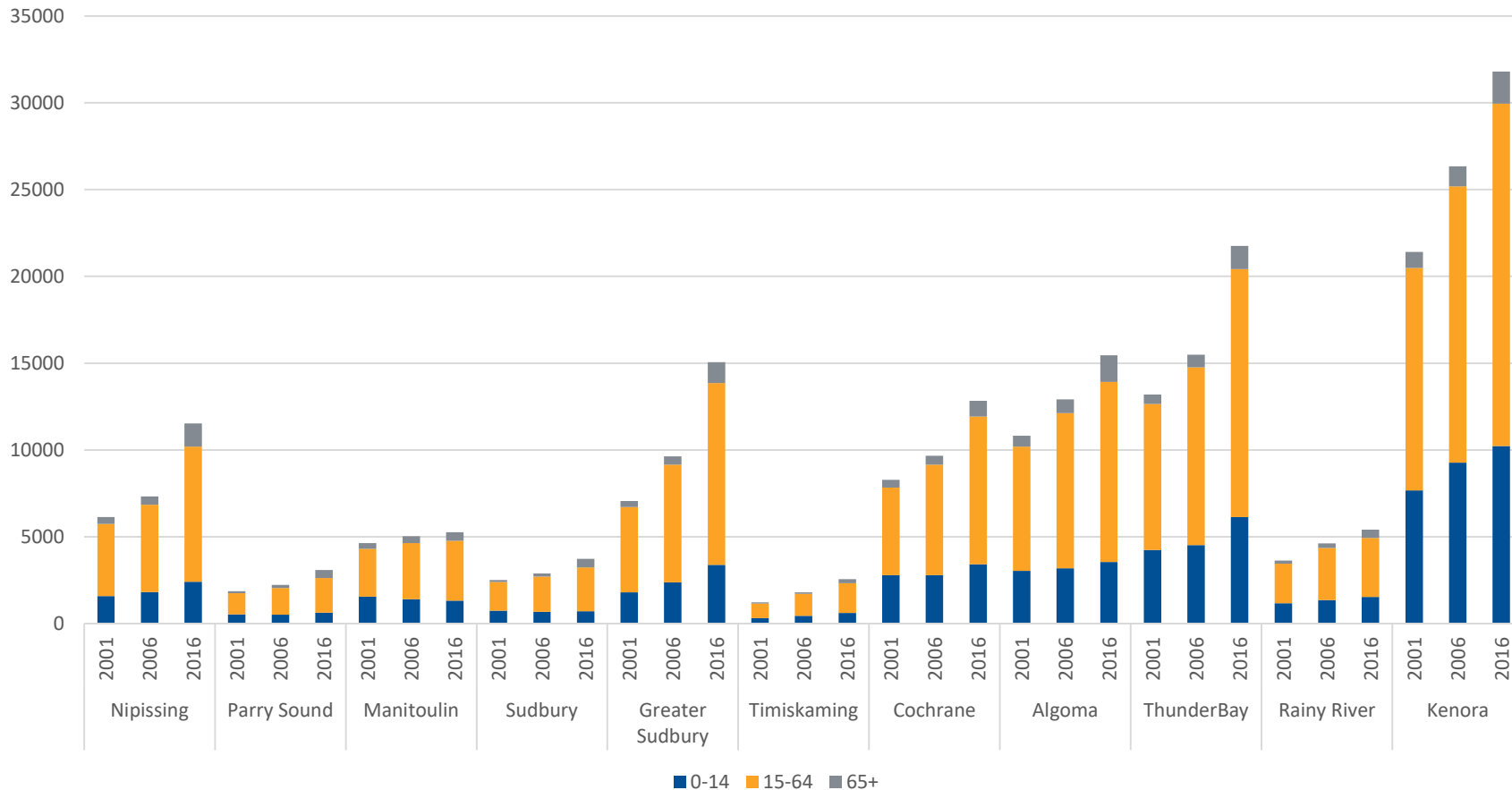


Source: Author's calculation based on Statistics Canada, Census, various years, and Ontario Ministry of Finances Population Projections

# Demographics

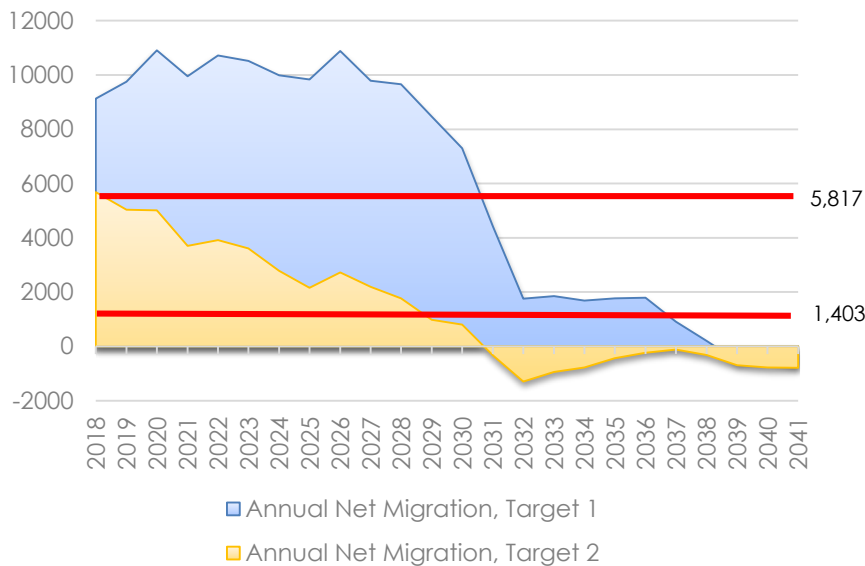
Indigenous population has increased in every district

Indigenous Population by Age Group

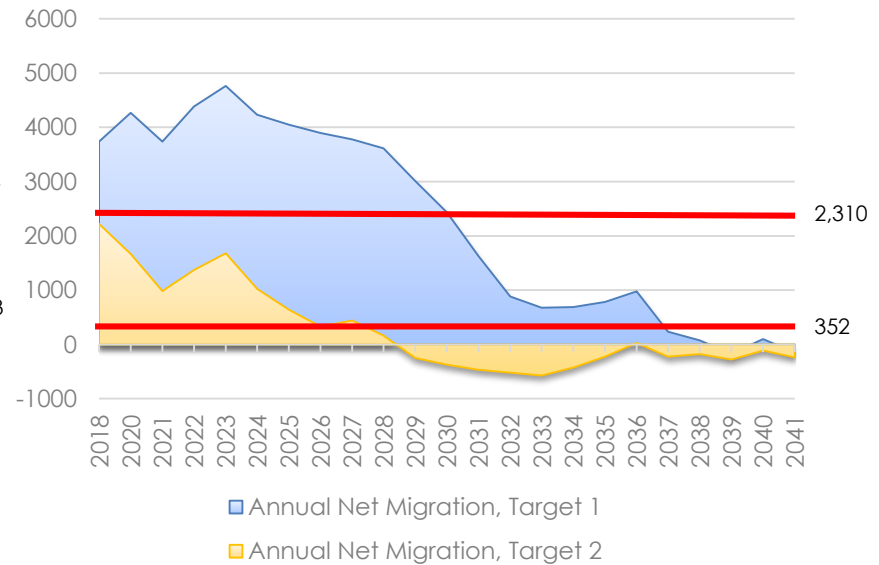


# We need BOTH Newcomers and the Indigenous Peoples

Required Annual Net Migration - Northeast



Required Annual Net Migration - Northwest

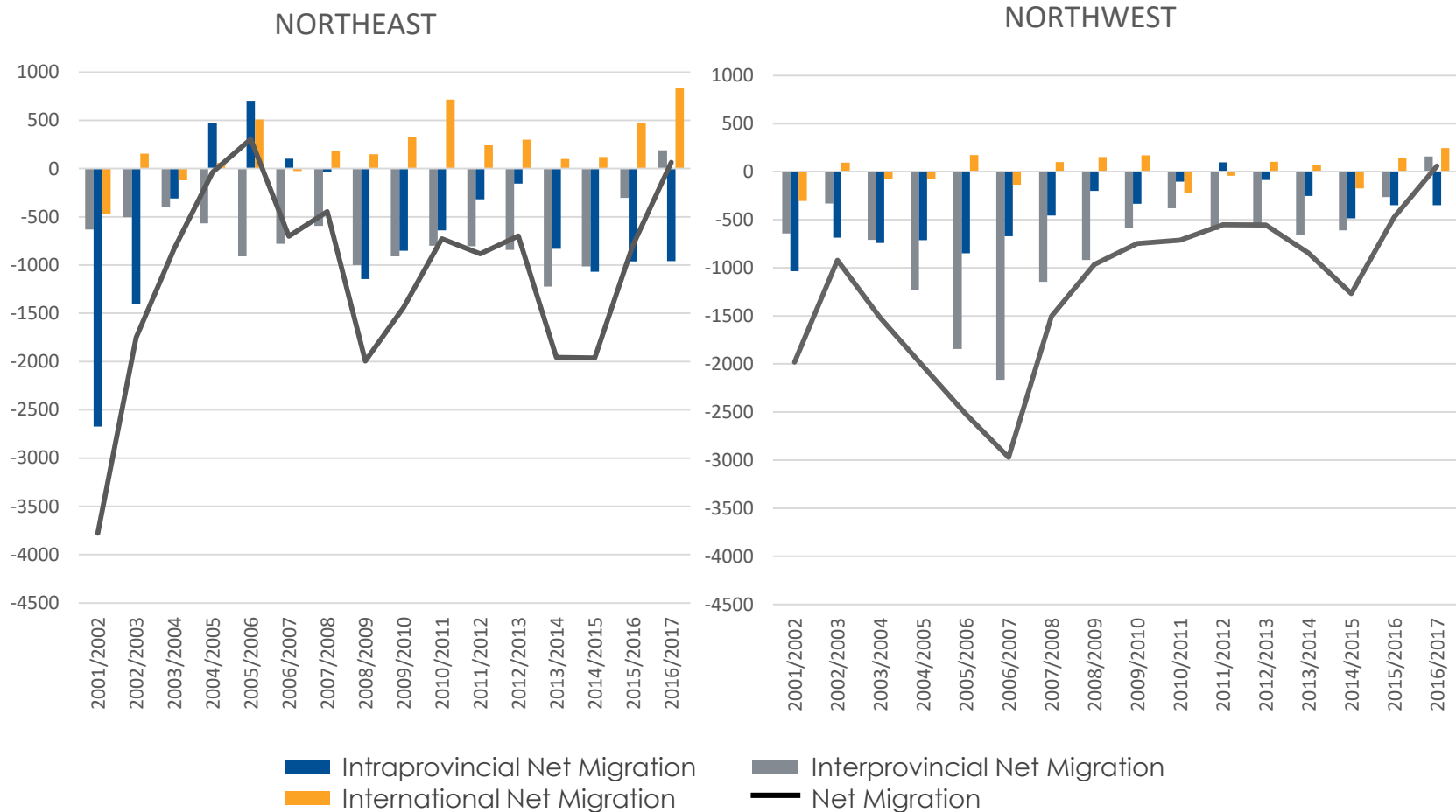


These graphs assume FULL EMPLOYMENT of the Indigenous Population – Economic Inclusion and Immigration are not either/or win/lose ideas – we need them both.

# Demographics

More People Leaving Northern Ontario than Coming to the Region

## NET MIGRATION AND MIGRATION COMPONENTS



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

## So – let's focus on jobs that ARE here

Economic Region	Vicinity Jobs Data # postings 2016-2018 (2yrs)	Job description	NOC	Skill Category	Covered by an Ontario immigration stream?
Northeast	1999	Retail salespersons	6421	C	No
Northeast	1496	Other customer and information services representatives	6552	C	No
Northeast	1333	Registered nurses and registered psychiatric nurses	3012	A	Yes
Northeast	1256	Retail and wholesale trade managers	0621	0	Yes
Northeast	1237	Other sales related occupations	6623	D	No
Northeast	1207	Sales and service (unidentified sub-category)	6000	N/A	No
Northeast	1133	Home support workers, housekeepers and related occupations	4412	C	No
Northeast	819	Cooks	6322	B	Yes
Northeast	751	Sales and account representatives - wholesale trade (non-technical)	6411	C	No
Northeast	583	General office support workers	1411	C	No

Economic Region	Vicinity Jobs Data # postings 2016-2018 (2yrs)	Job description	NOC	Skill Category	Covered by an Ontario immigration stream?
Northwest	953	Registered nurses and registered psychiatric nurses	3012	A	Yes
Northwest	739	Other customer and information services representatives	6552	C	No
Northwest	704	Other sales related occupations	6623	D	No
Northwest	700	Retail and wholesale trade managers	0621	0	Yes
Northwest	662	Retail salespersons	6421	C	No
Northwest	601	Sales and service (unidentified sub-category)	6000	N/A	No
Northwest	467	Home support workers, housekeepers and related occupations	4412	C	No
Northwest	464	General office support workers	1411	C	No
Northwest	447	Licensed practical nurses	3233	B	Yes
Northwest	366	Cashiers	6611	D	No



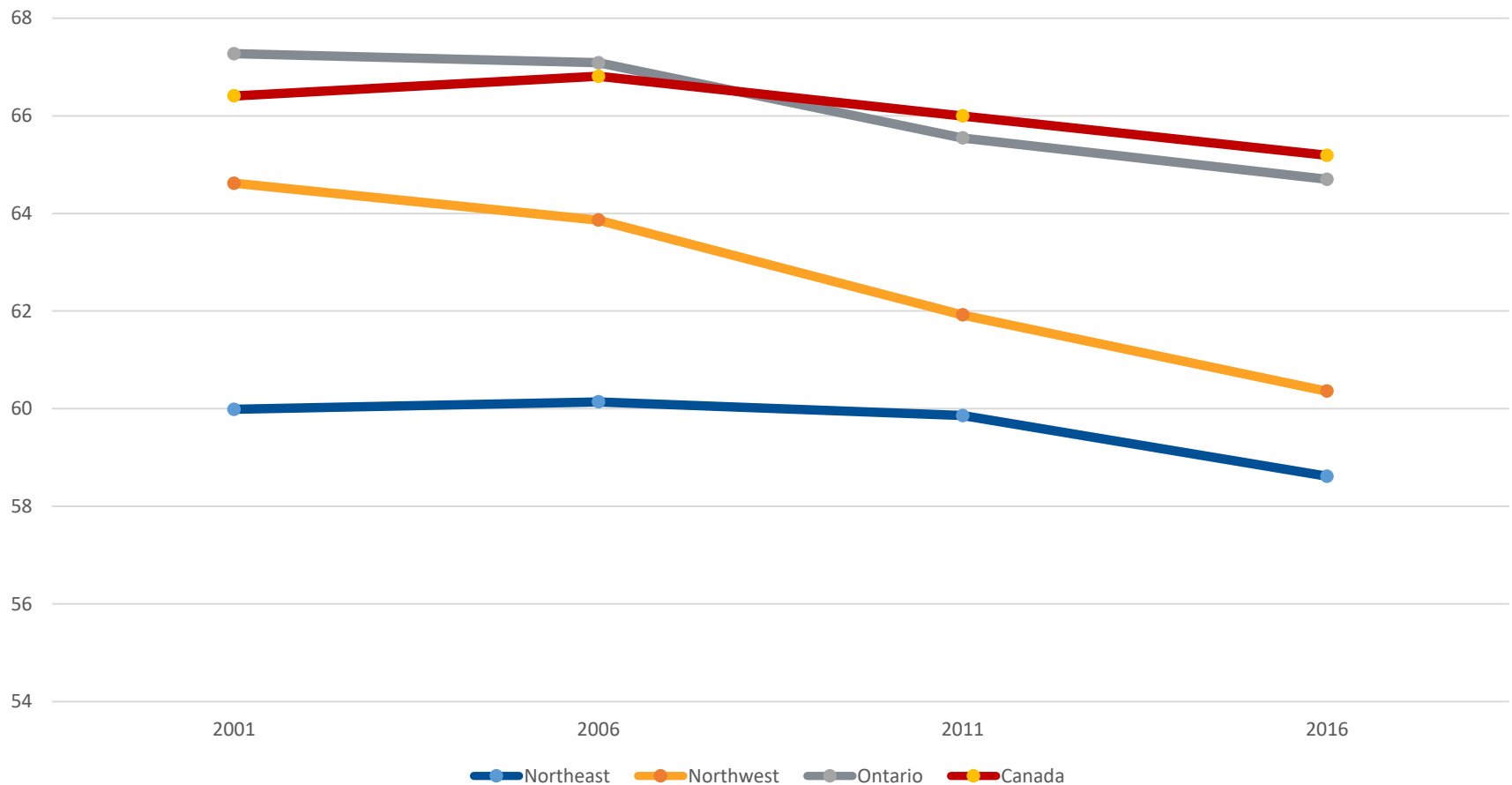
# LABOUR MARKET



# Integration in the Labour Market

Lower participation rates compared to Ontario and Canada

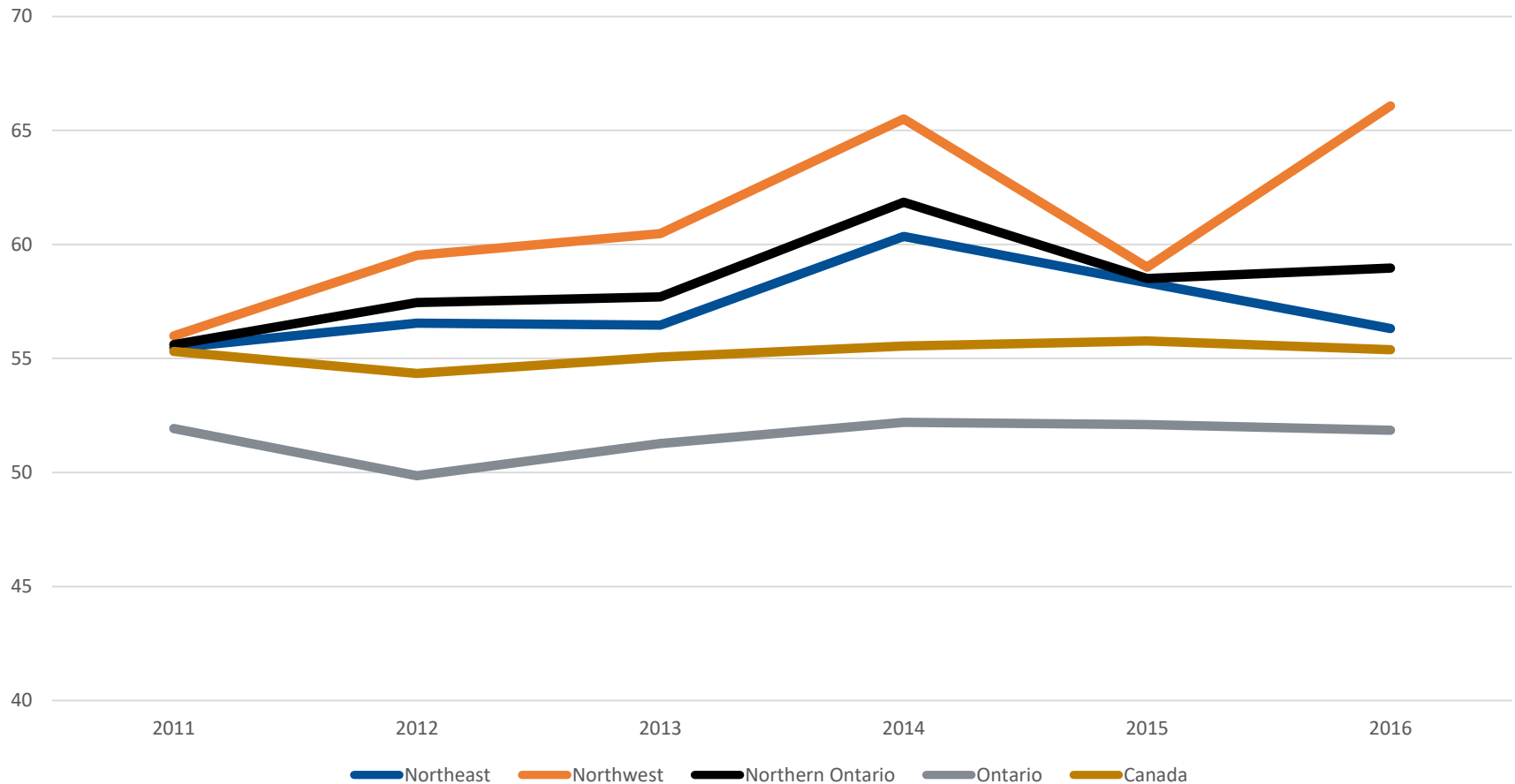
Participation Rate, 2001 to 2016



# Integration in the Labour Market

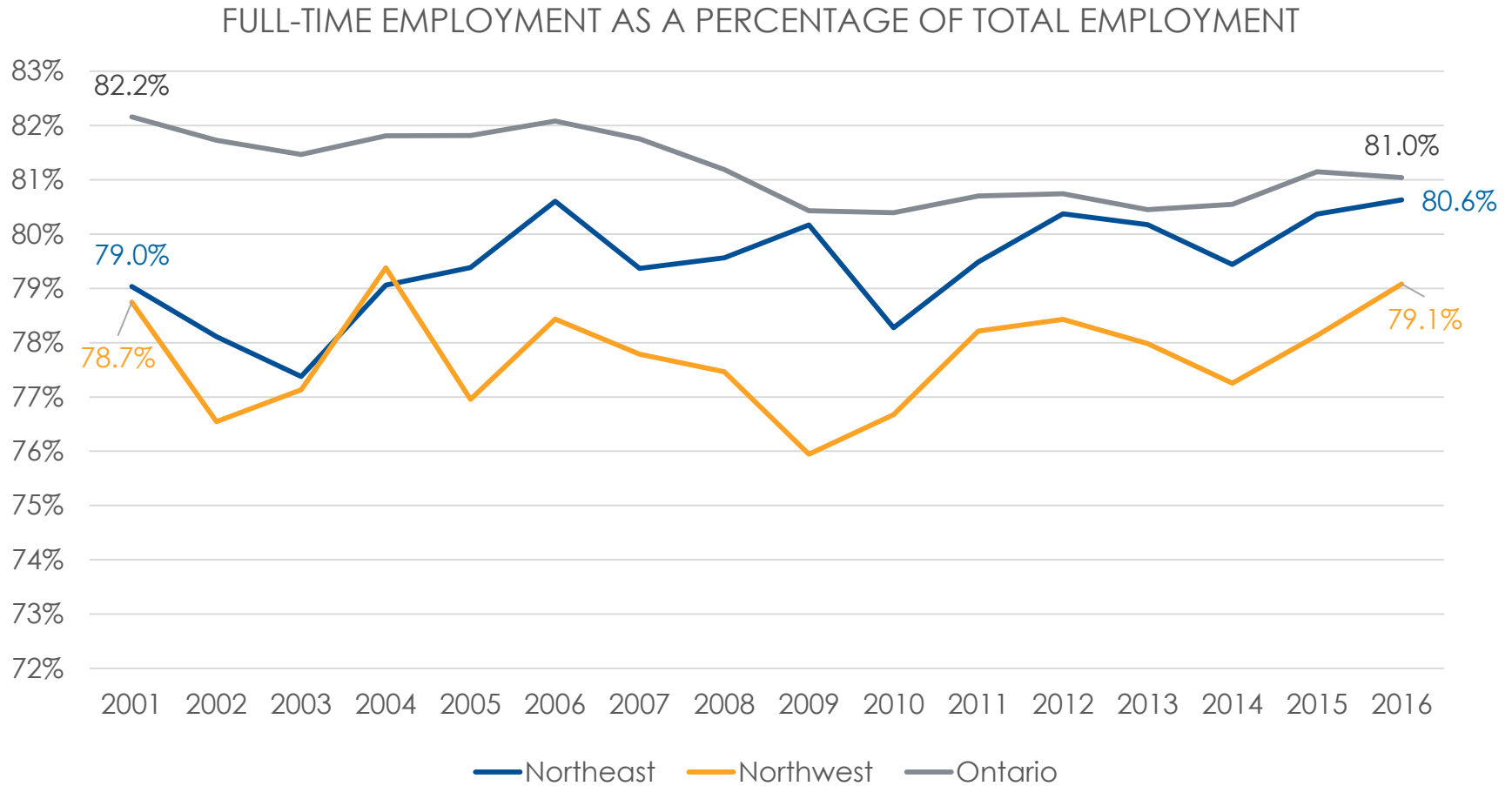
Youth Employment Rates higher than provincial and national average

Youth Employment Rates (Ages 15-24)



# Integration in the Labour Market

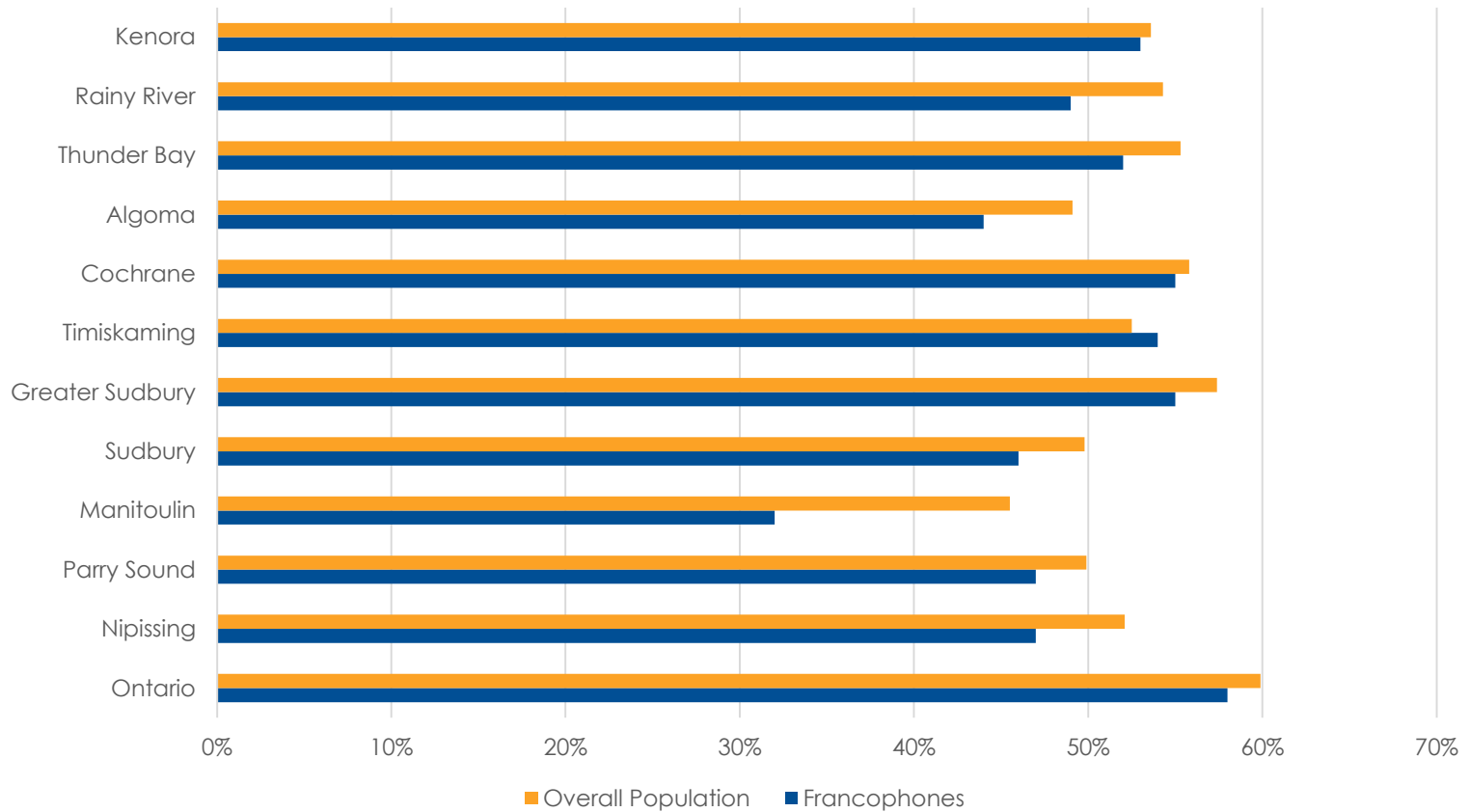
The proportion of full-time jobs increased in Northern Ontario



# Integration in the Labour Market

Francophone Population

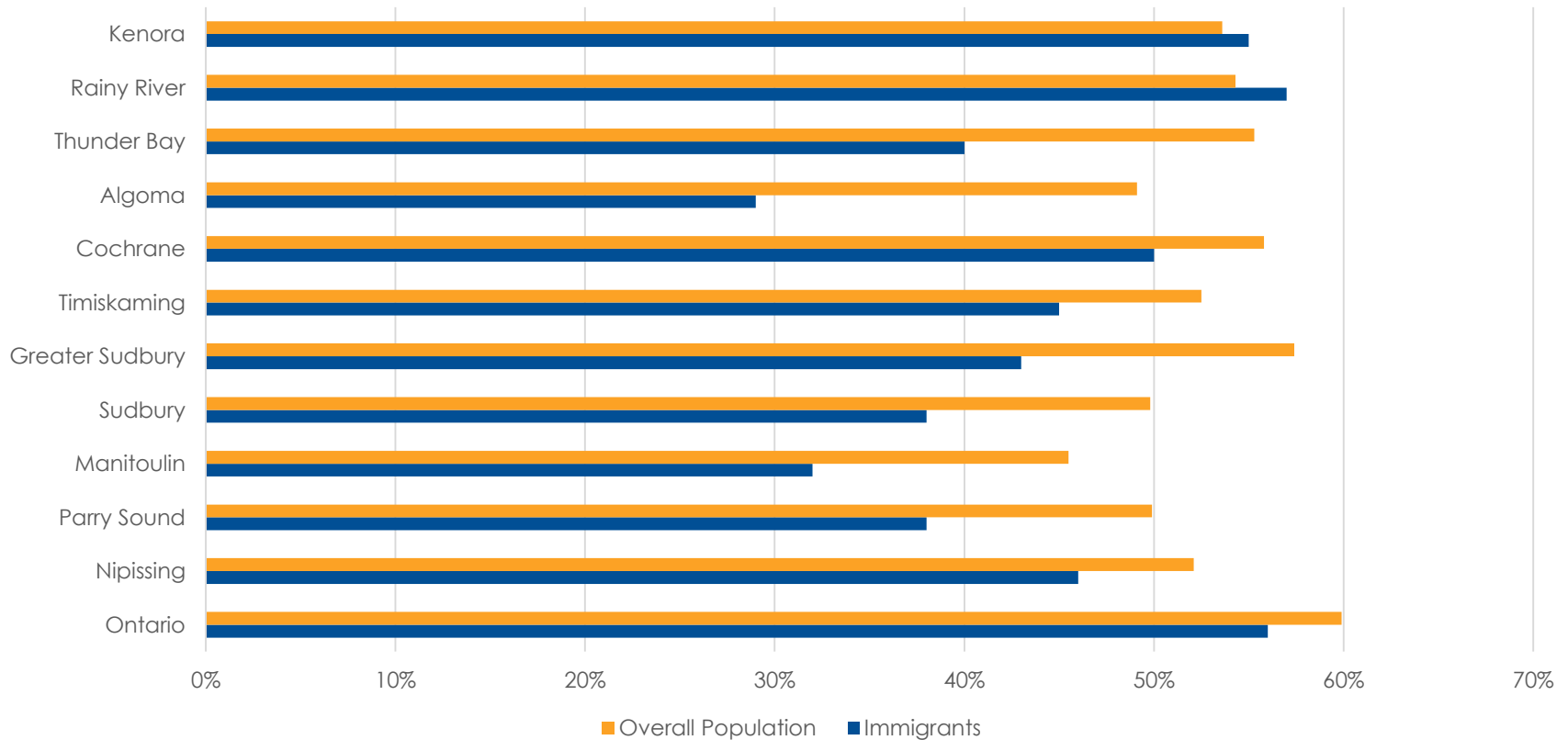
Employment Rate of Francophones Compared to that of the Overall Population, 2016



# Integration in the Labour Market

## Immigrant Population

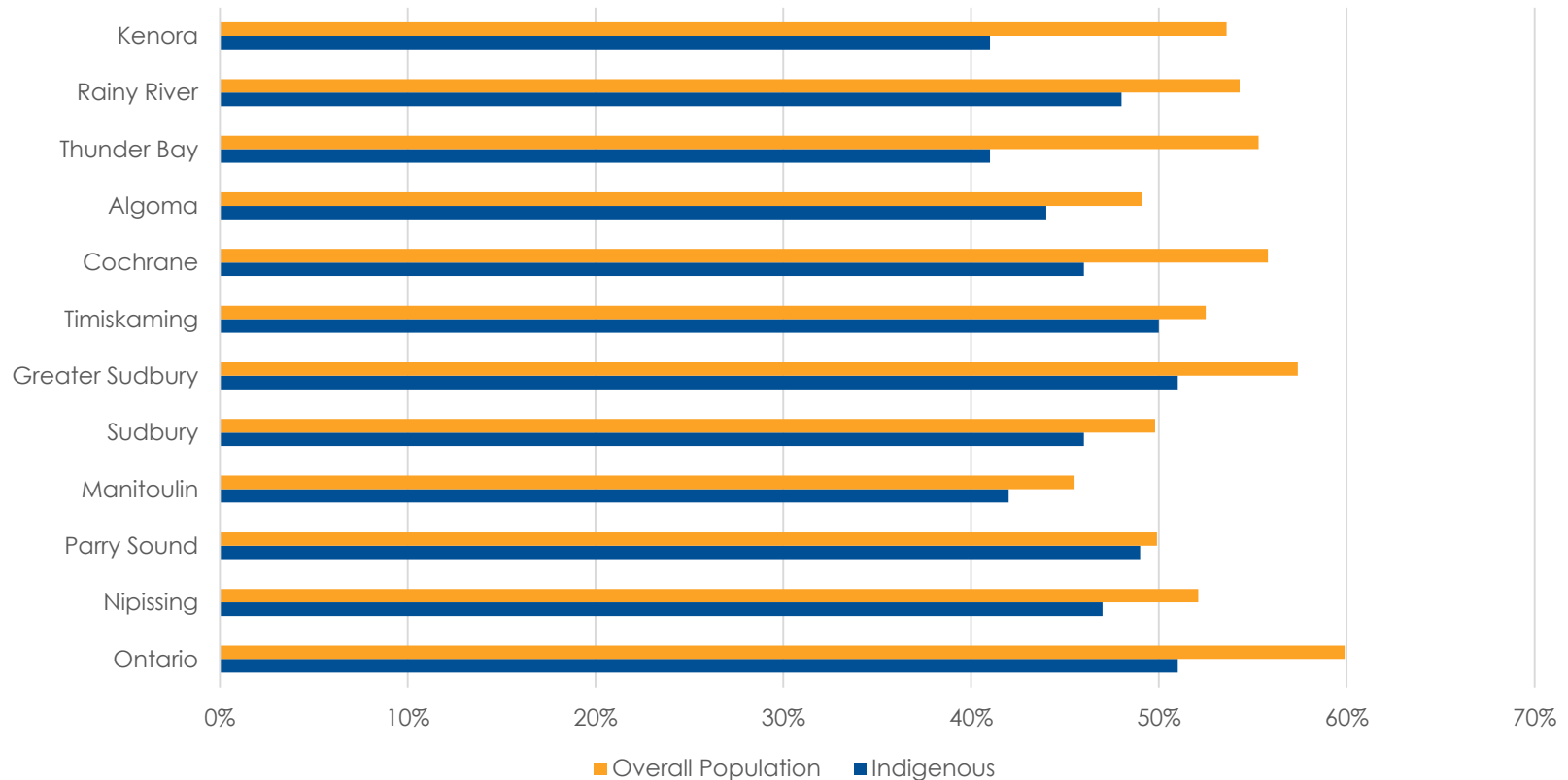
Employment Rate of Immigrants Compared to that of the Overall Population, 2016



# Integration in the Labour Market

## Indigenous Population

Employment Rate of the Indigenous Population Compared to that of the Overall Population, 2016



# THE ECONOMY

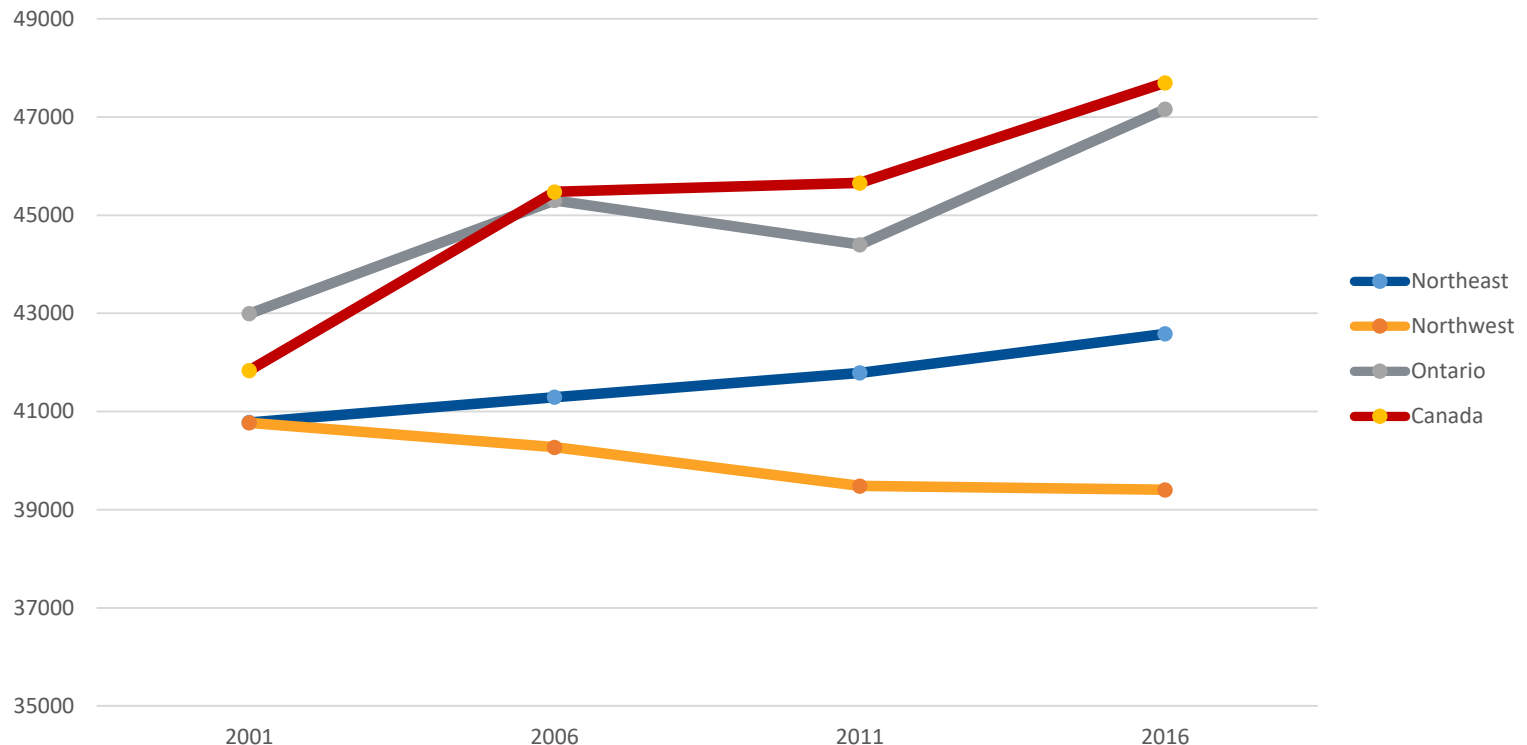




# The Economic Base

GDP Growth in the Northeast, slight decline in the Northwest

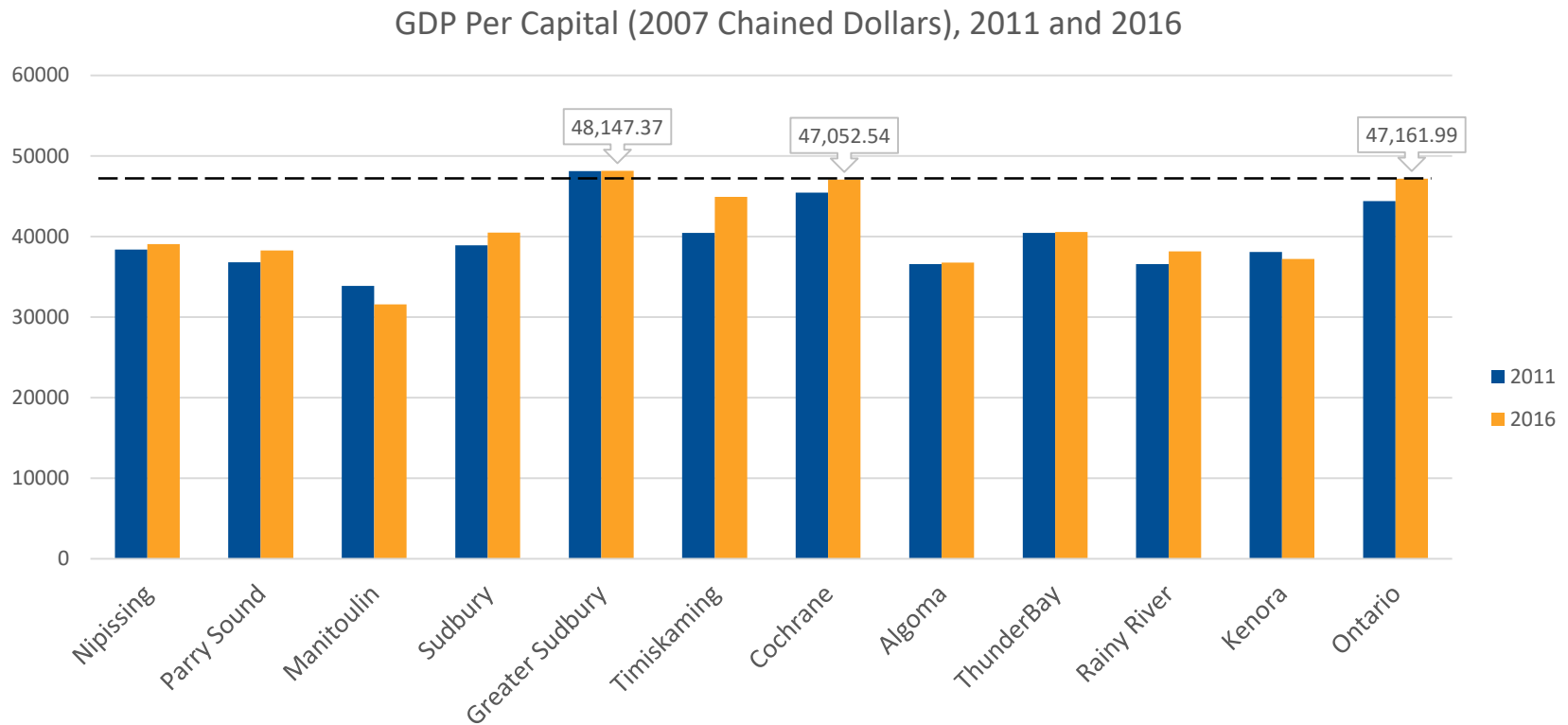
GDP Per Capital (2007 Chained Dollars), 2001 to 2016



Statistics Canada Table 36-10-0402-01 Gross Domestic Product (GDP) at Basic Prices, by Industry, Provinces and Territories (x 1,000,000)  
Statistics Canada 2001, 2006, 2011, and 2016 Census Profiles  
Statistics Canada 2011 National Household Survey Profile

# The Economic Base

## GDP per capita higher in Greater Sudbury than Ontario

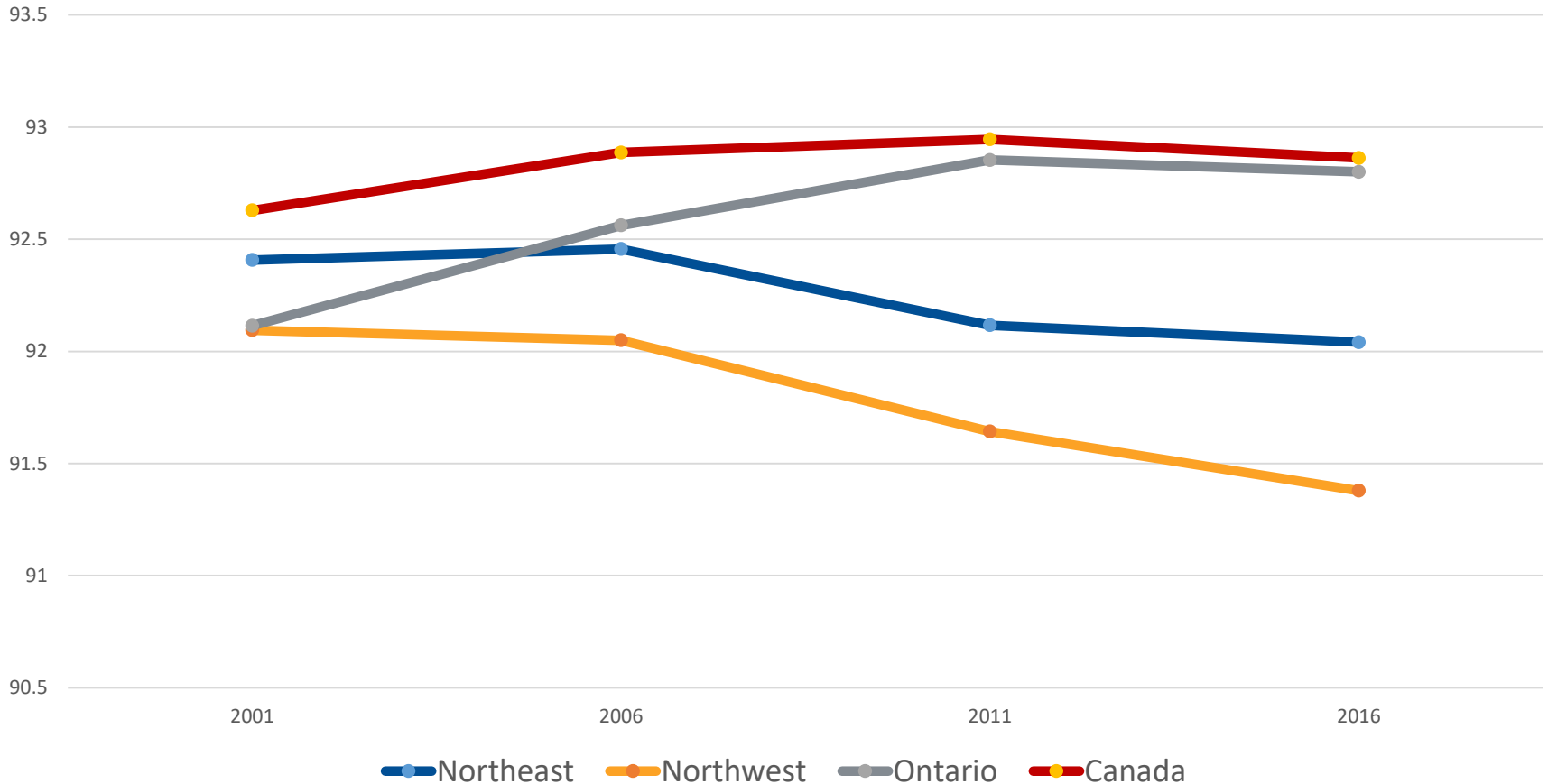


Statistics Canada Table 36-10-0402-01 Gross Domestic Product (GDP) at Basic Prices, by Industry, Provinces and Territories (x 1,000,000)  
Statistics Canada 2011 and 2016 Census Profiles  
Statistics Canada 2011 National Household Survey Profile

# Employment Diversity by Industry

Overall decrease in employment by industry diversification for NE and NW

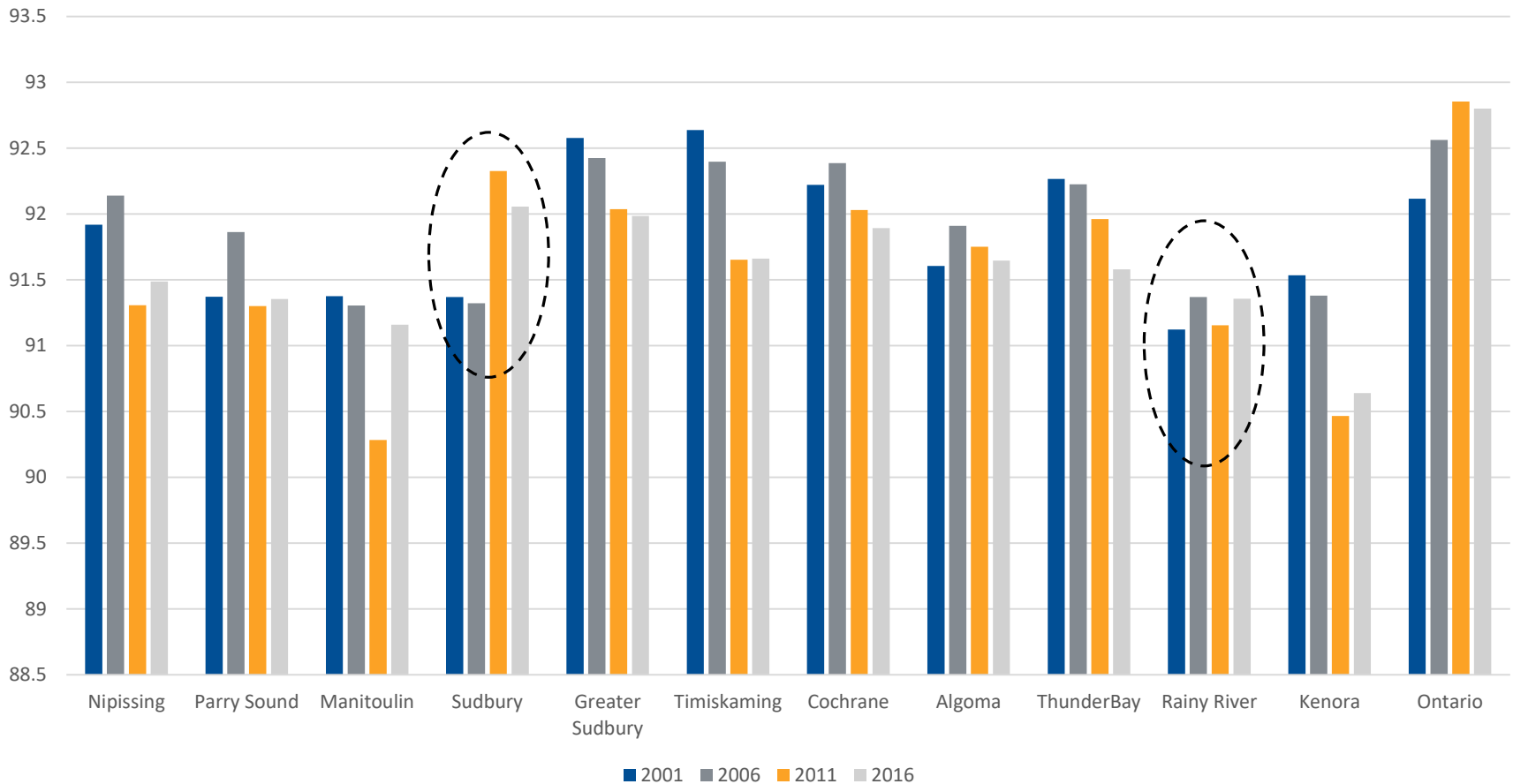
## Employment Diversification Index (Based on Industry)



# Employment Diversity by Industry

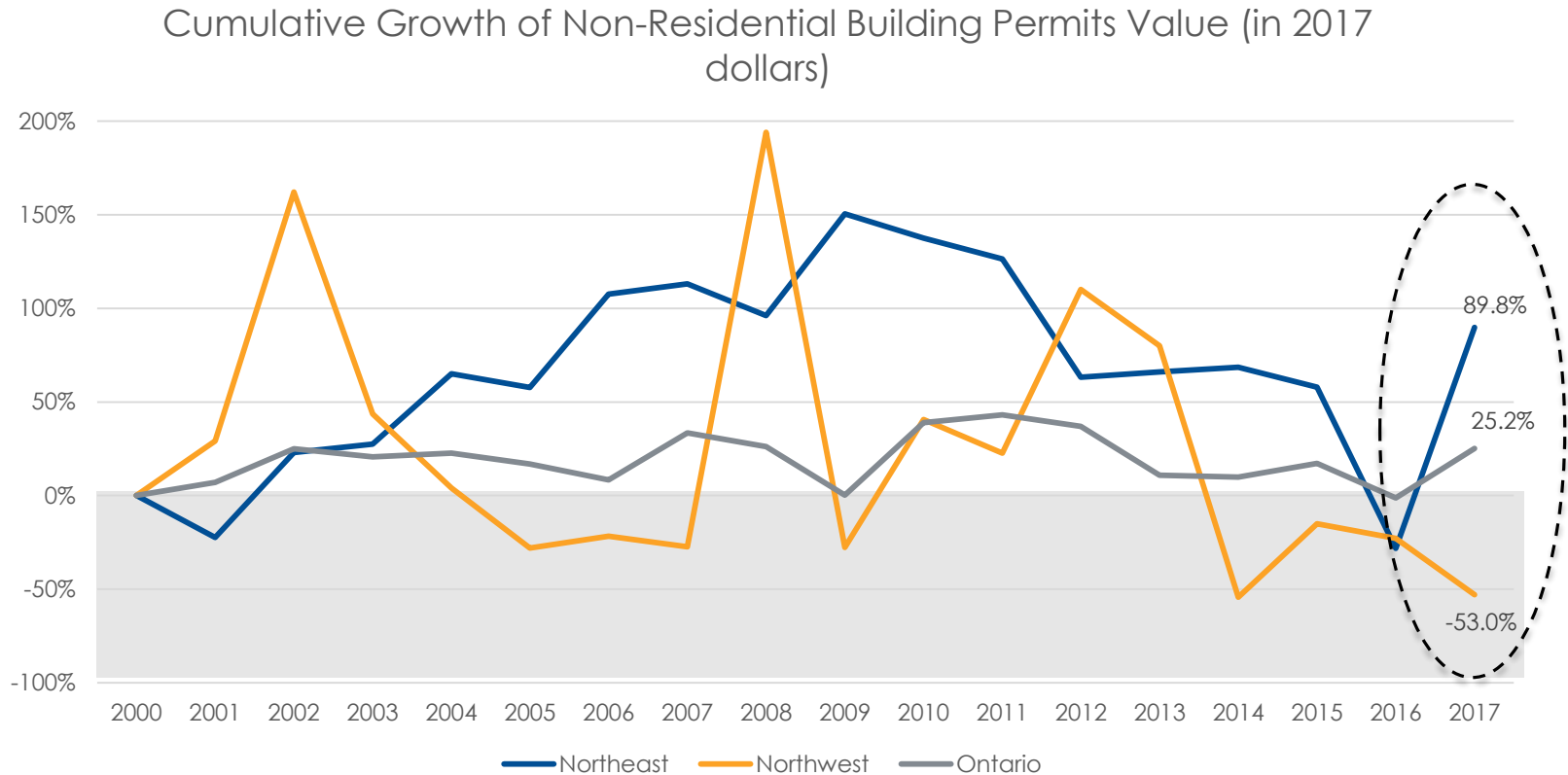
Decreased or remained the same in most districts since 2001, increased in Ontario

Employment Diversification Index (Based on Industry)



# Investment and Business Attraction

Increase in cumulative building permit growth for Northeast and Ontario in 2017, since 2001

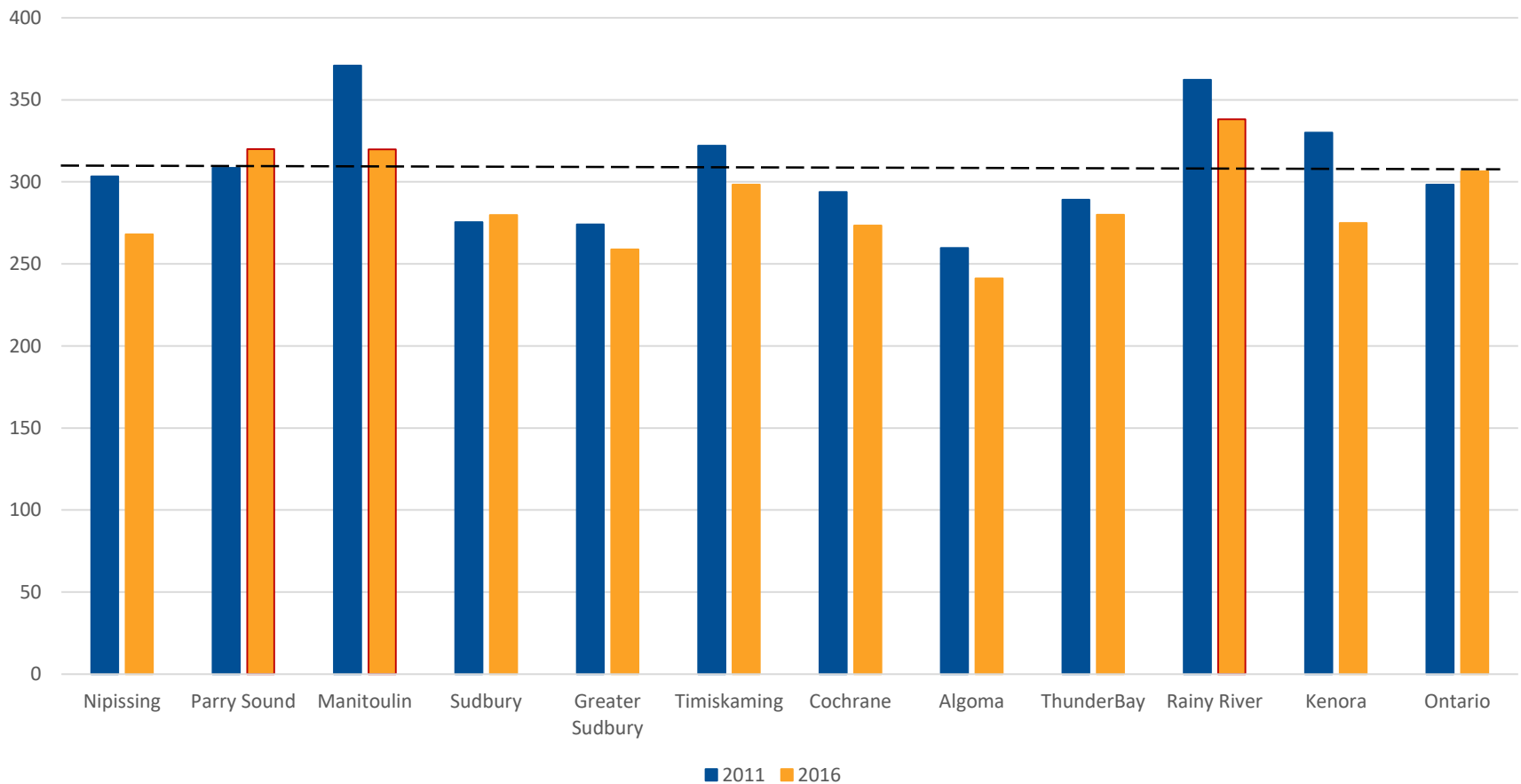


Source: Author's calculations based on Statistics Canada, Investment and Capital Stock Division, and Bank of Canada, Consumer Price Index

# Investment and Business Attraction

More businesses with employees per 10,000 population in Manitoulin, Parry Sound and Rainy River districts

Number of Businesses with Employees per 10,000 Population

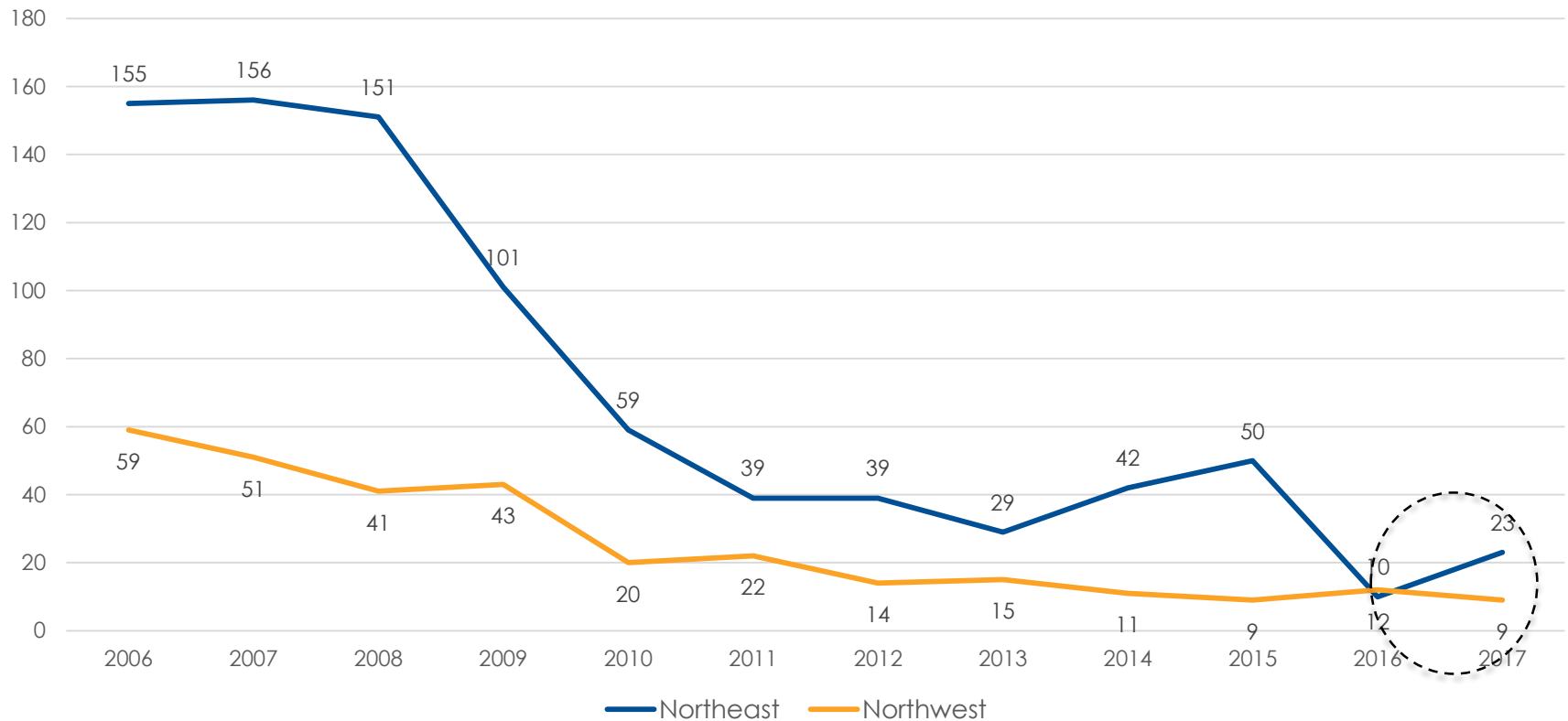


\* Businesses without NAIC classification were omitted  
Sources: Statistics Canada Business Register (1105),  
Canadian Business Patterns, Establishment Counts  
December 2011 and 2016  
Statistics Canada Census Profiles 2011 and 2016

# Investment and Business Attraction

A Decreasing Number of Bankruptcies since 2006, but an increase from 2016 to 2017 for the NE

## Number of Business Bankruptcies



INCOME

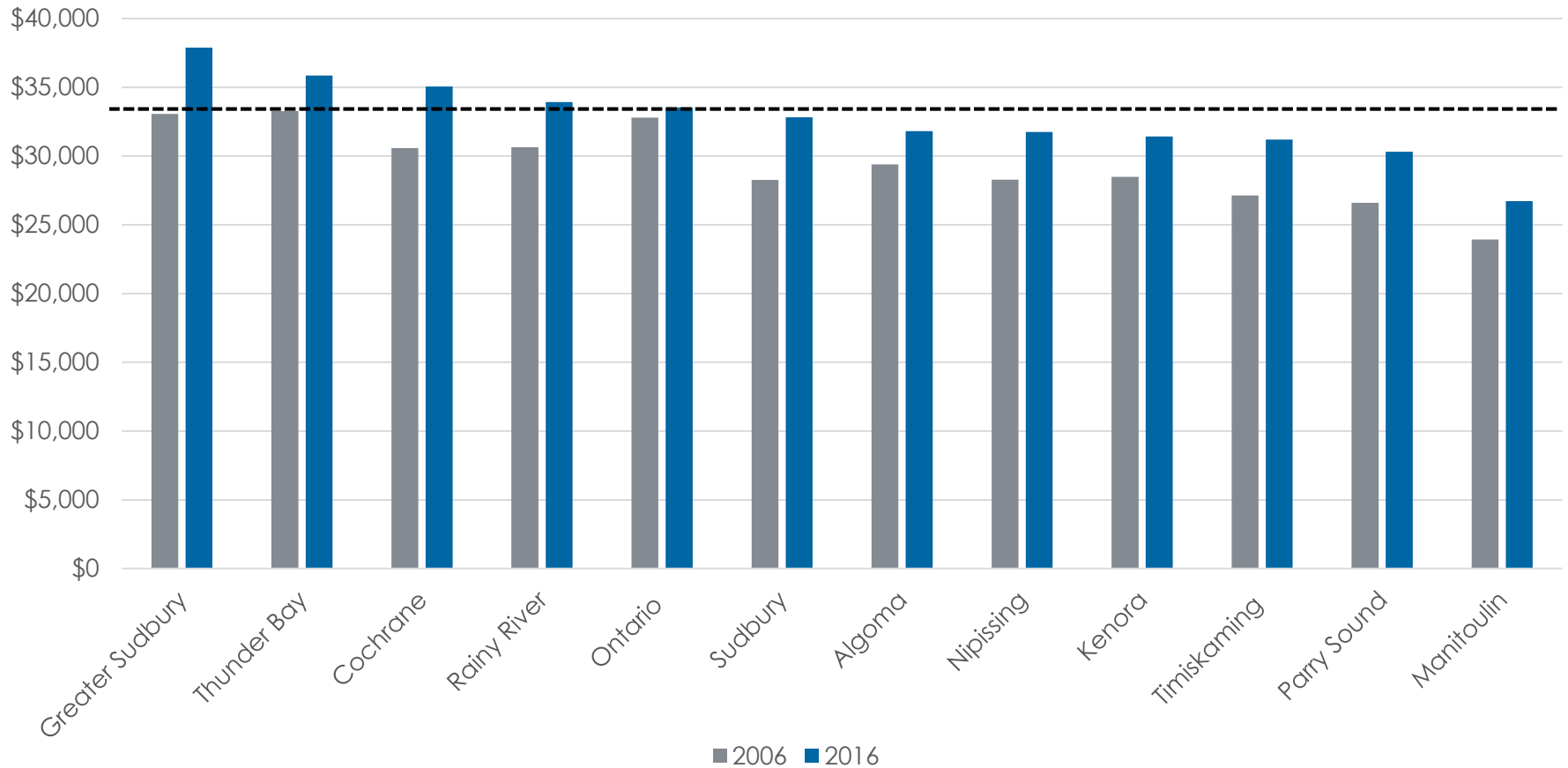




# Income

The Median Income Increased Since 2006 in Every District

MEDIAN INCOME (IN 2016 DOLLARS) BY DISTRICT

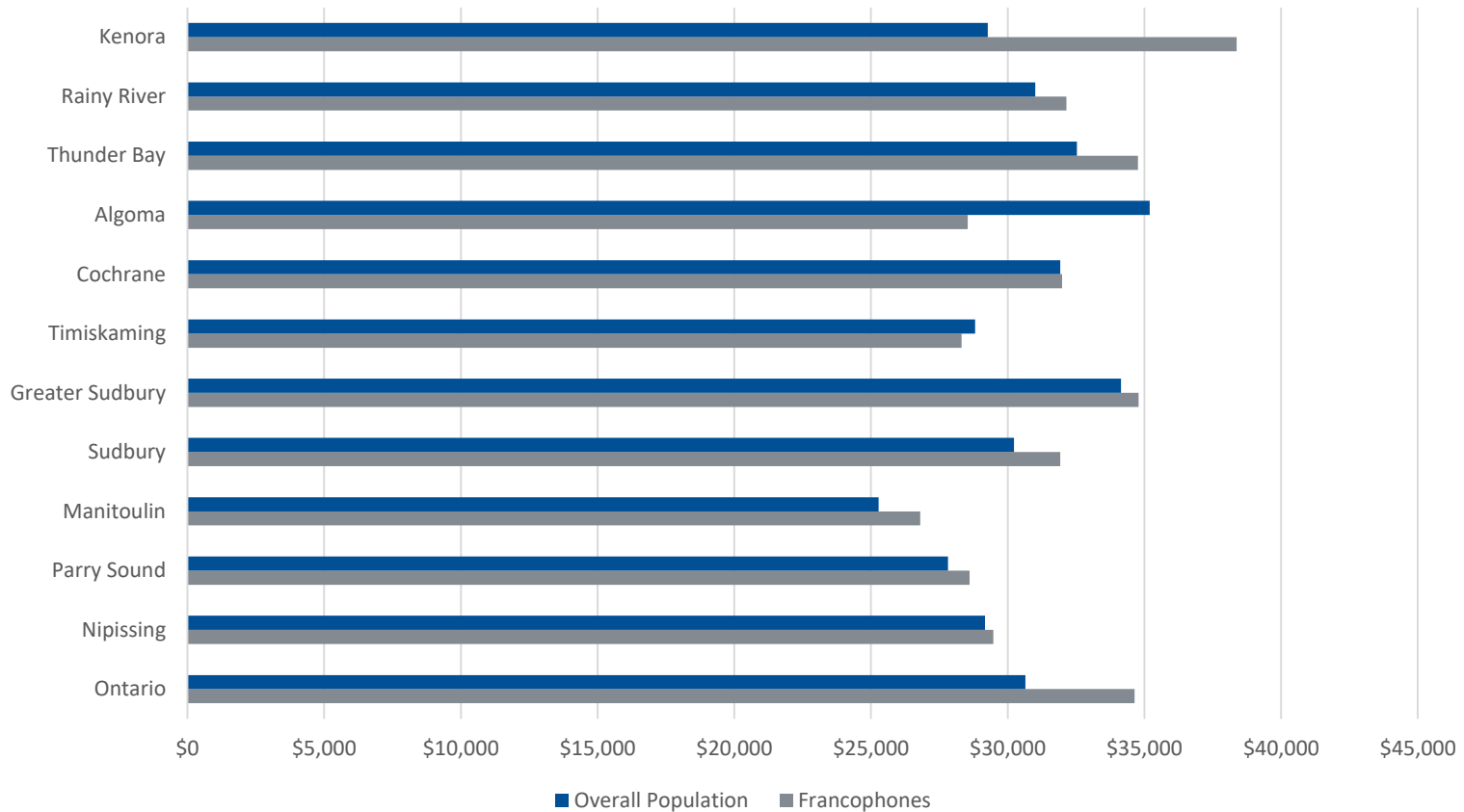


Source: Author's calculations based on Statistics Canada, Census, Various Years; and Bank of Canada, Consumer Price Index

# Income

## Francophone Population

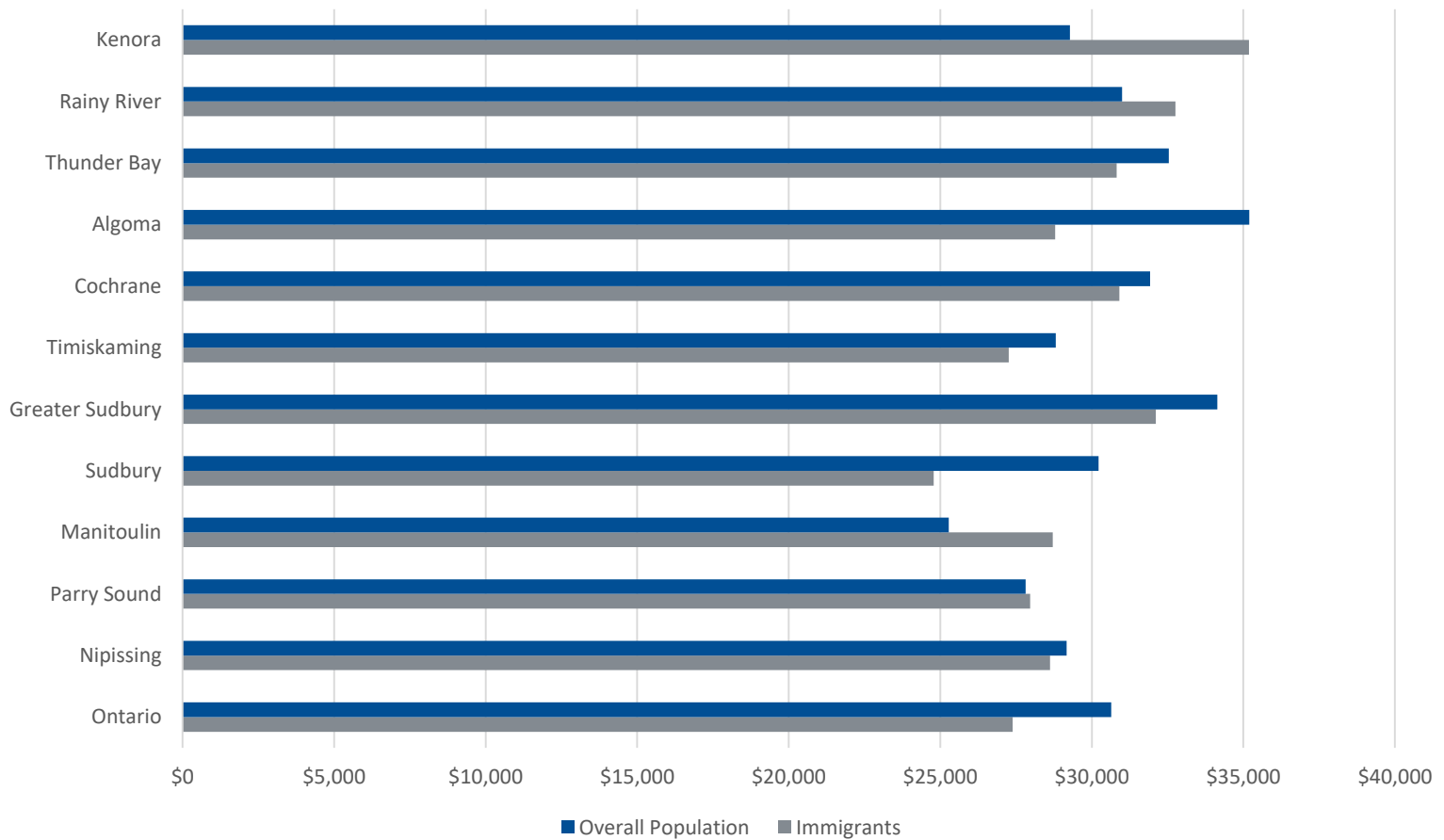
Median After-Tax Income of Francophones, 2016



# Income

## Immigrant Population

Median After-Tax Income of Immigrants, 2016

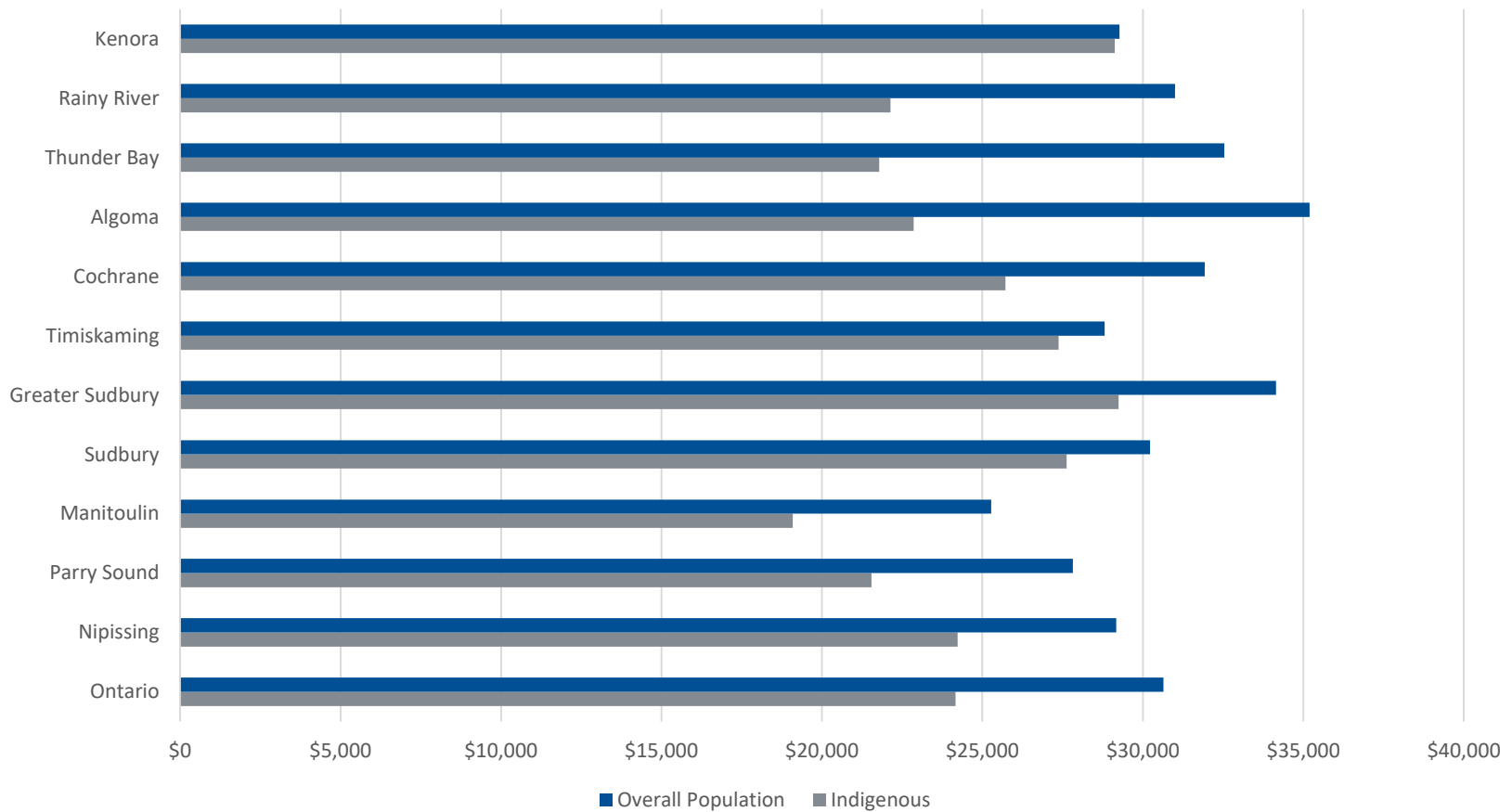


Source: Statistics Canada, 2016 Census Profile, custom tabulation

# Income

## Indigenous Population

Median After-Tax Income of the Indigenous Population, 2016



# Enjoy the Conference

- This year's theme is '**Taxing for Growth**'.
- To address the challenges presented discussions will be held on:
  - Optimum tax strategies to support growth
  - Northern Ontario's competitiveness
  - Taxation to support FN growth and sustainability
  - Evidence on the value of experimenting with policy options, like taxation in Northern Ontario

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Thank you. Marci. Pwà̀ᑦᑲᑦᑲᑦ  
Merci. Miigwech.

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