



The big shift: forces shaping Canada's economic future

Canadian Association of Movers' annual conference

November 10+11/13

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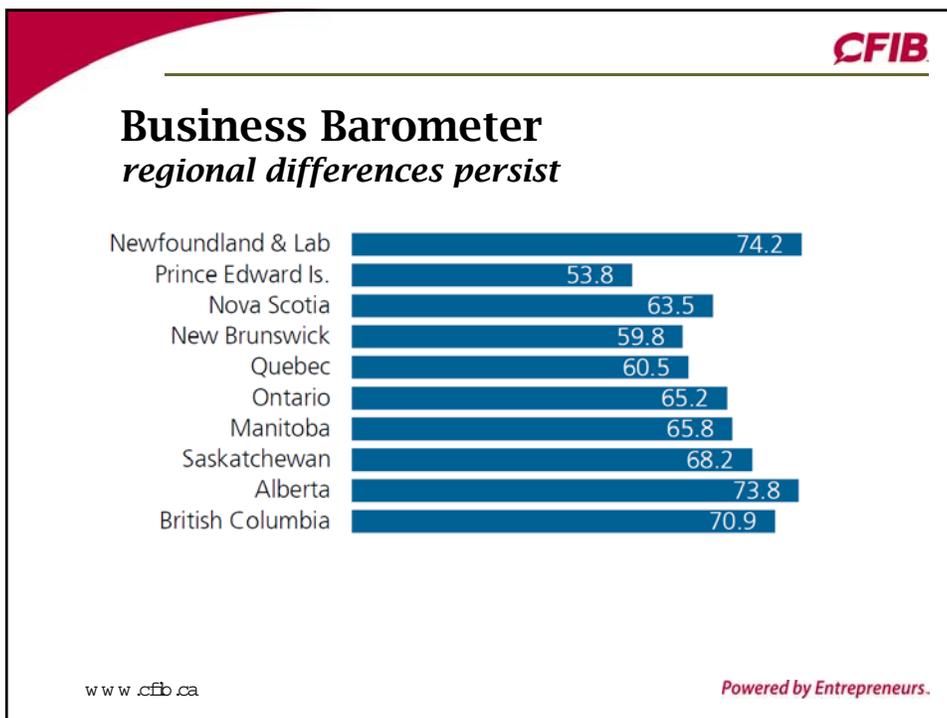
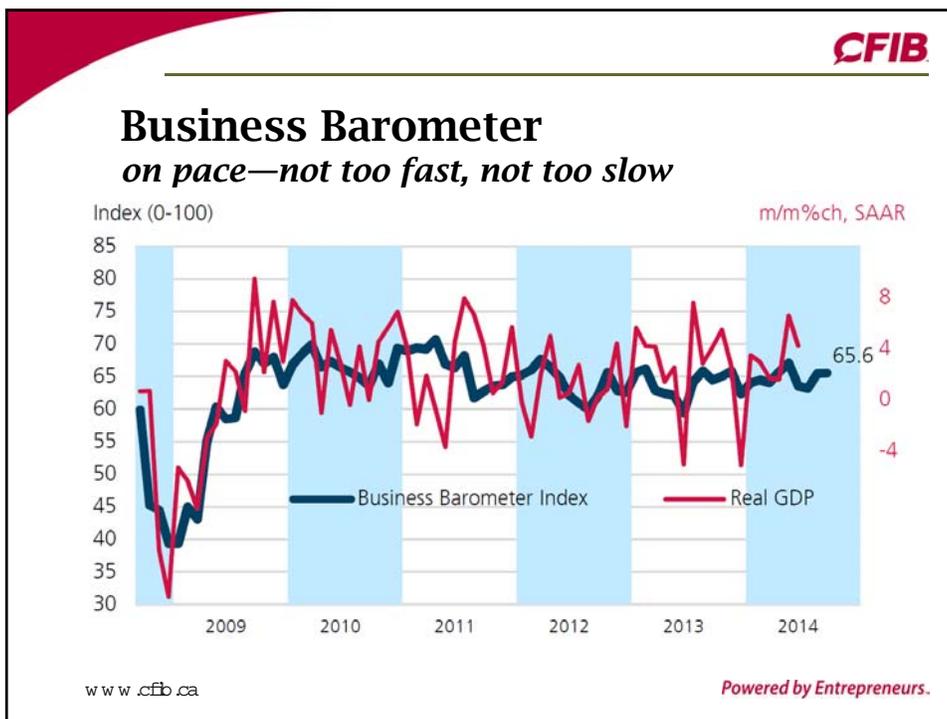


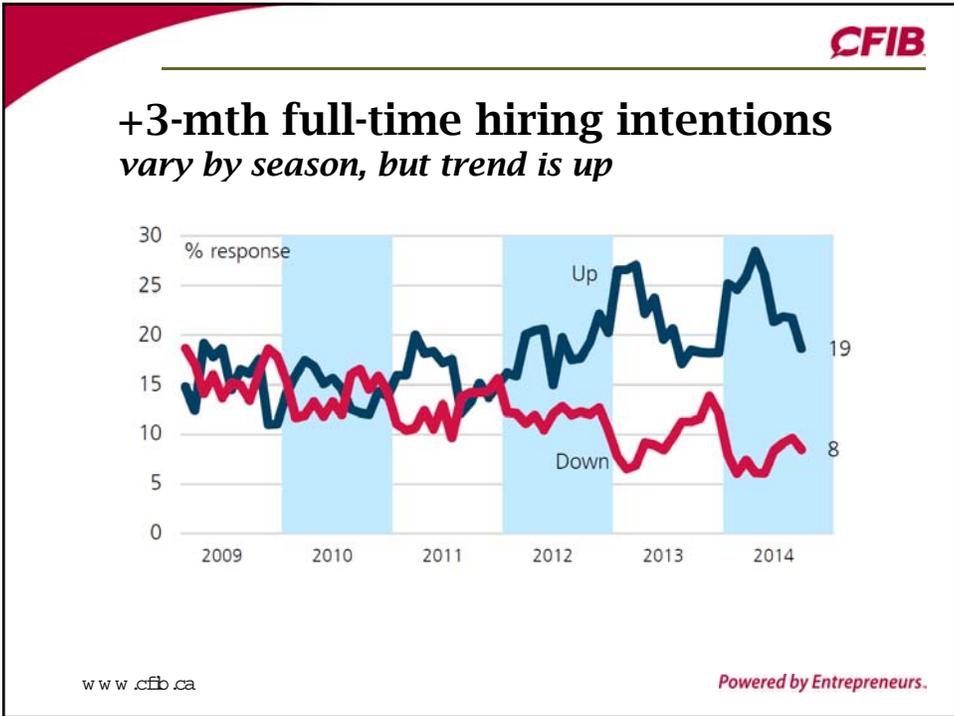
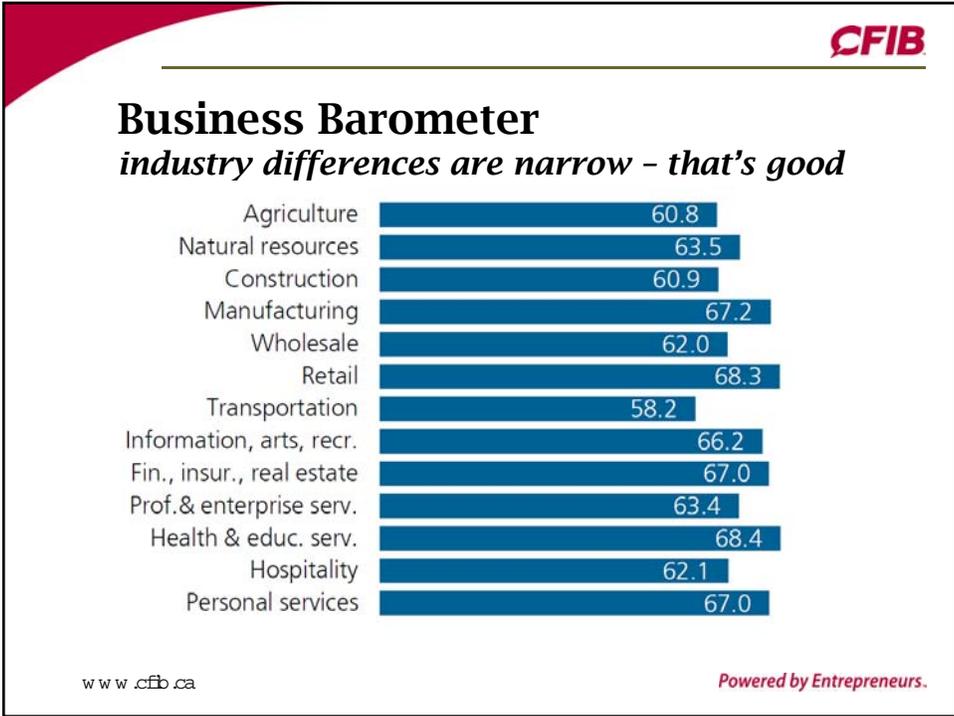
Eye to the future

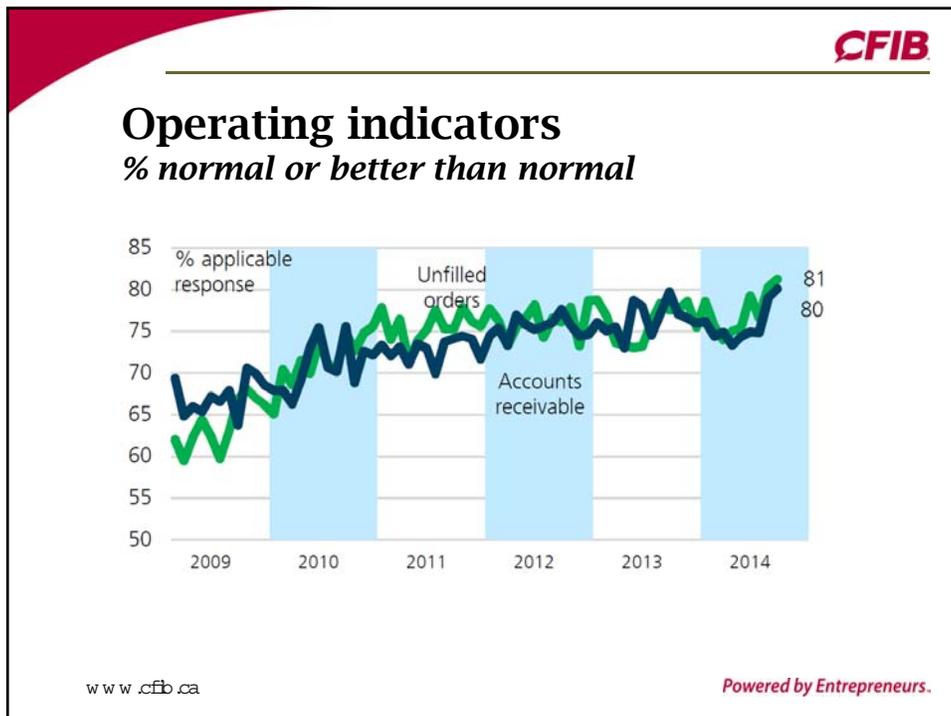
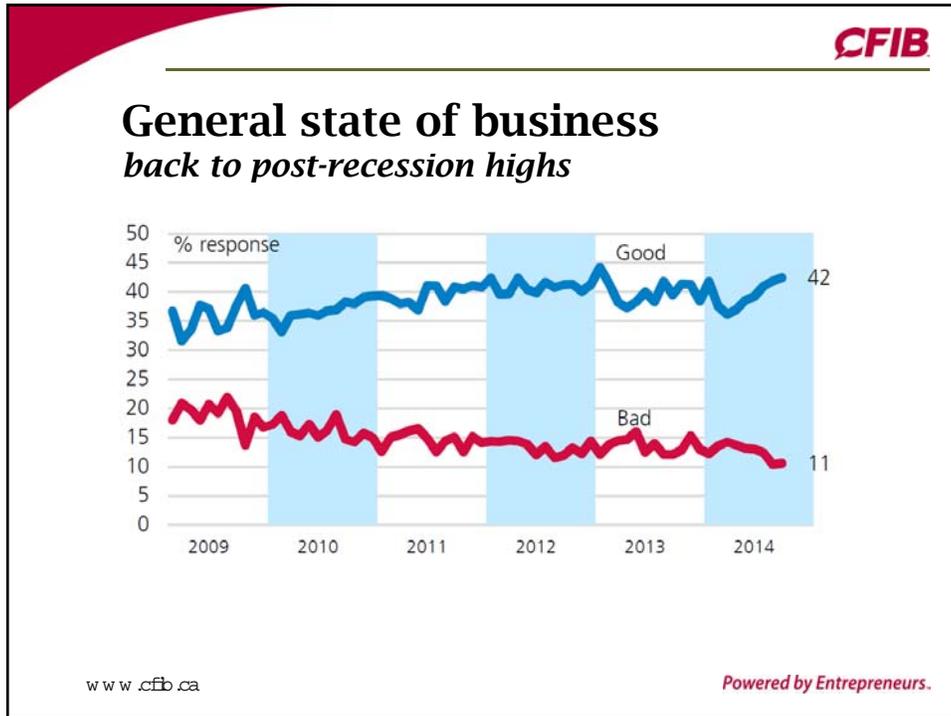
- ▶ Economic forces
International developments
- ▶ Public policy directions
Equality, efficiency
- ▶ Demographics
Changing patterns

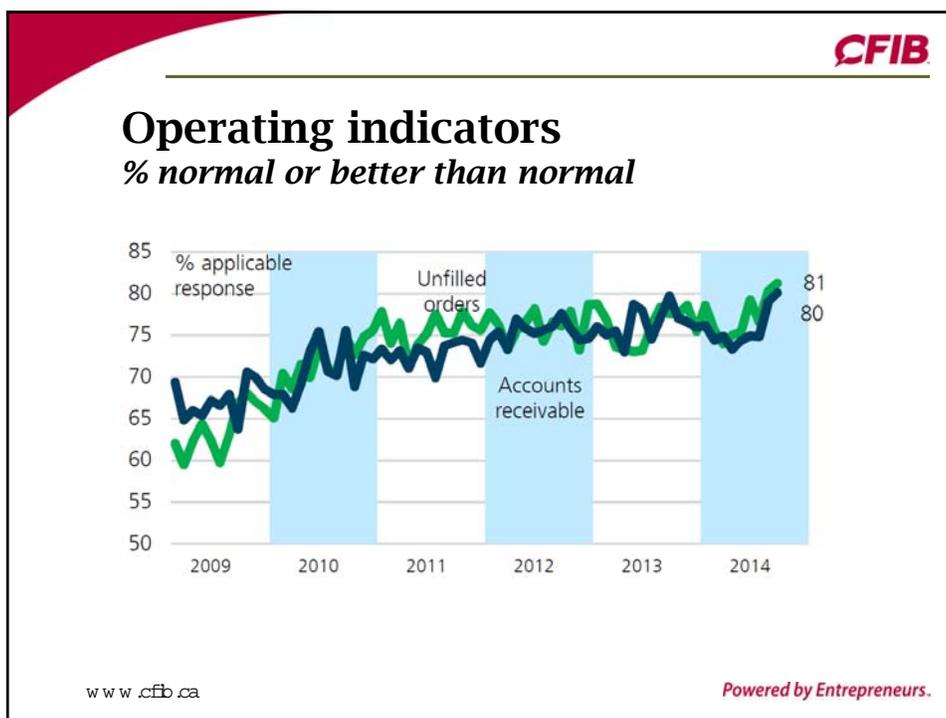
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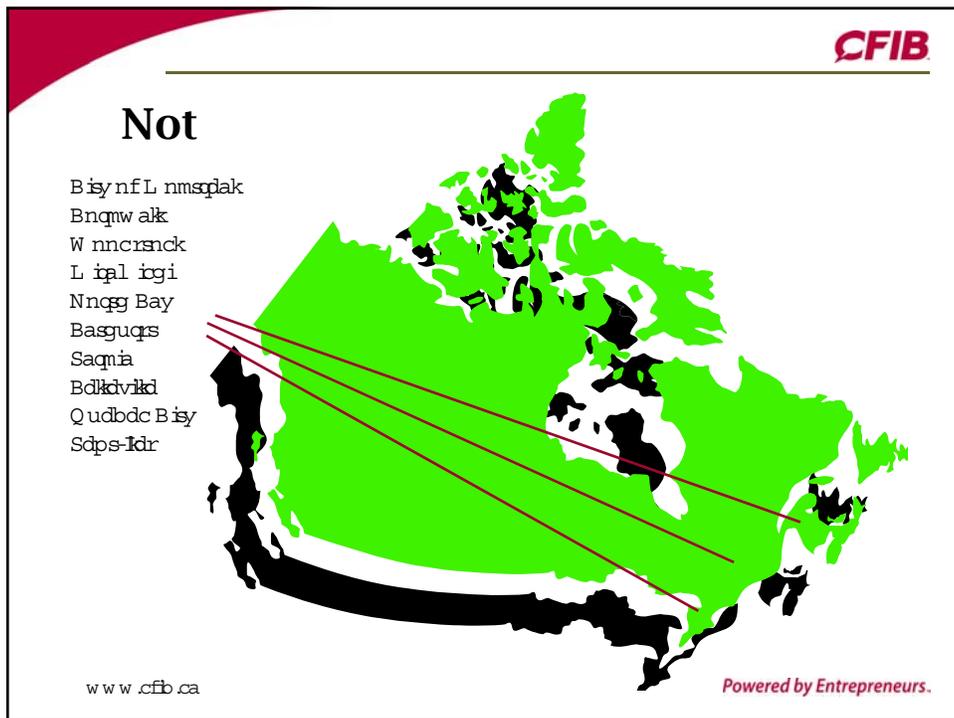
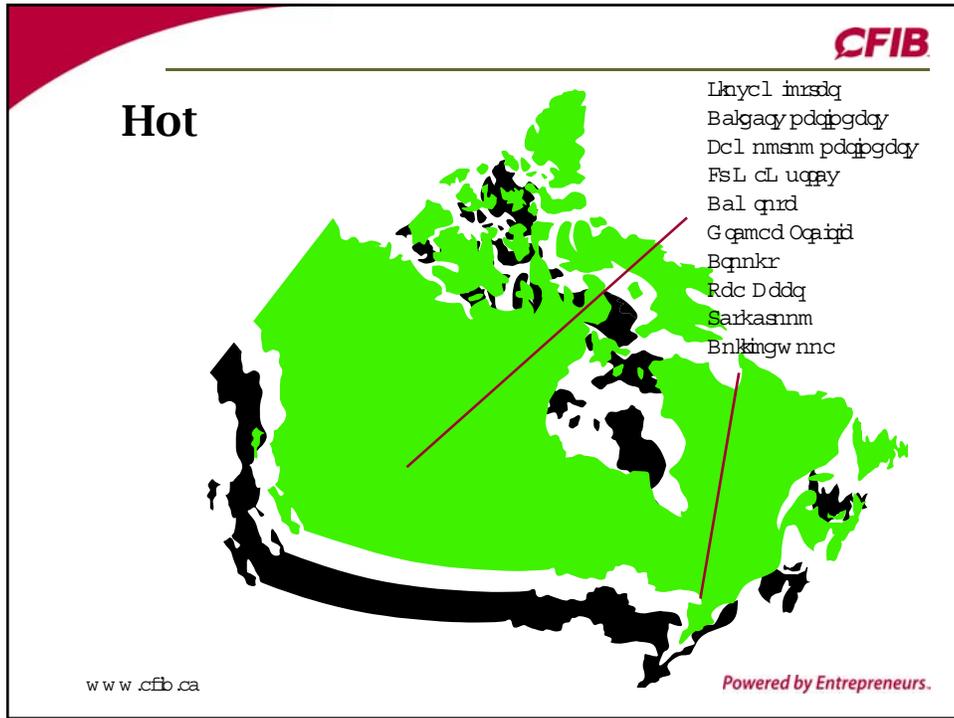
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Entrepreneurial cities

city would be one without biz creation

- ▶ Comparison of localized entrepreneurship stats across Canada
 - Presence: intensity and growth of biz sector*
 - Perspective: Optimism and performance*
 - Policy: accommodative environment*

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The big shift

net % of pop moving between provs 2009-13

<p>From:</p> <ul style="list-style-type: none"> ▶ Saint John - 2.0% ▶ Winnipeg - 1.4% ▶ Abbotsford - 1.0% ▶ TBay - 0.7% ▶ Sudbury - 0.7% ▶ Barrie - 0.6% ▶ London - 0.6% ▶ Oshawa - 0.6% ▶ Peterborough - 0.5% 	<p>To:</p> <ul style="list-style-type: none"> ▶ Edmonton + 2.2% ▶ Calgary + 2.2% ▶ Victoria + 1.7% ▶ Kelowna + 1.6% ▶ Saskatoon + 1.4% ▶ St John's + 0.5% ▶ Regina + 0.5% ▶ Ottawa-Gatineau + 0.5% ▶ Moncton + 0.4%
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The big shift

net #pop moving between provs 2009-13

<p>Net outbound:</p> <ul style="list-style-type: none"> ▶ Montreal ▶ Winnipeg ▶ Peel, Windsor, Barrie, York ON ▶ Vancouver ▶ Waterloo ▶ Honourable mentions: <ul style="list-style-type: none"> ▶ Longueuil, London, Cape Breton, Niagara, Fraser Valley, Saint John 	<p>Net inbound:</p> <ul style="list-style-type: none"> ▶ Calgary ▶ Edmonton ▶ Ft Mac ▶ Victoria ▶ Grand Prairie ▶ Honourable mentions: <ul style="list-style-type: none"> ▶ Red Deer, Ottawa, Toronto, Okanagan, Saskatoon, Nanaimo
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The big shift

net #pop moving within provs 2009-13

Net outbound:

- ▶ Toronto
- ▶ Montreal
- ▶ Peel,
- ▶ Vancouver
- ▶ Lethbridge
- ▶ Ft Mac

Net inbound:

- ▶ York, Halton, Durham, Simcoe
- ▶ Calgary, Edmonton
- ▶ Quebec City, La-Riviere-du-Nord
- ▶ Saskatoon
- ▶ Laval
- ▶ Fraser Valley

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The big shift

#pop moving within provs 2009-13

From:

- ▶ Anyplace AB
- ▶ NL
- ▶ MB

To:

- ▶ Mirabel, Outaouais, la-Riviere-du-Nord, la Jacques-Cartier QC
- ▶ Haliburton, Halton, Simcoe ON
- ▶ SE MB

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Demographics: the generation ahead

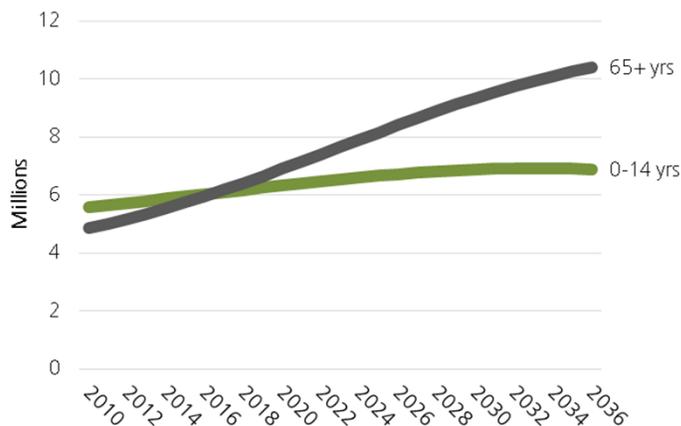
- ▶ 34 million in 2011 → 44 million in 2036 (approx +1% per year)
- ▶ Population shifting composition is a big deal
- ▶ Children: 5.5m → 6.9m (+0.9%/yr)
- ▶ Seniors: 4.8m → 10.4m (+3.1%/yr)

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Inbound and outbound population groups



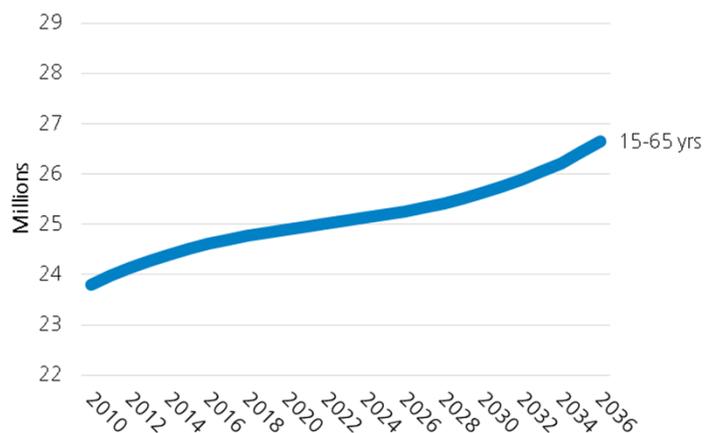
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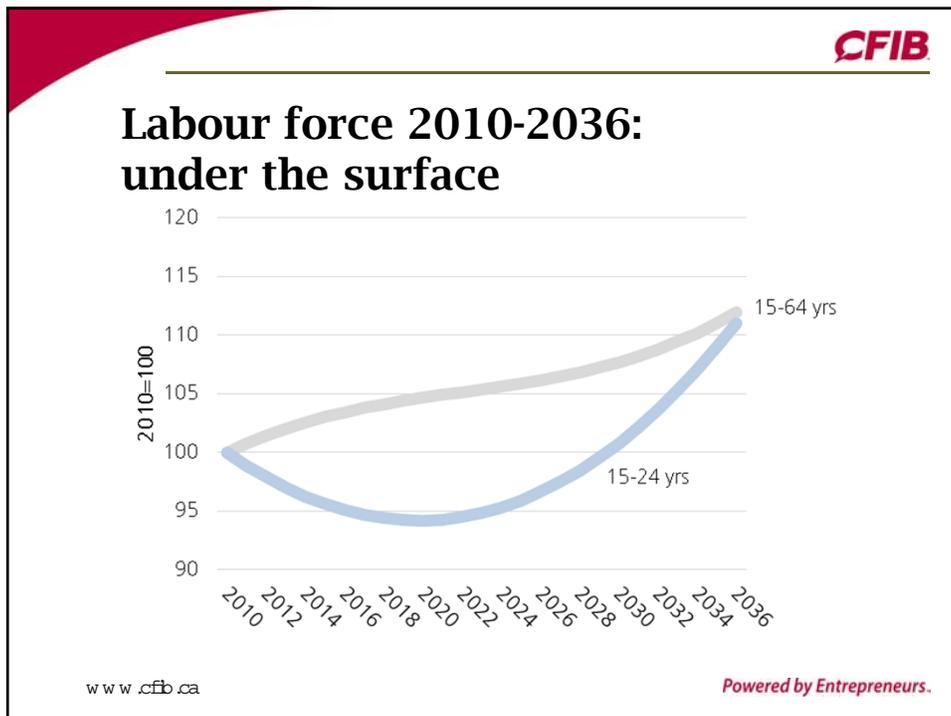
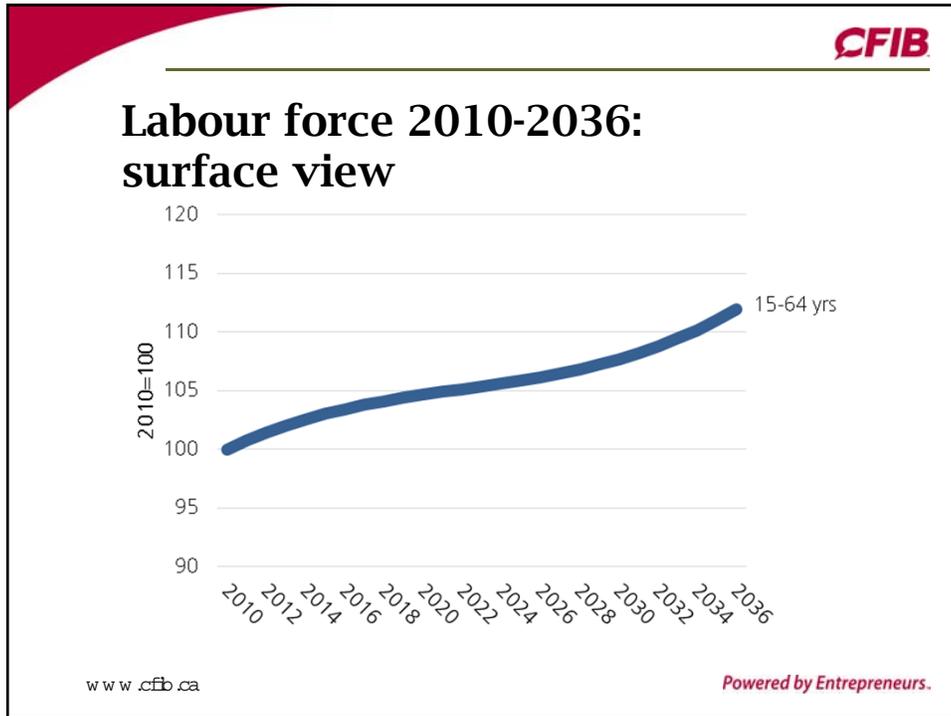
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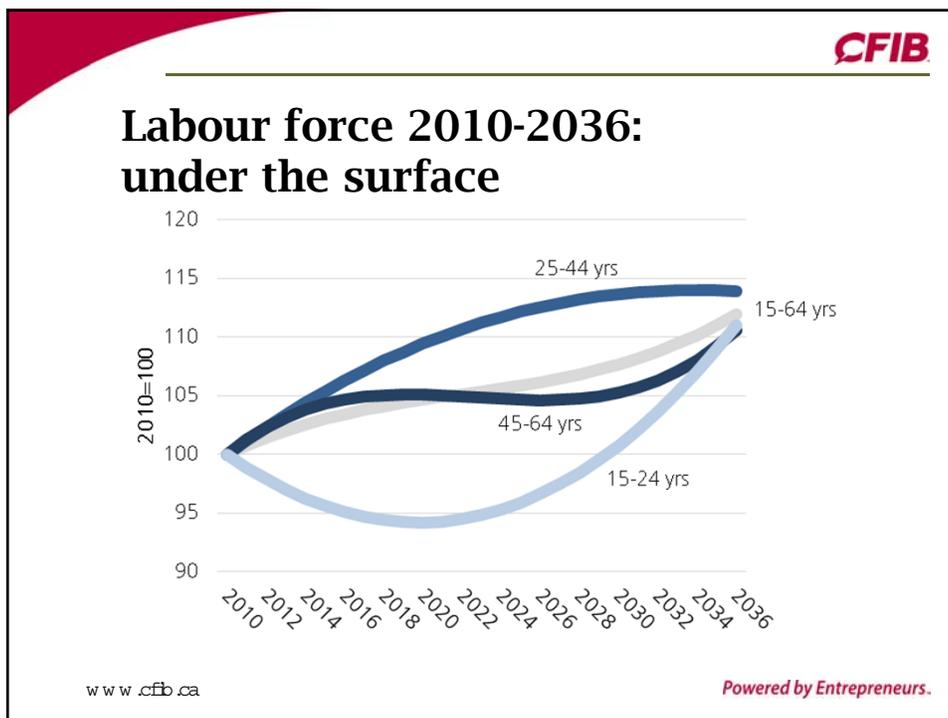
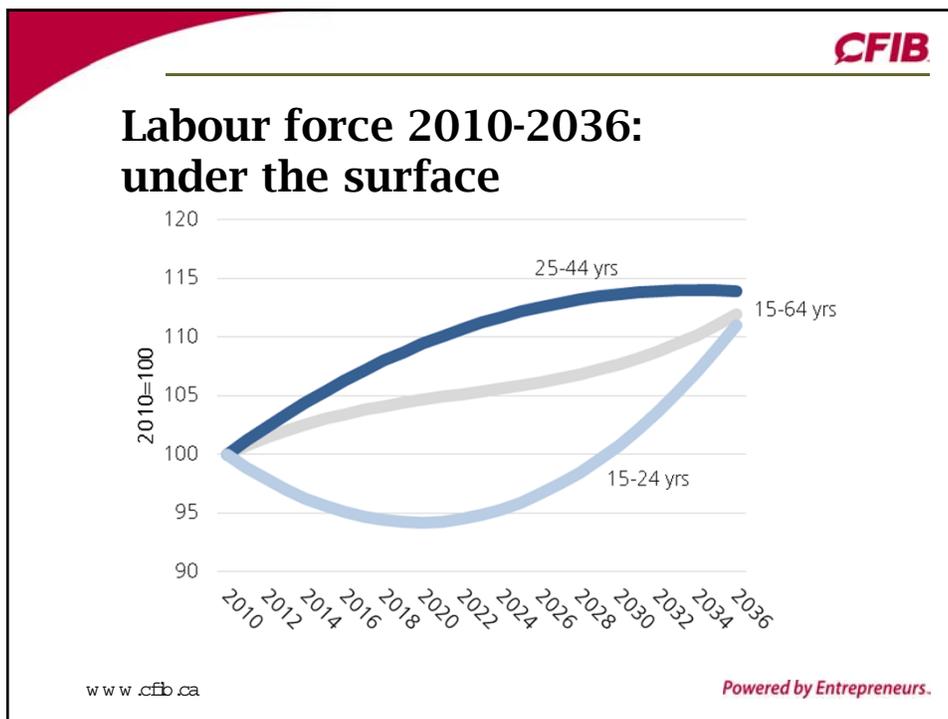
The working-age population

- ▶ 24 million in 2011 → 27 million in 2036 (approx +0.5% per year)
- ▶ Looks flat, but great deal of churn below the surface.
- ▶ Older workers opt to stay working longer

Labour force 2010-2036: surface view







Implications

- ▶ Moving away from low-skill jobs
Self-checkout, incentives to 'forgo'
- ▶ Older workers, reskilling
- ▶ Business models based on rapid turnover of casual labour will be harder to maintain
- ▶ Consumer preferences will change, cascading to business preferences

Policy directions

- ▶ Labour
Mobility
- ▶ Seniors
Health care, retirement savings
- ▶ Cost of doing business
Competitiveness



CFIB will be there

- ▶ Building a better business environment
- ▶ Practical advice
- ▶ Lower your costs of doing business

see more at: www.cfib.ca

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CANADIAN FEDERATION
OF INDEPENDENT BUSINESS

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