

Appendix E – Community Trends Report 2014



Community Trends Report

**Selected Demographic
and
Economic Information**

September 2014



The Community Trends Report: Selected Demographic and Economic Information

September 2014

The Community Trends report is meant to be a compilation of various socio-economic information on Winnipeg.

Prepared by the City of Winnipeg

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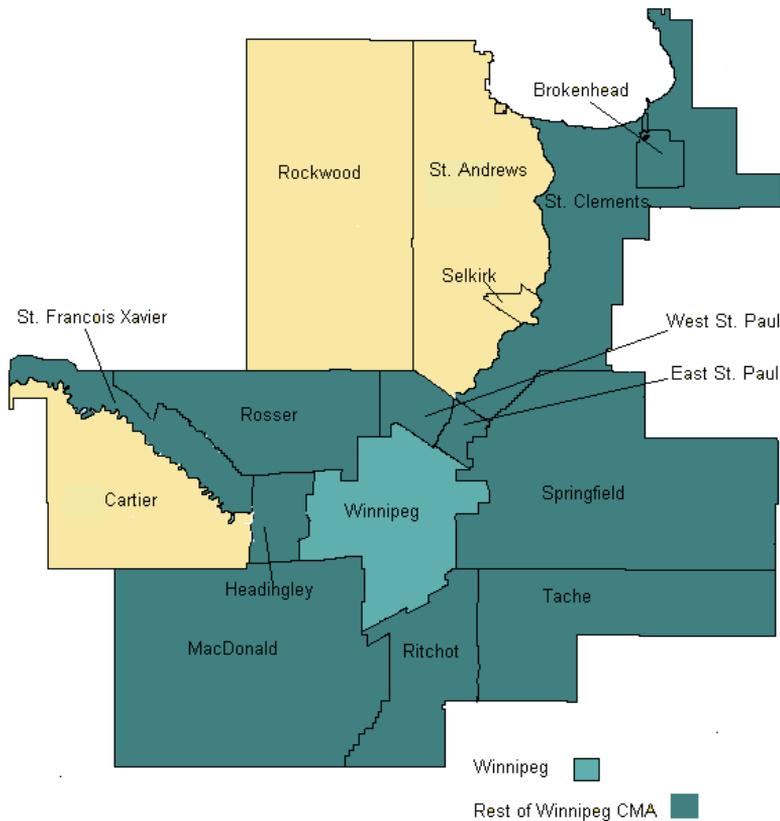
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Capital Region and Winnipeg CMA

Statistics Canada and the Conference Board of Canada often provide information based on Census Metropolitan Areas (CMA's). CMA's include the core city and any neighbouring municipalities where 50% or more of the labour force works in the core city.

In the coming pages there will be reference to Winnipeg's CMA. The map below shows the Capital Region, with Winnipeg CMA highlighted in green. Winnipeg CMA includes the rural municipalities of:

- Ritchot
- Tache
- Springfield
- East St. Paul
- West St. Paul
- Rosser
- St. Francois Xavier
- Headingley
- St. Clements
- Brokenhead First Nation
- MacDonald



Population Change

“CITY GROWTH STAYS STEADY... Officials pleased to avoid booms and busts, but more housing needed”.

February 9, 2012 *Winnipeg Free Press*

Winnipeg’s population continues to grow. In 2013, Winnipeg’s population was 699,300 – an increase of over 55,000 people over the past decade.

Historically Winnipeg had:

- modest population growth in the late 1980s;
- no population growth in the 1990s; and
- renewed population growth since the late 1990s.

The primary reasons for this resumed growth are a significant increase in immigration and a combination of less people leaving and more people coming to Winnipeg from other parts of Canada.

Over the last four years, the City has grown by about 9,000 people per year.

Population Forecast

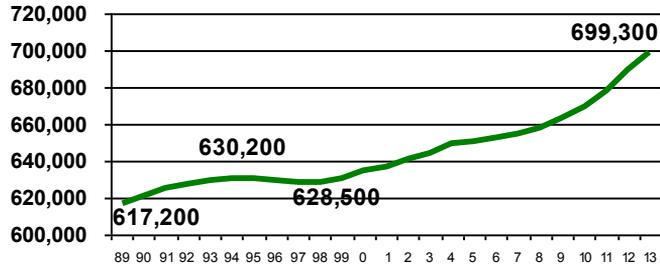
According to the Conference Board of Canada’s August 2012 Population Forecast, Winnipeg’s population is expected to grow by 95,000 people in the next 10 years; and 200,000 people in the next 23 years.

Winnipeg’s population growth rate has increased recently to 1.5% which is in the range of strong growth.

- The Conference Board forecasts this to continue in the short term with an average growth rate of 1.3% over the next 5 years

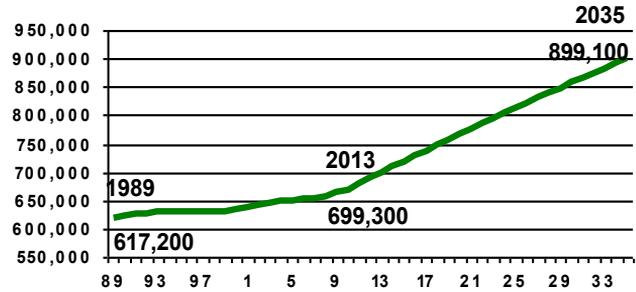
The City region (CMA) is forecast to grow by 51,000 people by 2018.

Population of City of Winnipeg 1989 to 2013



Source: Statistics Canada, Demography Division

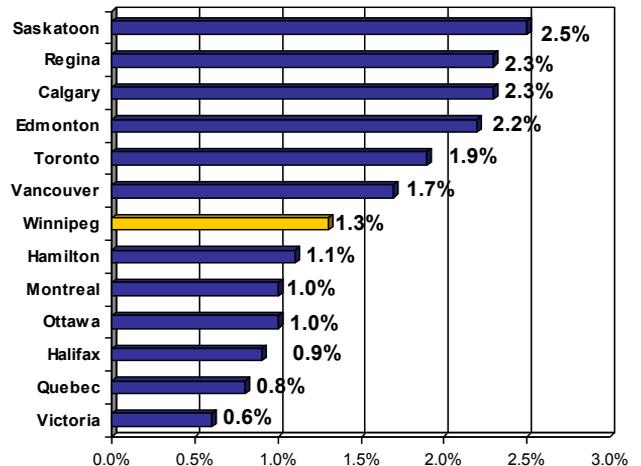
Population Forecast for the City (adjusted to new 2013 population base) 2013 to 2035



Source: Conference Board of Canada, Winnipeg Long-Term Forecast, Aug. 2012

Forecasted Average Annual Population Growth Rates of Other Cities

2014f to 2018f



Source: Conference Board of Canada, Metropolitan Outlook, Spring 2014
f = forecast

Migration (people moving)

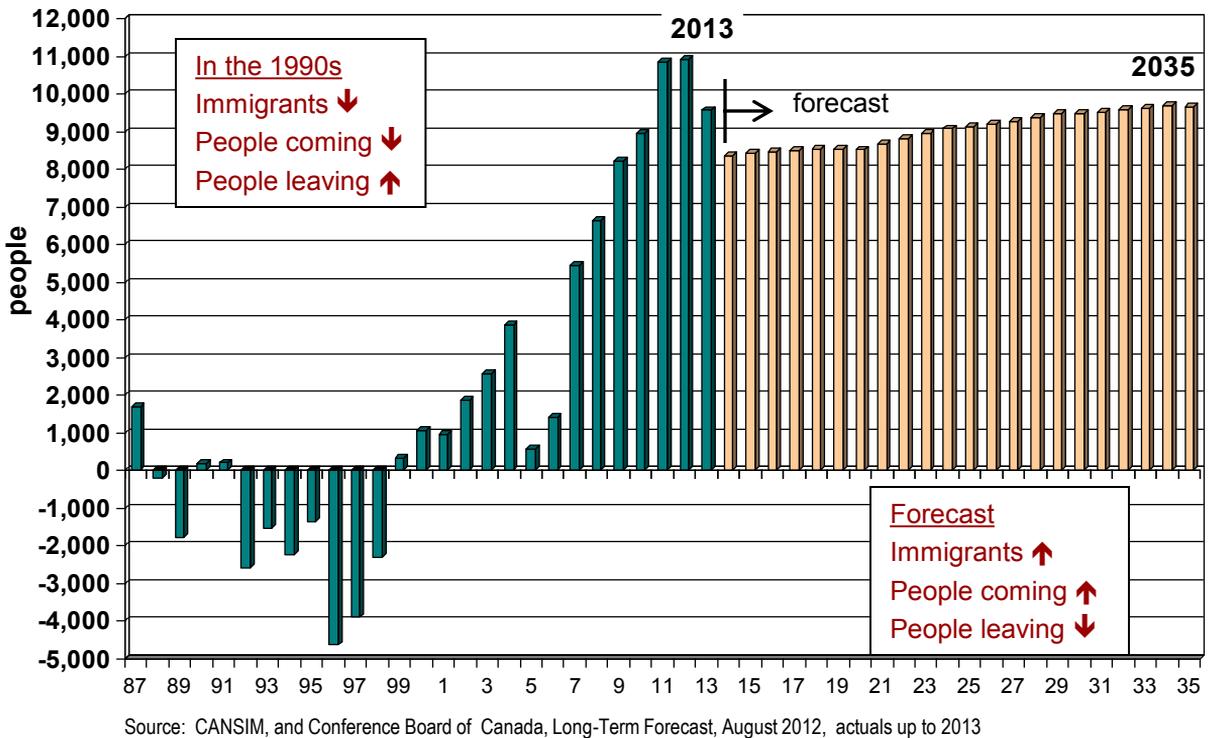
“Migration has become an increasingly important factor for population growth, and Winnipeg’s ability to attract new migrants will continue to be an important determinant of its future economic potential.”

Conference Board of Canada, Winnipeg long-term forecast, 2012

Migration has been the primary factor for the increase in Winnipeg’s population.

- In 1996 Winnipeg saw a net loss of 4,600 people; but in 2013, Winnipeg saw a net gain of 9,600 people.
- With the success of the Provincial Nominee Program, which began in 1999, Winnipeg’s immigration has quadrupled and for 2013, we estimate 11,000 immigrants arrived in the City.
- Winnipeg’s immigration level is currently above the Conference Board’s forecast.

Net Migration to Winnipeg
Number of People, Winnipeg CMA



The trends in each of the three forms of migration are:

- Intra-Provincial: The net number of people moving to/from Winnipeg CMA and the rest of Manitoba has improved. In 2013 Winnipeg experienced a net gain of almost 700 people.
- Inter-Provincial: The net number of people moving to/from Winnipeg CMA and the other provinces has improved from -4,700 in 1997 to -2,800 in 2013.
- International: The net number of people moving to/from Winnipeg and other countries has increased significantly from 2,200 in 1997 to almost 9,800 in 2013.

Immigration

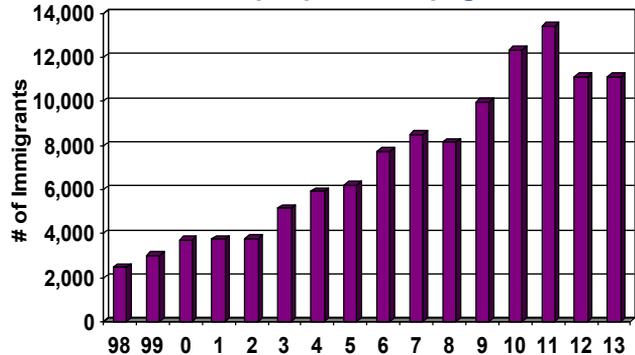
“PROVINCE (required) TO CAP NUMBER OF OVERSEAS SKILLED WORKERS The province has received more than the 2014 nomination limit of 5,000 applications given by Citizenship and Immigration Canada...”

August 15, 2014. Winnipeg Free Press

Immigration

- During the 1990s, Winnipeg’s immigration decreased.
- A turnaround occurred following the Provincial Government start-up of the Provincial Nominee Program. The result is an increase in immigration to Winnipeg (and the rest of Manitoba).
- The Conference Board of Canada forecasts that Winnipeg’s immigration will plateau in the range of 9,000 immigrants per year – this is below the last four years actual immigration numbers.

Immigration to Winnipeg
Number of people, Winnipeg CMA



Source: Citizen and Immigration Canada, Facts and Figures 2013 (Preliminary)

Winnipeg’s immigration is 6th highest of Canadian city regions in 2013

- The Toronto area receives the largest share of Canada’s immigrants. In 2013, Toronto saw approximately 81,800 immigrants, followed by Montreal (43,950), Vancouver (29,450), Calgary (17,505), Edmonton (12,717), and then Winnipeg (11,100).

Source Countries (2013)

- In 2013, the greatest number of people immigrating to Winnipeg were from the Philippines.
- This holds true for the rest of Manitoba, the Philippines is the number one source country, but in smaller numbers.
- Currently there are less differences between Winnipeg and the rest of Manitoba. Previously, Germany was the top source country for the rest of Manitoba.

To Winnipeg (2013)	
Philippines	3,298
India	1,668
China	759
Nigeria	611
Eritrea	400
Korea	318
Pakistan	292
Israel	284
U.S.A.	236
Ethiopia	222

Source: Manitoba Immigration

To Rest of Manitoba	
Philippines	520
India	223
China	131
Germany	107
U.S.A.	91
Ukraine	87
Russia	71
U.K.	70
Nigeria	70
Kazakhstan	65

Manitoba Immigration – Provincial Nominee Program (2012)

The Manitoba Government’s Provincial Nominee Program has been the primary factor for the increase in immigrants moving to Winnipeg. In 2012, the Program accounted for about 72% of Manitoba’s immigration. In 2012, immigration to Manitoba decreased by 17 per cent from 2011, totaling 13,300. The decline was due to both the federal cap to the Manitoba Provincial Nominee Program and some nominees brought smaller families. The level of immigration over the last several years is above what the Conference Board of Canada is forecasting for Winnipeg. Winnipeg was the top destination in the province, receiving 83 percent of immigrants to Manitoba, totaling 11,000. Trends indicate that Manitoba’s provincial nominees are generally younger than other immigrants. In 2012, Manitoban’s median age was 38 years; the median age of immigrants was 28. For 2012, the top 5 professions were: Registered nurses, secondary school teachers, industrial butchers, accounting and other types of clerks and cooks.

Source: Manitoba Immigration Facts 2012

Aboriginal People and Visible Minorities

Aboriginal People

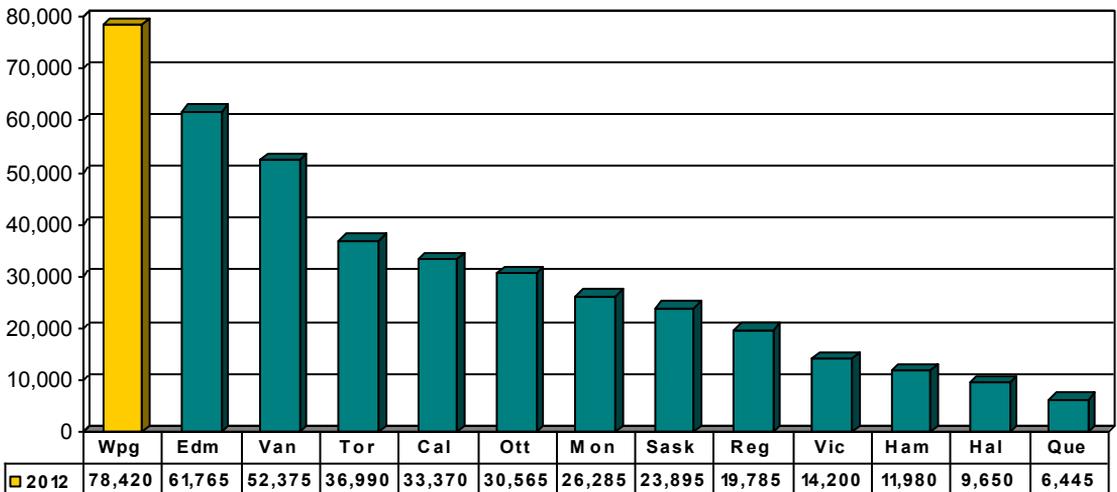
- The number of Aboriginal people in Winnipeg has been growing. In the City of Winnipeg, the Aboriginal people total 72,300 persons, while in the City region (CMA) the number is just above 78,400 persons.
- The City's Aboriginal people break down into three main groups: Métis (41,200 people) North American Indian (29,500 people) and Inuit (340 people).
- The chart below shows, that compared to other cities, Winnipeg has the greatest number of Aboriginal people.
- While the table to the right indicates that as a percentage of the total population, Aboriginal people account for 11% of the population in Winnipeg.
- Thus Winnipeg has both the highest concentration and the largest number of Aboriginal people out of large Canadian cities.

% Aboriginal Peoples

City Region	2006	2011
Winnipeg	10%	11%
Regina	9%	10%
Saskatoon	9%	9%
Edmonton	5%	5%
Victoria	3%	4%
Calgary	2%	3%
Ottawa-Gat	2%	3%
Halifax	1%	3%
Vancouver	2%	2%
Hamilton	1%	2%
Toronto	1%	1%
Quebec	1%	1%
Montreal	0.5%	0.7%

Source: Statistics Canada, 2006 Census, 2011 NHS

Aboriginal People in City Regions (CMAs)



Source: Statistics Canada, 2011 NHS

Visible Minorities

- Visible minorities number 140,800 people and now account for 20% of the population of the Winnipeg city region.
- People of Asian heritage account for over 75% of visible minorities in Winnipeg.
- The Filipino community is the largest visible minority group and comprise about 56,700 people, an increase of 20,000 people.
- Relative to other large Canadian cities, Winnipeg has an average proportion of visible minority people.
- Toronto and Vancouver's visible minorities are approaching 50% of the population.

% Visible Minorities

City Region	2006	2011
Toronto	43%	47%
Vancouver	42%	45%
Calgary	22%	28%
Edmonton	17%	22%
Montreal	16%	20%
Winnipeg	15%	20%
Ottawa-Gat	16%	19%
Hamilton	12%	14%
Regina	7%	11%
Victoria	10%	11%
Saskatoon	6%	11%
Halifax	7%	9%
Quebec	2%	3%

Source: Statistics Canada, 2006 Census, 2011 NHS

Demographic Changes: Age Composition

“Debates on urban issues too often neglect a crucial element: demographics. Planning and development decisions have less impact on the way our cities develop than changes in the composition and needs of the population.”

David Foot (demographer and economist), 2000

Over the next 10 years, the demographic changes will be modest.

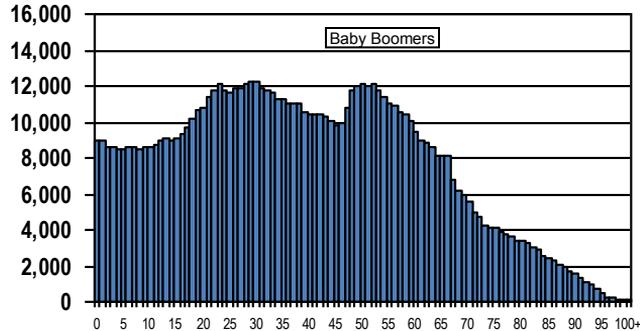
- The impact will be mostly due to the population increase and less to do with the change in the age composition of the population.
- The greatest change will occur in the older age groups with the entrance of the baby boomers.

However, in the longer term, to 2035, there will be significant change in the age composition of Winnipeg’s population.

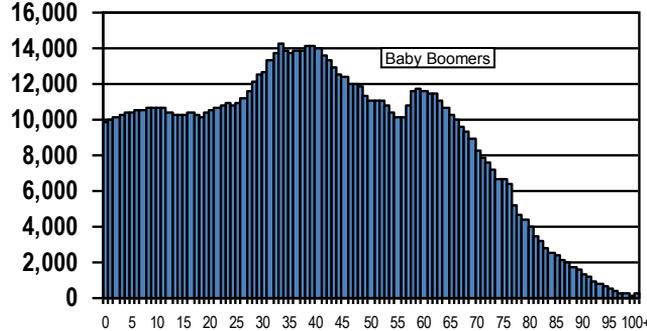
The baby-boomers, presently aged 47 to 66, will grow older and become a smaller % of the total population.

- Today, the baby boomers make up nearly 26% of the total population. By 2023, they will make up 21%, and by 2035, only 13%. This is a result of baby boomers getting older and passing away and an increase in the younger age groups, primarily due to immigration.
- However, at the same time, the senior population will increase by 68% when compared to today.
- With higher levels of immigration, the workforce age groups will see increases in all groups.

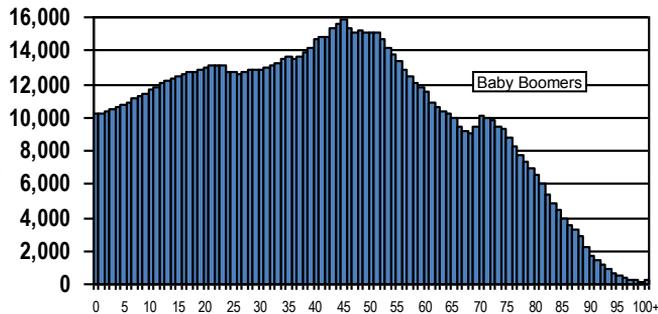
Population by Single Age in year 2013
Number of People



Population by Single Age in year 2023
Number of People



Population by Single Age in year 2035
Number of People



Source: Conference Board of Canada, Winnipeg long-term forecast, 2012

CHANGE IN THE NEXT DECADE (2013 TO 2023)

AGE GROUP	0 to 4	5 to 14	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75+
Additional People	6,900	17,800	-1,700	8,000	29,800	100	13,700	27,000	8,700
% Change	16%	20%	-2%	7%	28%	0%	14%	46%	17%

LONG TERM CHANGE (2013 TO 2035)

AGE GROUP	0 to 4	5 to 14	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75+
Additional People	9,400	29,500	20,600	13,400	40,300	34,600	21,400	40,000	38,300
% Change	22%	34%	19%	11%	38%	30%	22%	68%	74%

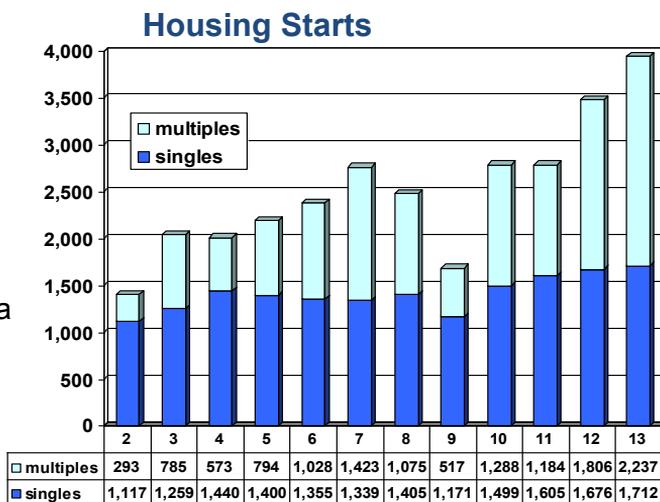
Housing – New Home Market

“The trend in total housing starts is supported by elevated production in both the single-detached and multi-family sectors, as starts remain above levels experienced last year.”

CMHC – Press Release October 8, 2013

2013 continued to be strong

- In 2009, new home buyers were cautious due to the recession, but in 2010 the number of housing starts rebounded.
- In 2012 and 2013 there was a substantial increase in housing starts – a 42% increase over the 2 year period.
- Increased demand for multiples was the driving factor. In fact, multiple family dwellings outnumbered the amount of single family dwellings built.

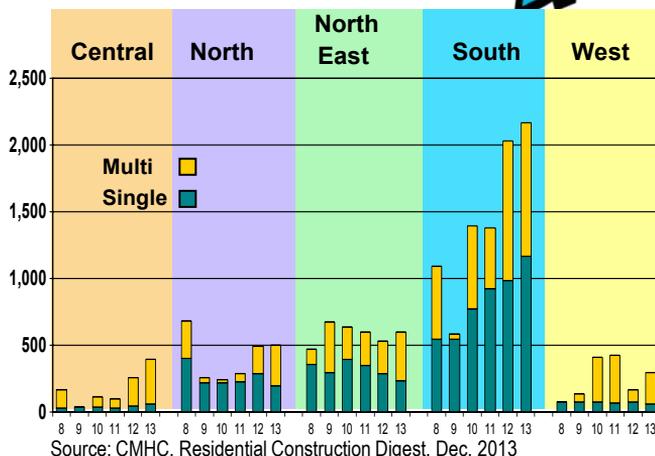


Source: CMHC – Housing Now

Demand for new homes strongest in South area of the City

- Overall, the majority of new homes were built in the South area of the City – south St. Boniface, south St. Vital and Fort Garry.

Housing Starts by Area 2008 to 2013, Number of Dwelling Units

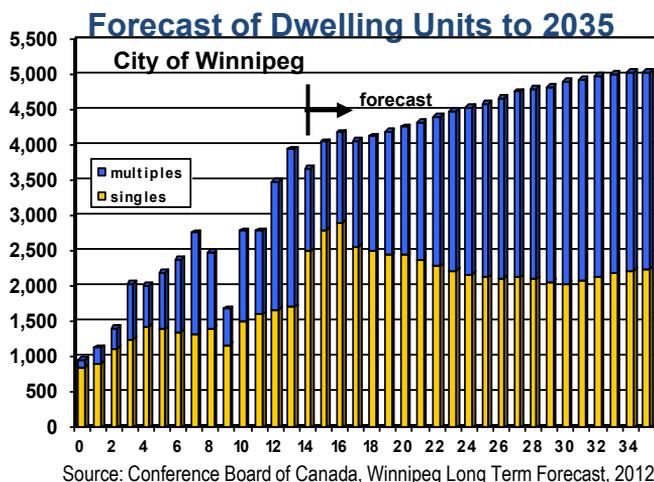


Average New House Price (single detached)

- Between 2000 and 2013 there was a 140% increase in the average price of a new house. (\$175,500 to \$420,500)
- Price increase is moderating. In 2013, the average price of a new house rose another 4.5% and further CMHC is forecasting a 3.0% increase for both 2014 and 2015.

Forecast: 100,000 units over next 22 years

- Going forward, the demand for housing will significantly increase. Over the next 22 years, 100,000 dwellings will be needed.
- Winnipeg’s housing market is forecast to go through a transformation as aging baby boomers and an increased demand for affordable housing units boost the demand for multi-family units, of which a large number will be apartment units as well as townhouses.

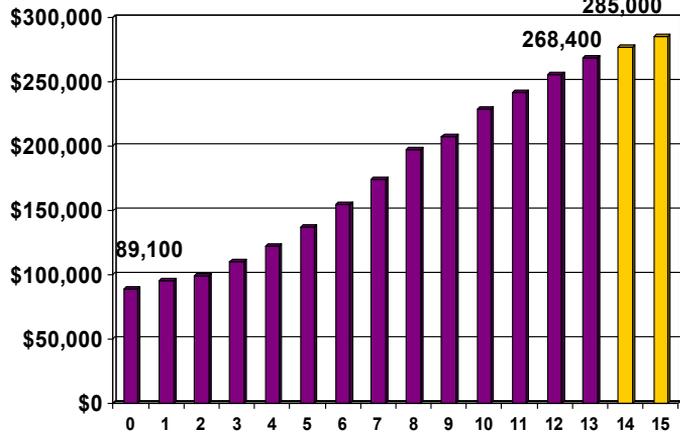


Housing – Resale Market

“Hot time for housing in the city – The only thing hotter than Winnipeg’s record-breaking spring temperatures is its red-hot resale homes market.”

Winnipeg Free Press, March 23, 2012

Average Resale House Price in Winnipeg 2000 to 2015f



Source: CMHC, Housing Market Outlook, Spring 2014

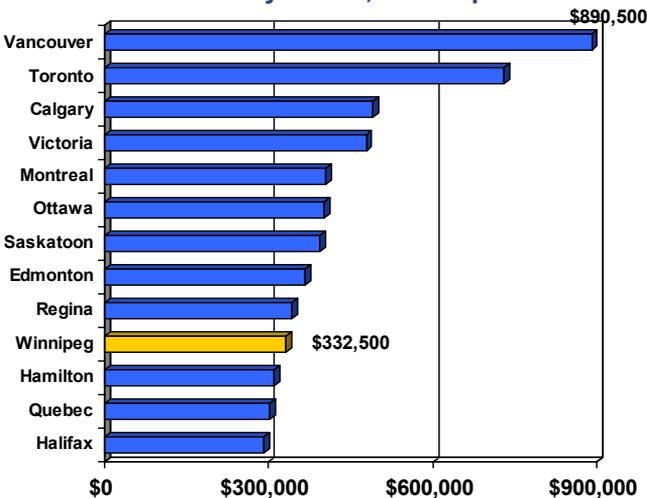
Price increase in resale market

- Winnipeg has seen a significant increase in housing prices over the last decade.
- Between 2000 and 2013 there was a 200% increase in the average price of a resale house in Winnipeg.
- For 2014 and 2015, CMHC is forecasting an increase of 3.2% and 2.9% respectively.

“One of the hallmarks of Winnipeg’s resale market has been its relative affordability when compared with other Canadian centres. Affordability was tested in recent years due to persistent double-digit price growth from 2003 to 2008.”

CMHC, Housing Market Outlook, Fall 2009

2014 Average Resale Prices in Other Cities Standard two-storey house, 1500 sq ft



Source: Royal LePage Survey Data, 2014, second quarter

Although Winnipeg has experienced significant increases in the average price of a home, when compared to other larger cities across Canada, Winnipeg continues to be a city with one of the lowest housing prices in Canada.

A two-storey home in Vancouver would cost \$890,500 or 168% more than the same two-storey home in Winnipeg (\$332,500).

- House Prices in Winnipeg have increased 42% over the last 7 years, with the average 2 story, 1,500 sq. ft. house selling for about \$332,500.
- Edmonton’s housing values have not fully recuperated since the recession. Prices are still down 8% from 2007, with a current value of \$365,800.
- There is a flattening of house prices across Canada – less variance. Historically lower priced cities like Regina, Saskatoon, Quebec City, Hamilton, Halifax and Winnipeg have seen significant increases recently. The exception is Vancouver and Toronto where house prices continue to remain high.

Housing – Rental Market

“Fuelled by population growth and new household formation, demand for rental accommodation remains high....continues to post among the lowest vacancy rates in the country.

CMHC, Housing Market Outlook, February 2012

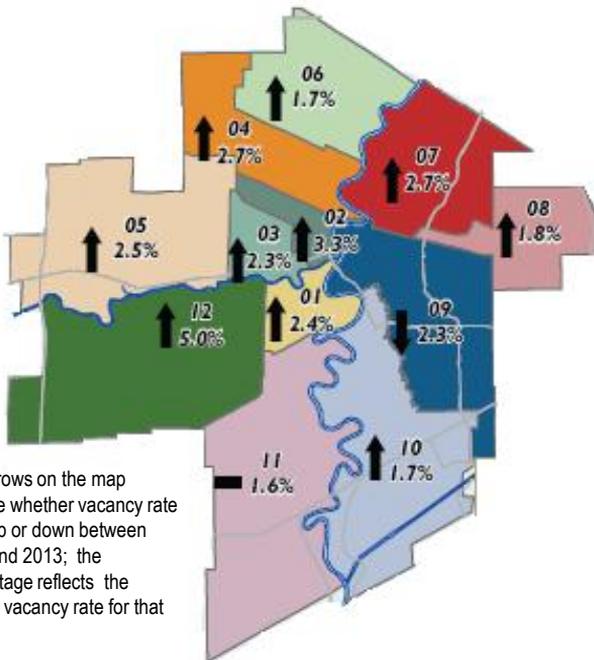
Apartment vacancy rates.

- The lowest vacancy rate occurs in the areas of Fort Garry, St. Vital and West Kildonan; the highest rate is in Assiniboine Park.
- The overall vacancy rate for Winnipeg is 2.5%.

2013 Apartment Vacancy Rates In various areas of Winnipeg

	Area	RATE
1	Fort Rouge	2.4%
2	Centennial	3.3%
3	Midland	2.3%
4	Lord Selkirk	2.7%
5	St. James	2.5%
6	West Kildonan	1.7%
7	East Kildonan	2.7%
8	Transcona	1.8%
9	St. Boniface	2.3%
10	St. Vital	1.7%
11	Fort Garry	1.6%
12	Assiniboine Park	5.0%

CMHC Rental Market Report, Fall 2013



The arrows on the map indicate whether vacancy rate went up or down between 2012 and 2013; the percentage reflects the current vacancy rate for that area.

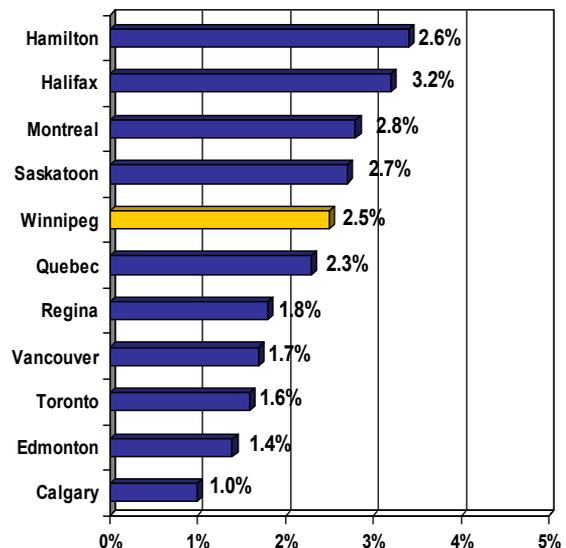
In 2013, Winnipeg’s vacancy rate rose above 2.0 percent – making it the first year the rate has been above 2.0 percent since the year 2000.

- Winnipeg’s vacancy rate increased from 1.7% in 2012 to 2.5% in 2013.

Rental costs are relatively low in Winnipeg.

- When the average cost of a two-bedroom apartment is compared between cities, Winnipeg’s rent is at the lower end, \$969 per month.
- Montreal has the lowest average rent cost at \$730 per month.
- Vancouver has the highest average cost at \$1,281 per month.

2013 Apartment Vacancy Rates In Other Cities



CMHC Rental Market Report, Fall 2013

Economy

“Real GDP in Winnipeg is expected to increase by 1.8 per cent in 2014, thanks to a healthier manufacturing sector and widespread growth in the region’s services sector.”

Conference Board of Canada, Metropolitan Outlook, Spring 2014

Winnipeg’s economy is one of Canada’s most diversified economies. Overall, our economic indicators are positive relative to other parts of Canada.

Even though Canada was in a recession in 2009, Winnipeg’s economy was doing relatively well. Winnipeg’s economy saw a 0.5 per cent decline while the national economy declined by 3.0 per cent.

From 2011 to 2013, Winnipeg’s economy saw a cautious recovery with manufacturing still struggling due to a high Canadian dollar and global economic uncertainty. With the recent drop of the Canadian dollar and improvements in the economy in general, the manufacturing sector is expected to improve.

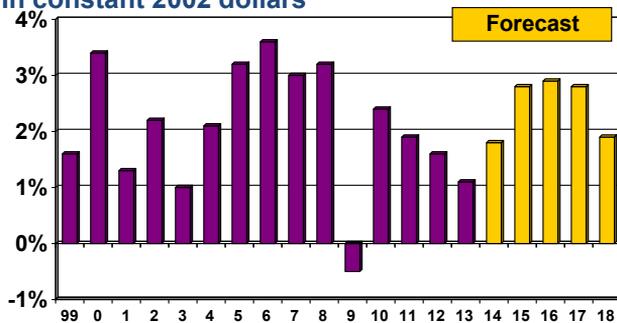
Over the next 5 years:

- Winnipeg’s economy is expected to create 31,000 jobs.
- Population in the Winnipeg region is forecasted to grow by over 50,000 people.
- Following a high level of housing starts in 2013, housing starts are expected to return to 2012 levels in 2014.
- GDP growth over the next 4 years (2015 – 2018) is forecast to average 2.6% per year.

These are relatively good numbers for Winnipeg.

Winnipeg’s Annual Economic Growth

Real Gross Domestic Product, annual % change
In constant 2002 dollars



Source: Conference Board, Metropolitan Outlook, Spring 2014- forecast

Other Cities Real GDP Growth

Annual Growth	11 - 13 (average)	2014f	15f – 18f (average)
Victoria	0.4%	1.4%	2.2%
Vancouver	2.7%	2.7%	3.2%
Edmonton	6.0%	3.1%	3.0%
Calgary	4.3%	3.4%	3.1%
Saskatoon	5.9%	2.9%	2.4%
Regina	5.2%	3.3%	2.3%
Winnipeg	1.5%	1.8%	2.6%
Toronto	2.2%	2.7%	3.0%
Ottawa	0.6%	0.9%	2.2%
Hamilton	1.2%	2.1%	2.2%
Quebec	1.6%	1.9%	2.0%
Montreal	1.8%	2.1%	2.2%
Halifax	1.6%	2.7%	2.6%

Source: Conference Board, Metropolitan Outlook, Spring 2014 - forecast

Economic Indicators Winnipeg CMA	2011	2012	2013	2014f	2015f	2016f	2017f	2018f
Real GDP (2002 \$ millions)	32,970	33,500	33,880	34,480	35,450	36,490	37,490	38,190
% change	1.9%	1.6%	1.1%	1.8%	2.8%	2.9%	2.8%	1.9%
CPI, % change	2.9%	1.6%	2.2%	1.7%	2.0%	2.2%	2.1%	2.0%
Retail Sales (\$ millions)	10,130	10,280	10,520	10,870	11,250	11,730	12,220	12,650
% change	2.4%	1.5%	2.4%	3.3%	3.5%	4.3%	4.1%	3.6%
Personal Income per capita	\$36,405	\$37,550	\$38,490	\$39,280	\$40,500	\$41,820	\$43,150	\$44,280
% change	1.4%	3.2%	2.5%	2.0%	3.1%	3.3%	3.2%	2.6%
Labour Force	433,480	441,700	445,260	447,850	455,320	462,850	469,700	473,210
% change	0.1%	1.9%	0.8%	0.6%	1.7%	1.7%	1.5%	0.7%
Employment	408,660	417,290	418,980	422,880	430,730	438,780	446,210	450,020
% change	0.1%	2.1%	0.4%	0.9%	1.9%	1.9%	1.7%	0.9%
Unemployment Rate	5.7%	5.5%	5.9%	5.6%	5.4%	5.2%	5.0%	4.9%

Source: Conference Board, Metropolitan Outlook, Spring 2014- forecast

Economy (cont'd)

“Low interest rates, together with strong population gains in recent years thanks to the provinces skilled worker nominee program, helped to fuel significant growth in Winnipeg’s housing starts over 2010 to 2012.”

Conference Board of Canada, Metropolitan Outlook, Spring 2013

Value of Building Permits (In millions of dollars)

	2008	2009	2010	2011	2012	2013
Residential	\$511	\$414	\$601	\$623	\$762	\$768
Non-Residential	\$542	\$697	\$552	\$536	\$779	\$1,014
Total	\$1,053	\$1,111	\$1,153	\$1,159	\$1,514	\$1,782

Source: City of Winnipeg, Building Permit Summary.

In 2013, Winnipeg saw over 1.7 billion dollars in building permit values.

- Residential permit values were up by 1%;
- The value in non-residential permits was up 30%;
- And, overall there was a 18% increase in building permit values.

2014 City Government Major Capital Investments - six year plan (in millions)

• Sewage Disposal	\$1,107
• Roads and Bridges	\$ 618
• Transit System	\$ 324
• Water System	\$ 172
• Parks, and Community infrastructure	\$ 185
• Public Safety Infrastructure	\$ 71
• Municipal Facilities	\$ 62
• Solid Waste Disposal/Garbage Coll.	\$ 38
• Land Drainage & Flood Control	<u>\$ 36</u>
	\$2,631

Other Major Capital Investments (in millions)

• Hydro Conawapa Generating Station	\$10,200
• Hydro Keeyask Generating Station	\$6,200
• Manitoba Highways (over 5 years)	\$2,000
• Rapid Transit / Pembina Underpass	\$600
• Seasons of Tuxedo (IKEA)	\$500
• Convention Centre	\$180

Other projects by category (in millions)

• Commercial	\$825
• Industrial	\$78
• Institutional	\$1,060
• Residential	\$788

The City Government Infrastructure Projects over the next six years totals \$2.7 billion, of which \$379 million is for 2014.

These projects, along with other significant major new capital investments in Winnipeg and the rest of the Province, requires the construction industry to continue ramping up its capacity.

Labour shortages continue to exist along with upward pressures on construction wages. The result is that base construction inflation is presently in the 4% range. Increasing infrastructure spending in Manitoba may result in an upward pressure on construction inflation.

Commercial Real Estate Markets

Current as of 2012Q4	Downtown Office Market		Industrial Market	
	Class A Vacancy Rate	Average Class A Net Rent (\$/sq ft)	Overall availability Rate	Average Net Rent (\$/sq ft)
Vancouver	6.1%	\$33.12	6.4%	\$7.96
Edmonton	9.7%	\$24.28	4.7%	\$10.79
Calgary	9.1%	\$36.76	6.4%	\$8.10
Saskatoon	na	na	na	na
Regina	na	na	na	na
Winnipeg	10.8%	\$15.81	4.0%	\$6.79
Toronto	6.1%	\$27.09	4.6%	\$5.04
Ottawa	7.2%	\$24.91	6.5%	\$8.53
Montreal	8.2%	\$21.71	7.9%	\$5.17
Halifax	8.3%	\$18.14	6.3%	\$7.43

Source: Conference Board of Canada, Metropolitan Outlook, Spring 2014

Cost of Doing Business

KPMG’s 2014 Competitive Alternatives examines location-sensitive business costs in 89 cities in Canada and the United States. Winnipeg has the lowest business costs of cities in western Canada. In fact, Winnipeg has lower business costs than all 74 U.S. cities examined.

Jobs and Wages

After modest growth the last couple of years, employment is forecast to grow by 1.9% in both 2015 and 2016. A third of the employment growth over the next 5 years is expected to be in the non commercial services sector.

Based on source data from the Conference Board of Canada, Metropolitan Outlook Spring 2014

Over the next five years, over 31,000 jobs will be created – on average, 6,000 additional jobs per year.

- Nearly all of the new jobs will be in the Service Sector.
- Three areas will see the most growth:
 - Non Commercial
 - Wholesale and Retail Trade
 - Construction

Winnipeg’s unemployment rate is expected to continue to hover in the 5.2% range – currently about 1.0% below the overall Canadian rate.

Winnipeg’s median hourly wage has increased 35% in the last 10 years which is above that of Canada’s overall increase of 30%.

During this same period, inflation in Winnipeg was 20% -- thus there were real wage gains in Manitoba over the decade, over 1.5% per year.

The chart to the lower right indicates the percentage difference from Manitoba shown relative to Manitoba’s median hourly wage. The provinces which compete with Manitoba for labour, all have higher wages than Manitoba – from 11% higher in Ontario to 28% higher in Alberta.

Manitoba has made wage gains against the provinces of Quebec, Ontario and BC. Currently wages in Ontario are 11% higher than in Manitoba, while back in 2001 they were 21% higher.

Wages in Saskatchewan and Alberta have increased at a greater pace than in Manitoba.

This information would further suggest that labour shortage will likely continue due to difficulty in retaining and attracting skilled labour.

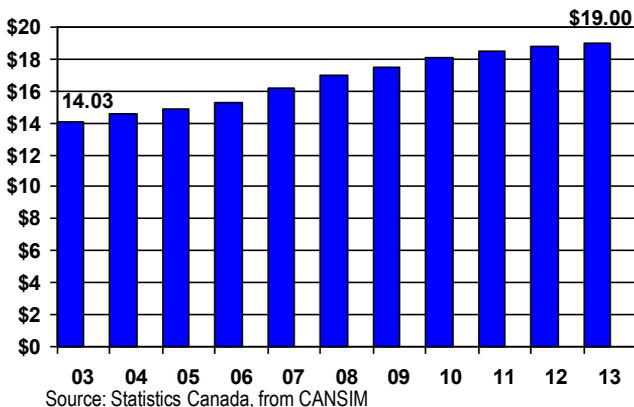
Winnipeg Employment – By Sector

Employment Sectors	2014 Jobs	2014 - 2018 Additional Jobs
Total Employment	422,880	31,000
Goods Producing Sector		
Primary & Utilities	9,850	210
Manufacturing	42,600	2,010
Construction	27,500	3,320
Service Sector		
Transportation & Warehousing	25,500	0
Information & Cultural Industries	9,170	30
Wholesale & Retail Trade	63,830	5,100
Finance Insurance & Real Estate	25,380	2,250
Business Services	38,850	3,090
Personal Services	59,060	2,740
Non-Commercial Services	95,650	12,070
Public Administration & Defense	25,500	220

Source: Conference Board of Canada, Metropolitan Outlook Data, Spring 2014

Salary Trend – Winnipeg

Manitoba’s Median Hourly Wage for all occupations



Source: Statistics Canada, from CANSIM

Wage Comparison

% Difference from Manitoba’s Median Hourly Wage

	2001	2006	2011	2012	2013
Canada	15%	14%	8%	9%	10%
Nova Scotia	-5%	-5%	-5%	-5%	-4%
Quebec	12%	9%	3%	5%	5%
Ontario	21%	19%	10%	11%	11%
Manitoba	--	--	--	--	--
Saskatchewan	3%	6%	9%	12%	14%
Alberta	13%	21%	21%	25%	28%
BC	27%	20%	12%	13%	14%

Source: Statistics Canada, derived from CANSIM

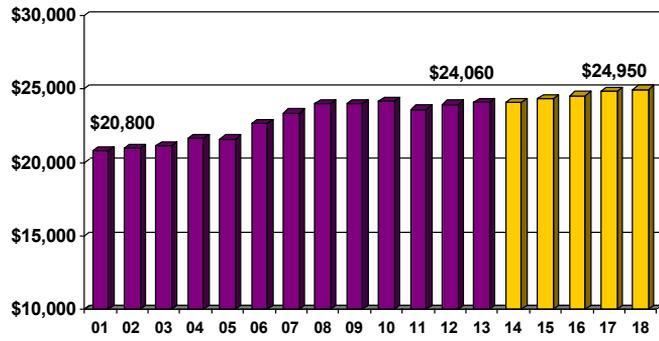
Disposable Income and Cost of Living

Real disposable income is stable

- In the early 1990's real personal disposable income decreased by 7.3%. This resulted in families having less money for discretionary spending.
- Over the last decade, Winnipeggers regained the lost real disposable income plus more for an increase of 15%.
- The Conference Board is forecasting only a 3.7% increase over the next 5 years. Thus, citizens will continue to have the same discretionary spending as today.

Real Personal Disposable Income per Capita 2001 to 2018f

In constant 2002 dollars, per capita



Source: Conference Board of Canada, Metropolitan Outlook Data, Spring 2014

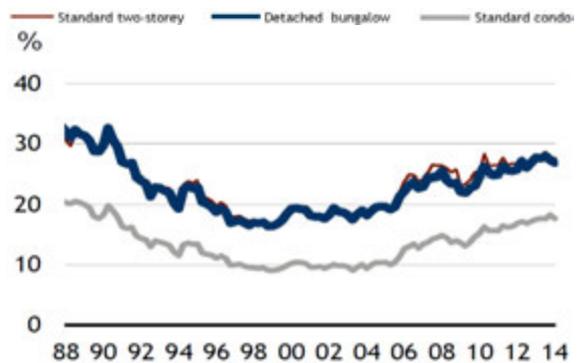
Winnipeg's Housing Affordability

(Using standard 2 storey and bungalow as the base)

- Housing affordability improved during the 1990s as a result of flat house prices during that time. Mortgage carrying costs decreased from 30% of household income to less than 20%.
- Over the last decade, this trend has reversed. In 2014, the average household is spending 26% of their household income on mortgage costs.
- Other large Canadian cities are less affordable based on this measure.

Mortgage Carrying Costs - Winnipeg

% of household income taken up by ownership costs

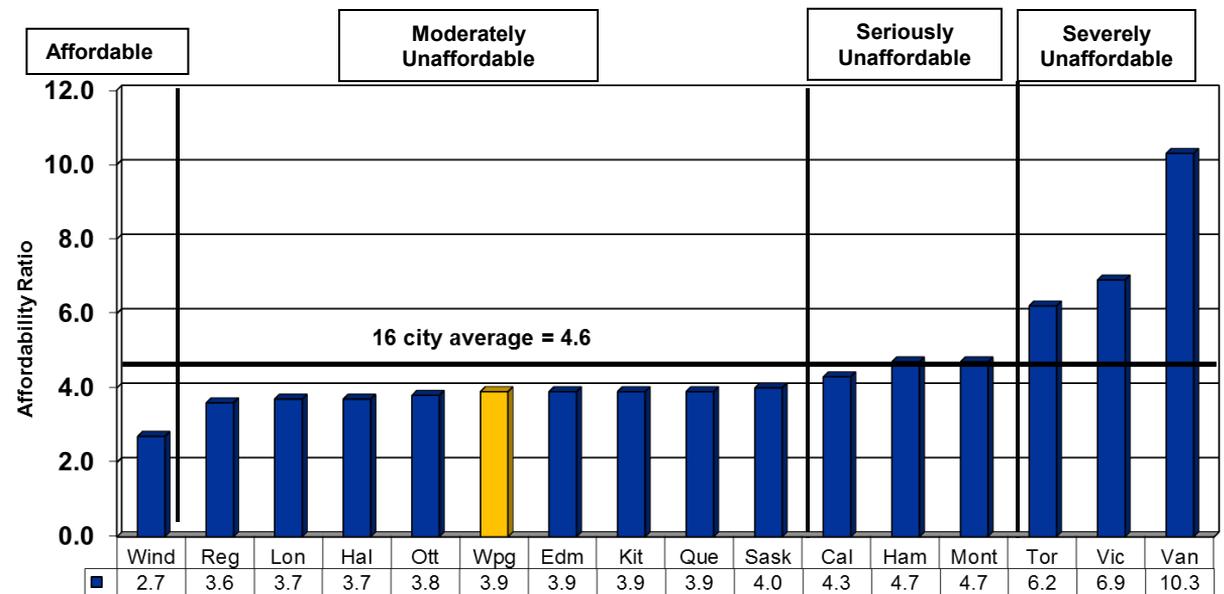


Source: Royal Bank of Canada, Housing Affordability, May 2014

Housing Affordability

Median House Price / Median Household Income

As result of significant increases in the price of homes over the last decade, Winnipeg's housing affordability has dropped significantly.



Source: Demographia, 10th International Housing Affordability Survey: 2013 (data for 3rd quarter 2013).
 Used 16 largest Canadian CMA cities (Regina and larger, 200,000 plus population).
 Affordability categories established by Demographia, <http://www.demographia.com/>

Population Figures: Capital Region, Cities and Towns

Capital Region Municipalities

Capital Region Area	Population			
	2011	2006	% change	# change
Winnipeg	663,617	633,451	4.8%	30,166
Springfield	14,069	12,990	8.3%	1,079
St. Andrews	11,875	11,359	4.5%	516
St. Clements	10,505	9,706	8.2%	799
Taché	10,284	9,083	13.2%	1,201
Selkirk	9,834	9,515	3.4%	319
East St. Paul	9,046	8,733	3.6%	313
Rockwood	7,964	7,692	3.5%	272
Macdonald	6,280	5,653	11.1%	627
Ritchot	5,478	5,051	8.5%	427
West St. Paul	4,932	4,357	13.2%	575
Stonewall	4,536	4,376	3.7%	160
Headingley	3,215	2,726	17.9%	489
Cartier	3,153	3,162	-0.3%	-9
Rosser	1,352	1,364	-0.9%	-12
St. François Xavier	1,240	1,087	14.1%	153
Teulon	1,124	1,124	0.0%	0
Dunnottar	696	692	0.6%	4
	769,200	732,121	5.1%	37,079

This page provides base Census population figures on the Capital Region and larger communities in Manitoba. The information provides perspective relative to Winnipeg. For smaller communities, the Census is the only source of population information.

The majority of the population growth of the Capital Region was in Winnipeg

- The Capital Region includes 18 municipalities of which Winnipeg comprises 86% of the total population.
- Although some communities had significant population growth on a percentage basis, overall Winnipeg accounted for 81% of the total population growth in the Capital Region. (30,166 of the total 37,079)

Cities and Towns with Population over 2,500

City	Population			
	2011	2006	% change	# change
Winnipeg	663,617	633,451	4.8%	30,166
Brandon	46,061	41,511	11.0%	4,550
Steinbach	13,524	11,066	22.2%	2,458
Portage la Prairie	12,996	12,728	2.1%	268
Thompson	12,829	13,446	-4.6%	-617
Winkler	10,670	9,106	17.2%	1,564
Selkirk	9,834	9,515	3.4%	319
Dauphin	8,251	7,906	4.4%	345
Morden	7,812	6,571	18.9%	1,241
The Pas	5,513	5,589	-1.4%	-76
Flin Flon	5,363	5,594	-4.1%	-231
Stonewall	4,536	4,376	3.7%	160
Altona	4,088	3,709	10.2%	379
Swan River	3,907	3,869	1.0%	38
Neepawa	3,629	3,298	10.0%	331
Niverville	3,540	2,464	43.7%	1,076
Beausejour	3,126	2,823	10.7%	303
Virден	3,114	3,010	3.5%	104
Carman	3,027	2,781	8.8%	246
Oakbank	2,944	2,427	21.3%	517
Minnedosa	2,587	2,474	4.6%	113

The majority of Manitoba's population growth was in the City of Winnipeg

- The table to the left comprises population figures for Winnipeg plus 20 of the largest cities and towns in Manitoba.
- Of the total population growth (43,254) of these 21 communities, Winnipeg makes up 70% of the total growth.
- Growth in these communities varies significantly. Steinbach had a growth rate of 22%, while Thompson had a decline of 4.6%. The most significant growth rate occurred in the smaller community of Niverville which experienced a 43% increase over these 5 years.
- Of these 21 larger communities, three are located in the north, Thompson, The Pas and Flin Flon all of which have had a decline in population.

Source: Statistics Canada, 2006 and 2011 Census

