

ENVIRONMENTAL SCAN

ALBERTA



Fall 2013

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Acronyms

| | |
|--------------|---|
| GDP | Gross Domestic Product |
| HRSDC | Human Resources and Skills Development Canada |

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About the E-Scan

At least twice a year, the Labour Market Information division of Service Canada, Western Canada and Territories Region develops an Economic/Environmental Scan (E-Scan), a report that provides a general overview of the demographic, economic and labour market condition and trends for Alberta. E-Scans are mainly intended to support regional Service Canada operations by identifying potential pressures on service and program delivery in the regions. However, they may also be of interest to those who seek to know more about the state of a provincial or regional economy and labour market. They are also used by Service Canada economists to help determine outlooks for industries and occupations.

Facts and statistics presented in this document reflect information available as of November 2013.

Key Points

General Overview

- Despite global challenges Alberta's economy remained strong in 2012, with GDP growth reaching 3.9%.
- Alberta's labour market will add 47,000 jobs in 2013 and 44,000 in 2014, annual increases of 2.2% and 2.0% respectively, while its unemployment rate is projected to hold steady at 4.7%.
- Over the next two years, Alberta's economy is expected to remain one of Canada's strongest, led by consumer spending, exports and business investment. However, there are some risks to the Alberta economy, the price of oil being chief amongst them.

Regional, Provincial and Local Labour Market Conditions

- Employment rose 2.7% in 2012, well above the 1.5% average growth of the last five years.
- In 2012, close to half (47%) of older Albertans –55 years and older – participated in the labour force. By contrast, just over one-third (37%) of Canadians aged 55 and above were employed or were looking for work.
- Alberta's economy is attracting large numbers of inter-provincial and international migrants. The immigrant share of Alberta's total work force is now close to one in five.
- Youth unemployment stood at 8.9% in 2012 – well up from 2007, but still considerably below the corresponding Canadian rate. Post-secondary school enrollment of 18 year olds remains 8 percentage points below the Canadian average, despite some improvement in recent years.
- Alberta's key oil sector is entering uncharted territory, as advances in drilling technology may bring considerable change from the sector's traditional business model.

Introduction

The purpose of the Environmental Scan is to outline the major trends and issues facing Canada and Alberta that will influence the economic and social environment in the current and future years. The document provides timely, evidence-based information to support the business planning process. It is divided into two main parts: the first part of the document includes a general overview of the economic context and some employment outlook information; the second part provides perspective of the regional, provincial and local labour market. Some terms and definitions are featured on page 15 in appendix A.

Section 1: General Overview / Economic Context

The World

The global economy slowed for the second consecutive year in 2012, as weak growth among developed countries – including the United States (US) – continued to take its toll. Coming into 2013 there was general optimism that conditions would improve during the second half of the year; but that upturn is now projected to occur later in 2014. In October 2013, the International Monetary Fund (IMF) lowered its 2013 global economic expansion target to 2.9%, which translates into a third straight year of slowing world growth.

The US is the world's largest economy, responsible for over 18% of global GDP in 2012. However, China could take over this top spot as early as 2016, according to the latest IMF forecast. Not surprisingly, the two economies are closely linked, and China is feeling the effect of slow growth in a number of its large export markets, including the US. In fact, China's expansion has slowed to about 7.5% per year. While this rate of growth seems astronomical by western standards, it represents China's worst performance in 23 years.

Steady growth is proving elusive for the US. Following two relatively slow years, the economy expanded by 2.2% in 2012, the highest rate among G7 countries. US growth slowed in the first half of 2013, and the IMF now anticipates 1.6% total growth on the year.

Yet, there is widespread optimism that the US will drive much of global growth in 2014. According to the Conference Board of Canada¹, the US economy will recover next year, expanding by over three percent. This positive outlook is reinforced by the IMF, which forecasts 2.6% GDP growth in the US in 2014.

Meanwhile, Germany, France, Italy, Spain and other European Union (EU) member states continue to crawl out of recession. Having receded 0.4 percent in 2012, according to the IMF, the EU economy is expected to shrink an additional 0.4 percent in 2013. The effects of the sovereign debt crisis have varied throughout the EU, and the most troubled EU member states continue to suffer through on-going austerity measures. However, business confidence indicators (inflation, interest rates, foreign investment etc.) suggest economic activity is close to stabilizing for some EU members.

Canada

Canada's economy outperformed those of most other developed nations in 2012, posting real GDP growth of 1.8% on the year. While the country may have done well compared to its peers, on its own merits, 2012's economic performance has to be considered mediocre. Long term, Canada needs GDP growth of between 2.0% and 2.5% for Canadians to maintain their standard of living.

¹ Conference Board of Canada, World Outlook—Global Economic Trends and Prospects: Autumn 2013

As with the world economy, Canadian economic activity was widely expected to pick up during the second half of 2013. Forecasters have since lowered their Canadian outlook, due largely to developments in the US. As of late October 2013, the Bank of Canada calls for the economy to grow by 1.6% in 2013, 2.3% in 2014, and 2.6% in 2015, with commodity-rich Alberta, Saskatchewan, and Newfoundland playing lead roles in the country's economic growth.

Canada's relatively poor showing in 2013 stems in part from lacklustre exports. The central bank had expected exports to show an increase in the third quarter, but weakened demand globally and fiscal turbulence within the US market delayed this turnaround. Stronger US economic growth and a weaker Canadian dollar next year are expected to propel export gains.

In response to slow economic growth and low inflation, the Bank of Canada is likely to hold interest rates at one percent through 2015. This measure could potentially reignite the housing market, increase borrowing and accelerate growth, particularly in the critical export sector.

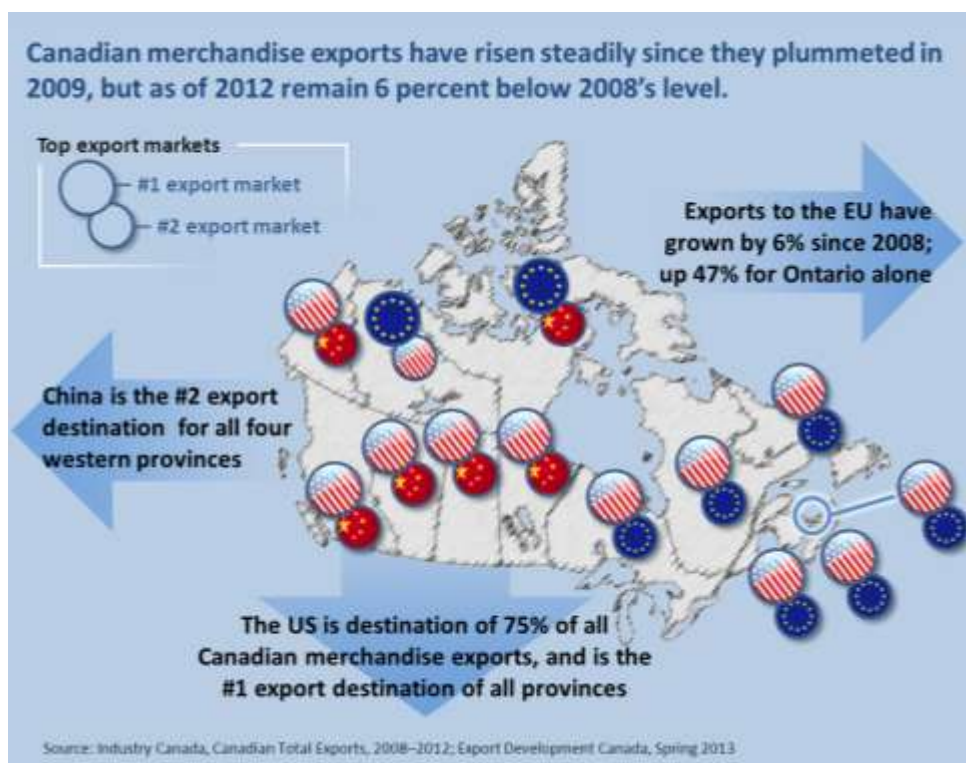
Global Growth and Canada's Exports

International trade makes up a large part of the Canadian economy, accounting for more than 45% of GDP. In 2012 the US, EU and China were the top three destinations for Canadian exports, together accounting for almost 90% of all shipments. The US, by far Canada's largest trading partner, is typically the destination for three-quarters of Canadian export goods. In 2012 the EU received 8.5% of Canadian shipments, China about half that. Between 2008 and 2012, China supplanted Japan as Canada's third largest export market.

Given the increasingly uncertain prospects for Canada's largest trading partner and the available partial-year data, it seems reasonable to expect modest export growth in 2013 and 2014. Although Canadian businesses have generally welcomed the tentative Canada – EU trade deal, it will be at least two years before the deal is implemented and begins to impact export volumes.

Through the first eight months of 2013 Canada's leading exports to:

- the US were: energy products, including oil & gas and electrical power; motor vehicles and parts; and wood, lumber, and pulp and paper products;
- the EU were: precious stones and metals, including gold and diamonds; aircraft and parts; and crude and petroleum oils, and to
- China were: wood, lumber, and pulp and paper products; seed and food oils, grains, and legumes; and iron and copper ores.



Alberta

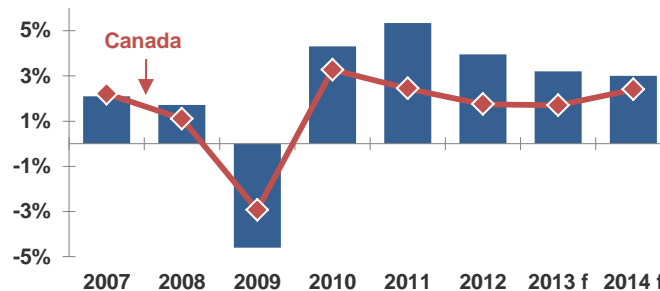
Alberta's economy was strong in 2012, posting growth of 3.9%, down from 2011's 5.2%, but more than double the national average. As a result of record international and interprovincial migration, Alberta's population growth was the highest in the country last year. On July 1, 2013, Alberta's population reached a record 4,025,074, up 136,335 or 3.5% from July 1, 2012.

While floods across southern Alberta disrupted the economy in June and July, most economic indicators are showing renewed activity. Sales of manufactured goods increased 8% and retail sales rose 5% in August compared to the same month last year. The value of building permits over the first eight months of 2013 are up 19% (non-residential 28% and residential 13%) as Alberta's economy continues to benefit from oilsands investment and post-flood reconstruction and repair work. And the most significant economic indicator for Alberta, international exports, is up 5.6% for the first eight months of 2013 compared to the same period last year.

The energy sector remains a critical driver of provincial economic activity. Energy commodities account for 70% of Alberta's exports and much of Alberta's massive capital investments are energy related. Alberta's Ministry of Enterprise and Advanced Education lists 65 oil sands projects valued in excess of \$110 billion on its latest major projects list. These projects are either under construction or scheduled to begin construction in the next few years and include the \$8.9 billion Imperial Oil Kearl Lake Oil

Chart 1

Year-over-year percentage change in Alberta's Gross Domestic Product between 2007 and 2014 (forecast), in 2007 dollars.



Sources: Statistics Canada Economic Accounts; Conference Board of Canada (forecast)

Sands Phase 2 project; the \$5.7 billion Northwest Redwater Bitumen Upgrader Phase 1 project; and the \$2.7 billion Husky Energy Inc./BP PLC Sunrise Thermal project. Other major investments include pipelines, utilities and other industrial construction projects.

Alberta's other major commodity exports, agriculture and forestry, are doing well with the value of agricultural (grains, oilseeds and cattle) exports up 20% and forestry products up 9% in 2012. Alberta's lumber and pulp mills are benefiting from a gradually improving U.S. housing market and increased exports to Asia. According to the Alberta Forest Products Association, the value of lumber, pulp and paper, and panelboard manufactured by Alberta member companies for the 2nd quarter of 2013 was up nearly 14% from the same period in 2012. Increased exports to Asia and more housing starts in the US, mean a healthy market for Alberta forest products.

While grain prices have weakened in recent months, production is expected to be up this year. In fact, Statistics Canada's preliminary estimates project record wheat and barley crops and near record canola crops in 2013. For the livestock industry higher costs associated with U.S. country-of-origin labeling (COOL) resulted in a major US meat processor recently halting purchases of Canadian slaughter ready cattle. While cattle prices are holding above last year and feed grain costs are falling, there is considerable uncertainty over the impact of COOL.

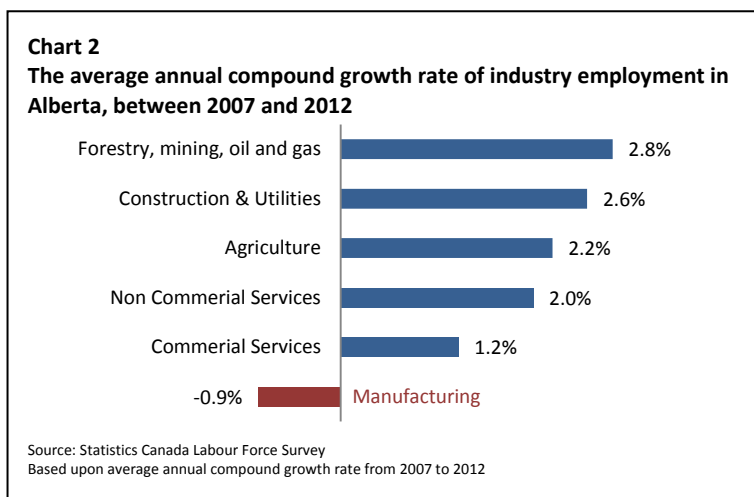
Alberta's labour market enjoyed a strong year in 2012. Employment increased by 2.7%, more than twice the increase seen Canada-wide. This strength is expected to continue, with the Conference Board forecasting that the Alberta labour market will add 47,000 jobs in 2013 and 44,000 in 2014, annual increases of 2.2% and 2.0% respectively. The provincial unemployment rate is projected to hold steady at 4.7% for 2013 and 2014 unless booming population growth results in the labour force increasing more rapidly than employment.

Over the next two years, Alberta's economy should remain one of Canada's strongest, led by robust consumer spending, exports and business investment. The Conference Board of Canada expects moderate GDP growth of 3% in 2013, still the third highest growth rate behind Newfoundland (6.0%) and Saskatchewan (3.5%). However, there are some risks to the Alberta economy, including: vulnerability to volatile global markets; skills and/or labour shortages; and a possible decline in the price of oil.

Section 2: Regional, Provincial and Local Labour Market Condition

Employment by Sector

After registering job losses in both 2009 and 2010, Alberta posted strong employment gains for the second consecutive year in 2012. From 2007 to 2012 employment averaged an annual growth rate of 1.5%. Job growth was highest in forestry, mining, oil and gas (2.8%) and in construction and utilities (2.6%). Employment in non-commercial services (education, health, and public administration) expanded by 2.0% over the same period. Employment in commercial services – which range from retail trade to business



services – increased a modest 1.2%.

Alberta's goods-producing sector was held back from even stronger growth over the last five years due to a decline in non-durable manufacturing jobs. The food manufacturing industry contributed to this decline as did the petroleum and coals products subsector. Employment in food manufacturing will almost certainly rebound, as 2012's job losses can be directly attributed to last year's tainted beef recall. The outlook for the petroleum and coal products manufacturing subsector is not so clear, however. Alberta's oil and gas producers are focused on extraction activities. By comparison, refinery operations in the province are relatively limited.

Table 1
Change in employment by Industry in Alberta between 2007 and 2012

| | 2012 | 2007 | % Share 2012 | Growth rate* |
|---|----------------|----------------|-----------------|-----------------|
| Total, all industries | 2,149.6 | 1,991.3 | 100.0% | 1.5% |
| Goods-producing sector | 619.4 | 567.3 | 28.8% | 1.8% |
| Agriculture | 56.2 | 50.4 | 2.6% | 2.2% |
| Forestry, fishing, mining, quarrying, oil and gas | 177.4 | 154.3 | 8.3% | 2.8% |
| Utilities | 20.7 | 20.4 | 1.0% | 0.3% |
| Construction | 226.6 | 197.5 | 10.5% | 2.8% |
| Manufacturing | 138.5 | 144.6 | 6.4% | -0.9% |
| Services-producing sector | 1,530.2 | 1,424.0 | 71.2% | 1.4% |
| Trade | 322.4 | 294.4 | 15.0% | 1.8% |
| Transportation and warehousing | 116.4 | 107.4 | 5.4% | 1.6% |
| Finance, insurance, real estate and leasing | 103.8 | 100.2 | 4.8% | 0.7% |
| Professional, scientific and technical services | 157.9 | 149.7 | 7.3% | 1.1% |
| Business, building and other support services | 72.9 | 74.9 | 3.4% | -0.5% |
| Educational services | 128.9 | 133.9 | 6.0% | -0.8% |
| Health care and social assistance | 228.6 | 189.0 | 10.6% | 3.9% |
| Information, culture and recreation | 71.1 | 77.4 | 3.3% | -1.7% |
| Accommodation and food services | 133.3 | 119.3 | 6.2% | 2.2% |
| Other services | 106.3 | 96.8 | 4.9% | 1.9% |
| Public administration | 88.6 | 81.1 | 4.1% | 1.8% |

Source: Statistics Canada Labour Force Survey

*Based upon average annual compound growth rate from 2007 to 2012

Employment by Age

In 2012, close to half (47%) of older Albertans – individuals in the 55 years and older age group – participated in the labour force. This is the highest rate ever recorded for individuals in this group. By contrast, just over one-third (37%) of Canadians aged 55 and above were employed or were looking for work in 2012.

The strongest growth in employment since 2007 has been in the 55 and over age group (+32.2% male; +32.7 female), while the weakest growth has occurred among those under 25 years of age (-12.1% male; -6.0% female). In fact, 32,000 fewer Albertans aged 15 to 24 were employed in 2012 than five years earlier. Employment in the prime working age group (25-54) accounted for 68% of provincial employment.

Women held 44.8% of all jobs in 2012, the exact same percentage as in 2007. In fact, during 2009 and 2010, when overall employment levels fell as a result of the global recession, women's share of employment increased to 45.2%, as male-dominated occupations in the goods-producing sector were hit the hardest. By 2012, however, the identical gender-based employment patterns seen in 2007 were again in effect, with no changes in composition or growth rates observed over the full five-year period. A notable exception occurred in protective services (e.g. security guard), in which women's share of employment increased from 14% to 23% between 2007 and 2012.

Non-Standard Employment

Non-standard employment refers to all employment arrangements other than the traditional one of open-ended, full-time employment with a single employer. Non-standard then includes all part-time and/or part-year work, as well as fixed-term contract work and self-employment. Comprehensively, it is difficult to track, even at a national level. Canada-wide, it is believed that about one-third of the workforce aged 15 and over engages in at least one of part-time work, temporary work, own-account self-employment, or multiple jobholding in any given year.

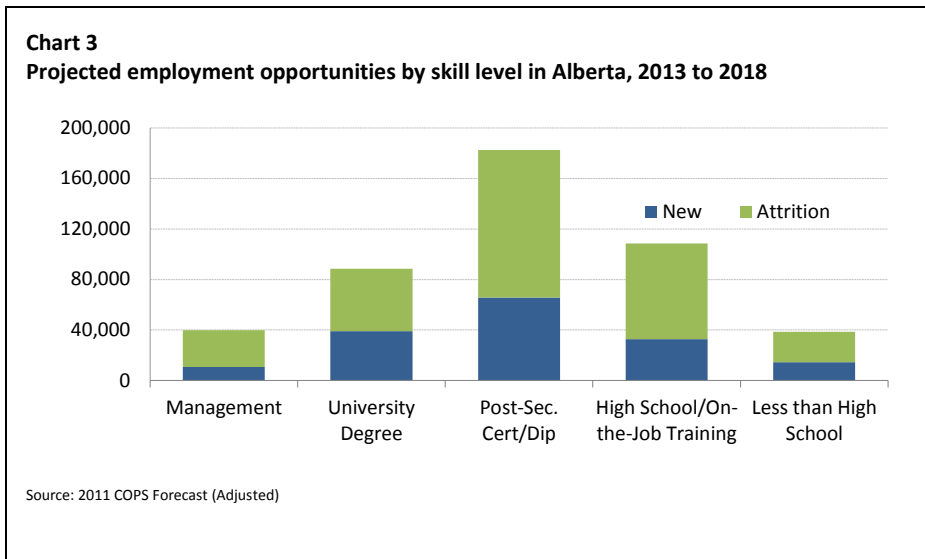
Between 2007 and 2012, part-time positions in Alberta grew almost as rapidly as full-time ones (7.4% versus 8.0%, respectively). For men, however, growth in part-time work (8.0%) slightly outpaced that seen in full-time (7.9%). Growth in self-employment was very limited for both men and women, less than 1.0% in total over the last five years.

Despite the slight uptick seen in male part-time work noted above, females in Alberta continue to comprise the overwhelming majority of part-time workers (about 71%). While women now comprise only about one-third of all self-employed workers, the proportion of females among the self-employed has steadily increased over the past three decades.

Job Opportunities by Skill Level

The greatest demand between 2013 and 2018 will be for workers with a post-secondary certificate or diploma. This has a lot to do with how common highly-skilled jobs have become in Alberta; currently, 40% of all jobs in the province require a post-secondary certificate or diploma.

This being said, demand remains high for jobs requiring high school graduation. Indeed, forecasted demand for these jobs remains greater than for jobs requiring a university degree. This is principally due to the large employment base, and with an aging workforce, high rates of replacement demand. There is similar demand for jobs in management as there is for jobs requiring less than high school.



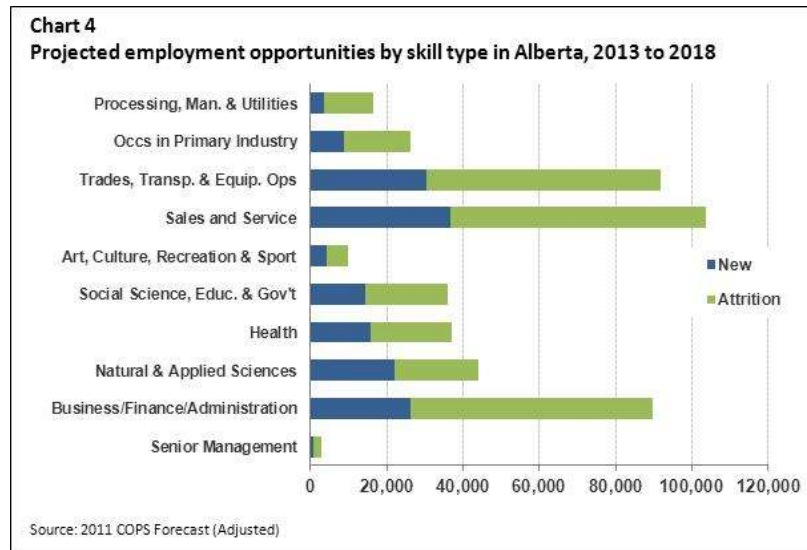
Job Opportunities by Skill Type

Over the next five years, over 60% of employment opportunities are projected to occur in three occupational groups: sales and service (22.6%); trades, transportation and equipment operators (20.1%); and business, finance, and administration occupations (19.6%). These are currently the largest occupational skill types in Alberta, and replacement demand will be steady as current workers retire. New job growth will also be a significant factor in Alberta over the next few years, particularly for sales and service occupations, which are expected to add 37,000 positions by 2018.

Not surprisingly, the fewest opportunities are expected in the select ranks of senior management (2,750). About 10,000 positions are expected in art, culture, recreation and sport-related occupations.

Local Labour Market Condition

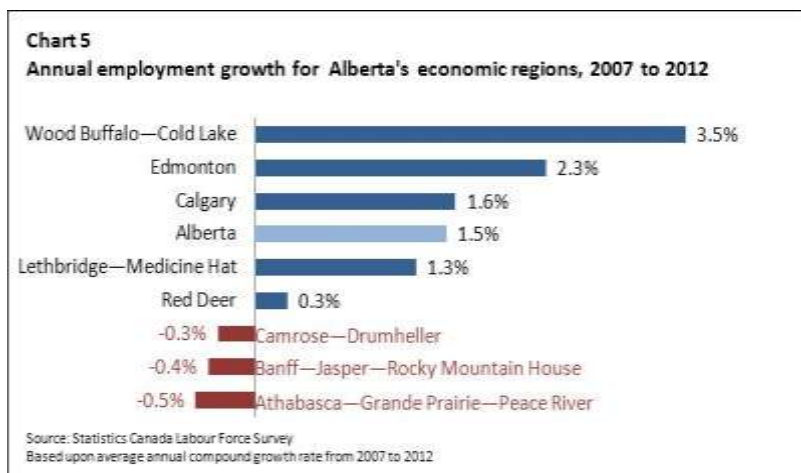
The strong Alberta economy is attracting inter-provincial and international migrants to the province, particularly to the larger centers. In 2012, Edmonton and Calgary ranked second and third respectively among Canadian cities, as measured by growth in the working age population. Employment growth was also strong in Edmonton and Calgary, measuring 2.3% and 1.6% respectively on an annual basis.



Wood Buffalo—Cold Lake, in the northeast of the province, is home to Alberta's oilsands. Centred on Fort McMurray, the region has undergone exceedingly rapid industrial development, particularly over the past decade. While some oil sands projects are modest in size, many are giant affairs, requiring billions of dollars in capital spending and thousands of person-years of employment before the first drop of oil is produced. The most recent project to enter into production was Imperial Oil's Kearl project, which in 2008

was pegged to cost \$7.9 billion. Due to cost increases, the total development cost is now \$12.9 billion². This type of “investment at all costs” in oil sands megaprojects is widely expected to moderate in future years.

By contrast to fast-growing Wood Buffalo—Cold Lake, Athabasca—Grande Prairie—Peace River experienced average population declines of one-half percent between 2007 and 2012, principally due to the collapse of North American natural gas prices. Economic growth will return quickly, however, should extraction of Alberta’s shale oil – currently in exploratory stages only – begin in earnest.



Interprovincial Migration

Alberta’s economy and labour market continues to attract people from other provinces. Interprovincial migration was particularly strong in the first quarter of 2013 with a net gain of 13,438, setting Alberta up to record its 10th consecutive quarter of positive net interprovincial migration. Over the first quarter, Alberta led all provinces in total net interprovincial in-migration. The largest number of newcomers came from Ontario (9,027) and British Columbia (7,128).

Labour Market Outcomes for Client Segments

Immigrants/Newcomers

By 2012, Alberta’s immigrant workforce was more than 400,000 strong, a number that does not include temporary foreign workers. The population of recent immigrants – those who have been in the country for less than five years – has been increasing rapidly since 2007. The labour force and employment of this group has been growing at an annual rate of almost 7%. By contrast, employment of the Canadian-born has been increasing only marginally, at 0.9%. The immigrant share of Alberta’s total employment is now close to one in five.

Aboriginal Workers

In Alberta, Aboriginal people are more engaged in the labour market compared to Aboriginal people across Canada. In fact, the participation rate for this group’s working age population in Alberta was higher than across Canada (65% and 61%, respectively) in 2011. Within the provincial context, however, Alberta’s Aboriginal people continue to trail the general population on most labour force measures. In fact, on average the Aboriginal unemployment rate is about twice that of the general population.

On a positive note, employment prospects for Alberta’s Aboriginal people improve dramatically with higher educational attainment. For example, in 2012 the unemployment rate for Aboriginal people holding a university degree was lower than it was for degree-holders across the population as a whole. Moreover, Aboriginal education levels increased substantially between 2007 and 2012. In 2012, 40% of off-reserve Aboriginal people aged 15 years or older had completed a post-secondary educational program, up 6 percentage points from five years prior. Even so, a gap of 12 percentage

² Source: <http://www.theglobeandmail.com/globe-investor/imperial-bumps-up-cost-of-kearl-oil-sands-project/article8102965/>

points remained between Aboriginal and non-Aboriginal people (52%) on this measure of educational attainment.

Older Workers

In 2012, over 78% of workers aged 50 to 64 participated in the labour force, a rate just below the all-time high recorded in 2008. This age group is a rapidly growing one, increasing at almost double the rate of the overall population. Employment has also been growing quickly, although not as quickly as the number of unemployed. The unemployment rate for this group of older workers averaged 3.9% in 2012, up from 2.6% five years earlier.

Senior Workers

The number of people aged 65 and older is rising in Alberta as is their share of total population. Still, Alberta's share is far lower than the national average (11% vs. 15% in 2012). Only the territories have a lower proportion of seniors. This is primarily a reflection of the draw of Alberta's economy on job seekers aged 25 to 54 years. Most labour force characteristics are unavailable for those 65 and older. However, the labour force participation of those 55 years and older in Alberta increased from 43% in 2007 to 47% in 2012.

Workers with Disability

In 2006, a slightly smaller proportion of Alberta's population self-identified as having a disability (13.6%) than was reported Canada-wide (14.3%). Of those, 70% participated in the labour market, a much higher rate than seen in other parts of the country. Within the 15 to 64 age group, about one-third of persons with disabilities reported severe to very severe activity limitations, five percentage points below the national rate. Workplace and job redesigns were accommodated over 80% of the time by Alberta employers, compared to the national average of just 65%. Disability types (which are not mutually exclusive) were as follows: pain (69%); mobility (63%); agility (61%); hearing (33%); and sight (19%).

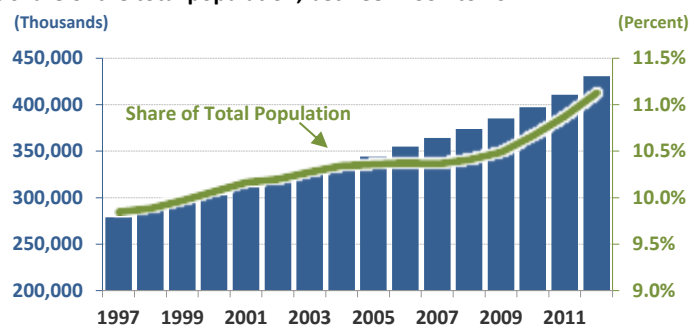
Youth Labour Force

Alberta's youth population, those aged 15 to 24, declined in number between 2007 and 2012, down about 0.5%. Declines in labour force and employment for this age group, however, were much steeper yet. Youth unemployment stood at 8.9% in 2012 – well up from 2007, but still considerably below the corresponding Canadian rate of 14.3%. While Canadian youth have largely responded to limited job prospects by concentrating on their studies, this is less so in Alberta. In fact, post-secondary school enrollment of 17 to 19 year olds remains 10 percentage points below the Canadian average, despite some improvements over the previous five³.

Official Language Minority Communities

In 2011, approximately 92% of Alberta's population had knowledge of English only, 6% had knowledge of both English and French, 1.4% had no

Chart 6
The change in Alberta's population aged 65 years and over, and change in its share of the total population, between 1997 to 2012



Source: Statistics Canada, Annual Demographics Estimates

³ Source: Statistics Canada Labour Force Survey 2012 Public Use Microdata File.

knowledge of either official language and only 0.1% had knowledge of French alone.

Conclusion

Alberta's labour market enjoyed a strong year in 2012, despite a softening Canadian economy and lower benchmark prices for the province's key oil exports. Employment increased by 2.7% on the year, while the unemployment rate, at 4.6%, was the lowest in the country.

The five years between 2007 and 2012 were far from uniform, however. With about a one-year lag, the global recession of 2008-2009 hit Alberta hard, and the province experienced back-to-back annual job losses in 2009 and 2010. As a consequence, employment growth over the five-year period averaged just 1.5%.

While many of Alberta's secondary industries seem poised for growth in upcoming years, the province's key oil and gas industry stands at an uncertain crossroad. Technological advancements that led to unprecedented production of North American natural gas – and a complete collapse in its price – are now threatening to destabilize the oil business as well. How this will all play out in Alberta is far from clear. It seems prudent, however, to temper the expectations that have been sky-high in recent years.

Note: *In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.*

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Appendices

Appendix A: Glossary of Terms

Aboriginal Identity Population - Refers to individuals who reported identifying with at least one Aboriginal group, i.e. First Nations people, Métis or Inuit and/or who reported being a Treaty Indian or a Registered Indian as defined by the Indian Act of Canada and/or who reported they were members of an Indian Band or First Nation.

Average Annual Compound Growth Rate – The average year-on-year growth rate of a given indicator over a number of years. Although indicators seldom change at a constant rate, the compound annual return smoothes out figures by assuming constant change.

Employed - Persons who worked during the Labour Force Survey reference week.

Gross Domestic Product (GDP) – Refers to the total value of the goods and services produced in Canada or in a province or territory, often referred to as a global measure of economic activity.

Immigrant Population – Refers to persons residing in Canada who were born outside of Canada, excluding temporary foreign workers, Canadian citizens born outside Canada and those with student or working visas.

Labour Force – Refers to the total number of individuals 15 years of age and over who are either employed or unemployed in the week prior to a given survey such as the Labour Force Survey or the Canadian Census.

Non-Standard Employment – Refers to employment other than permanent full-time work, including part-time, temporary, and self-employment.

Older Workers – Refers to workers aged 55 and over.

Participation Rate – The labour force expressed as percentage of the population 15 years of age and over.

Seniors Population – Refers to persons aged 65 and over.

Unemployed – Refers to persons who were without work and were available for work during the Labour Force Survey reference week.

Unemployment Rate – The unemployed expressed as a percentage of the labour force.

Workers with Disability – Refers to persons who self-identify as having a physical condition, a mental condition, or a health problem, that reduces the amount or the kind of activity that they are able to do. These include difficulty hearing, seeing, communicating, walking, climbing stairs, bending, learning or doing any similar activities