

Labour Market Bulletin

Saskatchewan

June 2018



This Labour Market Bulletin provides an analysis of Labour Force Survey results for the province of Saskatchewan, including Regina-Moose Mountain, Swift Current-Moose Jaw, Saskatoon-Biggar, Yorkton-Melville and Prince Albert and Northern economic regions.

OVERVIEW

There were 1,700 fewer people working in Saskatchewan in the second quarter of 2018 compared to the previous quarter. Both full- and part-time employment decreased during this period, by 1,000 and 700 respectively. Meanwhile, the provincial labour force grew 3,400 on the quarter.

Saskatchewan Quarterly Labour Force Statistics

| Seasonally Adjusted | 2nd Quarter | 1st Quarter | er 2nd Quarter | Quarterly V | ariation/ | Yearly Variation | |
|------------------------|-------------|-------------|----------------|-------------|-----------|------------------|------|
| Data | 2018 | 2018 | 2017 | Number | % | Number | % |
| Population 15 + ('000) | 884.1 | 881.7 | 876.2 | 2.4 | 0.3 | 7.9 | 0.9 |
| Labour Force ('000) | 606.2 | 602.8 | 607.4 | 3.4 | 0.6 | -1.2 | -0.2 |
| Employment ('000) | 567.2 | 568.9 | 568.4 | -1.7 | -0.3 | -1.2 | -0.2 |
| Full-Time ('000) | 466.1 | 467.1 | 466.6 | -1.0 | -0.2 | -0.5 | -0.1 |
| Part-Time ('000) | 101.1 | 101.8 | 101.8 | -0.7 | -0.7 | -0.7 | -0.7 |
| Unemployment ('000) | 39.0 | 33.9 | 39.1 | 5.1 | 15.0 | -0.1 | -0.3 |
| Unemployment Rate (%) | 6.4 | 5.6 | 6.4 | 0.8 | - | 0.0 | - |
| Participation Rate (%) | 68.6 | 68.4 | 69.3 | 0.2 | - | -0.7 | - |
| Employment Rate (%) | 64.2 | 64.5 | 64.9 | -0.3 | - | -0.7 | - |

Note: Totals may not add due to rounding

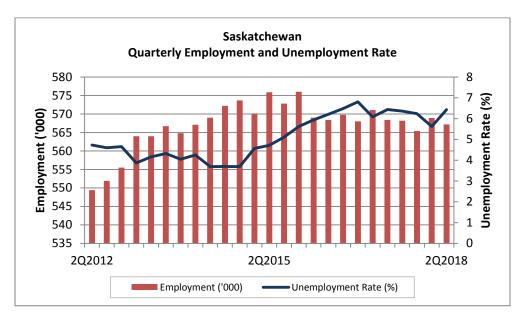
Source: Statistics Canada Labour Force Survey – Table 14-10-0287, formerly CANSIM 282-0087

Looking at classes of workers, public sector employment declined markedly (-2,400) on the quarter, while private sector employment remained virtually unchanged (-100). Conversely, the number of self-employed Saskatchewanians increased during this period (+800).



The Canadian Federation of Independent Business (CFIB)'s latest Help Wanted report shows that Saskatchewan's private sector job vacancy rate - the proportion of unfilled jobs relative to all available jobs in the private sector – stood at 2.1% in the first quarter of 2018. Weak labour market conditions in Saskatchewan have resulted in a moderate decline in the provincial vacancy rate.¹

As well, Saskatchewan's small business owners were least optimistic in the country, according to CFIB's Business Barometer for June. Optimism among Saskatchewan's small business owners stood at an index of 44.8 on a scale of zero and 100 – over 17 points below the national average of 62.2 points. Insufficient domestic demand was the main operating challenge for the businesses surveyed, followed by a shortage of skilled labour and management skills. Hiring plans also remained weak in June, as 14% of Saskatchewan's small business owners stating that they plan to cut jobs over the next three to four months; whereas, only 12% of business owners reported that they plan to increase full-time employment during the same period.²







Saskatchewan's unemployment rate increased to 6.4% in the second quarter of 2018, up 0.8 percentage points from the previous quarter. The provincial rate exceeded the national average of 5.9% during the same period, and was the second highest in Western Canada after Alberta (6.5%).

Saskatchewan Quarterly Unemployment Rates, by Gender and Age

| Seasonally Adjusted Data | 2nd Quarter 2018 (%) | 1st Quarter 2018 (%) | 2nd Quarter 2017 (%) | Quarterly Variation (% points) | Yearly Variation (% points) |
|---------------------------|----------------------------|----------------------------|----------------------------|--------------------------------------|-----------------------------------|
| Total | 6.4 | 5.6 | 6.4 | 0.8 | 0.0 |
| 25 years and over | 5.4 | 4.8 | 5.6 | 0.6 | -0.2 |
| Men - 25 years and over | 5.8 | 5.5 | 6.1 | 0.3 | -0.3 |
| Women - 25 years and over | 5.0 | 4.0 | 5.0 | 1.0 | 0.0 |
| 15 to 24 years | 12.8 | 10.9 | 11.4 | 1.9 | 1.4 |
| Men - 15 to 24 years | 16.4 | 13.5 | 13.4 | 2.9 | 3.0 |
| Women - 15 to 24 years | 8.7 | 7.8 | 9.2 | 0.9 | -0.5 |

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey - Table 14-10-0287, formerly CANSIM 282-0087

The largest annual unemployment rate increase occurred for young men in the second quarter of 2018 (+3.0 percentage points). In contrast, the unemployment rate for young women declined from 9.2% in the second quarter of 2017 to 8.7% in the second quarter of 2018; however, this was the result of decreased labour market participation, rather than higher employment. Meanwhile, unemployment rates for adults remained fairly stable, but the rate for men (5.8%) continued to be higher than that of women (5.0%).



Labour market indicators for Indigenous people

Saskatchewan - Labour Market Indicators for Indigenous People

| 3-month moving averages | Indigenous | | Yearly variation (Indigenous) | | Non-Indigenous | | Yearly variation (non-Indigenous) | |
|----------------------------|------------|------------|----------------------------------|------|----------------|------------|--------------------------------------|------|
| Seasonally unadjusted data | Q2 2018 | Q2 2017 | number | % | Q2 2018 | Q2 2017 | number | % |
| Population 15 + ('000) | 86.1 | 85.1 | 1.0 | 1.2 | 798.0 | 791.0 | 7.0 | 0.9 |
| Labour Force ('000) | 56.9 | 54.4 | 2.5 | 4.6 | 555.5 | 556.9 | -1.4 | -0.3 |
| Employment ('000) | 48.2 | 46.8 | 1.4 | 3.0 | 524.5 | 525.1 | -0.6 | -0.1 |
| Full-Time ('000) | 39.3 | 37.9 | 1.4 | 3.7 | 431.3 | 431.6 | -0.3 | -0.1 |
| Part-Time ('000) | 8.9 | 8.9 | 0.0 | 0.0 | 93.2 | 93.5 | -0.3 | -0.3 |
| Unemployment ('000) | 8.7 | 7.7 | 1.0 | 13.0 | 30.9 | 31.8 | -0.9 | -2.8 |
| Unemployment Rate (%) | 15.3 | 14.1 | 1.2 | - | 5.6 | 5.7 | -0.1 | - |
| Participation Rate (%) | 66.1 | 63.9 | 2.2 | - | 69.6 | 70.4 | -0.8 | - |
| Employment Rate (%) | 56.0 | 54.9 | 1.1 | - | 65.7 | 66.4 | -0.7 | - |

Notes: The Labour Force Survey excludes those living on-reserve.

Estimates are based on three-month moving averages.

Totals may not add due to rounding.

Totals may be different from other tables due to adjustments done to indigenous statistics in the Labour Force Survey.

Source: Statistics Canada Labour Force Survey – ESDC custom table

In the second quarter of 2018, the total population aged 15 years and over in Saskatchewan was 884,200. The Indigenous population living off-reserve accounted for 9.7% of that or 86,100 people. Employment among the Indigenous population in Saskatchewan stood at 48,200, representing an increase of +1,400 from the same period last year. This growth was driven entirely by a rise in the number of full-time positions (+1,400) while the number of part-time positions remained steady from the year previous.

The unemployment rate among the Indigenous population was 15.3% in the second quarter of 2018, an increase of 1.2 percentage points from the previous year. Among the non-Indigenous population, the unemployment rate was 5.6% (-0.1 percentage point). Between the second quarter of 2017 and the second quarter of 2018, the participation rate of Indigenous people was 66.1% (+2.2 percentage points) while among the non-Indigenous population, it was 69.6% (-0.8 percentage points). The employment rate for Indigenous people was 56.0% (+1.1 percentage points); for the non-Indigenous population, it decreased to 65.7% (-0.7 percentage points).



EMPLOYMENT BY INDUSTRY

On a quarterly basis, significantly lower services-producing sector (-3,900) employment was only partially offset by gains in the number of goods-producing sector positions (+2,200).

Saskatchewan Quarterly Labour Force Statistics, by Industry

| Seasonally Adjusted Data ('000) | 2nd Quarter | 1st Quarter | 2nd Quarter | Quarterly Variation | | Yearly Variation | |
|---|----------------|----------------|----------------|---------------------|------|------------------|-------|
| , | 2018 | 2018 | 2017 | Number | % | Number | % |
| Total employed, all industries | 567.2 | 568.9 | 568.4 | -1.7 | -0.3 | -1.2 | -0.2 |
| Goods-producing sector | 146.5 | 144.3 | 147.5 | 2.2 | 1.5 | -1.0 | -0.7 |
| Agriculture | 36.9 | 35.7 | 37.9 | 1.2 | 3.4 | -1.0 | -2.6 |
| Forestry, fishing, mining, quarrying, oil and gas | 24.8 | 24.6 | 23.3 | 0.2 | 0.8 | 1.5 | 6.4 |
| Utilities | 6.8 | 6.8 | 7.0 | 0.0 | 0.0 | -0.2 | -2.9 |
| Construction | 49.0 | 49.0 | 51.2 | 0.0 | 0.0 | -2.2 | -4.3 |
| Manufacturing | 29.0 | 28.1 | 28.2 | 0.9 | 3.2 | 0.8 | 2.8 |
| Services-producing sector | 420.7 | 424.6 | 420.8 | -3.9 | -0.9 | -0.1 | 0.0 |
| Trade | 90.3 | 90.9 | 92.3 | -0.6 | -0.7 | -2.0 | -2.2 |
| Transportation and warehousing | 28.0 | 30.0 | 27.8 | -2.0 | -6.7 | 0.2 | 0.7 |
| Finance, insurance, real estate and leasing | 28.8 | 27.6 | 27.0 | 1.2 | 4.3 | 1.8 | 6.7 |
| Professional, scientific and technical services | 26.0 | 27.0 | 31.1 | -1.0 | -3.7 | -5.1 | -16.4 |
| Business, building and other support services | 14.7 | 15.0 | 13.9 | -0.3 | -2.0 | 0.8 | 5.8 |
| Educational services | 41.0 | 41.8 | 40.4 | -0.8 | -1.9 | 0.6 | 1.5 |
| Health care and social assistance | 77.9 | 77.7 | 76.7 | 0.2 | 0.3 | 1.2 | 1.6 |
| Information, culture and recreation | 19.9 | 20.7 | 20.8 | -0.8 | -3.9 | -0.9 | -4.3 |
| Accommodation and food services | 36.9 | 36.9 | 36.7 | 0.0 | 0.0 | 0.2 | 0.5 |
| Other services | 25.7 | 25.7 | 24.6 | 0.0 | 0.0 | 1.1 | 4.5 |
| Public administration | 31.6 | 31.3 | 29.4 | 0.3 | 1.0 | 2.2 | 7.5 |

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey - Table T14-10-0355, formerly CANSIM 282-0088

Those employed in agriculture increased 1,200 in the second quarter of 2018. Seeding of this year's crops has been completed, and according to the Government of Saskatchewan's weekly crop report the majority of crops are at their normal stages of development and are in good condition for this time of year. Saskatchewan farmers have seeded more wheat and barley in 2018 compared to the previous year, while canola, soybeans, and oats seeding has declined in the province potentially due to weaker prices of the crops as well as to exports falling sharply. There has also been a decline in lentils and dry pea seeded across the province.

On an annual basis, the number of people employed in the resource extraction industry (i.e. forestry, fishing, mining, quarrying, oil and gas) increased 1,500 in the second quarter of 2018 compared to a year ago. Conditions in Saskatchewan's oil industry are improving as prices pick up. The industry is benefiting from new cost-effective thermal extraction technology that is anticipated to boost investment over the next few years. Saskatchewan's most recent public offering of crown petroleum and natural gas rights yielded higher rates



(\$725 per hectare on average) than Alberta and British Columbia, reflecting the industry's interest in the province's oil and gas sector.⁶

Employment in construction remained unchanged at 49,000 in the second quarter of 2018, compared to the previous quarter. The 2018-19 summer construction season recently began in Saskatchewan and work has started on a number of infrastructure projects. The Government of Saskatchewan has earmarked \$924.5 million for highway and road projects in this fiscal year, which aim to improve overall safety on the provincial highway system. Some of the major projects that the Province is funding include: 700km of repaving and preventative maintenance projects across the province (\$118 million), as well as Phase II of the Regina Bypass (\$330 million). In addition, the City of Regina is investing \$85.3 million on infrastructure projects in the 2018-19 fiscal year, with the majority of the investment going towards water, wastewater, and drainage systems (\$50 million). Similarly, Saskatoon's municipal government will spend \$61 million to improve 206 lane kilometres of roadways around the city.⁷

There were 900 more individuals employed in manufacturing in the second quarter of 2018. Conditions in the manufacturing industry are uncertain with the NAFTA negotiations underway. For instance, the U.S. government imposed a 25% tariff on steel imports that come from the European Union, Canada, and Mexico on June 1. The changes affect EVRAZ Regina, which is the largest steel company in Western Canada, which produces high-strength steel that is rolled into plate and coil, primarily for tubular products. The facility in Regina employs more than a 1,000 people and spurs six to 10 times as many indirect jobs through a supply chain, primarily in Western Canada. The U.S. government has supported its measures by citing national security concerns around the impact of these imported products on the American domestic industries.⁸

The transportation and warehousing industry recorded the largest decrease in employment among the services-producing industries in this quarter (-2,000). The Canadian Pacific (CP) Railways and the Teamsters Canada Rail reached a four-year tentative agreement for a new contract on May 30. With the new tentative agreement in place, full rail operations – which had been affected in April and early May – resumed at both CP rail and Canadian National (CN) Railways across Canada on May 31. On another positive note, the CN Railway plans to invest \$210 million into expanding its Saskatchewan network in 2018. Furthermore, the company is looking to increase its workforce by approximately 20% across Canada by the end of the year, offering bonuses to attract more workers. CN's investment in Saskatchewan is part of a \$3.4 billion national capital program for 2018, which also includes plans for spending around \$130 million in Manitoba, approximately \$340 million in British Columbia, and \$320 million in Alberta. On the largest decrease in employment among the services.

Employment in healthcare and social assistance is up 1,200 positions on the year. There have been some positive announcements related to healthcare and social assistance over the past two months. In its 2018-19 budget, the Provincial government earmarked \$5.77 billion in spending for health care and social services and assistance in this fiscal year. The province's health authority will receive \$3.5 billion of the funding, and \$49.4 million will go towards physician services, which includes the recruitment of new specialists and primary physicians. ¹¹ Also, the federal and provincial governments signed a bilateral agreement on May 14 to improve healthcare services. Under the new agreement, the Province will invest about \$158M in targeted funding over five years as part of a ten-year federal commitment of nearly \$350M. ¹²



Lastly, employment in educational services declined 800 in this quarter. The 2017-18 school year is now over, and in the upcoming school year school divisions in Regina and Saskatoon are planning to hire more teachers and support staff for the 2018-19 school year due to an increase in student enrolment. The Regina Public is planning to add 23.5 full-time-equivalent (FTE) teachers and 16.5 FTE educational assistants. Meanwhile, the Regina Catholic school board will see an additional 20 FTE teachers and 2.6 education support staff. A further 11.75 FTEs will be added in areas including English as an additional language programming, elementary school counselling, and the Early Learning Intensive Support pilot program. Similarly, the Saskatoon Public School Division plans to hire more than 21 new teachers, despite having a budgetary shortfall of more than \$15 million for the 2018-19. Alongside the new teachers, the division will hire more than 18 full-time educational assistants. Likewise, the Saskatoon Catholic division is set to hire 37 teachers and 19 education assistants to support an increase of 490 students in the upcoming school year. ¹³

REGIONAL ANALYSIS

Compared to the same period last year, employment is down in three out of five economic regions in Saskatchewan. Meanwhile, the unemployment rate decreased in two out of the five economic regions during this period.

Saskatchewan Quarterly Labour Force Statistics, by Economic Region

| | | Employment | | Unemployment Rate | | | |
|------------------------------|-------------------------------|-------------------------------|----------------------------|----------------------------|----------------------------|-----------------------------------|--|
| Not Seasonally Adjusted Data | 2nd Quarter 2018 ('000) | 2nd Quarter 2017 ('000) | Yearly Variation (%) | 2nd Quarter 2018 (%) | 2nd Quarter 2017 (%) | Yearly Variation (% points) | |
| Saskatchewan | 571.2 | 573.0 | -0.3 | 6.5 | 6.4 | 0.1 | |
| Economic Regions | | | | | | | |
| Regina - Moose Mountain | 186.5 | 182.9 | 2.0 | 5.9 | 5.6 | 0.3 | |
| Swift Current - Moose Jaw | 50.2 | 51.4 | -2.3 | 4.4 | 4.6 | -0.2 | |
| Saskatoon - Biggar | 200.7 | 198.3 | 1.2 | 6.7 | 7.7 | -1.0 | |
| Yorkton - Melville | 34.7 | 40.4 | -14.1 | 8.0 | 4.0 | 4.0 | |
| Prince Albert and Northern | 99.2 | 100.0 | -0.8 | 7.8 | 7.0 | 0.8 | |

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – Table 14-10-0293, formerly CANSIM 282-0122

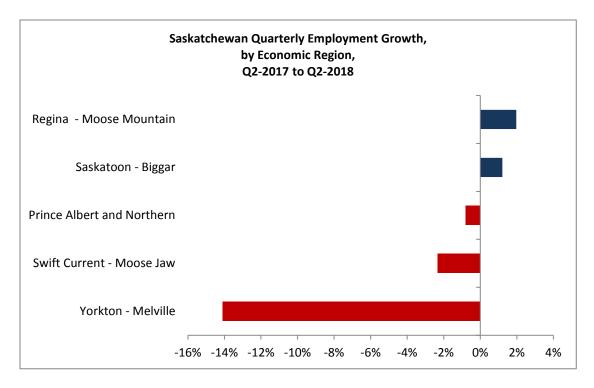
The number of people employed in Regina-Moose Mountain increased 2,000 between the second quarter of 2017 and the second quarter of 2018. Considerable employment gains in the services-producing sector (+4,200) overshadowed a slight decrease in the goods-producing sector employment during this period. Educational services led employment gains in the region, adding 2,900 positions on the year. In the 2018-19 provincial budget, the Province restored \$30 million for K-12 education after funding was reduced in 2017. The funding allows school divisions across the province to hire up to 400 teachers and other educational support staff. Overall, The Regina Public and Catholic School Divisions are planning to add 43.5 full-time-equivalent (FTE) teachers and 30.85 FTE educational support staff in the upcoming school year.

Employment in Saskatoon-Biggar increased 1,200 this quarter compared to a year ago. The number of people working in the goods-producing sector rose during this period, while employment in the services-producing sector remained flat. Manufacturing activity is booming in the region due in part to increased activity in the



province's resource extraction industry. Looking ahead, the Conference Board of Canada anticipates that Saskatoon's real GDP will grow 2% in 2018, after advancing 2.8 percent% in the last year.

Finally, the number of people employed in Yorkton-Melville has declined significantly over the past year. The region now employs 34,700 people, down 5,700 compared to the same period last year. The largest drop in employment was recorded in the region's construction and accommodation and food services industries during this period. The \$3 billion expansion of Nutrien's (previously Potash Corporation of Saskatchewan) Rocanville mine was a source of significant employment in the region. With the project completed in October 2017, there are no major construction projects ongoing in the region which has affected employment levels.¹⁶



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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For information on the Labour Force Survey, please visit the Statistics Canada Web site at: www.statcan.gc.ca

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