



Labour Market Bulletin

Manitoba

2015 (Annual Edition)



This Labour Market Bulletin provides an analysis of Labour Force Survey results for the province of Manitoba, including the regions of Winnipeg, Northern Manitoba and Southern Manitoba.

OVERVIEW

Employment

Manitoba experienced a higher year-over-year employment growth rate (1.6%) in 2015 than any other province in Canada. Oil and gas developments in the province are relatively small, and the Manitoba economy has maintained momentum at the end of the current resource cycle, while other more extraction-focused economies have faltered.

Yearly gains came in full-time employment (+8,700), while those employed part-time increased by 1,100. Full-time employment has trended upward over the last five years and accounted for 80.9% of all employment in Manitoba in 2015, up from 80.3% in 2010.

Gains in the public sector were responsible for most employment growth in Manitoba through 2015, with employment up 4,700 over the year. Meanwhile, for the first time since the 2009 recession, self-employment accounted for more yearly employment growth (+2,700) than the private sector (+2,300).

Unemployment

Manitoba's labour force grew rapidly over the year – up 12,000 compared to 2014 – and strong employment gains were not enough to employ all individuals looking for work. Accordingly, the number of unemployed persons in the province increased significantly in 2015 (+2,200) and the unemployment rate climbed from 5.4% to 5.6%. Nonetheless, Manitoba retains the second lowest rate nationwide, sitting behind Saskatchewan (5.0%). Looking ahead, the Conference Board of Canada expects the province's unemployment rate to rise to 5.7% in 2016.¹

Youth unemployment remained high in 2015, with the unemployment rate averaging 11.4% for those aged 15 to 24, more than double the rate of 4.5% for those aged 25 and older. Compared to the year before, the youth unemployment rate is up 0.7 percentage points. Those aged 55 and older had the lowest unemployment rate (3.8%) among all age groups in 2015.

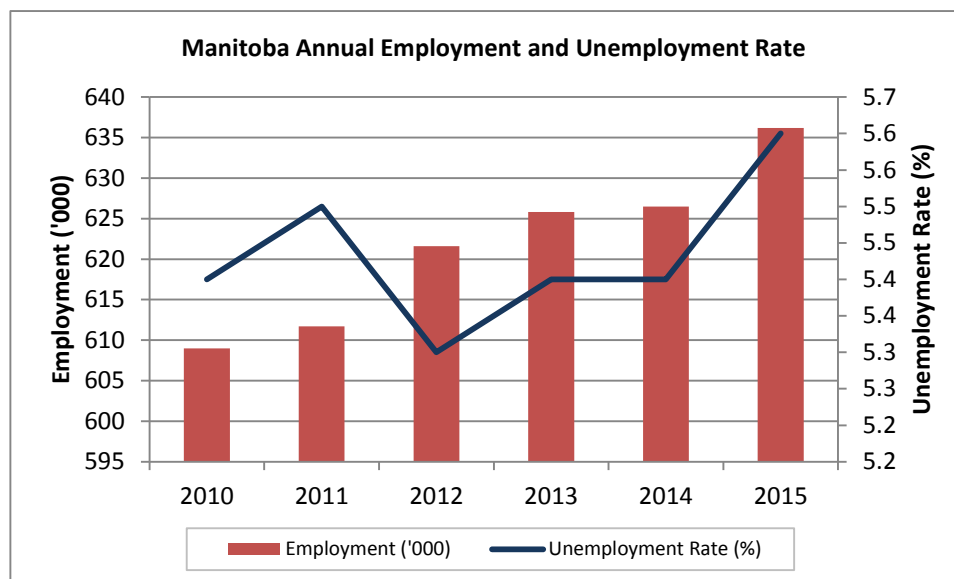
Looking at trends by gender, the unemployment rate remains the highest among young men at 11.8%. Young women saw the largest yearly increase of any age group in 2015, increasing nearly two full percentage points from 9.2% to 11.1%.

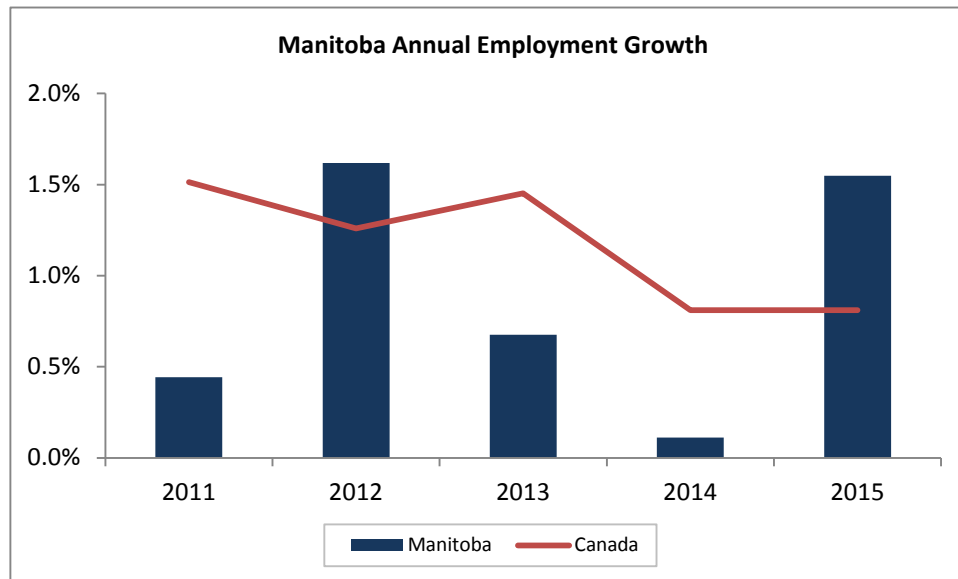
Manitoba Annual Labour Force Statistics

Labour Force Survey Estimates	2015	2014	2013	2014 to 2015		2013 to 2014	
				Number	%	Number	%
Population 15+ ('000)	987.2	976.4	964.3	10.8	1.1	12.1	1.3
Labour Force ('000)	674.1	662.1	661.5	12.0	1.8	0.6	0.1
Employment ('000)	636.2	626.5	625.8	9.7	1.5	0.7	0.1
Full-Time ('000)	514.7	506.0	502.6	8.7	1.7	3.4	0.7
Part-Time ('000)	121.5	120.4	123.2	1.1	0.9	-2.8	-2.3
Unemployment ('000)	37.9	35.7	35.7	2.2	6.2	0.0	0.0
Unemployment Rate (%)	5.6	5.4	5.4	0.2	-	0.0	-
Participation Rate (%)	68.3	67.8	68.6	0.5	-	-0.8	-
Employment Rate (%)	64.4	64.2	64.9	0.2	-	-0.7	-

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey Estimates – CANSIM Table 282-0002





Manitoba Annual Unemployment Rates, by Gender and Age

Labour Force Survey Estimates	2015	2014	2013	2014 to 2015	2013 to 2014
				(% points)	(% points)
Total	5.6	5.4	5.4	0.2	0.0
25 years and over	4.5	4.3	4.3	0.2	0.0
Men - 25 years and over	4.4	4.1	4.2	0.3	-0.1
Women - 25 years and over	4.6	4.6	4.5	0.0	0.1
15 to 24 years	11.4	10.7	10.7	0.7	0.0
Men - 15 to 24 years	11.8	11.8	11.9	0.0	-0.1
Women - 15 to 24 years	11.1	9.2	9.6	1.9	-0.4

Source: Statistics Canada Labour Force Survey Estimates – CANSIM Table 282-0002

EMPLOYMENT BY INDUSTRY

In 2015, employment in Manitoba’s services-producing sector jumped sharply (+9,300) after two years at a near standstill. Healthcare and social assistance and educational services saw the largest growth in the sector, adding 2,900 and 2,800 individuals respectively. The Manitoba government continues to follow through on commitments to reduce early-years classroom sizes and to increase nurse recruitment to meet the demands of a rapidly aging population. Conversely, public administration shrank by 500, reaching its lowest levels since 2000.

Trade remained the province’s second largest industry in 2015 despite dropping 1,600 employees through the year. Losses in the industry were found entirely in retail trade. Nonetheless, a number of retail developments should help trade employment return to positive growth in the long-term. Construction of a 100-store outlet

mall is underway in Winnipeg, which will create an estimated 1,300 jobs when it opens for business in early 2017.² Supermarket-chain Save-On-Foods also announced plans to open 12 new stores in Winnipeg and an undisclosed number of new stores across rural Manitoba over the next three to five years. Three locations are set to open in Winnipeg this year. Each store is expected to create 150 new retail positions. Meanwhile, business, building, and other support services expanded by 9.9% in 2015.

Accommodations and food services saw strong gains in 2015 (+1,800), capitalizing on high-profile sporting events like the Grey Cup and the FIFA Women's World Cup. The Winnipeg region benefitted from an estimated \$85.5-million in additional revenue from the Grey Cup event alone. Going forward, the city will host an NHL Heritage Classic game in October 2016 and the Canada Summer Games in 2017.

The transportation and warehousing industry ended the year up 900 (+2.4%) employees in spite of an 8-month run of employment losses late in 2015. Early-year employment gains carried the industry throughout 2015 thanks in part to efforts to clear a major backlog of grain shipments. Going forward, shipping requirements of a strong provincial manufacturing sector and the introduction of low-cost airline NewLeaf Travel to Winnipeg should positively impact employment trends.

Manitoba's goods-producing sector remained virtually unchanged in 2015, with just 500 more people employed over the year. The sector's flat performance can largely be attributed to substantial losses in the province's forestry, fishing, mining, quarrying, oil and gas industry (-1,200), which offset gains in a number of other areas. Although not as significant an employer in Manitoba as other western provinces, the industry has been negatively impacted by the global downturn in commodity prices. Agriculture also employed 900 fewer individuals for the second year in a row. Nonetheless, farmers in most parts of the province expect healthy receipts after enjoying a better growing season than their drought-stricken counter-parts in other western provinces.

Manufacturing saw growth in 2015, with 800 more employed in the industry. A lower Canadian dollar and recovering U.S. economy have boosted demand from key manufacturing sectors. However, areas of pronounced weakness within the industry – likely reflecting a spillover from the downturn in Alberta and Saskatchewan's energy sectors – are inhibiting overall growth³.

Construction industry employment was up over the year (+1,700) in 2015. A number of large hydro and infrastructure projects were able to offset an 11.6% annual decrease in housing starts in Manitoba. The outlook for construction employment in the near-term is positive. A BuildForce Canada forecast anticipates employment in the industry will expand and peak in 2016 and 2017, then taper off afterward.⁴ Non-residential construction projects are expected to dominate hiring trends in the short-term. Core infrastructure investment remains a priority for the province. The Manitoba government recently extended its infrastructure plan by three years and increased total funding to \$10-billion throughout the province.

Manitoba Annual Labour Force Statistics, by Industry

Labour Force Survey Employment Estimates ('000)	2015	2014	2013	2014 to 2015		2013 to 2014	
				Number	%	Number	%
Total employment, all industries	636.2	626.5	625.8	9.7	1.5	0.7	0.1
Goods-producing sector	147.4	146.9	146.6	0.5	0.3	0.3	0.2
Agriculture	23.2	24.1	25.0	-0.9	-3.7	-0.9	-3.6
Forestry, fishing, mining, quarrying, oil and gas	5.7	6.9	6.6	-1.2	-17.4	0.3	4.5
Utilities	8.3	8.2	7.3	0.1	1.2	0.9	12.3
Construction	45.6	43.9	45.0	1.7	3.9	-1.1	-2.4
Manufacturing	64.6	63.8	62.6	0.8	1.3	1.2	1.9
Services-producing sector	488.8	479.5	479.2	9.3	1.9	0.3	0.1
Wholesale and retail trade	91.9	93.5	92.1	-1.6	-1.7	1.4	1.5
Transportation and warehousing	38.4	37.5	37.1	0.9	2.4	0.4	1.1
Finance, insurance, real estate, rental and leasing	32.7	33.8	33.3	-1.1	-3.3	0.5	1.5
Professional, scientific and technical services	25.4	24.7	26.6	0.7	2.8	-1.9	-7.1
Business, building and other support services	18.8	17.1	20.0	1.7	9.9	-2.9	-14.5
Educational services	52.2	49.4	45.9	2.8	5.7	3.5	7.6
Health care and social assistance	102.1	99.2	95.9	2.9	2.9	3.3	3.4
Information, culture and recreation	22.6	21.8	24.5	0.8	3.7	-2.7	-11.0
Accommodation and food services	41.3	39.5	40.5	1.8	4.6	-1.0	-2.5
Other services (except public administration)	29.3	28.4	29.0	0.9	3.2	-0.6	-2.1
Public administration	34.1	34.6	34.3	-0.5	-1.4	0.3	0.9

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey Estimates – CANSIM Table 282-0008

REGIONAL ANALYSIS

The strength of local labour markets varied across Manitoba in 2015, with strong employment growth occurring in some of the province's economic regions and moderate to severe losses occurring in others.

The Winnipeg region was responsible for nearly all employment growth in the province over the year thanks to strong gains in its services-producing sector. Winnipeg contains 60% of Manitoba's population and remains the province's most important labour market. The region's 3.4% rise in employment represented 12,500 jobs. Gains in industries such as healthcare and social assistance (+2,800), trade (+2,100), and educational services (+1,600) led employment growth. Construction employment expanded (+400) in 2015, ending a two-year annual downward trend. Going forward, jobs in construction should remain in high demand. Ground has been broken on the \$400-million True North Square multi-use complex, and the 45-story SkyCity Centre is moving forward through the development phase.

Outside of Winnipeg, there were positive annual employment gains in the Parklands and Northern (+2.9%) and Southwest (+0.2%) regions. A 23.8% increase in agriculture played a central role in driving up employment in Parklands and Northern, which posted its strongest gains in five years. Large-scale hydro infrastructure projects

such as the Keeyask generating station and the Bipole III transmission line should see labour market activity remain active in the province’s northern territory.

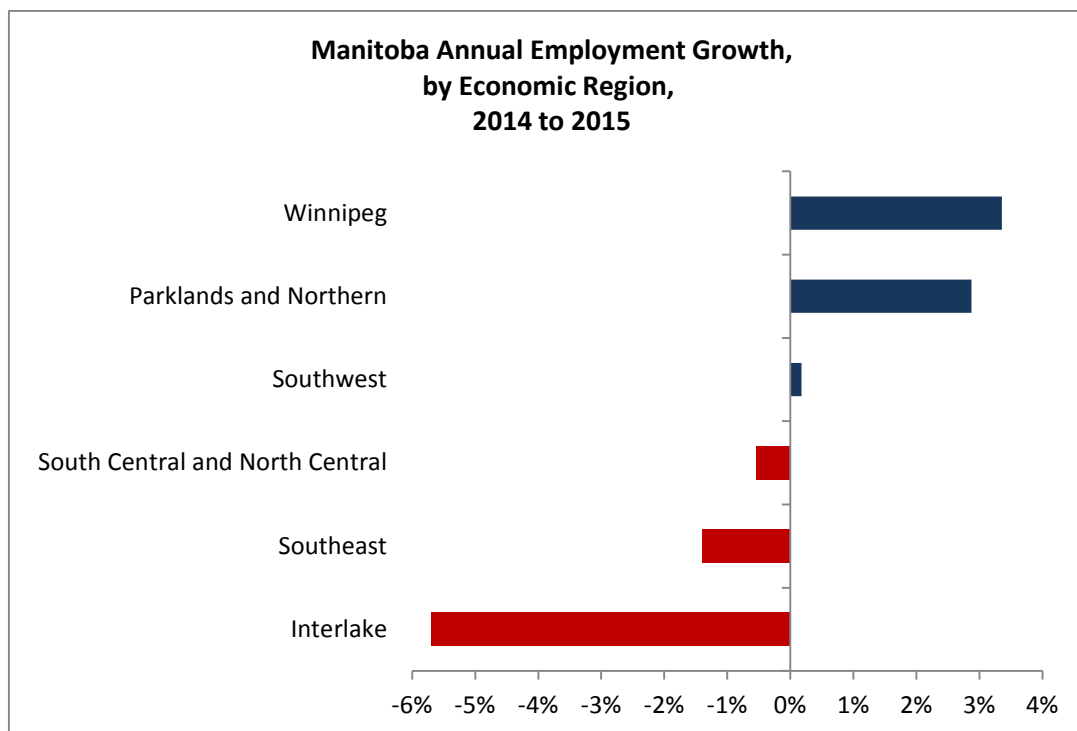
Employment dropped in Manitoba’s other three regions in 2015. The Interlake region claimed the provinces’ largest decrease (-5.7%), with 2,800 fewer individuals employed year-over-year. In Southeast, employment fell 1.4% (-800). Both regions’ declines stemmed from a steep drop in the agriculture industry, which shed 2,100 individuals in each region. The drop is somewhat surprising, considering the previously mentioned favourable growing conditions Manitoba enjoyed during the summer months. Finally, the South Central and North Central region remained virtually unchanged in 2015, with employment falling 0.5%.

Manitoba Annual Labour Force Statistics, by Economic Region

Labour Force Survey Estimates: Employment ('000)	2015	2014	2013	2014 to 2015		2013 to 2014	
				Number	%	Number	%
Manitoba	636.2	626.5	625.8	9.7	1.5	0.7	0.1
Economic Regions							
Southeast	56.3	57.1	58.0	-0.8	-1.4	-0.9	-1.6
South Central and North Central	54.8	55.1	54.5	-0.3	-0.5	0.6	1.1
Southwest	57.7	57.6	58.2	0.1	0.2	-0.6	-1.0
Winnipeg	385.3	372.8	373.6	12.5	3.4	-0.8	-0.2
Interlake	46.3	49.1	46.8	-2.8	-5.7	2.3	4.9
Parklands and Northern	35.8	34.8	34.7	1.0	2.9	0.1	0.3

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – CANSIM Table 282-0123



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 [Statistics Canada](http://www150.statcan.gc.ca/n1/pub/75-602-x/2015001/article/14861-eng.htm)

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¹ Conference Board of Canada, Provincial Outlook Executive Summary: Winter 2016

² Talia Ricci. (September 25, 2015). First outlet mall arrives in Manitoba. Global News. <http://globalnews.ca/news/2242267/first-outlet-mall-arrives-to-manitoba/>

³ RBC Economics, Provincial Outlook: December 2015
<http://www.rbc.com/economics/economic-reports/pdf/provincial-forecasts/man.pdf>

⁴ BuildForce Canada, Construction and Maintenance Looking Forward: Manitoba