



# Labour Market Bulletin

Nova Scotia

March 2018



This Labour Market Bulletin provides an analysis of Labour Force Survey results for the province of Nova Scotia, including the regions of Annapolis Valley, Cape Breton, Southern, Halifax and North Shore.

## OVERVIEW

During the first three months of 2018, there were on average 454,900 people employed in Nova Scotia. This was an increase of 4,300 employed persons over the previous quarter, arising from solid gains in full-time positions, offsetting smaller losses in part-time employment. With improvements in the job market, the labour force expanded by 1,300 over the previous quarter. Furthermore, the rate of unemployment was lower in the first quarter of 2018, compared the last quarter of 2017.

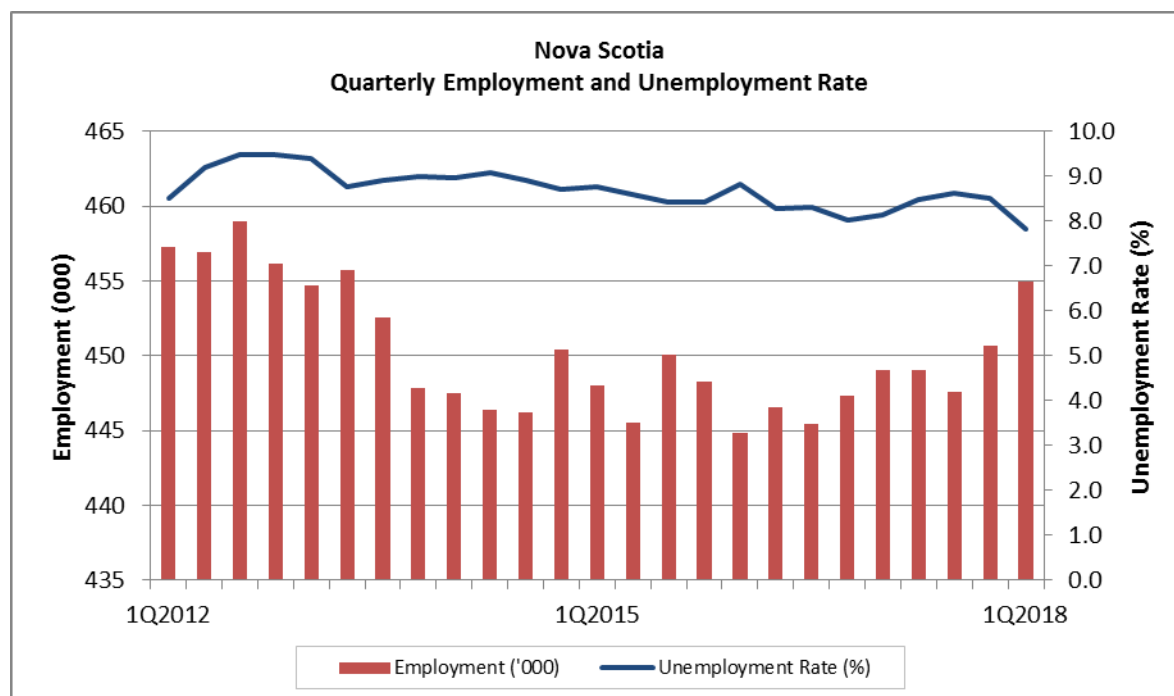
Nova Scotia Quarterly Labour Force Statistics

Seasonally Adjusted Quarterly Data	1st Quarter 2018	4th Quarter 2017	1st Quarter 2017	Quarterly Variation		Yearly Variation	
				Number	%	Number	%
<b>Population 15 + ('000)</b>	796.2	794.9	790.5	1.3	0.2	5.7	0.7
<b>Labour Force ('000)</b>	493.6	492.6	488.9	1.0	0.2	4.7	1.0
<b>Employment ('000)</b>	454.9	450.6	449.1	4.3	1.0	5.8	1.3
Full-Time ('000)	373.7	367.0	362.9	6.7	1.8	10.8	3.0
Part-Time ('000)	81.2	83.6	86.2	-2.4	-2.9	-5.0	-5.8
<b>Unemployment ('000)</b>	38.6	42.0	39.8	-3.4	-8.1	-1.2	-3.0
<b>Unemployment Rate (%)</b>	7.8	8.5	8.1	-0.7	-	-0.3	-
<b>Participation Rate (%)</b>	62.0	62.0	61.9	0.0	-	0.1	-
<b>Employment Rate (%)</b>	57.1	56.7	56.8	0.4	-	0.3	-

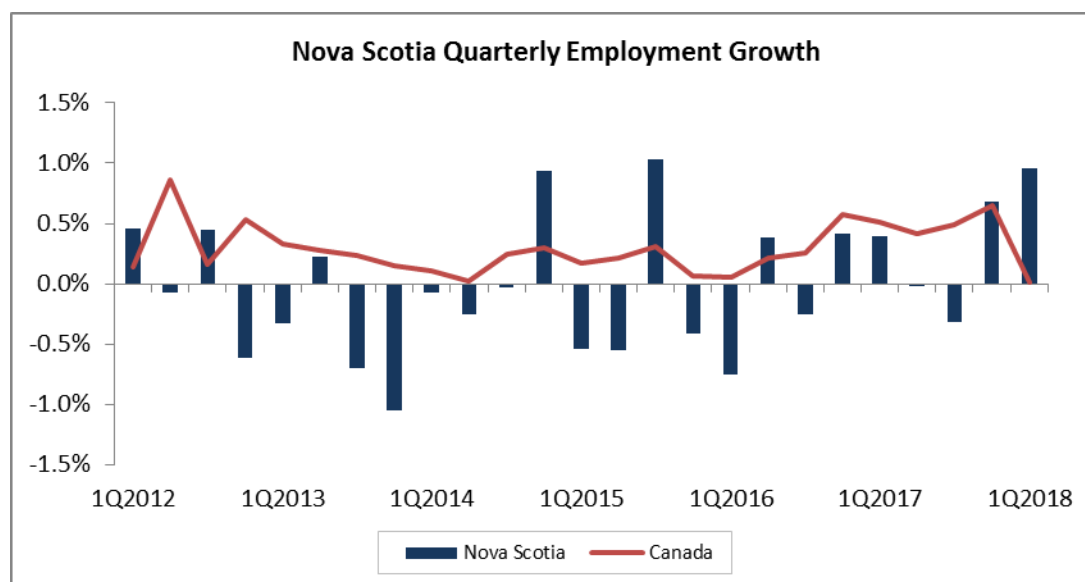
Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – CANSIM Table 282-0087

Employment in the first quarter of 2018 in Nova Scotia was higher than it was during the same period in 2017. At 1.3%, employment over the year grew at a rate slightly below the national average rate (1.6%). Additional full-time employment was the main contributor to the job growth. The unemployment rate for the first quarter of 2018 was lower when compared to the same period in 2017. This appears to be attributed to gains in employment outpacing both the gains in working-age population and labour force.



Employment in Nova Scotia has been fairly stagnant over the previous five years, demonstrating a cycle of expansions and contractions cancelling each other out. Signs of improvement have been displayed in the most recent two quarters where consecutive gains have pushed employment to a five-year high.



The number of employed males expanded by 3,700 over the previous quarter, and now stands at its highest point since the first quarter of 2013. The most recent gains in employment helped lower the unemployment rate for males to a multi-year low, at 9.2%. Female employment increased marginally since the previous quarter but remains lower than the same period in 2017. The unemployment rate among females decreased to 6.4% in the latest quarter, bringing it closer to the national average of 5.4%.

Employment among those aged 25 to 54 experienced the largest gains, up 5,200 on a year-over-year basis. The unemployment rate for this age group was slightly lower in the first quarter of 2018. Employment among those aged 15 to 24 experienced little change in employment, decreasing by 500 jobs since the previous year. The unemployment rate among this age group increased by 2.2 percentage points, resting at 17.7%. This increase can be partially attributed to the expansion of the labour force for this age group.

Nova Scotia Quarterly Unemployment Rates, by Gender and Age

Seasonally Adjusted Data	1st Quarter	4th Quarter	1st Quarter	Quarterly	Yearly
	2018 (%)	2017 (%)	2017 (%)	Variation (% points)	Variation (% points)
<b>Total</b>	7.8	8.5	8.1	-0.7	-0.3
<b>25 years and over</b>	6.2	7.0	7.0	-0.7	-0.7
Men - 25 years and over	7.3	8.4	9.0	-1.1	-1.7
Women - 25 years and over	5.0	5.4	4.8	-0.4	0.2
<b>15 to 24 years</b>	17.6	18.0	15.4	-0.4	2.2
Men - 15 to 24 years	20.6	22.4	18.9	-1.8	1.7
Women - 15 to 24 years	14.8	13.6	11.6	1.2	3.2

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – CANSIM Table 282-0087

In the first quarter (Q1) of 2018, the total population aged 15+ in the Atlantic Provinces was 1.99 million. The Indigenous population living off-reserve accounted for 3.5% of that, or 69,200 people. Employment among Indigenous people in the Atlantic provinces reached 34,800, representing an increase of 2000 (6.1%) from a year earlier (Q1 2017). The increase was in both full-time positions (+1,500 or +5.6%) and part-time positions (+500 or 8.3%).

Atlantic - Labour Market Indicators for Indigenous People

3-month moving averages Seasonally unadjusted data	Indigenous		Yearly variation (Indigenous)		Non-Indigenous		Yearly variation (non-Indigenous)	
	Q1 2018	Q1 2017	number	%	Q1 2018	Q1 2017	number	%
<b>Population 15 + ('000)</b>	69.2	67.3	1.9	2.8%	1,922.5	1,915.2	7.3	0.4%
<b>Labour Force ('000)</b>	41.4	38.1	3.3	8.7%	1,153.0	1,153.8	-0.8	-0.1%
<b>Employment ('000)</b>	34.8	32.8	2.0	6.1%	1,029.4	1,024.9	4.5	0.4%
<b>Full-Time ('000)</b>	28.3	26.8	1.5	5.6%	850.4	838.4	12.0	1.4%
<b>Part-Time ('000)</b>	6.5	6.0	0.5	8.3%	179.0	186.5	-7.5	-4.0%
<b>Unemployment ('000)</b>	6.6	5.3	1.3	24.5%	123.6	128.9	-5.3	-4.1%
<b>Unemployment Rate (%)</b>	16.0	13.8	2.2	-	10.7	11.2	-0.5	-
<b>Participation Rate (%)</b>	59.9	56.5	3.4	-	60.0	60.2	-0.2	-
<b>Employment Rate (%)</b>	50.3	48.7	1.6	-	53.5	53.5	0.0	-

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.

The unemployment rate among the Indigenous population was 16% in Q1 2018, representing an increase of 2.2 percentage points (pp) from the previous year. For the non-Indigenous population, the unemployment rate was also relatively stable at 10.7% (-0.5pp). Year-over-year, the participation rate among Indigenous people

increased to 59.9% (+3.4pp) while the participation rate for the non-Indigenous population stood at 60 % (-0.2pp). The employment rate of the Indigenous population increased year-over-year to 50.3% (+1.6pp), and the employment rate amongst the non-Indigenous population remained unchanged at 53.5%, compared to a year earlier.

## EMPLOYMENT BY INDUSTRY

Gains in employment in the first quarter of 2018 were primarily attributed to growth in the **Goods-producing sector**, increasing by 3,100 jobs since the previous quarter. Employment in this sector averaged 84,200 in the first quarter of 2018, the highest it has been since late 2015. Among the four Atlantic Provinces, Nova Scotia had the strongest quarterly growth rate in the Goods-producing sector, at 3.9%. Employment in the **Services-producing sector** in Nova Scotia increased marginally on a quarter-over-quarter basis, up 1,100 jobs. Employment in this sector has been trending upwards since the end of 2013, adding over 10,000 jobs.

On a year-over-year basis, almost every industry in the Goods-producing sector experienced job growth. Those experiencing gains included **Manufacturing** (+3,300), **Construction** (+1,200), **Agriculture** (+500) and **Utilities** (+200). Gains in these industries offset the losses in the **Forestry, fishing, mining, quarrying, oil and gas** industry (-1,900). Employment in the Forestry, fishing, mining, quarrying, oil and gas industry remains at a ten-year low.

All except two industries in the Service-producing sector had growth in employment since last year. Those industries seeing the largest gains from a year ago include **Educational services** (+3,300), **Accommodation and food services** (+3,200) and **Information, culture and recreation** (+2,600). Growth in the latter two can be attributed to stronger tourism activity in Nova Scotia. **Healthcare and social assistance** experienced the largest decrease among all industries, shedding 6,400 jobs since the first quarter in 2017.

Nova Scotia Quarterly Employed Labour Force, by Industry

Seasonally Adjusted Data ('000)	1st Quarter 2018	4th Quarter 2017	1st Quarter 2017	Quarterly Variation		Yearly Variation	
				Number	%	Number	%
<b>Total employed, all industries</b>	454.9	450.6	449.1	4.3	1.0	5.9	1.3
<b>Goods-producing sector</b>	84.2	81.1	80.9	3.1	3.9	3.4	4.2
Agriculture	5.2	4.9	4.7	0.3	6.8	0.5	11.3
Forestry, fishing, mining, quarrying, oil and gas	9.8	9.7	11.7	0.1	1.4	-1.9	-16.5
Utilities	4.1	4.0	3.9	0.1	2.5	0.2	6.0
Construction	33.8	31.1	32.6	2.7	8.6	1.2	3.7
Manufacturing	31.3	31.4	27.9	-0.2	-0.5	3.3	11.9
<b>Services-producing sector</b>	370.7	369.5	368.2	1.1	0.3	2.4	0.7
Trade	77.4	75.3	75.9	2.1	2.7	1.5	2.0
Transportation and warehousing	19.5	20.1	19.3	-0.6	-3.0	0.2	0.9
Finance, insurance, real estate and leasing	22.7	23.3	22.7	-0.6	-2.6	0.0	0.0
Professional, scientific and technical services	26.9	28.0	29.3	-1.1	-3.9	-2.4	-8.3
Business, building and other support services	18.0	18.1	17.8	-0.1	-0.6	0.2	1.1
Educational services	37.6	38.0	34.3	-0.5	-1.2	3.3	9.5
Health care and social assistance	69.0	70.3	75.4	-1.3	-1.9	-6.4	-8.4
Information, culture and recreation	17.6	17.2	15.0	0.4	2.5	2.6	17.3
Accommodation and food services	33.5	31.2	30.3	2.3	7.4	3.2	10.6
Other services	18.7	18.7	19.1	0.0	0.0	-0.4	-2.3
Public administration	29.9	29.4	29.1	0.6	1.9	0.8	2.7

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – CANSIM Table 282-0088

## REGIONAL ANALYSIS

Over the past year, labour market conditions have been mixed across regions of Nova Scotia. Two economic regions experienced growth in employment on a year-over-year basis in the first quarter of 2018: Annapolis Valley and Halifax Region. The Annapolis Valley region has been among the fastest growing regions in Canada at 5.3%, outpacing the national average of 1.6%. Employment in Cape Breton has decreased marginally from a year ago, whereas more notable declines occurred in the Southern region (-3.1%) and North Shore region (-4.0%).

Employment in **Cape Breton** decreased by 800 jobs (-1.7%) in the first quarter of 2018, compared to the same period in 2017. Gains in part-time employment (+800) were not enough to offset the decrease in full-time employment (-1,600). Due to the labour force in the region shrinking by 500, the unemployment rate also decreased marginally to 15.8% over the year. Employment within the Services-producing sector fell by 1,800 positions compared to a year ago. The losses occurred primarily in Educational, Wholesale and retail trade, down over the year by 1,800 and 1,100 respectively. The Goods-producing sector in Cape Breton region experienced modest gains in employment in the first quarter of 2018, up 1,600, compared to the same period in 2017. The bulk of the gain in this sector took place in Manufacturing, adding 1,500 jobs compared to a year ago.

Employment numbers in the latest quarter were lower in the **North Shore** region for both part-time and full-time jobs, down a combined 2,700 compared to a year ago. Fewer employment opportunities have led some individuals to exit the labour market, causing the unemployment rate to increase from 9.5% to 10.2% for the same period. The Services-producing sector experienced the majority of the employment losses. Healthcare and social assistance had the largest loss (-2,900) followed by Other services (-1,400). The Goods-producing sector remained somewhat stable in the first quarter of 2018. Manufacturing employment grew by 1,500, while Agriculture, Forestry, fishing, mining, quarrying, oil and gas, Utilities and Construction all reported employment reductions.

Nova Scotia Quarterly Labour Force Statistics, by Economic Region

3-Month Moving Averages Seasonally Unadjusted Data	Employment			Unemployment Rate		
	1st Quarter 2018 ('000)	1st Quarter 2017 ('000)	Yearly Variation (%)	1st Quarter 2018 (%)	1st Quarter 2017 (%)	Yearly Variation (% points)
<b>Nova Scotia</b>	440.4	434.2	1.4	8.8	9.2	-0.4
<b>Economic Regions</b>						
Cape Breton	45.2	46.0	-1.7	15.8	15.9	-0.1
North Shore	65.0	67.7	-4.0	10.2	9.5	0.7
Annapolis Valley	55.7	52.9	5.3	9.7	9.7	0.0
Southern	46.2	47.7	-3.1	8.9	10.8	-1.9
Halifax	228.3	219.8	3.9	6.7	7.2	-0.5

Note: Totals may not add due to rounding

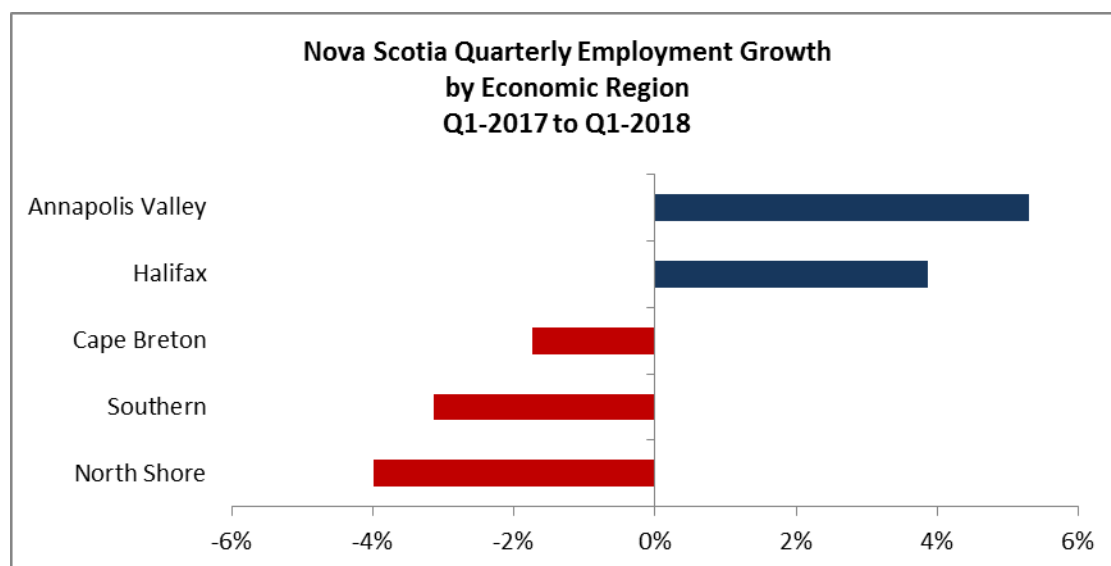
Source: Statistics Canada Labour Force Survey – CANSIM Table 282-0122

Labour market conditions in the **Annapolis Valley** region continue to display positive growth. Employment in the region expanded by 2,800 jobs in the first quarter of 2018 compared to the same period in 2017. The growth was nearly equal between full-time (+1,200) and part-time employment (+1,500). Participation in the labour force increased within the region causing the unemployment rate to remain steady at 9.7%. The Services-producing sector had the largest increase in employment, accounting for three-quarters of the overall job gain. Employment growth was primarily within Wholesale and retail trade (+2,300), while the remaining industries

experienced marginal changes. Employment in the Goods-producing sector was slightly higher than it was last year, growing by 700 jobs. Agriculture accounted for the majority of this growth.

Labour market indicators in the **Southern** region trended downward in the first quarter of 2018. Employment decreased by 1,500 jobs, all of which were in positions offering full-time hours. Due to the weakening labour market conditions, some individuals opted out of the labour force, causing the unemployment rate to decrease to 8.9%, from 10.8% last year. The Goods-producing sector continues to shed jobs, decreasing by 1,800 positions. On the other hand, the Services-producing sector had a small employment increase of 400 jobs. Growth was primarily located within the Educational services and Accommodation and food services industries.

In the first quarter of 2018, **Halifax** region had the largest year-over-year employment increase in Nova Scotia. Employment grew by 8,500 jobs, driven by full-time employment (+13,500) offsetting the losses in part-time employment (-5,000). Due to positive labour market conditions, the unemployment rate decreased by half a percentage point from the previous year to 6.7%. The Services-producing sector increased employment within the Halifax region by 5,900 jobs in the first quarter of 2018. Most industries showed signs of growth since the previous year; Information, Culture and recreation (+2,900), and Accommodation and food services (+2,800) were the largest contributors to this growth. Employment in the Goods-producing sector grew in the first quarter of 2018, expanding by 2,600 over the year.



**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 further information,** please contact the LMI team at:

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