



Environmental Scan

Manitoba

2018



Once a year, Service Canada develops Economic/Environmental Scans (E-Scan) that provide a general overview of demographic, economic and labour market conditions and trends. E-scans will be of interest to those who seek to know more about the state of a provincial or regional economy and labour market. Facts and statistics presented in this document reflect information available as of April 2018.

HIGHLIGHTS

- Rail access to Churchill remains in disrepair, driving up the prices of food and fuel in the remote northern community.
- Employment in Northern Manitoba will decline over the medium-term, as mining companies scale back on their operations.
- Overall employment is expected to grow more slowly in 2018 and 2019.
- Increasing global demand will strengthen the agriculture and manufacturing sectors.
- Non-residential construction is expected to decline in the next few years as major construction projects, such as the True North Square and the Keeyask hydroelectric generating station, near completion.

ECONOMIC CONTEXT

Global Outlook: Good Times for Now

The International Monetary Fund (2018) predicts continued global economic growth (3.9%) over the next two years.¹ Though advanced economies are better positioned to capitalize on the rising tide of global investment and trade, developing countries are expected to grow at an even faster pace (5.0%) this year.² The European Union appears to be avoiding the negative economic consequences of the United Kingdom's exit. Nonetheless, high levels of personal and corporate debt, coupled with growing trade protectionism, have reduced prospects for growth across much of Europe.

Despite a slow start in 2018, the US economy is expected to grow with increased consumer spending and reductions to personal and corporate taxes. The Bank of Canada's most recent Monetary Report pegs growth in real GDP in the US to average 2.5% over the 2017-2019 forecast period. However, the current U.S. administration's willingness to explore protectionist trade policies introduces a new level of market uncertainty.

WORLD ECONOMIC OUTLOOK

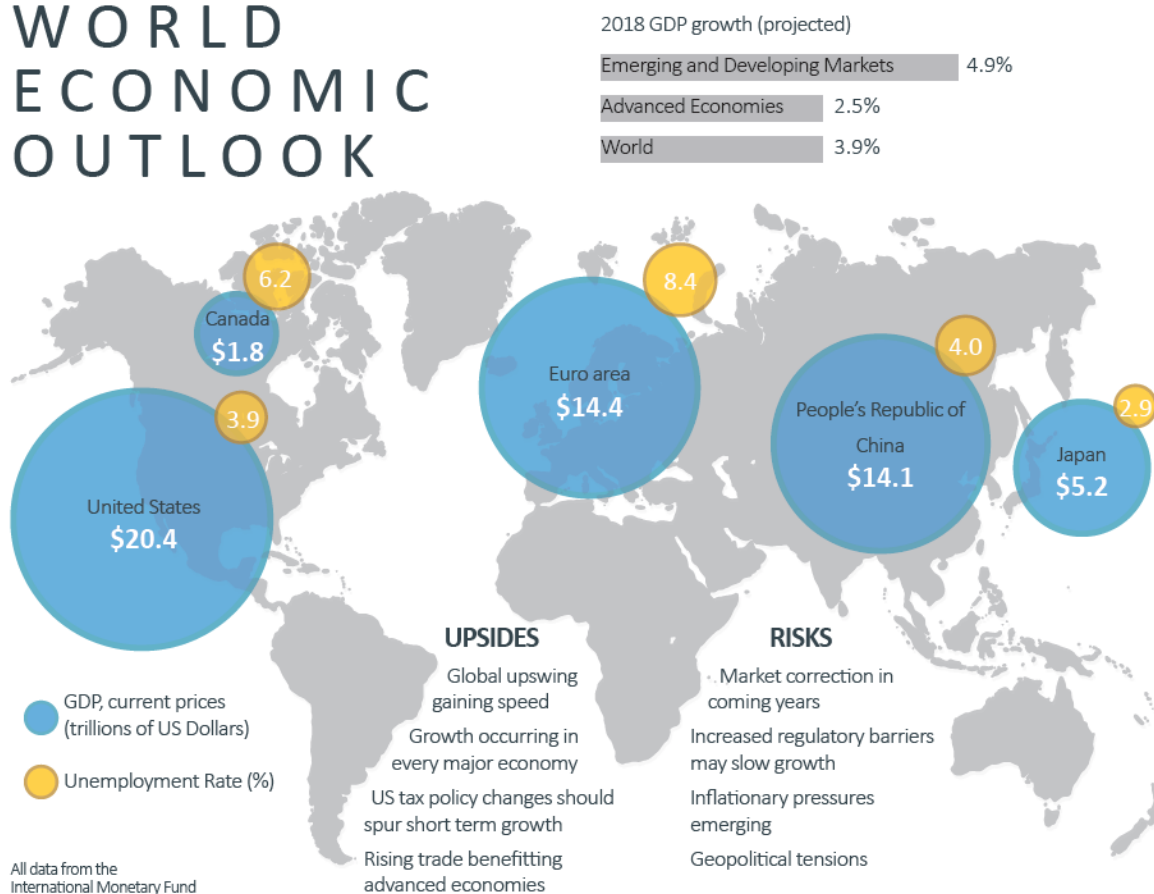


Figure 1

Source: International Monetary Fund, World Economic Outlook Update, April 2018

Canada Struggling to Keep Pace with Strengthening World Economy

Despite challenges in previous years, the economies of the European Union and Latin America are expanding. Further, post-2018, economic growth in Canada is expected to be more moderate. According to the Bank of Canada, Canada's overall GDP growth should decline from 3.0% in 2017 to 2.2% in 2018 and weaken further to 1.6% growth next year.³

Consumer spending will continue to act as the primary driver of growth in 2018, though at a slower pace compared to the previous year. Job growth will ease as baby boomers continue exiting the workforce, creating a tighter labour market. That tightness will likely drive wages upwards as employers compete for labour; however, increases will not be enough to offset a reduction in spending caused by record high debt levels among Canadian households. Borrowing costs are also expected to increase in the spring of 2018 as the Bank of Canada signals an interest rate increase to keep inflation in check. All told, disposable income growth is expected to drop to 2.4% this year, down from 3.7% in 2017.⁴

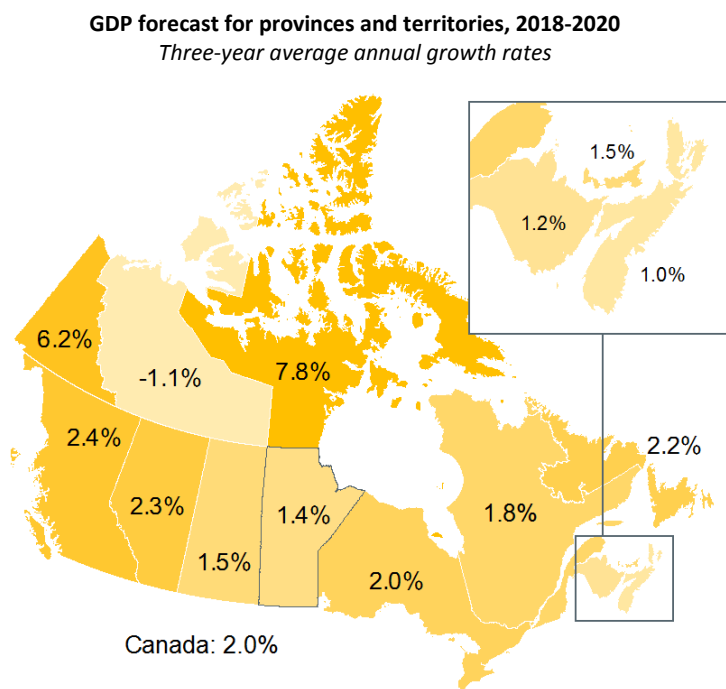


Figure 2

Source: Conference Board of Canada, Provincial Outlook Economic Forecast: Winter 2018

Canadian businesses have so far sent mixed signals about their investment intentions in 2018. The Bank of Canada's business outlook survey shows a significant portion of companies (+24%) planning to expand and update facilities and equipment this year.⁵ The Conference Board of Canada's has a more conservative view. Specifically, the Board notes that Canada will find economic growth more challenging in the future because of trade uncertainty, U.S. corporate tax cuts, and capacity issues within the Canadian economy. Regardless, business investment is unlikely to return to pre-2014 levels in the near term.⁶

Canadian exports continue to underperform in spite of strong demand from the US and a low Canadian dollar. The Conference Board of Canada predicts non-energy exports will remain stagnant over the next two years. Meanwhile, oil exports are hitting a transportation bottleneck as production exceeds current pipeline capacity. Relying on more expensive rail transport to ship excess product has increased costs and negatively impacted producers' bottom line. And the export outlook could become worse depending on the outcome of NAFTA renegotiations. Though these negotiations appear to be heading in a positive direction for Canada with a resolution expected this summer, the US has signalled its willingness to enact tariffs that may result in trade wars elsewhere. Canada could experience collateral damage from the resulting fallout.

Provincial Overview

Manitoba's economy continued to grow in 2017, following a strong recovery in 2016. The two-year rebound was fueled by year-over-year growth in the construction industry, particularly due to increased housing starts in Winnipeg as some builders tried to avoid the city's new Impact Fee.^{7,8}

An increase in consumer confidence fueled job growth in the services-producing sector as provincial retail sales grew by 7.8% in 2017, to nearly \$1.7 billion.⁹ Unfortunately, investment from the private sector is expected to

decline, in part due to last year's cut to the U.S. corporate tax rate. With an increasingly competitive business environment arising across North America, the Manitoba government faces the challenge of maintaining a business friendly environment attractive to new investment.

With several mines nearing the end of their life-span or having become less lucrative, Manitoba's mining industry will decline in the near-future. For instance, last fall Vale closed its Birchtree mine in Thompson, and earlier this year Klondex reduced its operations at its True North mine in Bissett.^{10,11} While investments in mining exploration is expected to grow in 2018, no new mining projects are expected to be announced soon.¹²

In 2016, Manitoba Hydro's Keeyask construction project experienced delays and cost-overruns, though construction now appears to be back on track. Manitoba Hydro's debt reached \$14 billion due to a decrease in energy demand, low energy prices, and growing infrastructure costs.¹³ In order to address its significantly large long-term debt, the Crown Corporation was seeking an annual increase of 7.9% a year, until 2019.¹⁴ However, the Public Utilities Board of Manitoba is allowing a 3.6% average rate increase for 2018-19.¹⁵

Following a second consecutive downgrade of its credit rating in 2017, the provincial government is pursuing a fiscal restraint and debt reduction strategy in its 2018 budget.¹⁶ The budget details how the Province expects to streamline provincial government services, and reduce nearly 8% of its workforce within 4 years, primarily through attrition.¹⁷

The Conference Board of Canada expects Manitoba's overall GDP growth to fall to 1.8% in 2018, and then to 1.2% in 2019 due to weak employment growth.¹⁸ With housing starts expected to grow at a slower rate than in the past few years, the economy will depend on non-residential construction projects such as Bipolle III, True North Square, Roquette's pea-processing plant, and the Waverly West underpass to sustain economic growth this year.

Key global trading partners

In 2017, Manitoba's total exports were sent to 170 countries around the world, with the majority to the United States.¹⁹ Canada's other trading partner under the trilateral North American Free Trade Agreement (NAFTA), Mexico, was in fact Manitoba's fourth largest trading partner, at 3%.²⁰

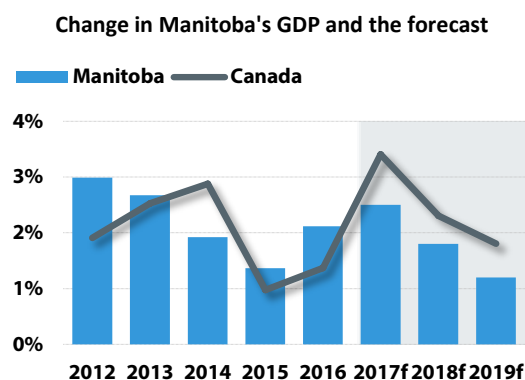


Figure 3
Sources: Statistics Canada CANSIM Tables 379-0030, 379-0031; Conference Board of Canada Economic Forecast

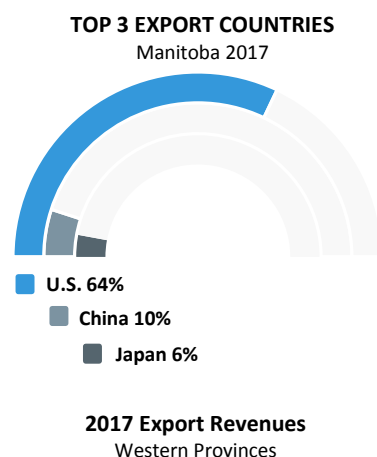


Figure 4
Source: Industry Canada, Trade Data Online, accessed March 2, 2018

Unlike the other western provinces, Manitoba's international export revenues are minimal. This is largely due to Manitoba's exports not having the same market value and volume as softwood lumber from British Columbia, or oil and gas from Alberta and Saskatchewan, for example.

Fortunately, Manitoba's geography has enabled the province's diversified economy to endure most challenges related to its limited international trade. Located in the middle of North America, Manitoba is the "keystone" province for the transportation of goods and services across the world, linking markets by air, rail, and highways. This has since benefited a good number of aerospace, agri-food, and heavy vehicle manufacturers in establishing integrated supply and distribution chains between Manitoba and the U.S.. Indeed, agriculture and processed meat products were Manitoba's primary exports in 2017, with China and Japan importing 48% of the province's farmed oilseeds and 70% of its processed meat, for a combined value of \$1.7 billion.²¹

Uncertainty remains around the ongoing NAFTA negotiations, and Manitoba's economy is vulnerable to any decision that could disrupt trade with the U.S.. However, the impending ratification and implementation of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) will help offset any potential loss in U.S. trade. Under the CPTPP, Manitoba's manufacturing and agriculture industries will eventually see tariffs eliminated on pork products, canola seed and canola oil in Japan and Vietnam, and aerospace products in Australia and New Zealand.²² For now, a low Canadian dollar, a strong U.S. economy, and the new Canada-European Union Comprehensive Economic Trade Agreement (CETA) will stimulate growth in Manitoba's exports.

POPULATION TRENDS

Manitoba's population increased by 1.5% in 2017, just above the national average of 1.2%, as the natural population (births less deaths) increased by 6,859.²³

Manitoba's overall population growth continues to rely heavily on immigration, as the province welcomed 15,679 newcomers into its communities in 2016-2017.²⁴ To attract more experienced and skilled workers, the Manitoba government amended its existing economic immigration program in 2017. The Provincial Nominee Program is designed to assist international students and entrepreneurs in attaining permanent residencies.²⁵

Manitoba's population continues to grow, yet faces the challenge of retaining people attracted by opportunities offered by other provinces. Overall, Manitoba's net inter-provincial migration showed a loss of over 30,000 individuals between 2012/13 and 2016/17. During this time, Alberta was the primary destination for Manitoba migrants; however, Ontario has been gaining ground since Alberta's economic downswing in 2015/16. British Columbia was the third largest destination for Manitobans, yet out-migration to British Columbia appears to have slowed in the past two years.²⁶

As Manitoba's economy is expected to decline between 2018 and 2022, this may lead to an increase in out-migration as Manitobans

**Manitoba inter-provincial migration
2012/13 to 2016/17**

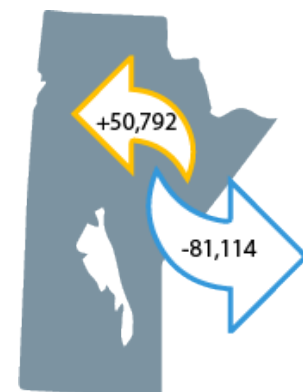


Figure 5
Source: Statistics Canada CANSIM Table 051-0019

search for work across Canada. Alberta's continued economic recovery, and economic opportunities in British Columbia and Ontario, will provide respite to displaced Manitobans.²⁷

Nonetheless, the province is home to a well established source of future growth. According to the 2016 Census, 18% of all Manitobans self-identified as Indigenous, the highest proportional rate among Canadian provinces. In 2016, Manitoba's Indigenous population was predominantly First Nations (130,510), followed by the Métis (89,355). Manitoba's Indigenous population is much younger compared to the non-Indigenous population, as nearly a third of Manitoba's Indigenous people are under 15 years old. With a much younger population, Manitoba's Indigenous peoples will soon represent a significant portion of the province's prime working-age population.

Manitoba's Indigenous Population: 2016 Census

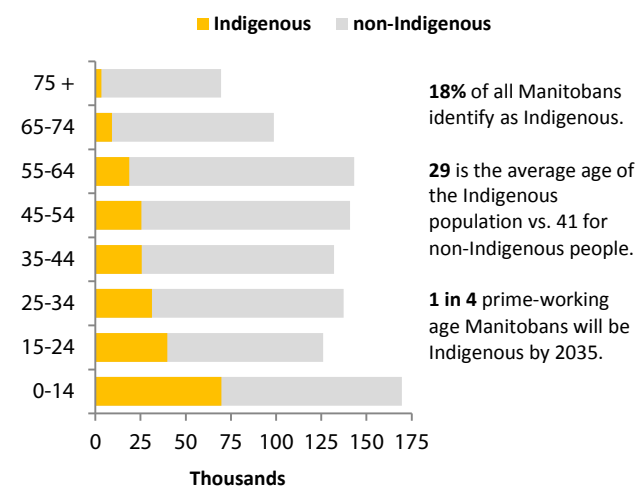


Figure 6
Source: Statistics Canada, 2016 Census

Age Structure

Manitoba is a young province with a median age of 37.4, just below the national median of 40.6. In the past two decades, Manitobans have on average become older and are living longer, as the prime working-age population (30-54) has declined by 3 percentage points since 1997.

Since 1997, the proportion of Manitoba's older worker and seniors' population (55+) grew from 21.7% to 27.8% in 2017. The provincial health care system is transitioning to increased care for an aging population, as Manitoba's seniors' population (65+) will continue to grow as the large baby-boomer population ages.²⁸ Within the next 20 years, nearly a fifth of the population will be recognized as a senior.

Manitoba's youth population (15-29) will continue to increase over time; however, its overall proportion of the total population is expected to decrease from 21% in 2017 to 19% in 2037. The prime working-age population will follow the same trend, falling 2.3 percentage points to 37.5%.

Demographic shifts in Manitoba: 1997-2037

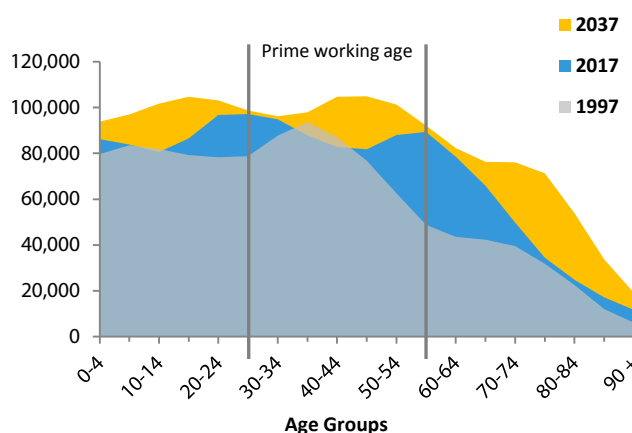


Figure 6b
Sources: Statistics Canada
CANSIM Tables 051-0001, 052-0005 (projection scenario M1)

LABOUR MARKET CONDITIONS

Manitoba's labour market recovered in 2017, following moderate job losses the year before. Employment increased by 1.7%, while the number of unemployed decreased by 11.1%. With an unemployment rate of 5.4%, Manitoba claimed the second lowest rate across Western Canada, following British Columbia (5.1%). With overall employment growth in both the goods and services industries, Manitoba's average weekly earnings increased by 2.5% in 2017.^{29,30}

Manitoba		Population growth	Labour Force growth	Employment rate	Unemployment rate	Participation rate	Average weekly earnings
2017		1,013,300	680,900	63.6%	5.4%	67.2%	\$911
Change over 2016		1.4% ▲	0.9% ▲	0.2 ▲	-0.7 ▼	-0.4 ▼	2.5% ▲

Figure 7

Source: Statistics Canada Labour Force Survey – CANSIM Tables 282-0002, 281-0027

The robust job growth in 2017 was due primarily to gains in full-time employment (+9,200), while part-time employment also increased (+1,300). During this same period, public sector employment declined slightly (-1,100), as the provincial and Winnipeg municipal governments each implemented cost reduction strategies.^{31,32,33,34,35} Employment in the private sector grew substantially, as an additional 10,300 employees joined the labour market.³⁶

The Conference Board of Canada predicts weak employment growth in the near future as the mining industry continues to decline and overall business investment decreases by 2.8% in 2019 and 4.9% in 2020.³⁷ Employment growth within the province may slow further as Manitoba's provincial government attempts to reduce their workforce by 8% through attrition. On a positive note, Manitoba's manufacturing and agriculture industries are expected to continue growing in 2018 due to increased global demand.

Employment by Sector

In 2017, employment in Manitoba's goods-producing sector remained relatively unchanged (+800), as employment losses in utilities (-1,000) were offset by gains in construction (+1,200). Employment in the construction industry increased for the third consecutive year in 2017, employing 48,300 workers. The industry experienced strong growth in part due to an increase in residential construction projects. Last May, Winnipeg's housing starts suddenly spiked (722) prior to the city's new Impact Fee going into effect.^{38,39} Housing starts remained strong across the rest of the province, as the cities of Brandon (273) and Steinbach (257) continued to expand.^{40, 41}

In addition, the continuation of major non-residential construction projects such as Manitoba Hydro's Keeyask generating station and Bipole III, Roquettes pea-processing plant, and True North Square also contributed to robust employment. However, the Conference Board of Canada expects the industry to slow in the near term—major projects are nearing completion, and large residential investments within Manitoba are projected to fall by almost 6% in 2018.⁴²

Manitoba's agriculture industry remained relatively unchanged (-300) after unseasonal dry weather conditions, and a Porcine Epidemic Diarrhea virus (PEDv) outbreak affected some hog barns last year. Manitoba's crop production remains diversified, and in 2017 produced significant yields of wheat, soybeans, and canola.⁴³ As global prices on some crops may fluctuate, due to India increasing its import tariffs on pulse crops, and China threatening the U.S. with a tariff on soybeans, Manitoba farmers could decide to plant alternative seeds for improved financial security.^{44,45}

The utilities industry's leading employer, Manitoba Hydro, set a target of reducing 15% (900 employees) of its workforce as part of its effort to reduce operating costs. The Crown Corporation reduced its province wide workforce by over 800 positions, and intends to meet its target through attrition and retirements.⁴⁶ Separate from the voluntary departure plan, Manitoba Hydro also reduced its senior management staff by 30% earlier in 2017.⁴⁷

Last year, employment in the services-producing sector increased significantly by 9,700. Employment grew in all the industries within the service sector, with the exception of other services (e.g. repair and maintenance) as employment fell by -900. There was significant employment growth in finance, insurance, real estate, rental and leasing (+3,100), and modest growth in wholesale and retail trade (+1,600) and business, building and other support services (+1,200).

Employment in wholesale trade remained relatively untouched, as the industry benefited from a weak Canadian dollar and low interest rates. Indeed, pharmaceuticals, aerospace, motor vehicle, and heavy-duty truck parts were among the most highly exported items to the United States.⁴⁸ Employment in retail trade recovered slightly in 2017 (+1,600), after consecutive annual losses from 2013 to 2016.⁴⁹

Employment in business, building and other support services remains strong after a gain of 1,200 employees in 2017. Winnipeg is home to several client service call centres including those of Shaw, RBC, BellMTS, and 24-7 Intouch. Further employment opportunities will become available in Winnipeg, as 24-7 Intouch announced that it will open its fourth Winnipeg location and hire an additional 500 employees later this year.⁵⁰

Employment slightly increased in accommodation and food services (+900), due in part to the Canada Summer Games in Winnipeg and the expanded Winnipeg Convention Centre attracting 557,000 visitors.⁵¹ The industry should continue to expand marginally in the near term following the completion of five new hotels in Winnipeg, and as the province's Look North Action Plan works to promote tourism in Northern Manitoba.^{52,53}

Manitoba industries with largest job growth and decline in 2017

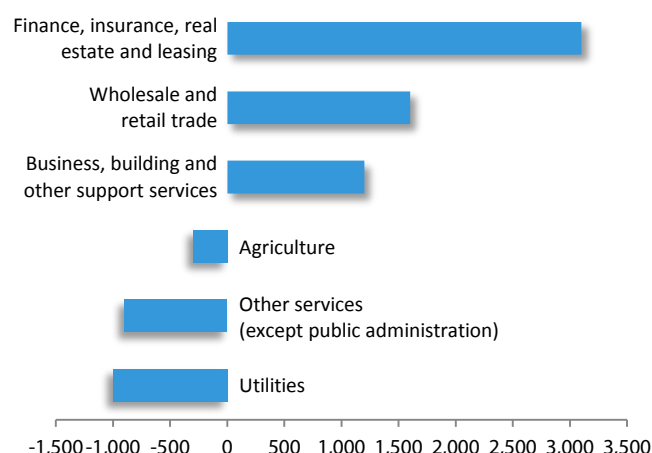


Figure 8

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

Labour Market Conditions by Economic Region

Last year, employment in Manitoba increased in all regions except for Parklands and North (-1.4%). Similarly, the unemployment rate declined in all but Parklands and North, with a significant improvement in Interlake as its unemployment rate declined by 2.8 percentage points.

Southeast					
	Population growth	Labour Force growth	Employment rate	Unemployment rate	Participation rate
2017	92,900	64,500	66.3%	4.5%	69.4%
Change over 2016	2.1% ▲	2.1% ▲	0.1 ▬	-0.2 ▼	-0.1 ▬

Figure 9.1

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

Southeast's population grew significantly in 2017, as Steinbach remained the third largest city within the province. The region experienced the second largest employment growth rate across the province, as employment in both the goods and services-producing sectors grew. Specifically, in agriculture, construction, and professional, scientific and technical services. On January 1, 2018 the City of Steinbach annexed approximately 2,800 acres of land from the Rural Municipality of Hanover and put it towards its continued growth plan.⁵⁴ The region's economic growth should continue into early 2018, following the City of Steinbach issuing 251 building permits in 2017, valued above \$57 million.⁵⁵

South Central and North Central					
	Population growth	Labour Force growth	Employment rate	Unemployment rate	Participation rate
2017	86,400	57,900	64.6%	3.6%	67.0%
Change over 2016	1.2% ▲	3.0% ▲	1.5 ▲	-0.5 ▼	1.2 ▲

Figure 9.2

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

Employment within South Central and North Central increased by 3.5% in 2017 as part-time employment outgrew full-time employment.⁵⁶ Employment grew in both the goods and services-producing sectors, primarily in the agriculture, and accommodation and food services industries.⁵⁷ Last fall, construction began on Roquette's \$400 million pea-processing plant in Portage La Prairie, and is expected to create up to 150 jobs.⁵⁸ Production at the plant is now scheduled for 2020.⁵⁹ The city's agri-food sector will continue to grow following J.R. Simplot's announcement to invest \$460 million in expanding its french fry processing facility.⁶⁰ Together, with nearly a billion dollars in private investment, the region should benefit with continued economic growth through 2018.

Southwest					
	Population growth	Labour Force growth	Employment rate	Unemployment rate	Participation rate
2017	89,300	58,300	61.8%	5.3%	65.3%
Change over 2016	0.9% ▲	1.6% ▲	0.7 ▲	-0.4 ▼	0.4 ▲

Figure 9.3

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

Following a significant decline in employment in 2016, the Southwest economic region has almost fully recovered, as employment increased by 2% in 2017.⁶¹ The recovery within the region was led by overall employment growth in the services-producing sector, as the goods-producing sector remained relatively unchanged.⁶² Going forward, the region's goods-producing sector should show signs of growth, following Hylife's \$176 million investment in its pork processing plant in Neepawa, and new feed mill in Killarney.⁶³ Manitoba's pork industry has the potential for further growth following the anticipated ratification and implementation of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).^{64,65}

Winnipeg					
	Population growth	Labour Force growth	Employment rate	Unemployment rate	Participation rate
2017	613,400	414,300	63.5%	6.0%	67.5%
Change over 2016	1.7% ▲	0.8% ▲	-0.1 ▬	-0.8 ▼	-0.7 ▼

Figure 9.4

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

Employment in Winnipeg grew by 1.5% in 2017, although the region's employment gains were predominantly from the services-producing sector. Despite reaching the highest employment level in the past 10-years, there were still some job losses within the regional workforce.^{66,67} Particularly, the closing of Sears retail stores, voluntary buyouts at Manitoba Hydro, and staff reductions at Great-West Lifeco.^{68,69,70}

Looking forward, Winnipeg's diverse economy will continue to grow, albeit at a slower pace as residential construction and consumer spending is expected to decline over the short-term.⁷¹ However, the region continues to experience positive economic activity due to a strong manufacturing industry and non-residential construction projects such as the Waverly Street underpass and True North Square.⁷²

Interlake					
	Population growth	Labour Force growth	Employment rate	Unemployment rate	Participation rate
2017	76,000	48,500	61.4%	3.9%	63.8%
Change over 2016	0.7% ▲	-1.4% ▼	0.6 ▲	-2.8 ▼	-1.4 ▼

Figure 9.5

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

In 2017, Interlake region recovered from its 2016 decline in employment, as gains in the services-sector, particularly in business, building and other support services, and public administration.⁷³ The region should see some growth as some First Nation communities are finally returning home after the 2011 flood.⁷⁴

Parklands and Northern					
	Population growth	Labour Force growth	Employment rate	Unemployment rate	Participation rate
2017	55,200	37,400	64.3%	5.1%	67.8%
Change over 2016	-0.4% ▼	-1.1% ▼	-0.7 ▼	0.6 ▲	-0.4 ▼

Figure 9.6

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

Unlike the rest of Manitoba, Parklands and North region's labour market is weakening as its unemployment rate increased by 0.6 percentage points in 2017, and its economy is projected to decline even further in 2018. The province's mining industry is expected to shrink as Vale (Thompson) and Hudbay Minerals (Flin Flon) reduce their staff to save costs. The downturn began last fall, with Vale's closure of its Birchtree nickel mine, affecting 150 employees. Vale has now issued 169 layoff notices in advance of the shutdown of its smelter and refinery, which is scheduled for August 2018. The company anticipates an additional two layoffs and a reduction of its full-time workforce to around 850 by 2019.⁷⁵ Hudbay Minerals is also expected to close its Reed mine, and layoff around 60 workers.⁷⁶

In the spring of 2017, severe flooding closed the single rail line into Churchill, and Omnitrax, the owner of the rail line, suspended services. As a result, the town of nearly 900 people experienced job losses along with rising food and gas prices. Without rail access, supplies have to be delivered either by plane, winter-road, or by boat when the weather permits. No announcements have been made as to when the rail line will be repaired.⁷⁷

Manitoba Hydro continues with construction of the Keeyask generating station between Thompson and Gillam, and reported 2,319 active hires in January 2018.⁷⁸ The project suffered significant cost overruns and delays prior to 2017, though significant progress has since been made. The project should continue to employ nearly 3,500 people during the 2018 construction season.^{79,80}

LABOUR MARKET OUTCOMES FOR CLIENT SEGMENTS

Indigenous Peoples

According to the 2016 Census, Manitoba's Indigenous population of 223,310 represented 18% of the total provincial population, the highest proportional rate of any province in Canada.⁸¹ Current labour market information is only available for Manitoba's off-reserve Indigenous population.

Between 2013 and 2017, Manitoba's off-reserve Indigenous labour force of 15 years and over grew from 67,600 to 75,000, an increase of nearly 11%. In comparison, Manitoba's non-Indigenous labour force rose 1.9%. Unfortunately, employment barriers remain that affect Indigenous people, and Manitoba's Indigenous population experienced a higher unemployment rate (10.8%) than Manitoba's non-Indigenous population (4.8%).⁸²

Immigrants and Newcomers

The 2016 Census identifies immigrants as people who are, or who have ever been landed immigrants or permanent residents in Canada. According to the 2016 Census there were 227,465 immigrants residing in Manitoba, which represented 18.3% of the provincial population. Since 2011, Manitoba's immigrant population grew by 23.4%, outpacing the Canadian-born population (+1.6%).^{83,84}

In 2017, landed immigrants accounted for around 21% of Manitoba's total working age population (15 years and over).⁸⁵ Since 2016, this group grew by 5.9%, compared to the province's Canadian-born population which remained relatively unchanged.⁸⁶ Recently landed immigrants (landed 5 or less years earlier) have unemployment rates not only greater than Canadian-born workers, but also greater than immigrants who arrived before them. For instance, in 2017 the unemployment rate for recent immigrants in Manitoba was 9.5%, compared to 5.5% for immigrants who landed more than 5 to 10 years earlier.⁸⁷ The initially high unemployment rate is often associated with such barriers to the labour market as language and education.

Youth

The unemployment rate for Manitoba youth (aged 15 to 24 years) declined 1.6 percentage points to average 11.6% in 2017. However, the rate is still nearly three times that of adults aged 25 years or older (4.2%). Though the unemployment rate for young men (12.9%) exceeded that of young women (10.3%), both demonstrated gains compared to the previous year as their unemployment rates declined by 2 and 1 percentage points, respectively.⁸⁸

Following four years of consecutive declines, youth employment began to recover in 2017, increasing by 2,100. However, from 2013 to 2017, the participation rate for Manitoba's youth steadily declined from 68.6% to 66%.⁸⁹

Older Workers

Within the past five years, Manitoba's experienced workforce (aged 55-64 years) grew by 6,400 to represent around 16% of the total provincial workforce in 2017. Between 2013 and 2017, the number of employed older workers increased by 6.5%, which was two times more than the province's overall 15+ workforce (2.9%). During this period, the number of employed older men increased by 7.8%, while that of older women increased by 5.1%.⁹⁰

Seniors

Between 2013 and 2017, Manitoba's seniors (65+) population has grown exponentially, increasing by 11.7%, whereas employment increased by 14.1%, to 29,100. During this period, the participation rate of Manitoba's seniors fluctuated over time, yet in 2017 it returned close to its 2013 rate of 15.6%. In 2017, 20.7% of senior men were participating in the labour market, compared to that of 11.5% of older women.⁹¹ Compared to the rest of Canada, Manitoba's seniors held the lowest unemployment rate in 2017 at 2.7%.⁹²

People with Disabilities

According to the 2012 Canadian Survey on Disability, 145,270 Manitobans aged 15 years or over were identified with a form of disability. This represented 15.6% of the provincial working age population, and was the fourth highest level across Canada.⁹³ For Manitobans between the ages of 15 to 64 years, around 56% of people with a disability were employed. In comparison, Manitobans without disabilities had an employment rate of 77%. Whereas, the participation rate for those with a disability was close to 62%, compared to that of 81% for those without.⁹⁴

The Canadian Survey on Disability is conducted every 5 years, with the most recent survey conducted in 2017. The results of the survey are planned for release in early December, 2018.⁹⁵

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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¹ International Monetary Fund. April 2018. World Economic Outlook (WEO)
<http://www.imf.org/external/datamapper/NGDPD@WEO/OEMDC/ADVEC/WEOWORLD>

² Ibid.

³ Bank of Canada. January 17, 2018. Monetary Policy Report – January 2018

⁴ The Conference Board of Canada. Canadian Outlook Executive Summary: Spring 2018

⁵ Bank of Canada. April 9, 2018. Business Outlook Survey – Spring 2018

⁶ Conference Board of Canada (2018) Canadian Outlook Long-Term Economic Forecast
<https://www.conferenceboard.ca/e-library/abstract.aspx?did=9347>

⁷ Planning, Property & Development, Impact Fee – Property & Development Department - City of Winnipeg, last modified February 15, 2018, accessed April 20, 2018 <http://www.winnipeg.ca/PPD/ImpactFee/default.stm#3>

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