



Labour Market Bulletin

Alberta

November 2019



This Labour Market Bulletin provides an analysis of Labour Force Survey results for the province of Alberta, including the regions of Calgary, Edmonton, Central Alberta and Mountain Parks, Southern Alberta, and Northern Alberta.

OVERVIEW

Employment in Alberta fell sharply in November, declining by 18,200 (-0.8%) and erasing the gains of the previous three months. Full-time employment was down by 14,100, while the number of part-time workers slipped by 4,100. On the month, job losses were concentrated in the private sector (-23,000), with employment in the public sector little changed (-400). Self-employment increased by 5,100.¹

Alberta Monthly Labour Force Statistics

Seasonally Adjusted Monthly Data	November 2019	October 2019	November 2018	Monthly Variation		Yearly Variation	
				Number	%	Number	%
Population 15 + ('000)	3,550.8	3,545.9	3,490.2	4.9	0.1	60.6	1.7
Labour Force ('000)	2,521.2	2,526.5	2,513.7	-5.3	-0.2	7.5	0.3
Employment ('000)	2,338.7	2,356.9	2,356.9	-18.2	-0.8	-18.2	-0.8
Full-Time ('000)	1,922.4	1,936.5	1,954.0	-14.1	-0.7	-31.6	-1.6
Part-Time ('000)	416.3	420.4	402.9	-4.1	-1.0	13.4	3.3
Unemployment ('000)	182.5	169.6	156.8	12.9	7.6	25.7	16.4
Unemployment Rate (%)	7.2	6.7	6.2	0.5	-	1.0	-
Participation Rate (%)	71.0	71.3	72.0	-0.3	-	-1.0	-
Employment Rate (%)	65.9	66.5	67.5	-0.6	-	-1.6	-

Note: Totals may not add due to rounding

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

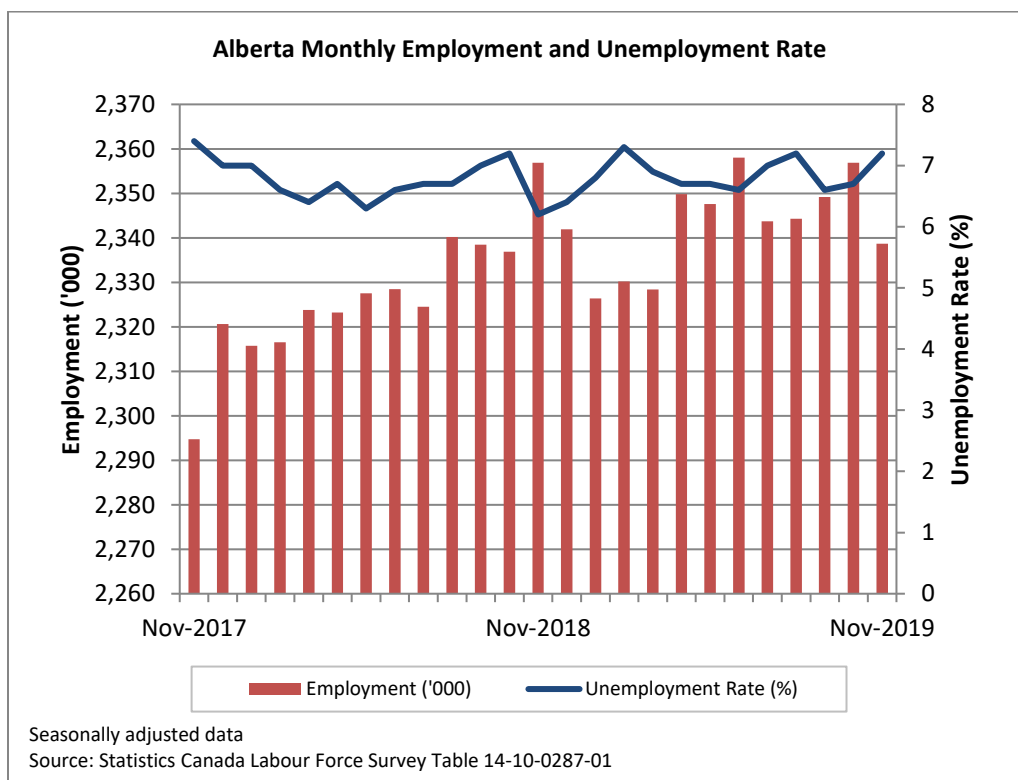
Year-over-year, employment in Alberta fell by 18,200, which was the same loss as seen month over month. However, compared to November 2018, employment was up in both the public and private sectors (+1.7% and +0.4% respectively) – with the net drop entirely due to a steep decline in the self-employed (-8.1%).²

Women in Alberta had a disproportionate share of the job loss on the month. Of the 18,200 positions lost between mid-October and mid-November, 15,800 of them were held by women. Losses were concentrated in natural resources, agriculture and related production occupations, occupations in education, law and social, community and government services, and in technical occupations in health.³

Hourly paid Albertans worked 31.4 hours per week on average in September 2019 (the most recent data available). This was the third highest among provinces and well above the national average of 30.5 hours. However, while all provinces posted longer work weeks compared to September 2018, Alberta's increased the least: up 0.6% versus 1.7% nationwide. Meanwhile at \$1,178 per week, average weekly earnings in Alberta remain the highest among provinces, despite posting four monthly declines through the first nine months of 2019.⁴

In September (again the most recent data available), the number of regular Employment Insurance beneficiaries declined for a second consecutive month. Compared to September 2018, beneficiaries in Alberta were down 6.3% versus a decline of 1.1% nationwide.⁵

Unemployment jumped in November, up by 12,900. At 182,500, the number of unemployed in the province was 25,700 higher than in November 2018. Alberta's unemployment rate, increased to 7.2%, the highest rate west of New Brunswick. On average, unemployed Albertans went 19.8 weeks before finding a job in November, second longest among provinces and 3.4 weeks above the national average.⁶



Unemployment by major demographic grouping

At 7.2%, Alberta's overall unemployment rate increased by a full percentage point (pp) compared to November 2018. Young workers fared the worst, with young men facing an unemployment rate of 19.4% compared to a rate of 10.8% for their female contemporaries. The outlook facing older men somewhat mirrored that of their younger counterparts, with the unemployment rate for men 25 years and older 0.5 pp higher than that of women from the same age group.

Alberta Monthly Unemployment Rates, by Gender and Age

Seasonally Adjusted Data	November 2019	October 2019	November 2018	Monthly Variation	Yearly Variation
	(%)	(%)	(%)	(% points)	(% points)
Total	7.2	6.7	6.2	0.5	1.0
25 years and over	6.0	5.7	5.7	0.3	0.3
Men - 25 years and over	6.2	6.1	6.1	0.1	0.1
Women - 25 years and over	5.7	5.2	5.1	0.5	0.6
15 to 24 years	15.2	13.2	10.2	2.0	5.0
Men - 15 to 24 years	19.4	16.5	12.9	2.9	6.5
Women - 15 to 24 years	10.8	9.8	7.2	1.0	3.6

Note: Totals may not add due to rounding

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

EMPLOYMENT BY INDUSTRY

Turning to employment by industry, the province's goods-producing sector (e.g. construction) saw job losses both on the month and year over year. By contrast, the services-producing sector (e.g. wholesale and retail trade) saw employment contract on the month (-13,000) but expand compared to November of last year (+5,000).

Notably, Alberta's goods-producing sector represents a far larger share of the economy than it does in other major provinces. Despite ongoing job losses, the outsized sector's share still accounted for almost one-quarter of total employment in the province, 4.5 percentage points above the national average.

In November, the combined employment in forestry, fishing, mining, quarrying, oil and gas (138,200) was close to 25% lower than the 183,600 posted in September 2014.

Alberta Monthly Labour Force Statistics, by Industry

Seasonally Adjusted Data ('000)	November 2019	October 2019	November 2018	Monthly Variation		Yearly Variation	
				Number	%	Number	%
Total employed, all industries	2,338.7	2,356.9	2,356.9	-18.2	-0.8	-18.2	-0.8
Goods-producing sector	583.3	588.6	606.7	-5.3	-0.9	-23.4	-3.9
Agriculture	50.2	52.1	48.3	-1.9	-3.6	1.9	3.9
Forestry, fishing, mining, quarrying, oil and gas	138.4	140.2	153.1	-1.8	-1.3	-14.7	-9.6
Utilities	24.3	24.8	25.3	-0.5	-2.0	-1.0	-4.0
Construction	235.5	236.6	248.8	-1.1	-0.5	-13.3	-5.3
Manufacturing	135.0	134.8	131.2	0.2	0.1	3.8	2.9
Services-producing sector	1,755.3	1,768.3	1,750.3	-13.0	-0.7	5.0	0.3
Trade	332.2	337.8	328.1	-5.6	-1.7	4.1	1.2
Transportation and warehousing	135.6	137.0	139.8	-1.4	-1.0	-4.2	-3.0
Finance, insurance, real estate and leasing	106.1	107.6	107.5	-1.5	-1.4	-1.4	-1.3
Professional, scientific and technical services	192.7	189.9	181.9	2.8	1.5	10.8	5.9
Business, building and other support services	78.4	81.7	91.3	-3.3	-4.0	-12.9	-14.1
Educational services	161.0	159.1	153.0	1.9	1.2	8.0	5.2
Health care and social assistance	303.7	304.7	288.2	-1.0	-0.3	15.5	5.4
Information, culture and recreation	75.4	75.4	78.2	0.0	0.0	-2.8	-3.6
Accommodation and food services	152.6	149.0	150.2	3.6	2.4	2.4	1.6
Other services	108.4	112.9	116.8	-4.5	-4.0	-8.4	-7.2
Public administration	109.3	113.2	115.4	-3.9	-3.4	-6.1	-5.3

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – Table 14-10-0355, formerly CANSIM 282-0088

Oil and gas

Oil production in Alberta expanded sharply in 2018, the year in which oil production in the province officially exceeded pipeline take away capacity. While oil extraction occurs in every corner of the province, the oilsands region produces by far the largest provincial share. In September 2019, oilsands operations accounted for 84%

of total oil production in Alberta. And while direct employment in oil and gas extraction is down by as much as one-quarter since Q3-2014, oil production is up by about one-third.⁷

In recent years, Alberta's oil and gas firms have struggled to remain competitive with their U.S. counterparts, particularly with respect to attracting investment capital. The draw down in oil and gas investment is not just limited to Alberta or Canada, however. Globally, investment in oil production fell by about 40% between 2014 and 2018.⁸

In late 2018, a combination of pipeline constraints, refinery closures, and falling international oil prices threatened the viability of the provincial energy sector. That November, the price of Western Canada Select (WCS), Alberta's benchmark bitumen crude, averaged just \$18 USD per barrel over the entire month, far below the cost of production.

Attempting to limit job losses and bankruptcies, the Government of Alberta placed an overall cap (curtailment) on oil production in the province, effective January 2019. Initially the policy raised the price of WCS, which touched \$55 USD per barrel in April. Since then WCS has fallen along with other oil prices worldwide, as trade disruptions and action on climate change – in countries other than Canada – limit global oil demand growth.⁹ At the time of writing, WCS was trading at about \$39 USD, roughly \$20 below the benchmark price of U.S. oil (WTI). In November, OPEC (The Organization of Petroleum Exporting Countries) lowered its medium- and long-term oil demand forecasts.¹⁰

Despite the WCS price hike, Alberta's curtailment policy remains deeply unpopular with the province's largest oil producers. Because integrated firms with their own refineries can still make money when crude prices are low, these firms tend to oppose government intervention. Regardless, although curtailment remains on the books, firms can now increase production as they see fit, providing they ship extra barrels by rail and not by pipeline.¹¹

While oil by rail continues to expand, industry is still pinning its hopes on the completion of any two of the three export pipeline projects currently in advanced stages: Trans Mountain Expansion (TMX); Keystone XL; and the Line 3 replacement project. Of these, Line 3 is most likely to first come on stream – although it may yet again be delayed in Minnesota. In December, Enbridge completed the \$5.3 billion Canadian portion of Line 3 and began commercial operations between Alberta and Manitoba. Regarding TMX, in September the Federal Court of Appeal adjudicated on 12 further appeals of the project, dismissing six outright, while agreeing to hear the other six simultaneously and on an expedited basis.¹² In December, anticipating a positive outcome to the remaining court challenges, Trans Mountain began putting pipe in the ground.¹³ The project twins an aging pipeline from Alberta to tidewater in Burnaby B.C., almost tripling capacity from 300,000 barrels per day (bpd) to 890,000 bpd.¹⁴

Other goods-producing industries

Looking at Alberta's other goods-producing industries, **construction** posted a heavy year over year job loss in November (-5.3%). In October (the most recent data available), the seasonally-adjusted value of building permits issued in the province – including both new product and renovations – declined, following three monthly gains. At \$960 million, building permits fell by 6.6% compared to September 2018.¹⁵ There have also been troubling signs of residential overbuilding in the province. In October, completed and sold – i.e. absorbed – new housing

units in Alberta's two major centres of Calgary and Edmonton accounted for 24% of all large-city units absorbed nation-wide. At the same time, however, the two cities accounted for 35% of all large-city *unabsorbed* (completed and unsold) units.¹⁶

After a poor 2018, Alberta's **agriculture** industry had hoped for a recovery year in 2019. However, starting in March, trade issues came to the fore, as China systematically revoked all licences to import Canadian canola.¹⁷ The country then temporarily halted the importation of all Canadian meat products, following its discovery of counterfeit Canadian veterinary certificates.¹⁸ More recently, it became apparent that China has in fact accelerated importation of Canadian wheat year to date.¹⁹

This year's harvest did not go well, as winter arrived early in Alberta. As of December 3rd, 90% of crops had been harvested with little prospects of the remaining 10% being removed until spring 2020.²⁰

While low energy prices are a huge negative for resource extraction firms, they are a significant plus for the province's petrochemical **manufacturing** industry. Inter Pipeline is currently building a \$3.5 billion petrochemical complex in Alberta's Industrial Heartland, just outside Edmonton's city limits. The project is a major undertaking for Inter. Calgary-based Pembina Pipeline Corporation's \$4.5 billion joint venture with Kuwait's national petrochemical company is also being built in the Industrial Heartland. In September, the Globe and Mail reported that Inter Pipeline had rejected an unsolicited takeover bid from Hong Kong billionaire Li Ka-Shing's CK Infrastructure Holdings Ltd.²¹

Services-producing industries

Turning to the services-producing sector, at 1.755 million, overall employment decreased by 13,000 in November, while remaining up by just 5,000 on the year. **Wholesale and retail trade**, Alberta's largest industry by employment, also saw job losses on the month (-5,600) and year over year gains (+4,100). In September (the most recent data available), total retail sales slipped by 1.6% on the month, while down 2.7% compared to September 2018.²²

Wholesale and retail trade is one of the service industries deeply hurt by the prolonged slump in the provincial energy sector. For example, over the five-year period from September 2014 to September 2019, the total value of retail sales in Alberta decreased by 0.4% – compared to an almost 20% gain Canada-wide. Wholesale trade fared even worse; total sales in September 2019 were 4.6% below the level of September 2014.²³

In November, **health care and social assistance**, Alberta's second largest industry by employee count, posted a slight decline in job gains on the month (-0.3%) but remained up on the year (+5.4%). Health care, along with educational services, and public administration are **public sector** industries. In general, public sector job growth tends to reflect population increase, somewhat independent of economic conditions. As such, these industries have been less affected by the oil and gas downturn than have private sector industries such as trade. That being said, in its first Budget, Alberta's new government proposes a course change and a 2.8% reduction in provincial operating expenses. The Province intends to reduce its public service by 7.7% over four years through hiring restraints and attrition, and to reduce post-secondary institutions' operating grants by up to 7.9%.

REGIONAL ANALYSIS

Over the past year, employment increased in three of seven Alberta regions. On a percentage basis, Calgary led the province in job growth (+3.4%), while Red Deer was the worst performing region (-8.14%). On the whole, the seasonally unadjusted employment numbers in the table below indicate that there was a year over year gain of 0.3%, which is a contrast from the seasonally adjusted numbers discussed earlier in the bulletin. It is important to note that the figures shown in the table below are based upon a three month moving average, where strong employment performance in September and October offsets the weak November numbers. Three month moving averages are used to smooth the results of the highly volatile Labour Force Survey and are reported when we are not able to calculate seasonally adjusted values.

Alberta Monthly Labour Force Statistics, by Economic Region

3-Month Moving Averages Seasonally Unadjusted Data	Employment			Unemployment Rate		
	November 2019 ('000)	November 2018 ('000)	Yearly Variation (%)	November 2019 (%)	November 2018 (%)	Yearly Variation (% points)
Alberta	2,352.8	2,346.7	0.3	6.4	6.2	0.2
Economic Regions						
Lethbridge - Medicine Hat	146.1	144.5	1.1	4.9	3.9	1.0
Camrose - Drumheller	97.3	98.3	-1.0	3.7	6.9	-3.2
Calgary	924.3	893.9	3.4	6.7	7.5	-0.8
Banff - Jasper - Rocky Mountain House and Athabasca - Grand Prairie - Peace River	186.4	185.9	0.3	5.7	4.6	1.1
Red Deer	111.7	121.6	-8.1	6.5	5.4	1.1
Edmonton	806.8	821.1	-1.7	7.0	5.6	1.4
Wood Buffalo - Cold Lake	80.2	81.4	-1.5	4.3	5.3	-1.0

Note: Totals may not add due to rounding

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

In **Lethbridge-Medicine Hat**, employment was up 1.1% compared to November 2018, however the unemployment rate edged up by 1 percentage point to 4.9% as labour force growth (+2.2%) outpaced employment growth.

Growth was fuelled by a strong services-producing sector, which offset job losses in the goods-producing sector. Looking forward, there is optimism that the goods-producing sector will strengthen in 2020 as a number of renewable energy projects are slated to begin construction. This includes the first phase Suncor Energy's Forty Mile wind farm, located on 50,000 acres of land between Lethbridge and Medicine Hat²⁴. Two additional wind farms near Medicine Hat are expected to begin construction next summer as they clear regulatory hurdles²⁵.

In November, employment decreased year-over-year by 1% to approximately 97,300 in **Camrose-Drumheller**. At 3.7%, the region has the lowest unemployment rate in the province. On an industry basis, job gains in construction and in manufacturing were offset by a decline in agriculture and wholesale and retail trade. Healthcare and social assistance posted strong job numbers, in part thanks to the recently opened supportive living facility for area seniors with complex care needs in Wetaskiwin, 70 kilometres south of Edmonton. The care facility adds 82 supportive living spaces to the city, bringing the total to 304, an increase of 27%. Phase two of

the development is planned and will see the construction of seniors' apartments for those who are still able to live independently but require assistance²⁶.

Employment increased in **Banff-Jasper-Rocky-Mountain House and Athabasca-Grande Prairie-Peace River** by a moderate 0.3% from November 2018. The region's unemployment rate jumped 1.1 percentage points to 5.7% as more people entered the labour market. The construction industry, which has had flat growth throughout 2019, shows promise looking ahead as two projects are given the green light. The first is the Cascade Power station, located 12 kilometres southwest of Edson. Now that it has received approval from the Alberta Utilities Commission, construction is targeted to begin in the spring of 2020. At the peak of construction approximately 500 people will be employed. The second project is the widening and upgrading of Highway 1A between Cochrane and Canmore, which the Government of Alberta has allotted \$26.5 million to, over the next four years, with an additional \$50 million in future years. The project is estimated to take two to three years to complete, once a contract is awarded²⁷.

On a year-over-year basis, **Red Deer** posted negative job growth in November (-8.1%) and the unemployment rate increased by 1.1 percentage points to 6.5%. The construction industry, which was one of the worst performing on an annual basis, might be getting a boost as the city allocated \$10 million to build a new railway overpass over highway 11A. No word yet on when shovels are expected to hit the ground for the latest project in the city.

In the northeast, **Wood Buffalo-Cold Lake** employment stood at approximately 80,200, down 1.5% on the year. Over the same period, the regional unemployment rate declined by one percentage point to 4.3% as around 2,200 people left the labour force (-2.6%).

Employment has been stagnant in the region in the absence of new oilsands projects. In early December, the Government of Alberta approved Grizzly Oil Sands' \$200 million May River project. Now, both Grizzly's May River project and Imperial Oil's \$2.6 billion Aspen project have regulatory approval to proceed, but await corporate final investment decisions to do so.

The **Edmonton** region's labour market continued to slow in November. Year-over-year employment across the region decreased by 1.75% (-14,300) to roughly 806,800, with job losses in both the goods-producing and the services-producing sectors. Employment in the public administration and educational services industries fared the worst in the region. As more information is shared about the proposed job cuts outlined in the Government of Alberta's 2019 budget, released on October 24, it is likely that these two industries will continue to struggle in 2020. It is projected that 764 full-time equivalent provincial public administration jobs will be lost by April 2020, with many of them expected to be based in Edmonton, the provincial capital.²⁸

Unemployment in the **Calgary** area labour market fell in November thanks to employment growth of 3.4% on the year. The unemployment rate in the region stands at 6.8% which is an improvement of 0.8 percentage points from November 2018 and brings it close to the provincial average of 6.7%. Major employment gains were seen in agriculture and in health care and social assistance. The construction industry, which posted a mild decline in employment for November, is getting a boost as building The Dorian hotel in downtown Calgary commences. The luxury hotel will employ 120 crew members at the peak of construction and will create 150 new jobs when it opens in the spring of 2022²⁹.

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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² Ibid

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