Contents

■ General Economic Overview
  - Population
  - Gross Domestic Product
  - Other Key Economic Indicators

■ Definition of Labour Market Terms and Concepts

■ Employment - characteristics of jobs and persons working in them
  - Hours of work
  - Industry
  - Category
  - Age and gender
  - Education level
  - Aboriginal identity
  - Sub-provincial regions

■ The East Central Economic Region

■ Socioeconomic characteristics of those not employed

■ Reports re: Labour Market Information
Saskatchewan’s population has been at or near 1 million for the past 15 years.

In fact, the population has fluctuated near this psychological figure since the late 1920s.

An increase in out-migration and declining in-migration led to annual population declines in the late 1990s.
The Gross Domestic Product (GDP) is the most widely used measure of overall economic activity.

The GDP measures the value of goods and services produced in the economy. Adjusted for inflation, it is called the "real GDP".

A decline in real GDP is the technical definition of a recession. The provincial economy was in recession in 2001 and 2002.
Resources/International Trade

Value of Mineral Production

Value of International Merchandise Trade

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Drought, poor grain prices, and the BSE case have led to declining cash receipts in 2002 and 2003.

Net cash income has been supported by government transfer payments since 2000 as it was in the last 1980s and early 1990s.
Economic growth in 2002 and 2003 has been better than expected because consumer spending is strong.

Motor vehicle sales, in particular, have generated increases in retail spending well above the rate of inflation.

Other indicators of consumer confidence such as housing starts are also strong.
With the exception of the unprecedented drop in 2001, employment has grown at a reasonable pace in the past decade.

From 1992 to 2000, employment grew at an average annual rate of 1% per year.

From 2000 to 2003, there has been virtually no change in employment; two years were required to recover the 13,000 jobs lost in 2001.
Employment and the Labour Force
The labour market data is all based on a telephone survey of individuals - the Labour Force Survey (LFS) - conducted monthly by Statistics Canada. Approximately 5,000 Sask residents take part in the LFS every month.

The survey excludes those who live on Indian Reserves.

Statistics Canada classifies all persons 15 years of age or older into one of three categories:

- employed: working full-time or part-time, as a paid worker or self-employed
- unemployed: not working but actively seeking employment
- not in the labour force: everybody else

About one half of those “not in the labour force” are retired seniors.
Inter-provincial Comparisons

Saskatchewan's employment growth rate of 1.0% from 1992 to 2000 was below the national average but still respectable.

The 0.1% average annual increase since 2000 is the lowest in Canada.
In 2003, 23% of persons employed were working part time.

In the early period - 1992 to 2000 - full time jobs were replacing part time ones. Since 2000, the increase has been in part time jobs.

Saskatchewan has the highest proportion of multiple job holders (persons with two or more jobs simultaneously) in Canada but the incidence is declining. In 2003, 8% of the employed had two or more jobs.
In effect, employment in the province increases when the non-agricultural sector can absorb the ongoing loss of agriculture jobs. Employment in agriculture accounted for 10% of the total in 2003 compared with 18% in 1993.

Employment in non-agricultural industry groups increased by 1.8% per year from 1992 to 2000 and 1.3% per year from 2000 to 2003.

Note that the industry is based on the “main job” for multiple job holders.
Characteristics of the Employed - Gender

Employment among women is increasing more quickly than among men.

Part (but not all) of the reason is the nature of the industry growth. That is, the fastest growing sectors are those where women are more likely to be employed, e.g.

- health and social services
- education
- information, culture, recreation
Characteristics of the Employed - Age

In the past ten to fifteen years, the bulge in the population called the “baby boom” generation has moved from their forties to their early fifties.

The growth in employment among those 40 to 54 is a natural consequence of the aging of the population. The growth among those 55 and older in the past three years is because of higher participation in the labour force.
All of the employment growth since 1990 has been among those with a post-secondary education.

In 2002, over 85% of those 25 to 64 and with a post-secondary education were employed. This compares with 61% of those with less than Grade 12.
The LFS doesn't measure Aboriginal identity; these figures are from the 2001 census.

The employment rate is the percentage of the population that was employed in June 2001.

There is a sizable gap in employment rates, particularly on Reserve and particularly among young people.
Employment by Region
For the purposes of the LFS, the province is divided into five rural and two urban “economic regions”.

Saskatchewan’s Economic Regions

- North/Far North
- Saskatoon CMA
- West Central
- Regina CMA
- Southwest
- East Central
- Southeast
Saskatoon Census Metropolitan Area

Saskatoon CMA Employment in Thousands

1993 1995 1997 1999 2001 2003

West Central
North/Far North
Saskatoon CMA
Regina CMA
Southwest
Southeast
Employment Outlook

- The provincial economy can be viewed as having four “drivers”.
  - **Consumers** are the largest driver but consumer spending is expected to slow after several years of increasing consumer debt.
  - The public sector is in a period of restraint for the short term as expenditures exceed revenues at both the provincial and municipal levels.
  - The private sector is poised for a recovery after several years of below-average performance.
  - The **national and international marketplace** is volatile because of the US election and the rising Canadian dollar.

- Based on this combination of factors, economic growth in 2004 and 2005 will probably be below average. Employment growth in 2004 is forecast at less than 1%.

- Over the long term, the province’s prospects are bright although the retiring baby boomers will put pressure on the labour market. Skilled workers will be increasingly hard to come by; more new entrants to the labour market will be Aboriginal.
East Central Economic Region
Compared with other rural areas in 2001, that is excluding the Regina and Saskatoon CMAs, the East Central region’s population is different in a number of ways.

- The population is concentrated in older age groups.
- People are less likely to live in a large urban centre, i.e. the region is more “rural”.
- A high proportion of dwellings (87%) are single detached houses and 77% are without a mortgage.
- There are relatively few (12%) lone parent families.
- The population is stable - 71% did not change their address from 1996 to 2001.
The Aboriginal population is 11% of the total compared with 17% in other rural areas.

The region’s immigrant population (3.2% of the total) are more likely to have come to Canada before 1961 - 56% did so.

Polish and Ukrainian ancestry are much more common.

Educational attainment levels are below average.

Average farm size is 1,005 acres compared with 1,283 in other rural areas. They are also smaller in terms of capitalization and revenue.

Employment growth in the service sector, private sector services in particular, has lagged behind the provincial average.

* provincial total not including the Regina and Saskatoon CMAs

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Regional Characteristics (continued)

Household Incomes in 2000

- Household income in 2000 was 89% of the rural average compared with 92% in 1990.
- Individual incomes were 92% of the rural average in 2000.
- 21% of income was from government transfers compared with 18% provincially.
- Relatively few households had incomes in excess of $60,000 in 2000 - 20½% compared with 26%.

* provincial total not including the Regina and Saskatoon CMAs
Employment Growth by RM, 1991 to 2001

Employment Growth, 1991 to 2001
(Provincial Average = 2%)

- 4% or more
- -4% to +3.9%
- -10% to -3.9%
- Declined more than 10%

Ituna
Melville
Bredenbury
Esterhazy
Wynyard
Foam Lake
Canora
Kamsack
Fort Qu'Appelle
Characteristics of those “Not Employed”
Definitions

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About one half of those “not in the labour force” are retired seniors.
The characteristics of the 120,300 Sask residents who were, in 2002, in the 20 to 64 age group and were not working were obtained from LFS data. (Remember that the LFS doesn't include the Reserve population.)

Some key features are:
- 62% were women;
- 28% were 20 to 29 years of age; 29% were 55 or older;
- 15% were attending school;
- 48% live in households where no one is employed;
- 33% had less than grade 12 and two thirds of these were 35 or older;
- 19% were “unemployed”, that is, actively seeking employment;
- 37% had worked in the past year, 52% had worked but not for at least a year, 11% had never had a job; and
- about one half of those who worked in the past year were laid off, the rest left voluntarily.
Family Status of those Not Employed, 2002

- One quarter to a third of the family situations involve young children and a parent that is probably staying at home to look after them.
- Another quarter seem to be retirees and women who have never been in the labour force.
- Many of the remaining potential employees are young adults, some of whom are going to school.

Unattached individuals 17%

Women in families with children under 18 17%

Women where husband is employed, no young children 13%

Men in families with wife employed 10%

Neither employed, 50 or older 15%

Lone parents under 50 7%

All others 21%
Labour Market Studies

- The *Labour Market Trends* report mentioned in the binders is currently being updated. This report projects a declining non-Aboriginal labour force as the baby boomers retire.

- Research for the *Public Service Commission* and the *Crown Investment Corporation* documents the aging of public sector employees.


- *Regional profiles* (using census data) for the DCRE regions and regional college regions are being prepared.