Why Job Growth Patterns?

Job growth is a major indicator of regional prosperity. A stable employment level means that new workers can only find jobs when a present worker retires. Most economic development analysts focus on job growth to provide opportunities for individuals who want to stay or who want to move into the area.

The objective of this Fact sheet is to document the pattern of job growth (and decline) in rural Manitoba.

Findings

In 2013, there were 215 thousand Manitobans employed in the non-metro areas1 of Manitoba (Figure 1). There has been slow but steady growth in non-metro employment since 1998.

However, there has not been growth in non-metro areas in every period. The vertical bars in Figure 2 show the percent change in employment in a given month, compared to the same month in the previous year2. Note that the vertical bars for ‘non-metro’ are generally above zero – thus, employment is generally growing. Non-metro employment has been growing since April, 2013. However, there were some periods of decline – particularly, June, 2001 to June, 2002 and from July, 2012 to March, 2013 (as indicated in Figure 2 where the non-metro vertical bars are below zero).

1. Non-metro refers to areas outside the Census Metropolitan Area (CMA) of Winnipeg. For details, see RDI factsheet “Rural Population Size and Change”.
2. The data for each month is an average of the previous 12 months. By taking a 12-month moving average, we are averaging over the seasonality of employment within a year. Thus, each bar is, in fact, a comparison of the annual average for the 12 months up to a given month, compared to the same calculation for the same given month in the previous year.

In 2013, employment in non-metro areas contributed 34% of the employment in Manitoba (Table 1). This share is higher than the non-metro share at the Canada level (28%). Five provinces have a higher
non-metro share than Manitoba – Saskatchewan and the four Atlantic Provinces. Interestingly, only Ontario has a lower non-metro share than Canada as whole.

**Table 1.** Number employed in non-metro areas, Canada and Provinces, 2013

<table>
<thead>
<tr>
<th></th>
<th>All Areas</th>
<th>Non-metro</th>
<th>Non-metro as a percent of all areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newfoundland and Labrador</td>
<td>233</td>
<td>125</td>
<td>54</td>
</tr>
<tr>
<td>Prince Edward Island</td>
<td>74</td>
<td>74</td>
<td>100</td>
</tr>
<tr>
<td>Nova Scotia</td>
<td>454</td>
<td>227</td>
<td>50</td>
</tr>
<tr>
<td>New Brunswick</td>
<td>351</td>
<td>214</td>
<td>61</td>
</tr>
<tr>
<td>Quebec</td>
<td>4,031</td>
<td>1,179</td>
<td>29</td>
</tr>
<tr>
<td>Ontario</td>
<td>6,876</td>
<td>1,243</td>
<td>18</td>
</tr>
<tr>
<td>Manitoba</td>
<td>634</td>
<td>215</td>
<td>34</td>
</tr>
<tr>
<td>Saskatchewan</td>
<td>554</td>
<td>259</td>
<td>47</td>
</tr>
<tr>
<td>Alberta</td>
<td>2,205</td>
<td>717</td>
<td>33</td>
</tr>
<tr>
<td>British Columbia</td>
<td>2,309</td>
<td>667</td>
<td>29</td>
</tr>
<tr>
<td>Canada</td>
<td>17,720</td>
<td>4,920</td>
<td>28</td>
</tr>
</tbody>
</table>


At the Canada level, non-metro employment generally grew up until the downturn of 2009 but the present level of employment is just now approaching the ‘peak’ that was attained before 2009 (Figure 3).

**Figure 3.** Employment in non-metro Canada was 4.9 million, December, 2013

Compare this to non-metro Manitoba where job growth slowed during this period (i.e. the vertical bars Figure 2 remained positive but were shorter), but did not decline (when calculated using a 12-month moving average). However, more recently, the decline in employment in non-metro Manitoba did contribute to the overall decline of non-metro jobs in Canada at the end of 2012.

There was a lengthy period of decline in non-metro employment at the Canada level during the 2009 economic downturn (Figure 4).

**Figure 4.** General Growth in non-metro employment at the Canada level.

When compared to the other provinces, Manitoba had stronger growth in non-metro employment from December, 2012 to December, 2013 than the Canada level (up 1.1% in non-metro Manitoba and up 0.3% at the Canada level) (Table 2). Only three provinces had non-metro growth that was greater than non-metro Manitoba (Newfoundland and Labrador, Prince Edward Island and Alberta).

To see where the employment change has been taking place in Manitoba, we note that recent employment growth has been strong in 3 economic regions (Table 3):

- up 7.9% in the North Central Economic Region (which includes Portage);
- up 3.7% in the South Central Economic Region (which includes Winkler); and
- up 2.7% in the Southeast Economic Region (which includes Steinbach).

There was little change in the Southwest Economic Region (which includes Brandon) and in the Winnipeg Economic Region and there was a decline of 2.5% in the Interlake Economic Region and in the combined Parklands (which includes Dauphin) and the North Economic Regions.

3 Where the data for each month is an average of the previous 12 months.
Table 2. Number employed and percent change by type of geographic area, Canada and Provinces

<table>
<thead>
<tr>
<th>Name of Economic Region</th>
<th>Percent change in employment from December, 2012 to December, 2013</th>
<th>Rank within group (across all economic regions in Canada)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro (CMA) areas</td>
<td>19.6</td>
<td>Highest</td>
</tr>
<tr>
<td>Non-metro (non-CMA)</td>
<td>16.9</td>
<td>16th</td>
</tr>
<tr>
<td>All areas</td>
<td>17.7</td>
<td>15th</td>
</tr>
<tr>
<td>Saskatchewan</td>
<td>2.9</td>
<td>21st</td>
</tr>
<tr>
<td>Non-metro (non-CMA)</td>
<td>2.1</td>
<td>22nd</td>
</tr>
<tr>
<td>All areas</td>
<td>2.6</td>
<td>23rd</td>
</tr>
<tr>
<td>Alberta</td>
<td>3.9</td>
<td>3rd</td>
</tr>
<tr>
<td>Non-metro (non-CMA)</td>
<td>3.1</td>
<td>4th</td>
</tr>
<tr>
<td>All areas</td>
<td>3.4</td>
<td>5th</td>
</tr>
<tr>
<td>British Columbia</td>
<td>-0.1</td>
<td>18th</td>
</tr>
<tr>
<td>Non-metro (non-CMA)</td>
<td>0.0</td>
<td>19th</td>
</tr>
<tr>
<td>All areas</td>
<td>-0.1</td>
<td>20th</td>
</tr>
<tr>
<td>Canada</td>
<td>1.0</td>
<td>21st</td>
</tr>
<tr>
<td>Metro (CMA) areas</td>
<td>1.1</td>
<td>15th</td>
</tr>
<tr>
<td>Non-metro (non-CMA)</td>
<td>0.3</td>
<td>22nd</td>
</tr>
<tr>
<td>All areas</td>
<td>0.3</td>
<td>23rd</td>
</tr>
</tbody>
</table>


1. Data for each month is an average for the previous 12 months (i.e. a 12-month moving average).
2. Percent change is calculated as the difference of logarithms.

Table 3 also shows the employment growth performance of each of Manitoba’s Economic Regions relative to their peers. Within each peer group, the Economic Regions in Canada have been ranked in terms of the percent change in employment from December, 2012 to December, 2013. Among Canada’s Economic Regions that are less than 5% non-metro, Toronto ranks at the top and Winnipeg ranks at the bottom.

Table 3.

<table>
<thead>
<tr>
<th>Name of Economic Region</th>
<th>Percent change in employment from December, 2012 to December, 2013</th>
<th>Rank within group (across all economic regions in Canada)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toronto (and area) Economic Region, Ontario</td>
<td>3.7</td>
<td>1st highest</td>
</tr>
<tr>
<td>Winnipeg Economic Region, Manitoba</td>
<td>0.6</td>
<td>6th lowest</td>
</tr>
</tbody>
</table>

Economic Regions that are less than 5% non-metro, sorted by percent change in employment in December, 2013, compared to same month in previous year.

Among Canada’s Economic Regions that are less than 5% non-metro, Manitoba’s North Central Economic Region ranks as the highest while the Southeast ranks 4th and the Interlake ranks 15th.

Economic Regions that are 33-94% non-metro, sorted by perfect change in employment in December, 2013, compared to same months in previous year.

Among Canada’s Economic Regions that are 95% non-metro, Manitoba’s South Central Economic Region ranks 8th, Southwest ranks 22nd and the combined Parklands and North Economic Region ranks 31st.

THE LONG-RUN EMPLOYMENT PATTERN IN EACH ECONOMIC REGION

Before reviewing the longer-run pattern in each Economic Region, we first note that employment in Manitoba has been increasing somewhat steadily since 1994. Note the slight dip in February, 2010 (Appendix A Figure A1).

4. Each Economic Region in Canada has been assigned to one of four categories according to the percent of the population in the Economic Region that is metro (i.e. part of a Census Metropolitan Area (CMA)). Only three groups are shown in Table 3 as there are no Economic Regions in Manitoba with 5% to 32% of their employment being in non-metro areas.

5. Note that Figure 1 starts in 1998 whereas the next set of charts begins 10 years earlier – in 1988.

6. In Appendix A, there is a bar chart such as Figure 2 and Figure 3 for each Economic Region in Manitoba.
Winnipeg contributes a majority of the jobs in Manitoba. Thus, the employment trend in Manitoba (Figure 5) would be expected to be similar to the employment trend in Winnipeg (Figure 6).

Employment generally declined in Winnipeg from 1990 to 1993 and did not recover to the level of 1990 until about 1996. The general trend has been upwards since 1996.

However, employment growth in the Winnipeg Economic Region has not been continuous (Appendix A Figure A2). After 1996, three small dips may be noted: 2003, 2005 and 2009.

**Figure 5. Number employed in Manitoba**

In Manitoba’s Southeast Economic Region, employment has been growing since 1993 (Figure 7). However, this trend of general growth has been interrupted by short periods of employment decline — about every 3 to 5 years (Appendix A Figure A3).

**Figure 7. Number employed in Manitoba’s Southeast (incl. Steinbach) Economic Region**

Manitoba’s South Central Economic Region has shown a general growth trend since 1993 (Figure 8). Again, this growth is not continuous. Since 1993 there have been four periods with noticeable employment decline — but the decline in 2009 during Canada’s economic downturn was scarcely perceptible (Appendix A Figure A4).

**Figure 8. Number employed in Manitoba’s South Central (incl. Winkler) Economic Region**

In Manitoba’s Southwest Economic Region, there was some growth in the early 1990s: employment was variable but not increasing from the mid-1990s to the mid-2000s, and then a significant increase can be observed since 2006 (Figure 9).

**Figure 9. Number employed in Manitoba’s Southwest (incl. Brandon) Economic Region**
In the midst of that significant increase since 2006, there was significant decline (more than 6%) in 2010 (Appendix A Figure A5).

Manitoba’s North Central Economic Region has shown a general upward trend since 1988 (Figure 10). However, the general pattern of low growth has been regularly interrupted with regular periods of employment decline (Appendix A Figure A6). Most noticeable was the decline of over 8% in early 2005.

**Figure 10. Number Employed in Manitoba’s North Central (incl. Portage) Economic Region**

![Graph showing employment trend in Manitoba’s North Central Economic Region](image)

The Interlake Economic Region has shown general continuous growth since 1998 (Figure 11). As is the experience in the other regions, this growth is not continuous. In fact, employment has been declining since November, 2012 (Appendix A Figure A7).

**Figure 11. Number employed in Manitoba’s Interlake Economic Region**

![Graph showing employment trend in Manitoba’s Interlake Economic Region](image)

When the Parklands Economic Region (which includes Dauphin) and the North Economic Region are combined (due to the small sample size in the Labour Force Survey), we find a pattern different than the other regions of Manitoba. The general pattern is a decline in the level of employment (Figure 12).

**Figure 12. Number employed in Manitoba’s Parklands (incl. Dauphin) and North Economic Regions**

![Graph showing employment trend in Manitoba’s Parklands and North Economic Regions](image)

Certainly there have been periods of growth (Appendix A Figure A8) but there was a long period of decline from October, 2006 to May, 2010 and more recently, employment has been declining since December, 2011.

**SUMMARY**

Manitoba’s non-metro employment is growing, generally. However, every few years, there is a decline. The most recent decline occurred from July, 2012 to March, 2013.

The combined Parklands and North Economic Regions have not participated in this growth. They have experienced a general decline over the period covered in this analysis (since 1988).

All other Economic Regions show a general pattern of growth, notwithstanding periodic interruptions of decline.

**FURTHER RESEARCH QUESTIONS**

- Which CDs have more job density?
- Is that attracting population?

Funding for this project was provided by the Manitoba Government.
APPENDIX A: SUPPLEMENTARY CHARTS

Figure A1


Figure A2


Figure A3


Figure A4


Figure A5


Figure A6

Figure A7


Figure A8