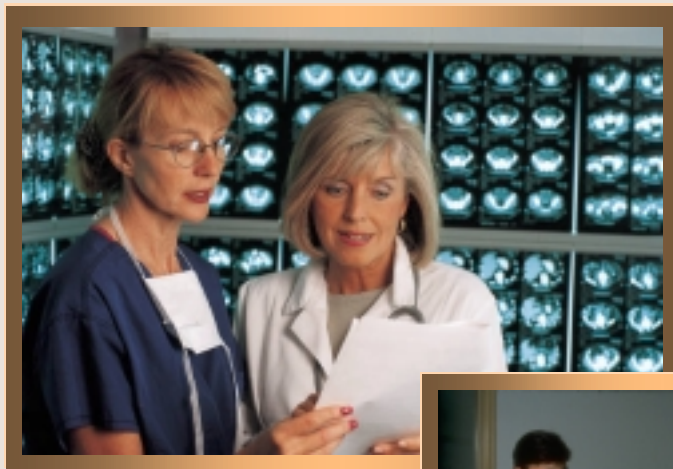
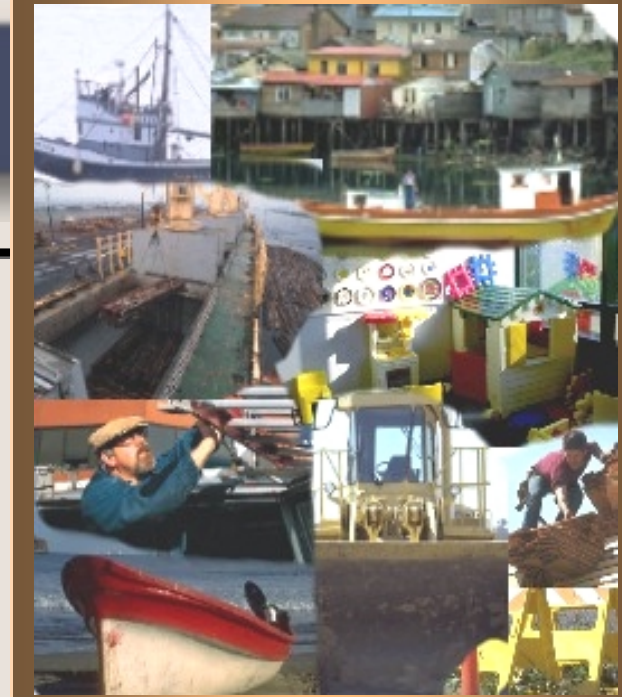


Understanding the dynamics of ...

Newfoundland & Labrador Labour Markets



Presentation for the
National Labour Market Information Forum
April 10th, 2003

Alton Hollett, Director,
Newfoundland and Labrador
Statistics Agency



Prof. Doug May, Memorial
University

Points to be covered

- Overview of NL economy
- Our Current Understanding: Using the LFS
- Expanding our understanding
 - Supply side
 - Full-year/Part-year and Urban/Rural
 - Migration and demographics
 - Educational Attainment
 - Satisfaction
 - Non-wage Benefits

More points

- Demand
 - Industrial Distribution
 - Occupational Distribution
- Outcomes
 - Real Incomes
 - Employment Levels
 - Unemployment Rates
- Role of Government
 - Job Creation
 - EI

Final Points

- New Information
- Links to evidence-based policy development

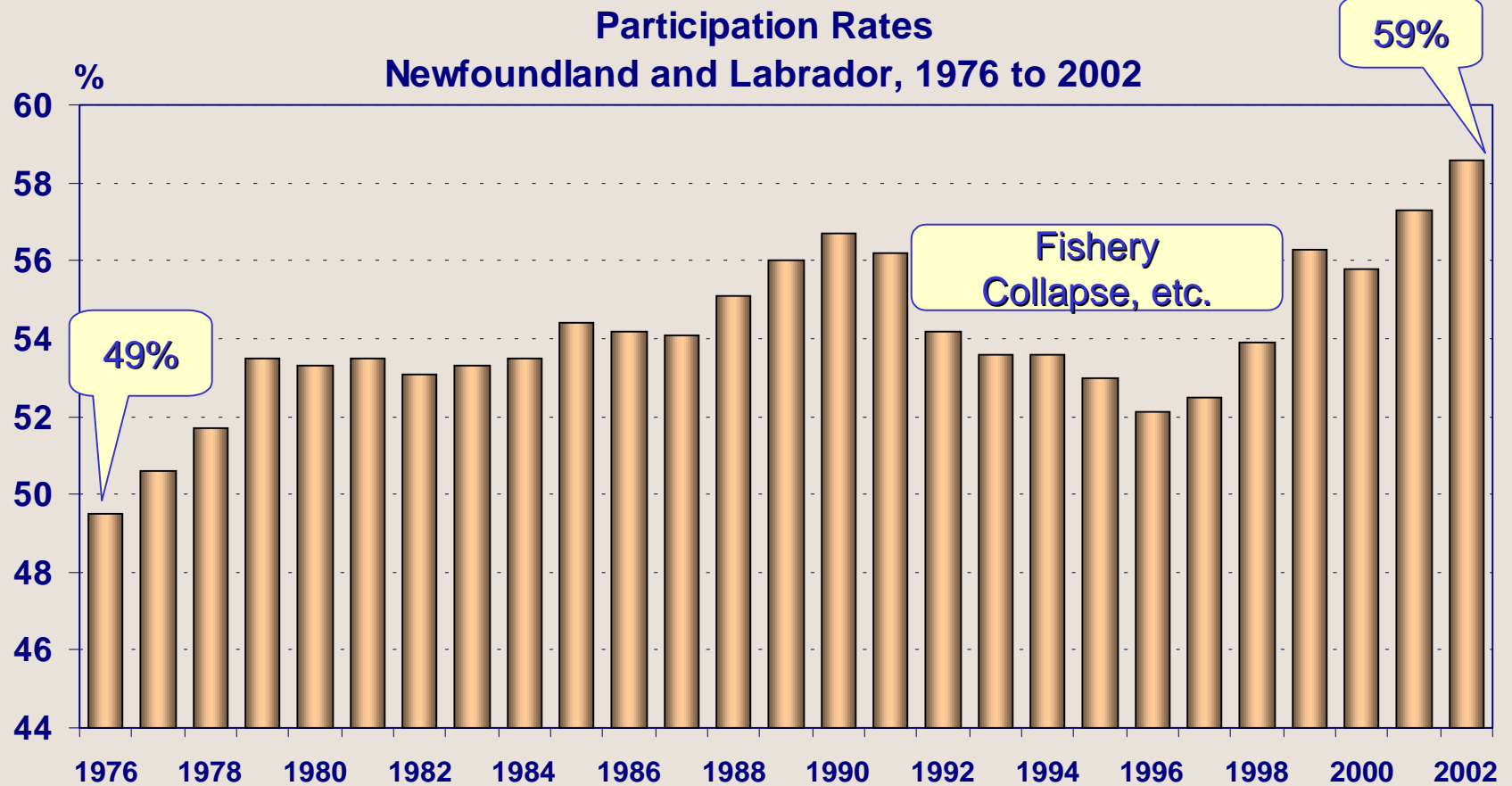
Overview of the Newfoundland and Labrador Economy

- In transition from a traditional resource-based primarily fishing economy to a new resource-based and service sector economy imbedded on the periphery of the Canadian and U.S. economies.
- Politics and policies seek new development opportunities while citizens place high value on maintaining traditional values through local employment opportunities.

Our Current Understanding: LFS

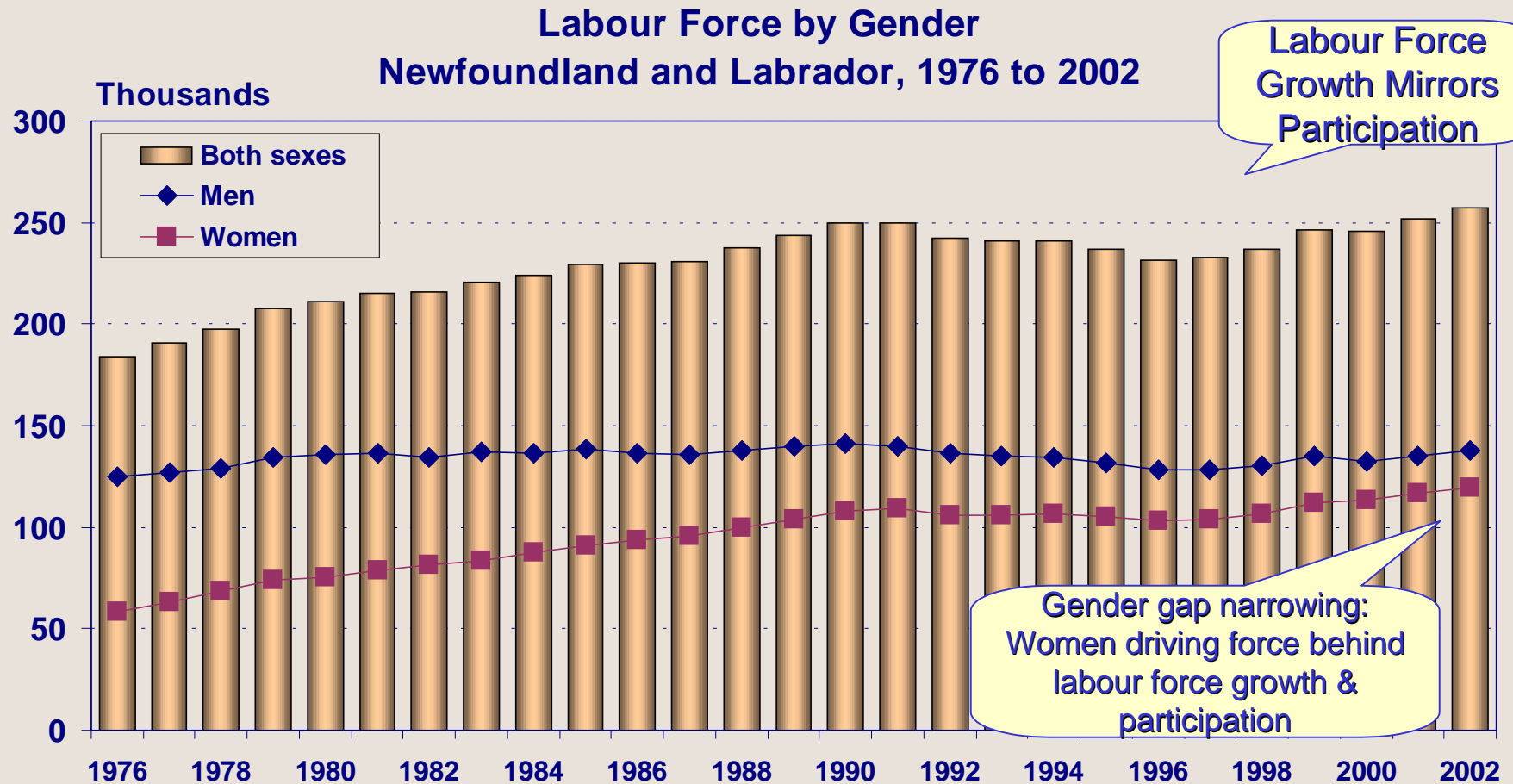


Historical Participation Rates



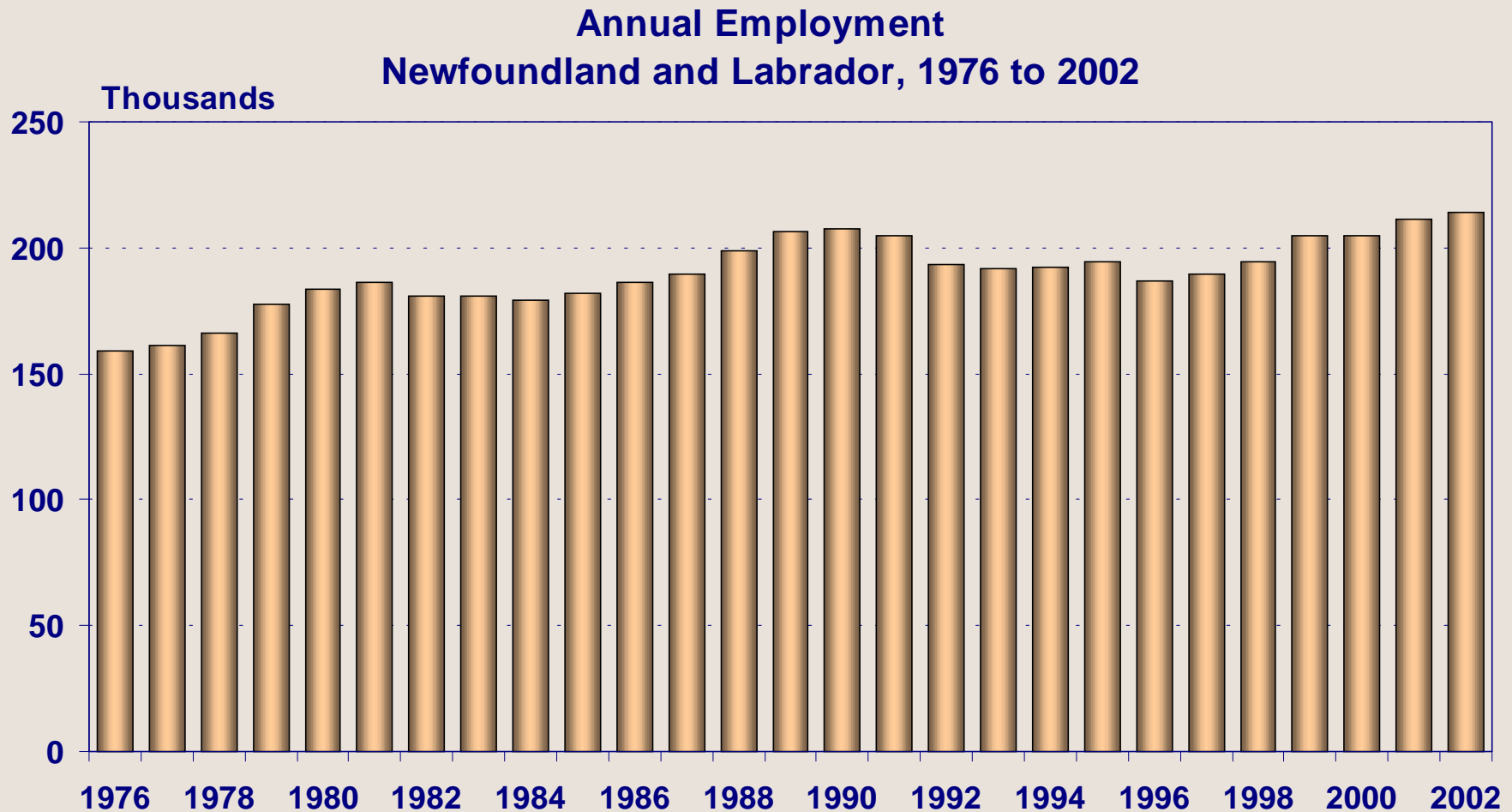
Source: Statistics Canada, Labour Force Historical Review, CD1T37AN

Labour Force by Gender



Source: Statistics Canada, Labour Force Historical Review, CD1T37AN

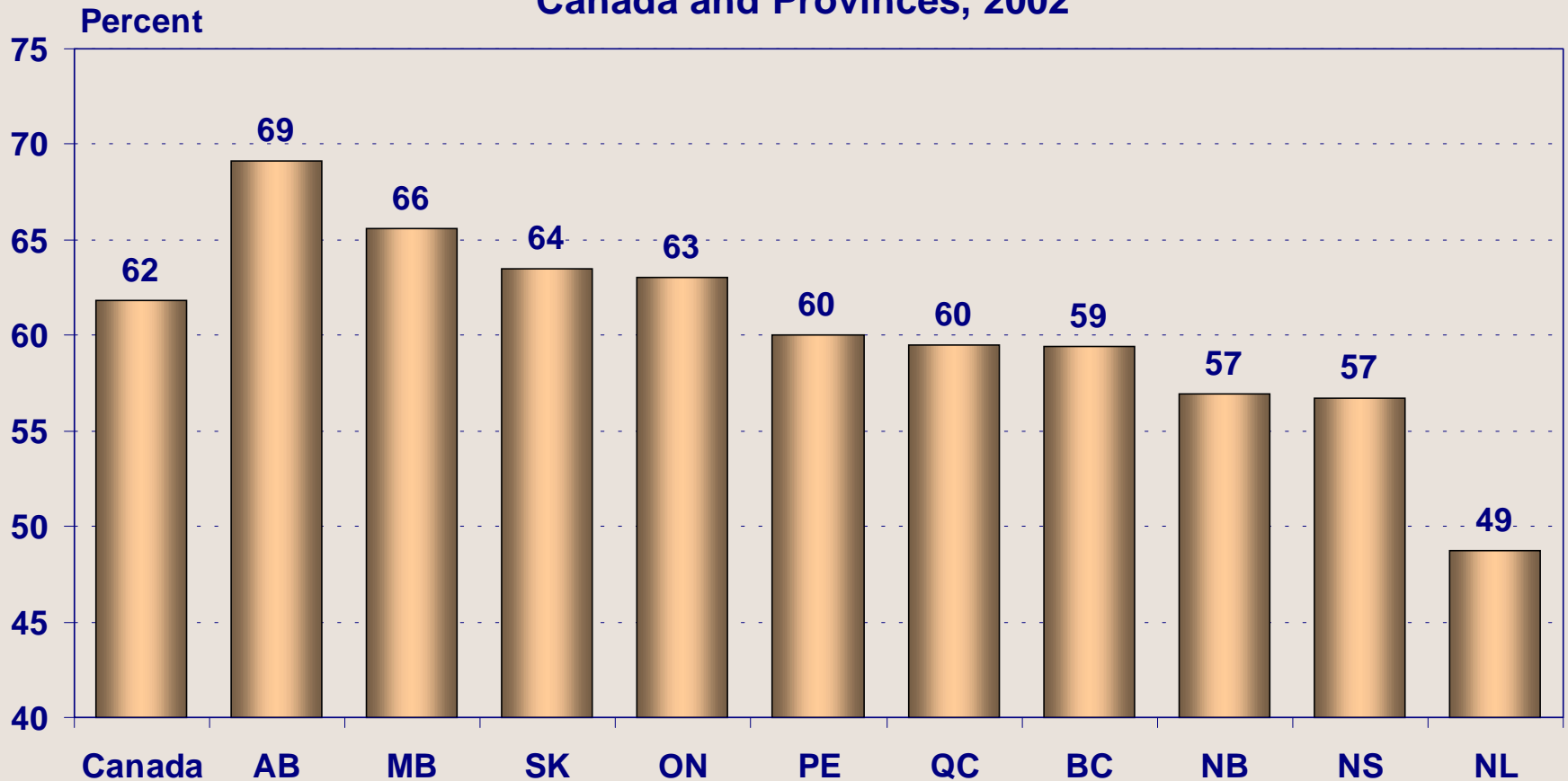
“Annual Employment Level Increasing”



Source: Statistics Canada, Labour Force Historical Review, CD1T01AN
April 2003

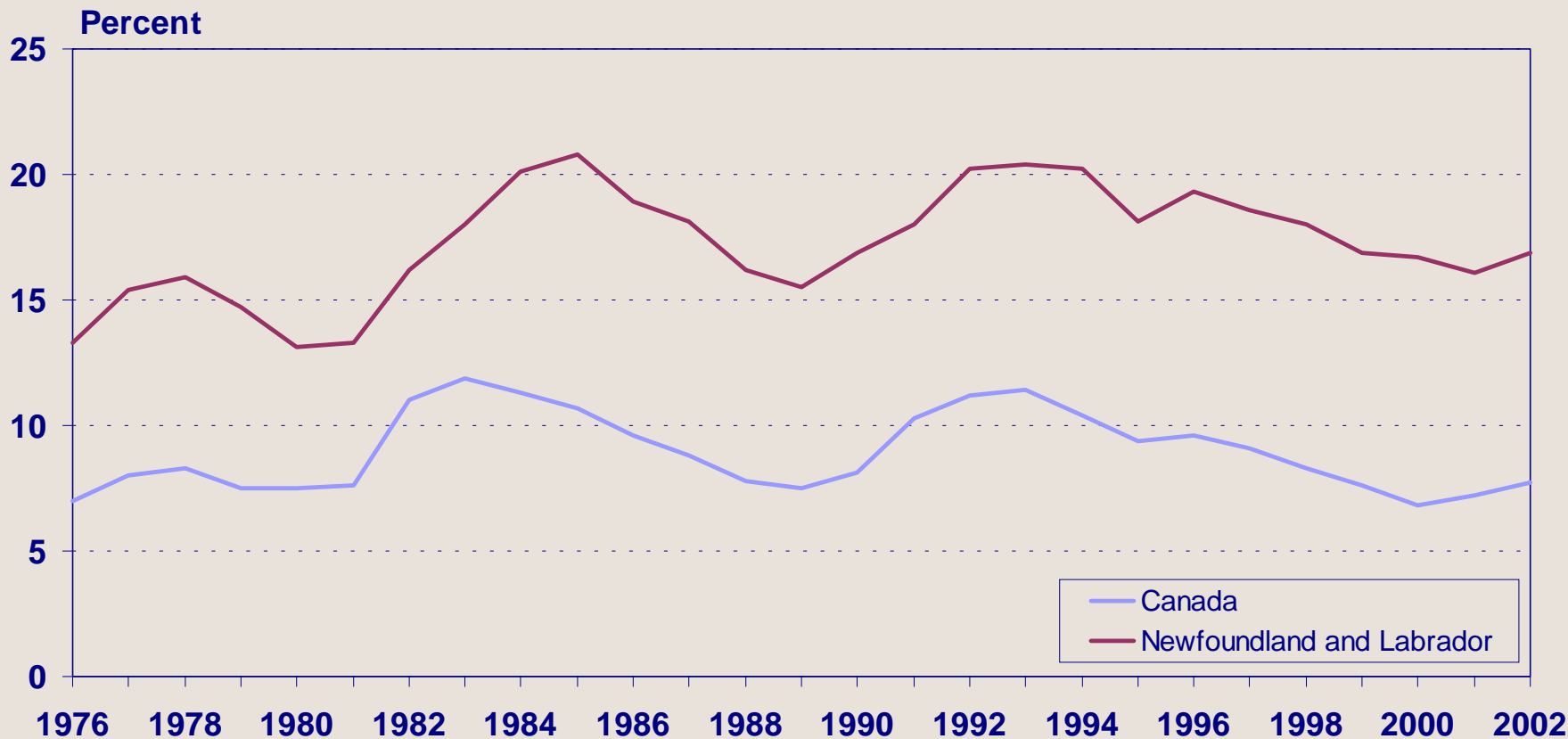
“Employment Rate Lowest in Canada”

Employment Rate
Canada and Provinces, 2002



“Unemployment Rate Declining but Remains Higher, No Evidence of Convergence”

Annual Unemployment Rate Canada and Province, 1976 to 2002

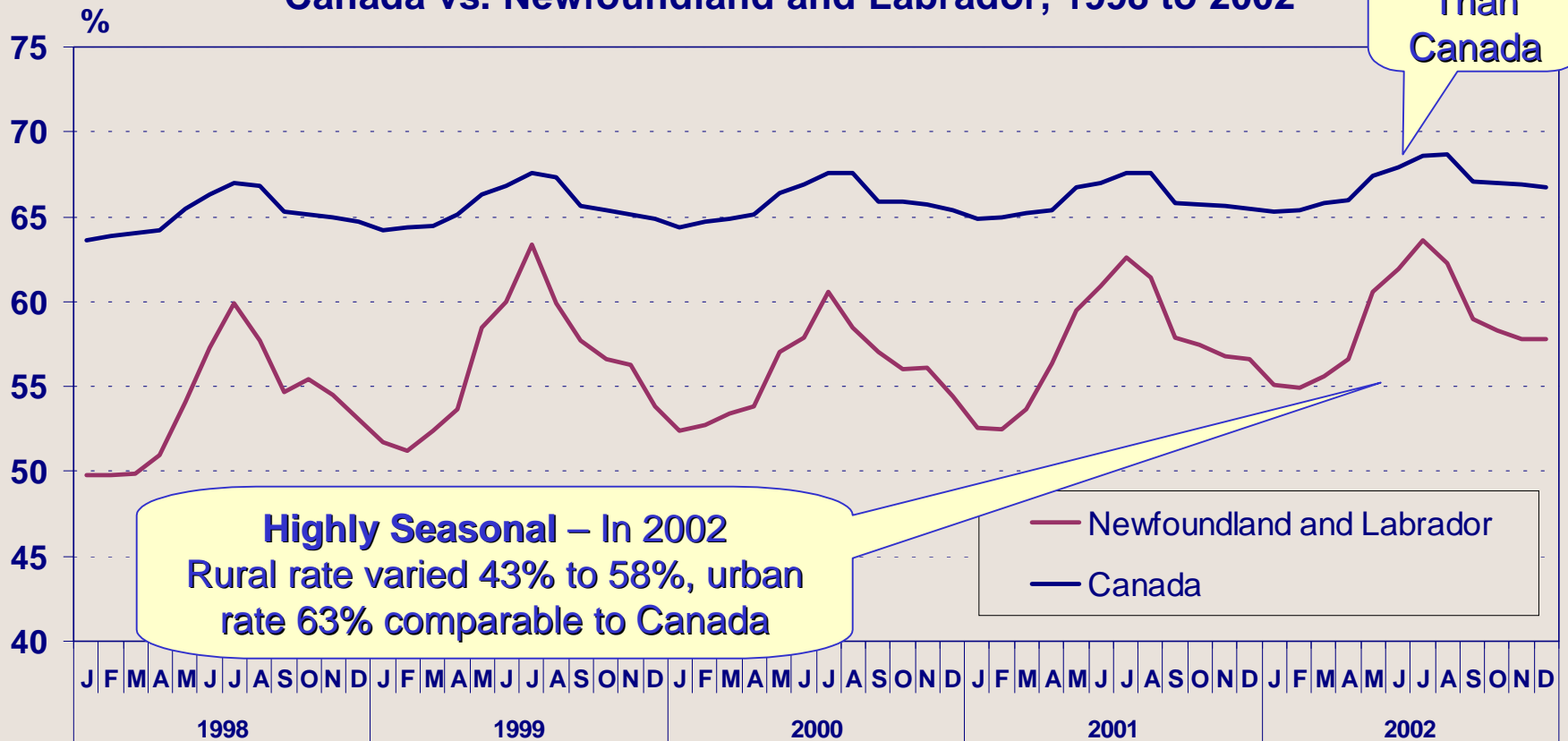


Source: Statistics Canada, Labour Force Historical Review, CD1T01AN

April 2003

Monthly Participation Rates

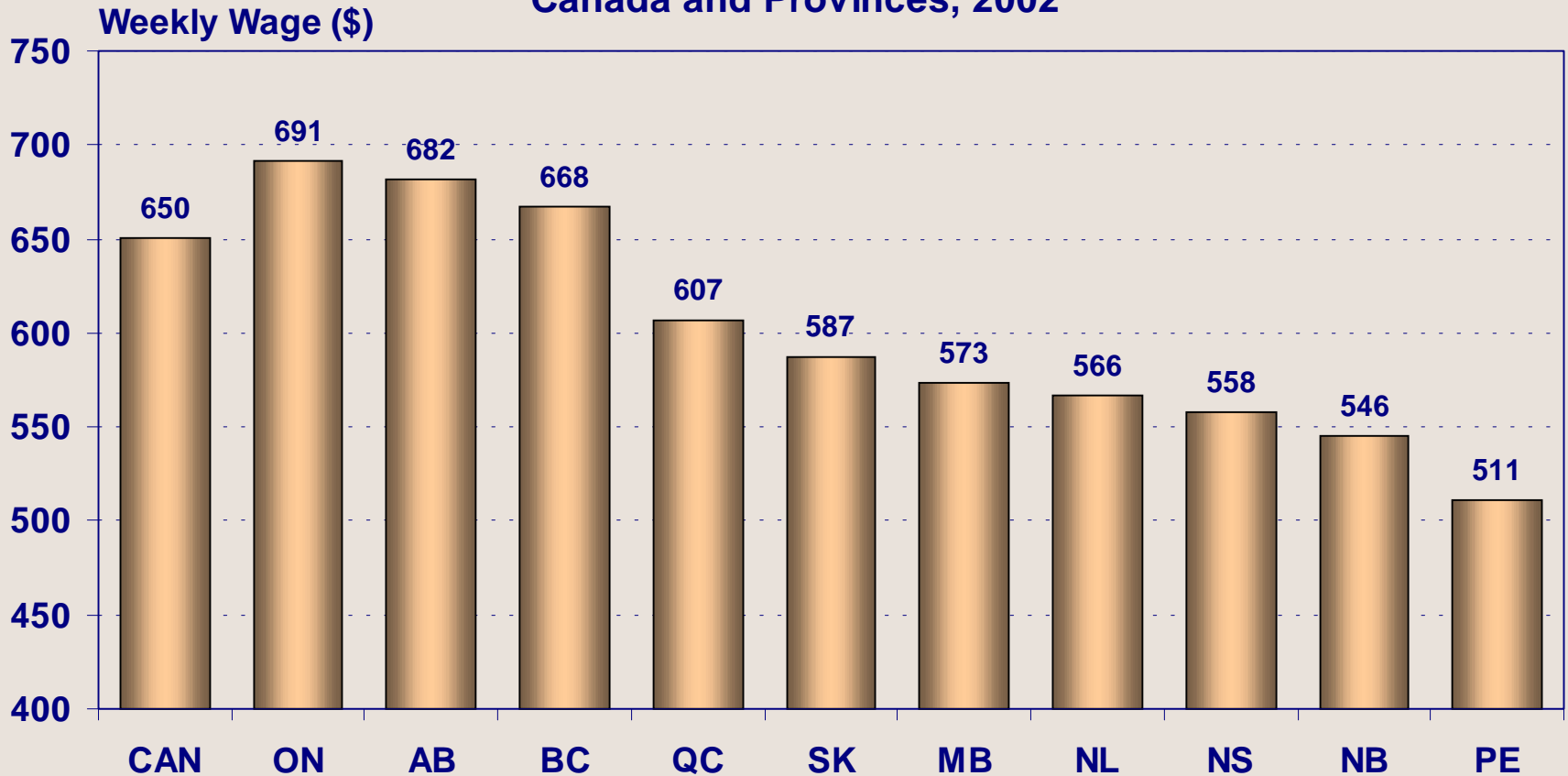
**Monthly Participation Rates
Canada vs. Newfoundland and Labrador, 1998 to 2002**



Source: Statistics Canada, Labour Force Historical Review, CD1T37AN

Weekly Wages

Average Weekly Wage Rate
Canada and Provinces, 2002



Source: Statistics Canada, Labour Force Historical Review, CD2T09AN

April 2003



Expanding Our Understanding

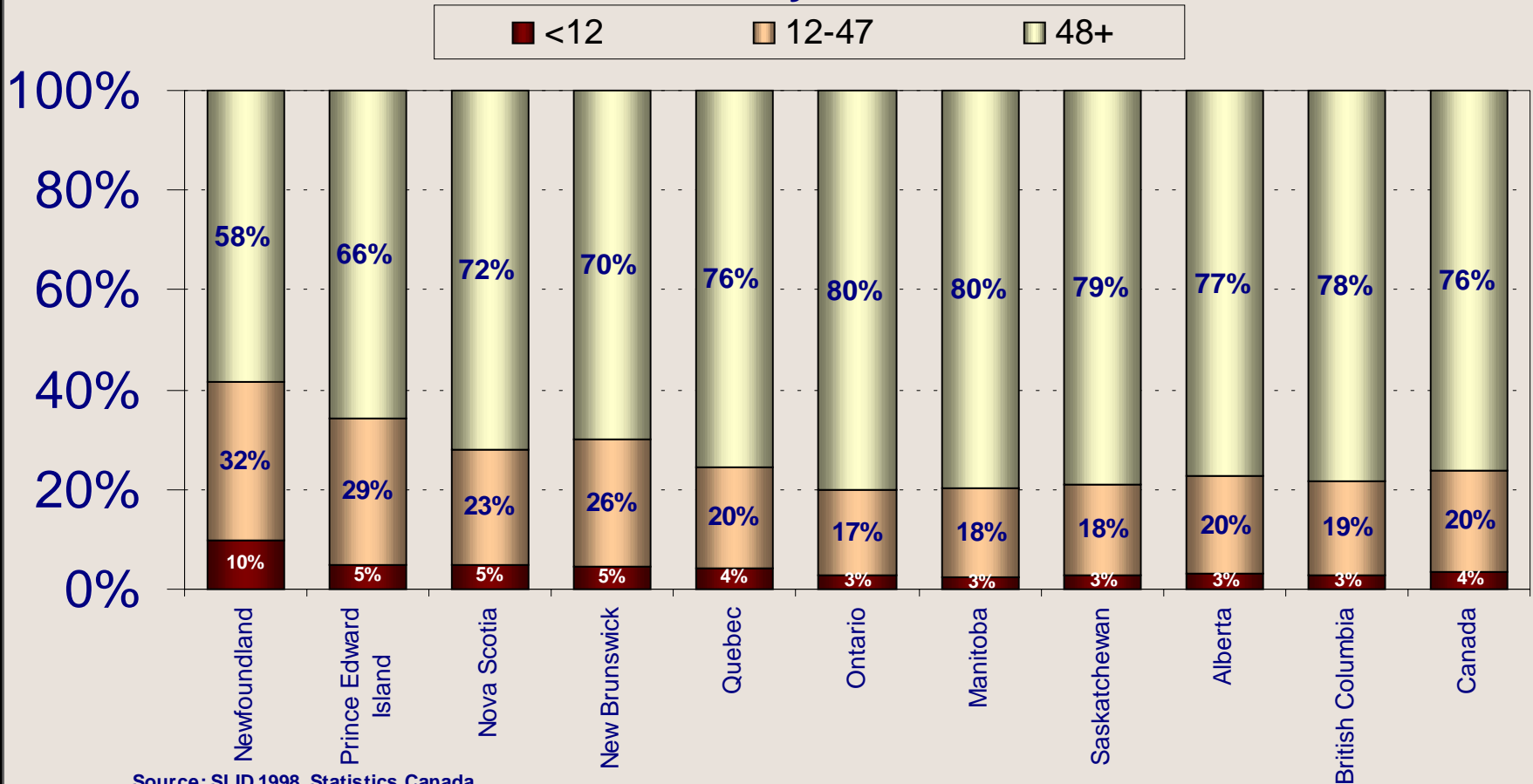


Supply Side



Duration of Employment - SLID

Weeks worked by Province, 1998



Source: SLID 1998, Statistics Canada

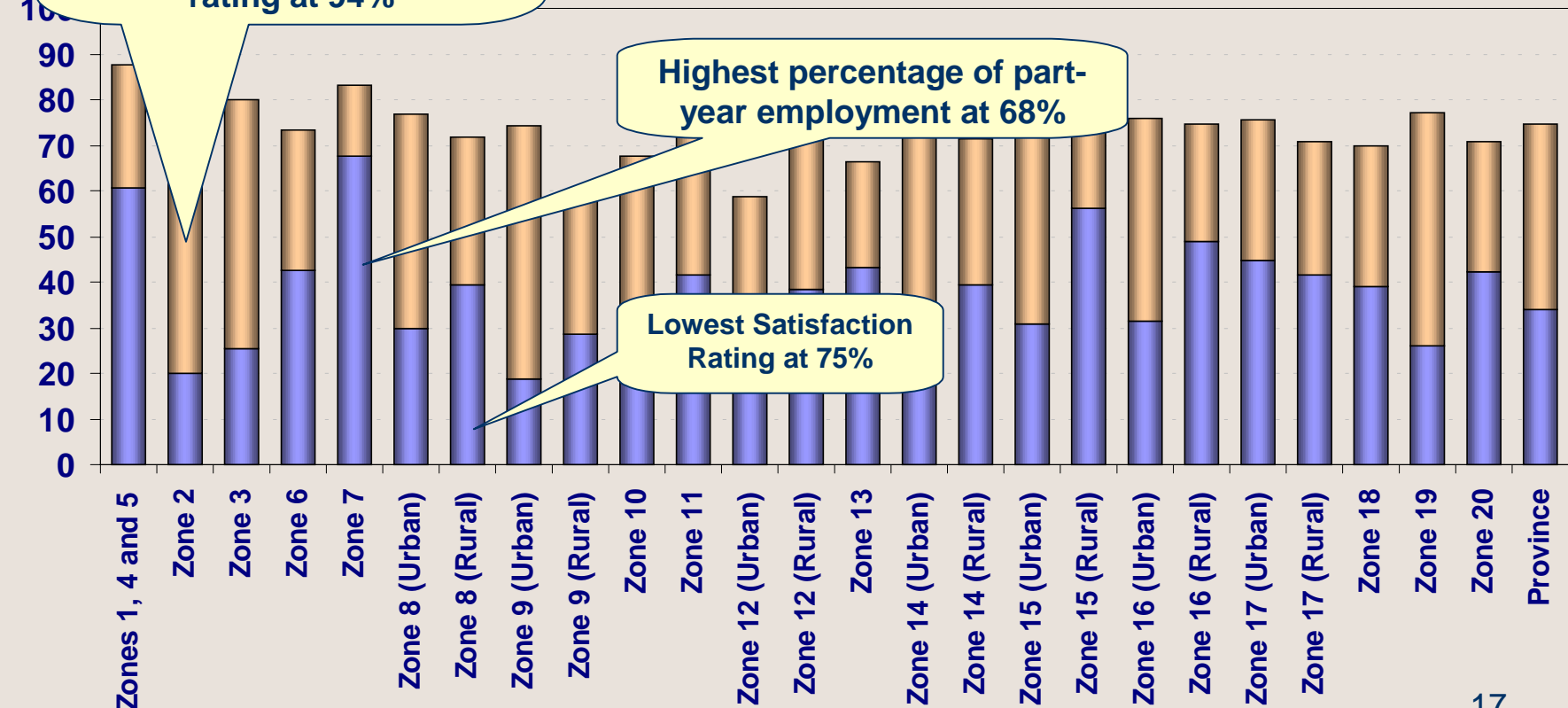
Duration of Employment - LAS

Weeks Worked, 2001

Newfoundland and Labrador and Regions

Map

Percentage of full-year employment (1 to 47 weeks) Full-Year (>47 weeks)



Highest percentage of full-year employment at 57%
And highest satisfaction rating at 94%

Highest percentage of part-year employment at 68%

Lowest Satisfaction Rating at 75%

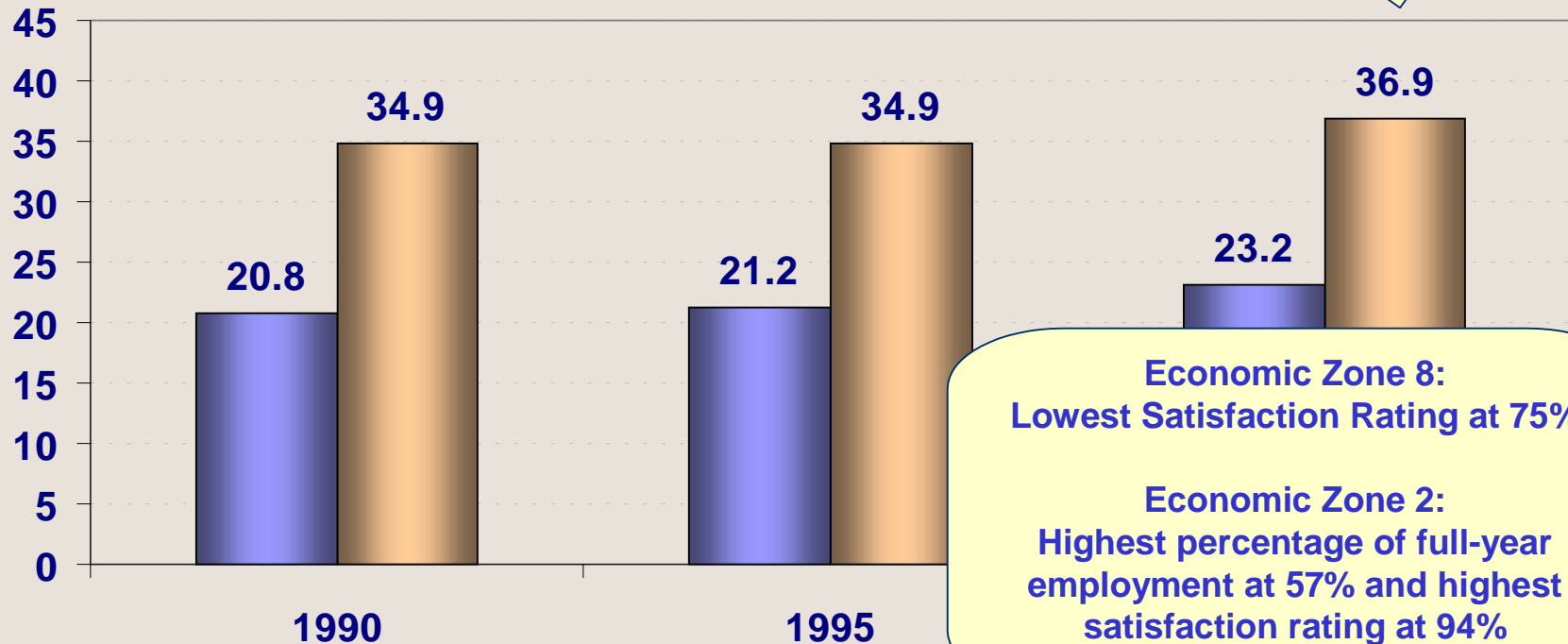
Average Weeks Worked

Average Weeks Worked per Year
Newfoundland and Labrador, 1990-2000

Hours worked per week higher than in Canada

■ Part-Year

■ Full-Year and Part-Year

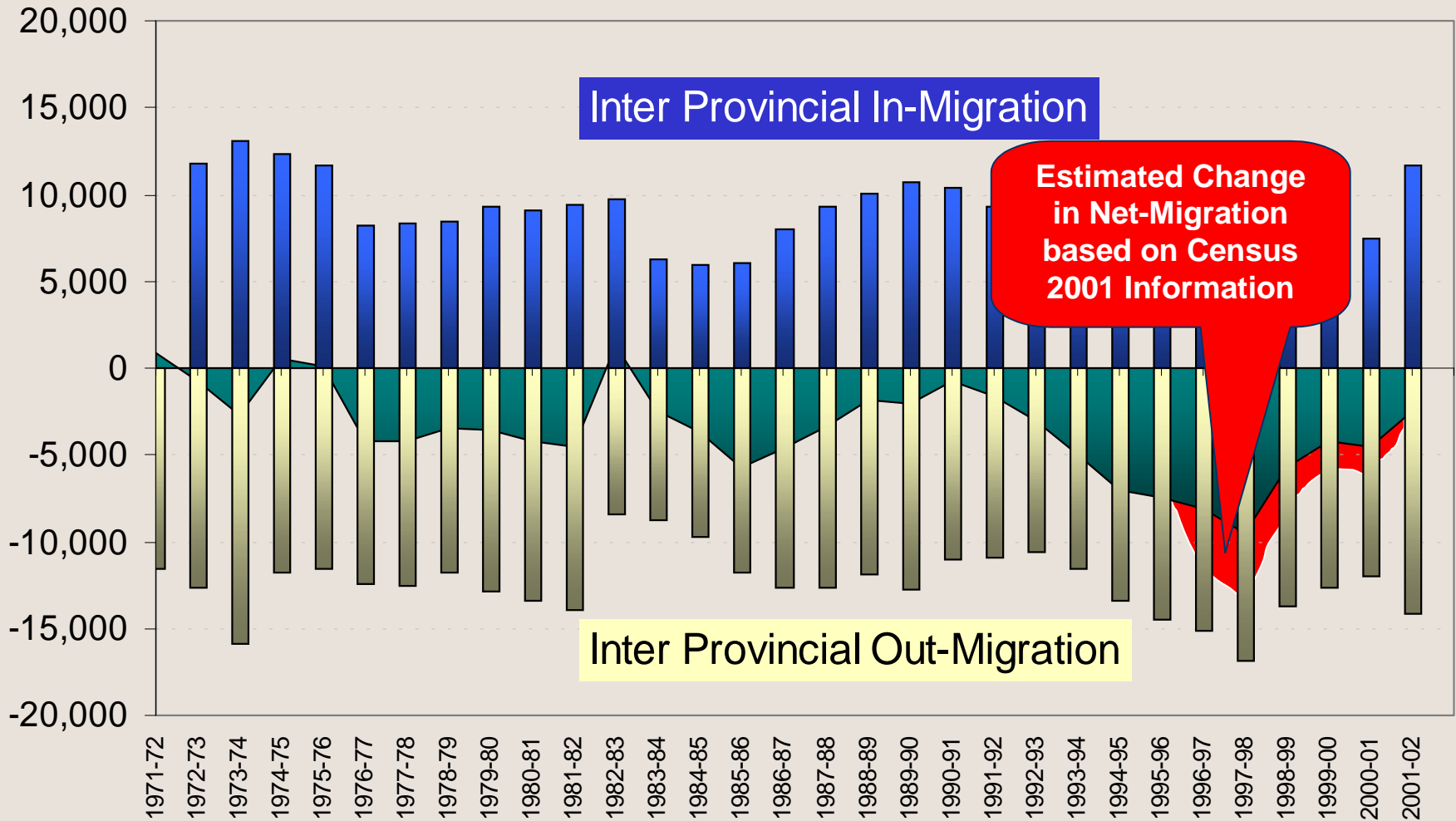


Economic Zone 8:
Lowest Satisfaction Rating at 75%

Economic Zone 2:
Highest percentage of full-year
employment at 57% and highest
satisfaction rating at 94%

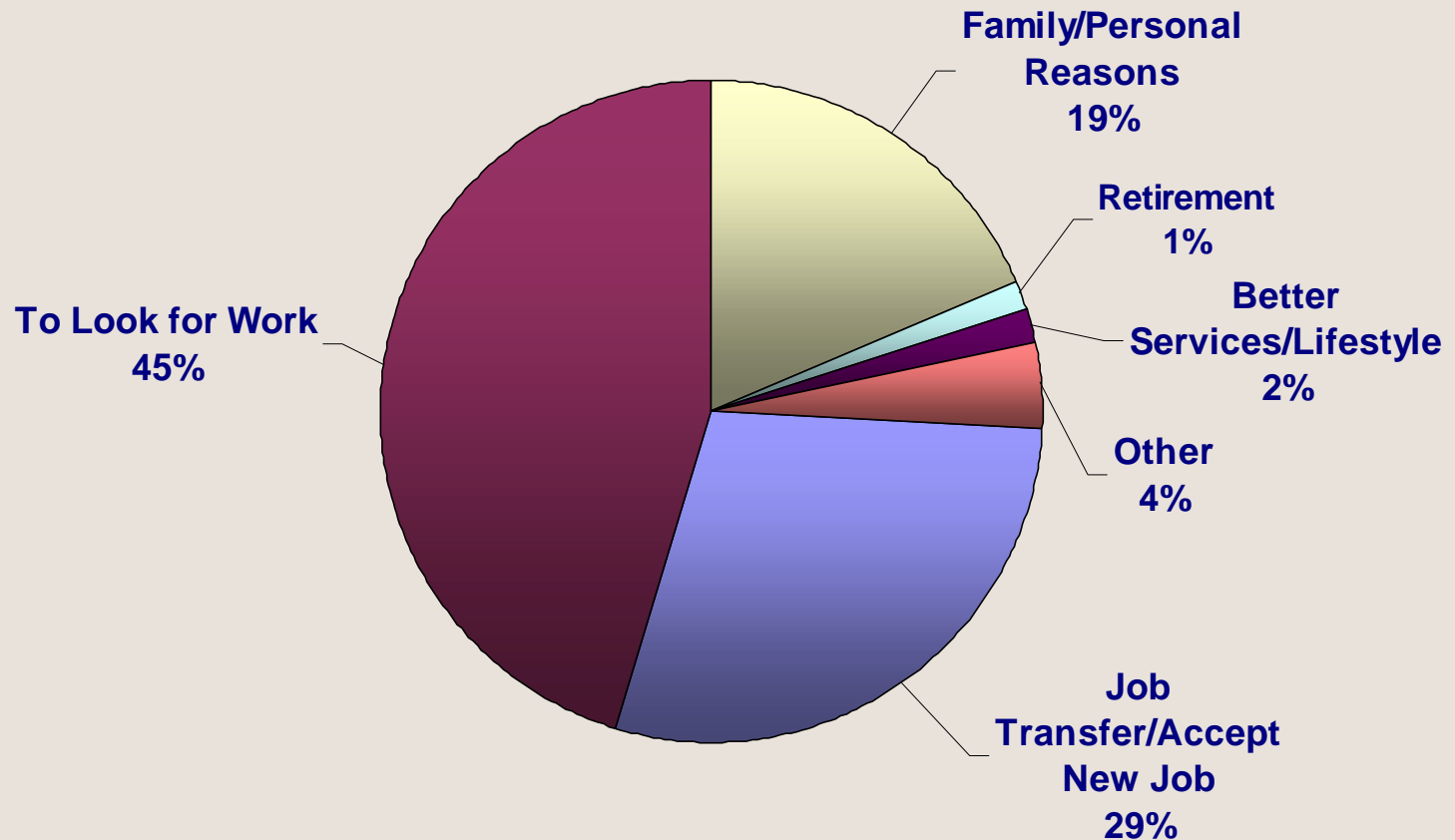
Source: Statistics Canada, Census 1991-2001

Inter-Provincial Migration Flows



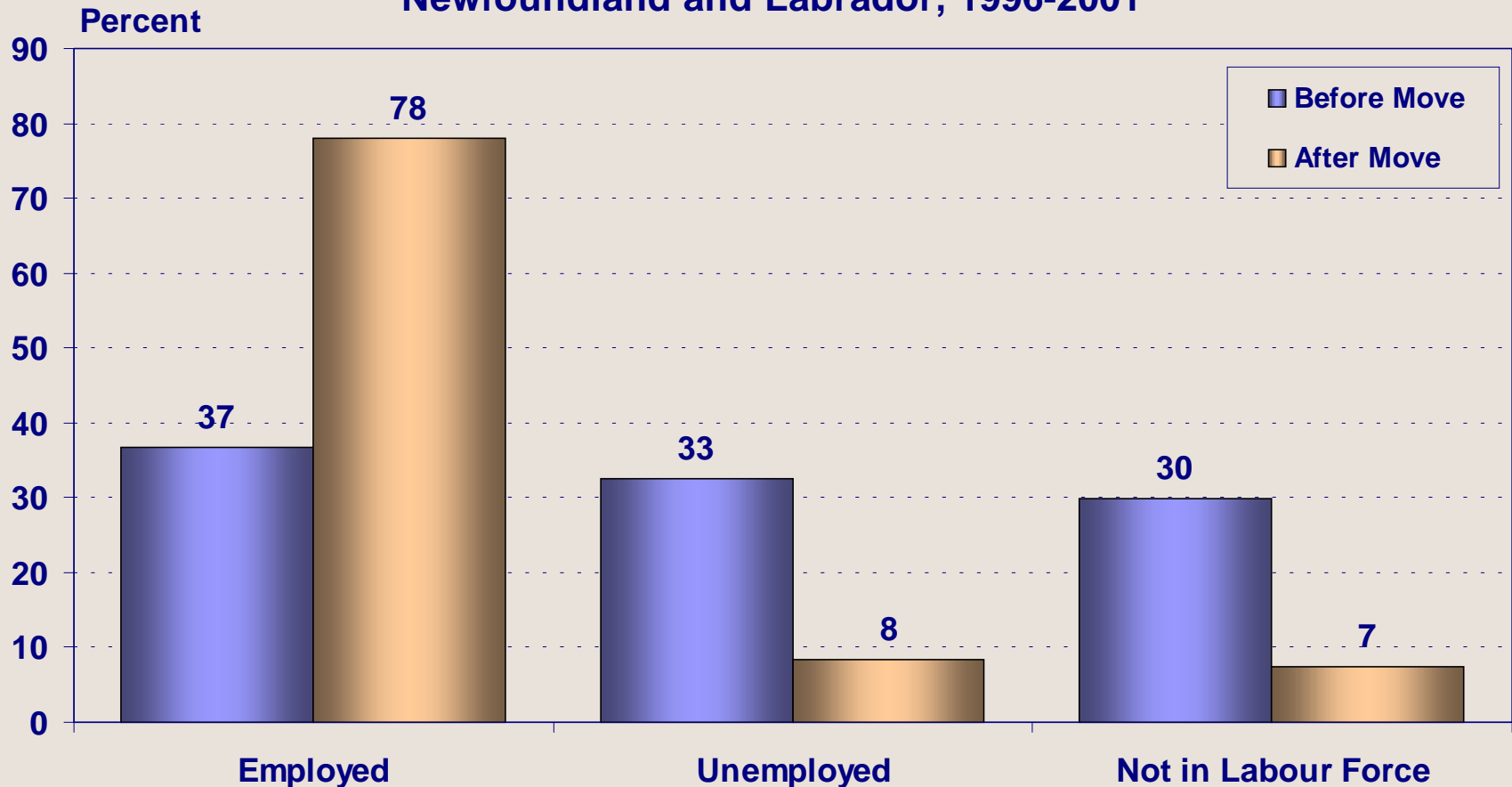
Out-Migrants: Reason for Leaving

**Out-Migrants by Main Reason for Moving
Newfoundland and Labrador, 1996-2001**



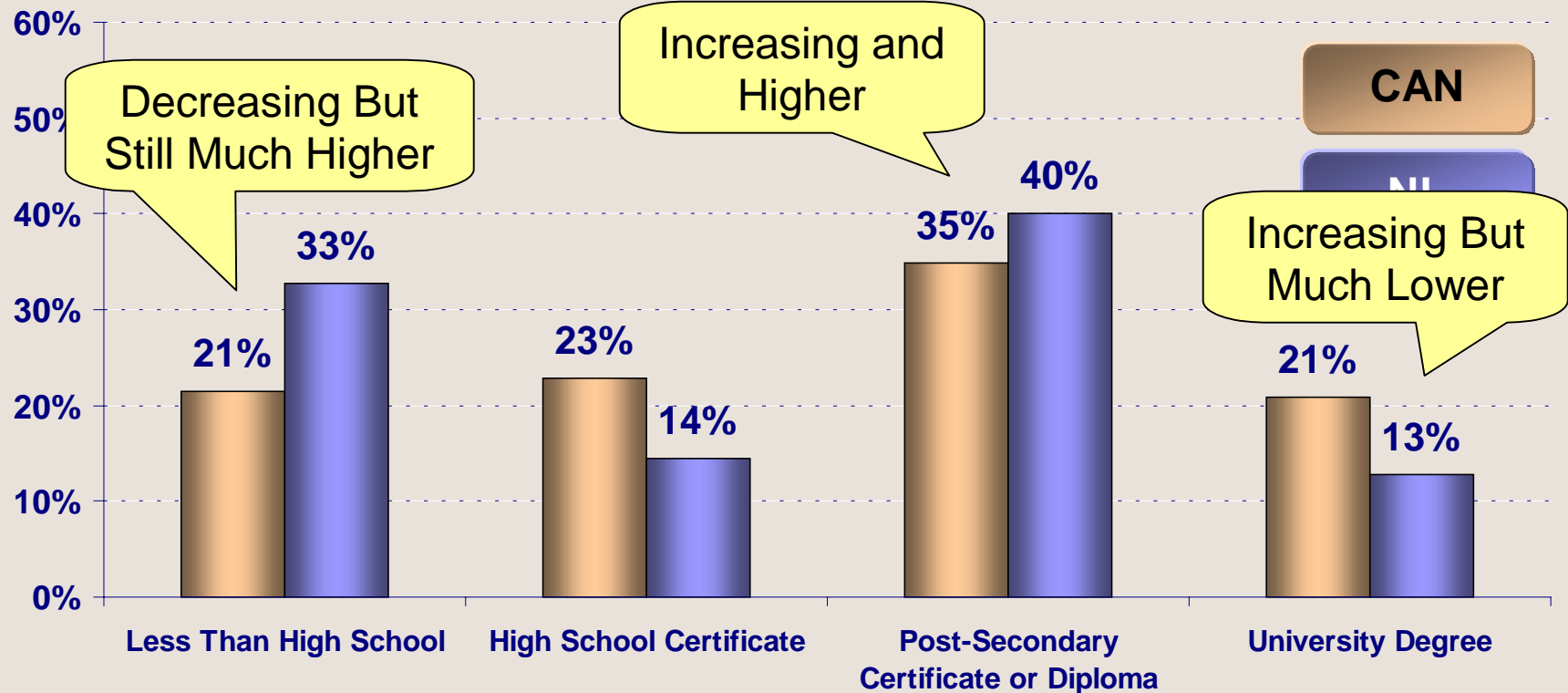
Out-Migrants: Labour Force Status

**Out-Migrant Labour Force Status Before and After Move
Newfoundland and Labrador, 1996-2001**



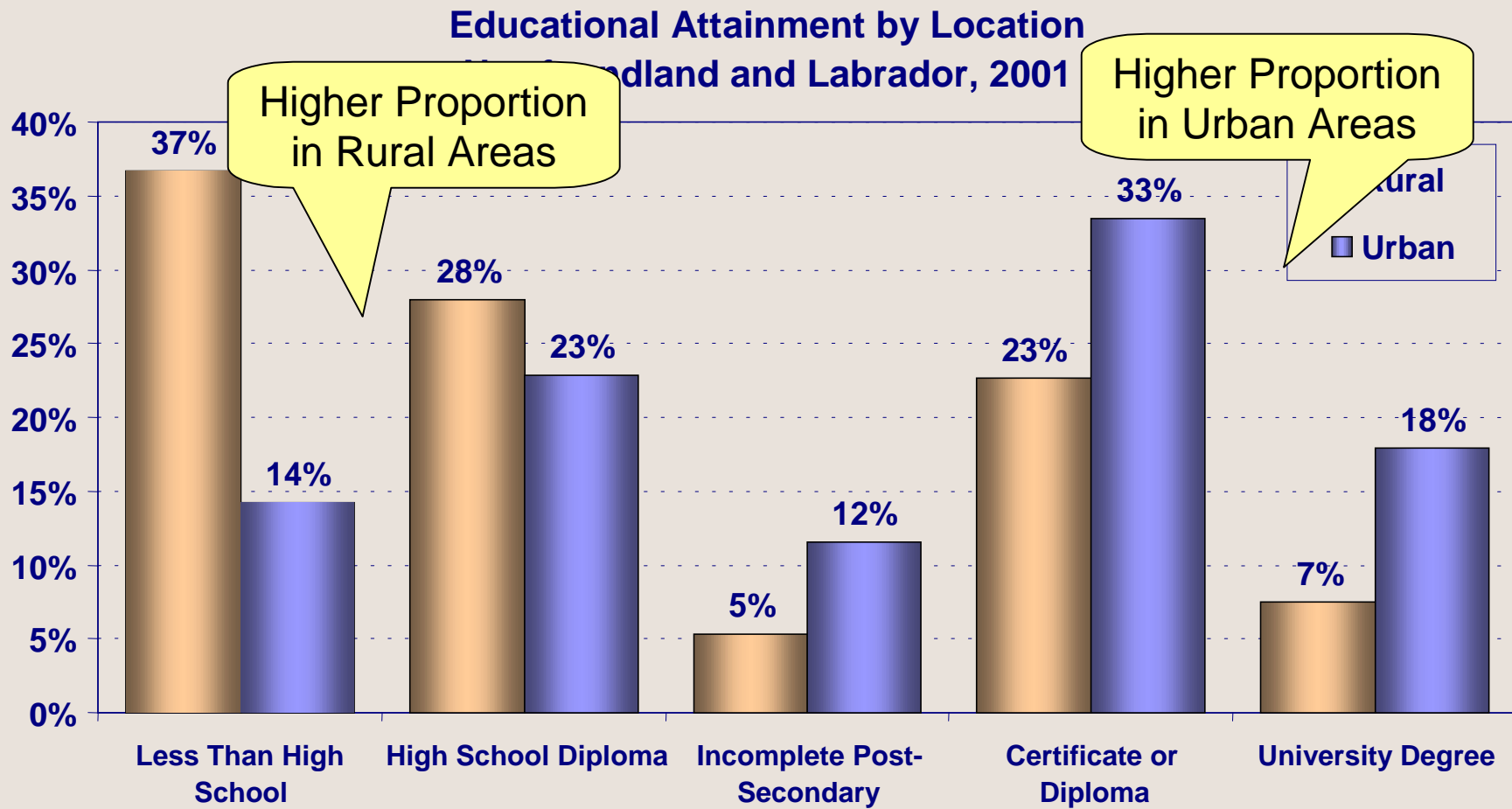
Educational Attainment: CAN vs. NL

Educational Attainment, 25-54 Years 2001



Source: Statistics Canada, Census of Population 1986-2001

Educational Attainment: Rural vs. Urban



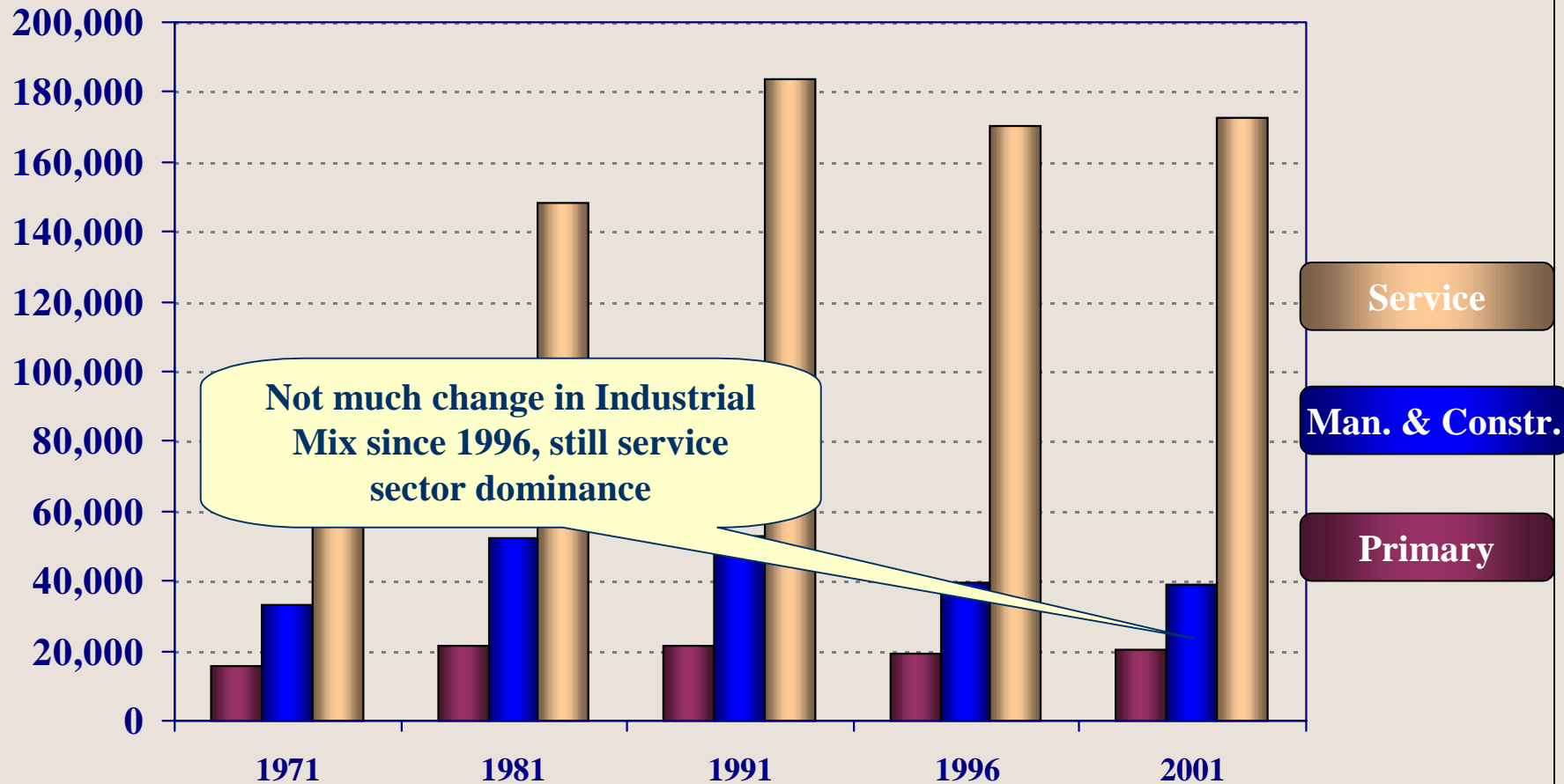
Source: Newfoundland Statistics Agency, Labour Activity Survey 2001



Demand Side Issues



Industry Breakdown Newfoundland and Labrador



Source: Statistics Canada, Census Experienced Labour Force.
 Figures for the years 1971 and 1981 are based on 1970 Standard Industrial Classification.
 Figures for the years 1991 and 1996 are based on 1980 Standard Industrial Classification.
 Figures for 2001 based on NAICS

Employment by Occupation, NL, 2002

Employment by Occupation, NL, 2002

Sales and Service	27%
Business, Finance, Administration	15%
Trades, Transport, Equipment Operators	15%
Social Science, Education, Government Service	8%
Health	8%
Management	7%
Primary Industry	6%
Natural and Applied Sciences	6%
Processing , Manufacturing, Utilities	5%
Art, Culture, Recreation, Sport	2%

“Very Little
Change since
1992”

“Diverse like
Canada with
very little
difference”

Source: Statistics Canada, Labour Force Historical Review, CD1T06AN



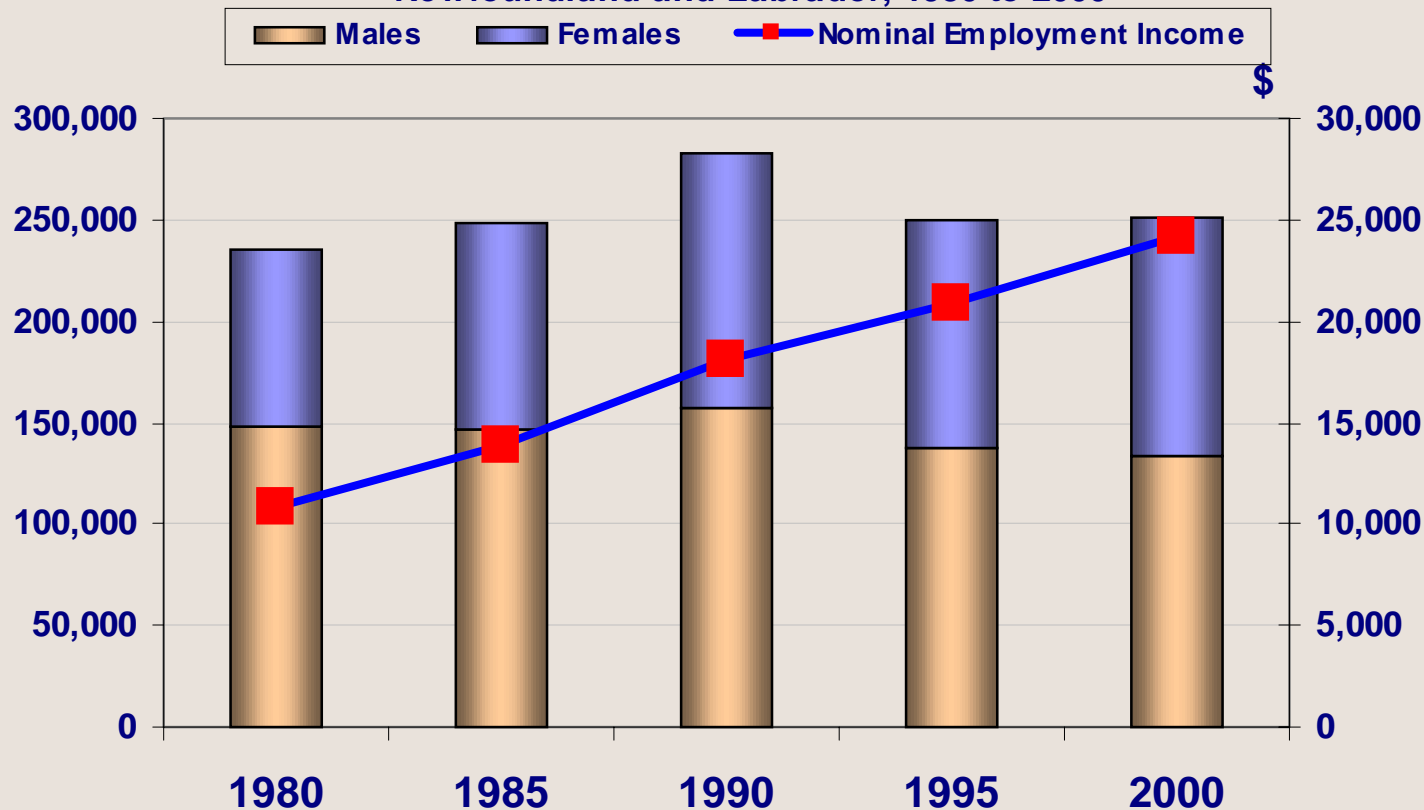
Outcomes



Employment by Gender and Nominal Employment Income, NL, 1980 - 2000

Employment Level by Gender and Avg. Nominal Employment Income

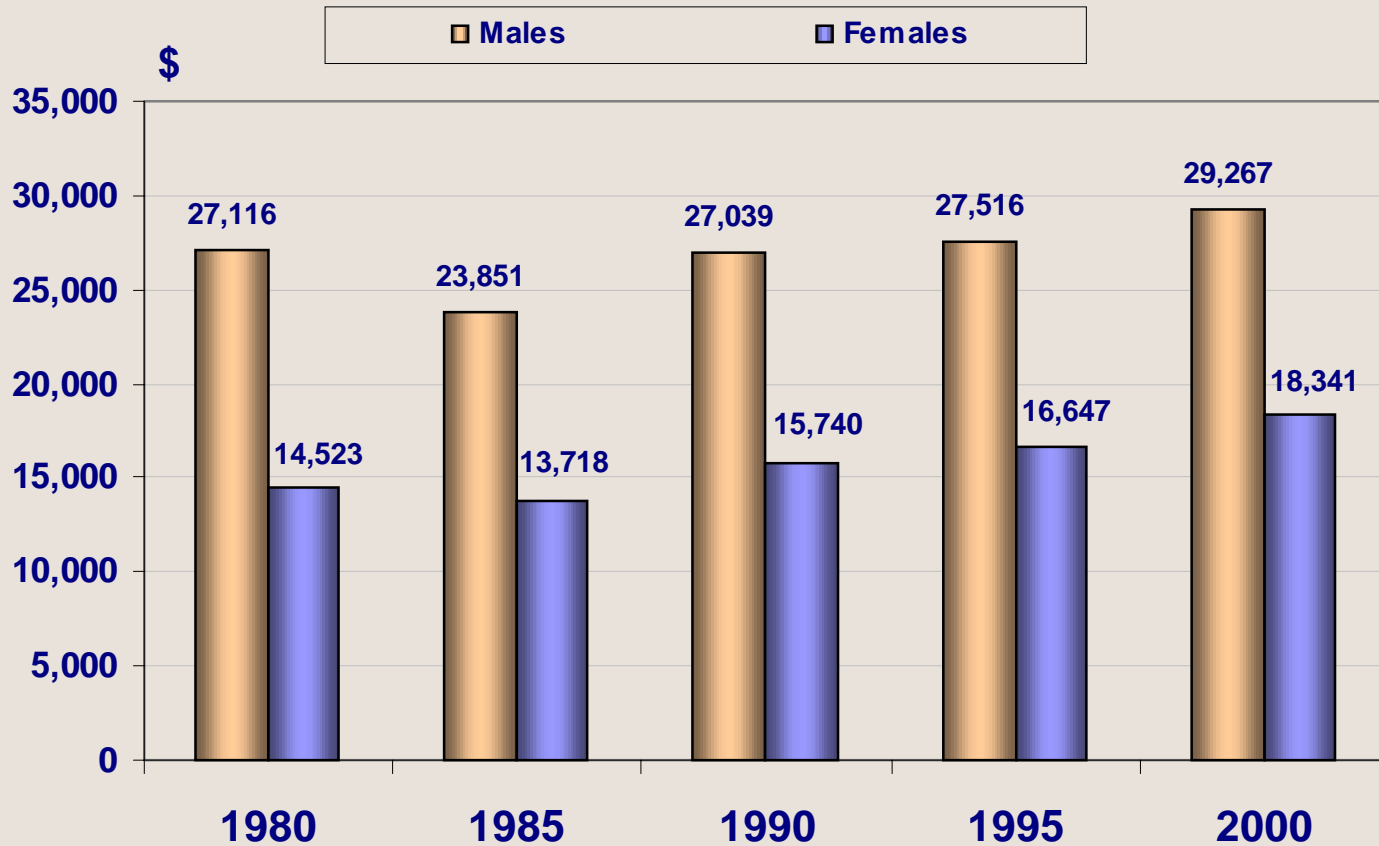
Newfoundland and Labrador, 1980 to 2000



Source: Statistics Canada, Census of Population 1981-2001

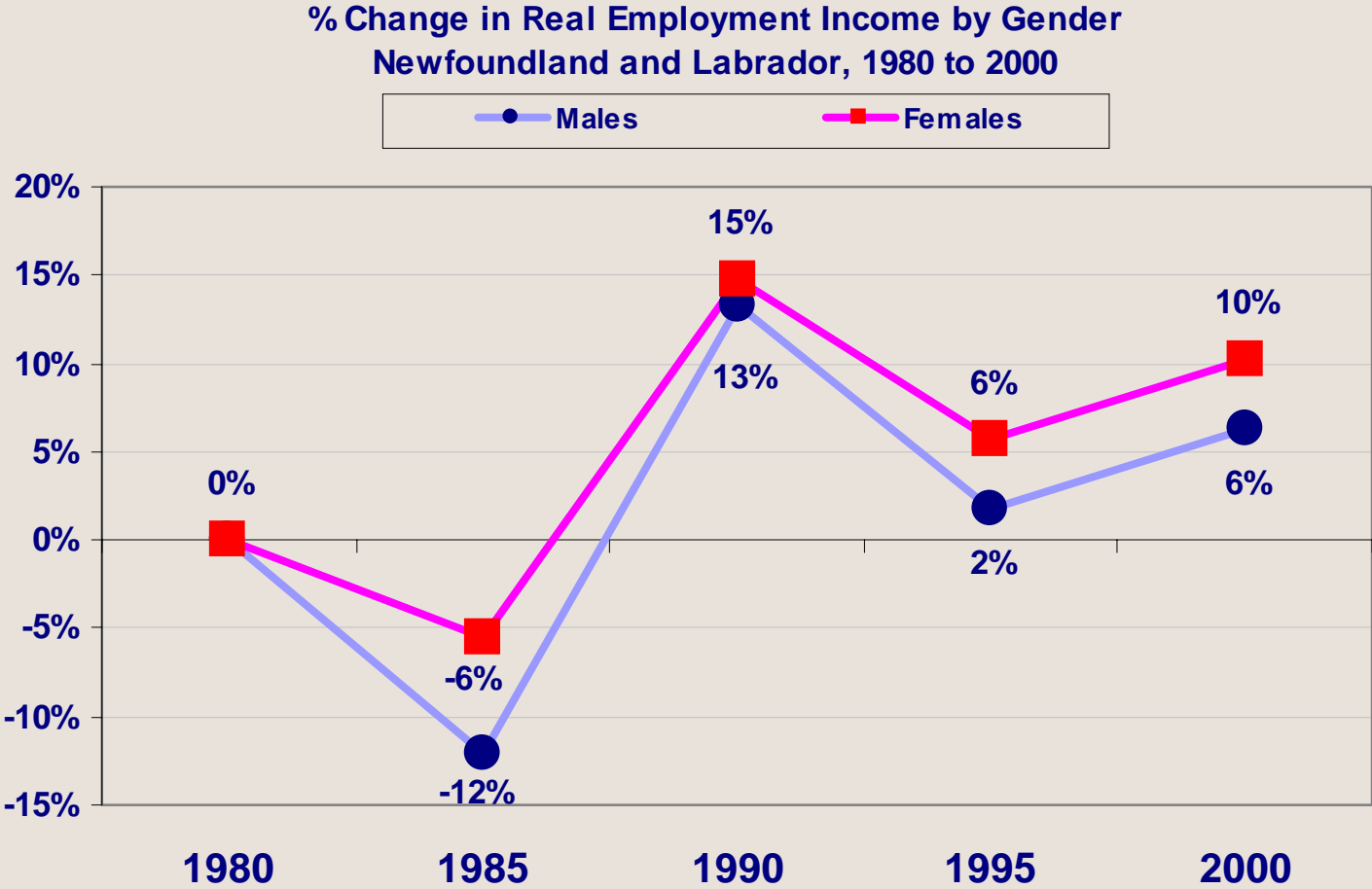
Average Real Employment Incomes

Average Real Employment Income by Gender
Newfoundland and Labrador, 1980 to 2000



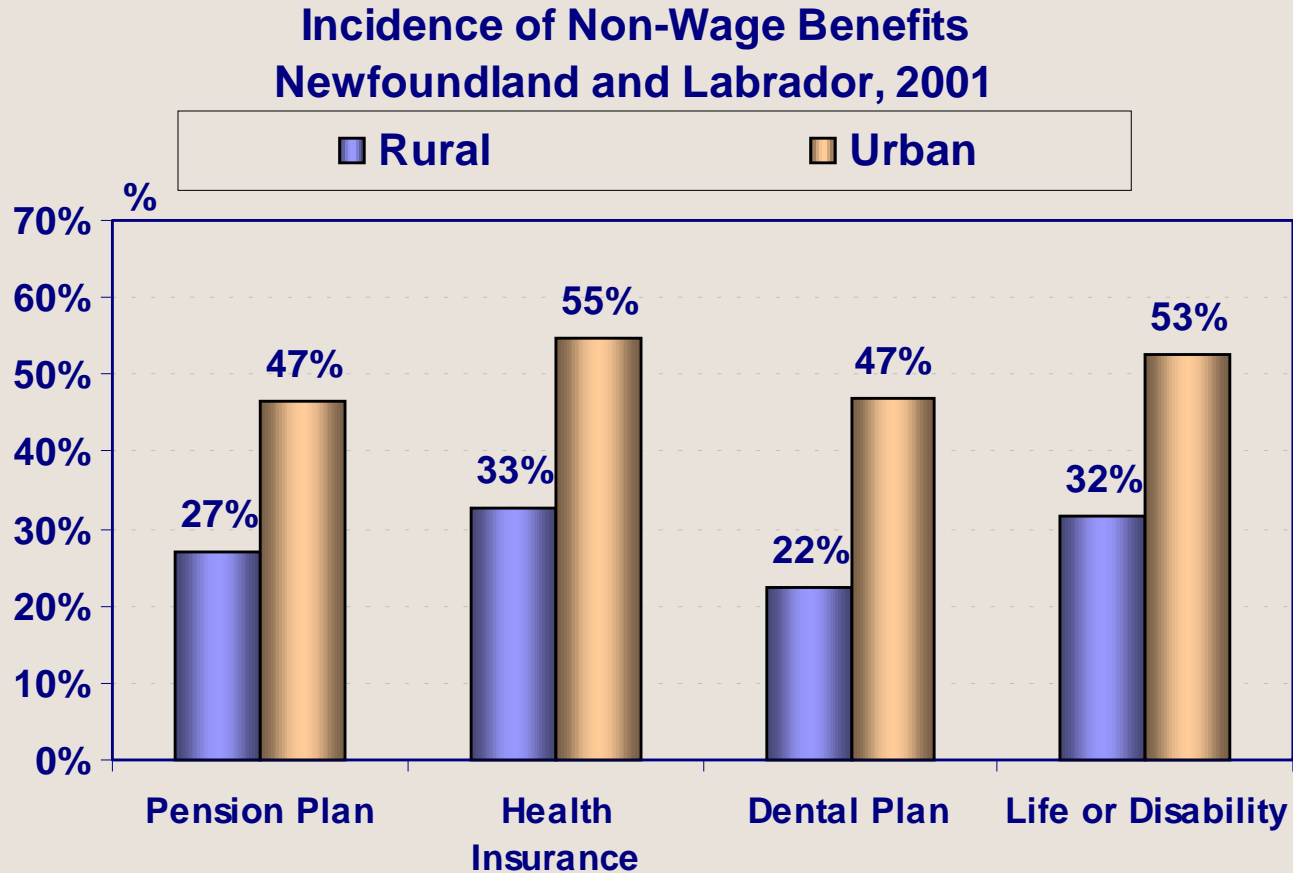
Source: Statistics Canada, Census of Population 1981-2001

Change in Real Employment Incomes by Gender, NL, 1980 - 2000



Source: Statistics Canada, Census of Population 1981-2001

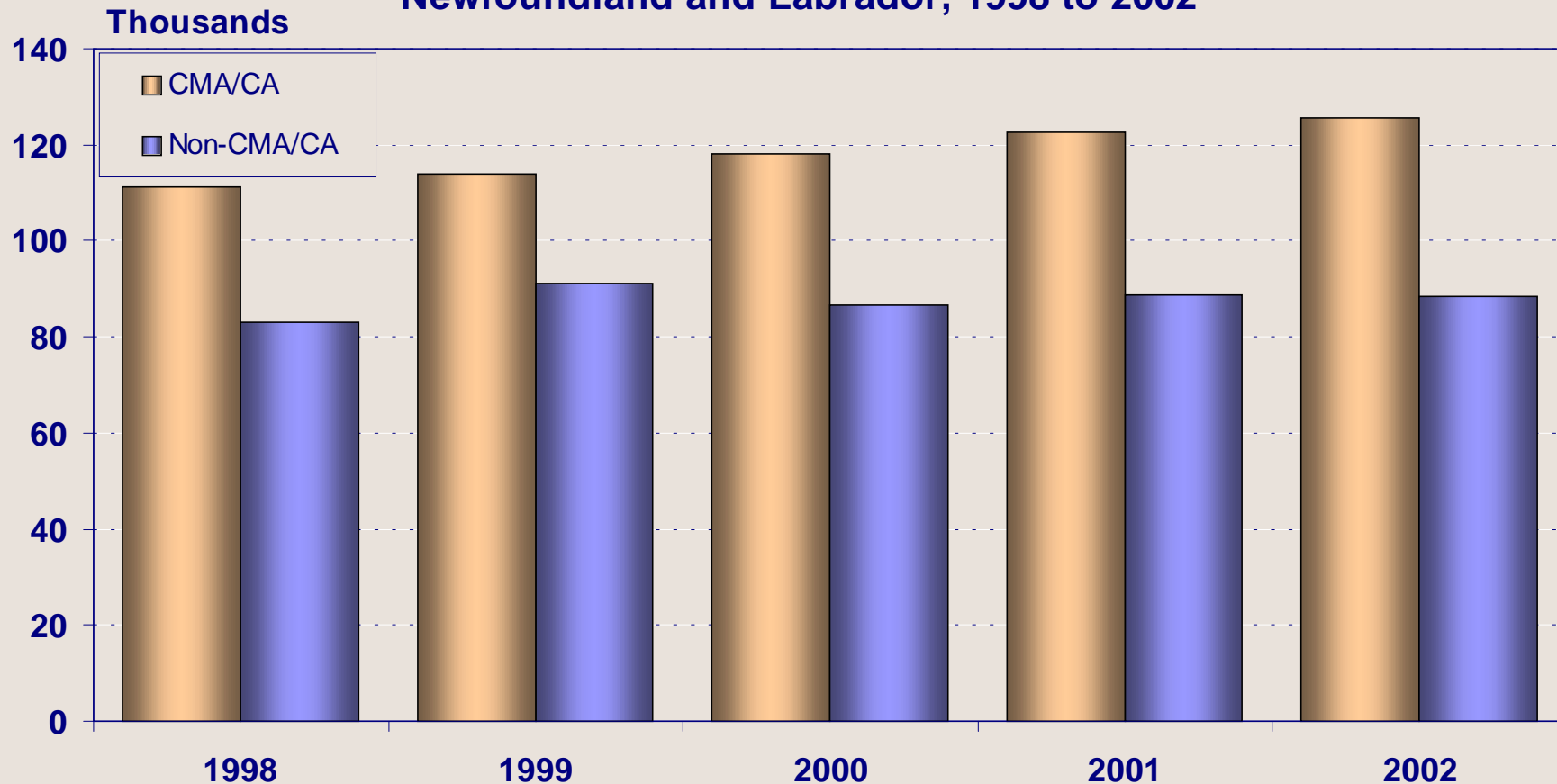
Incidence of Non-Wage Benefits, Urban-Rural, NL 2001



Source: Newfoundland Statistics Agency, LAS 2001

“High Rural Employment”

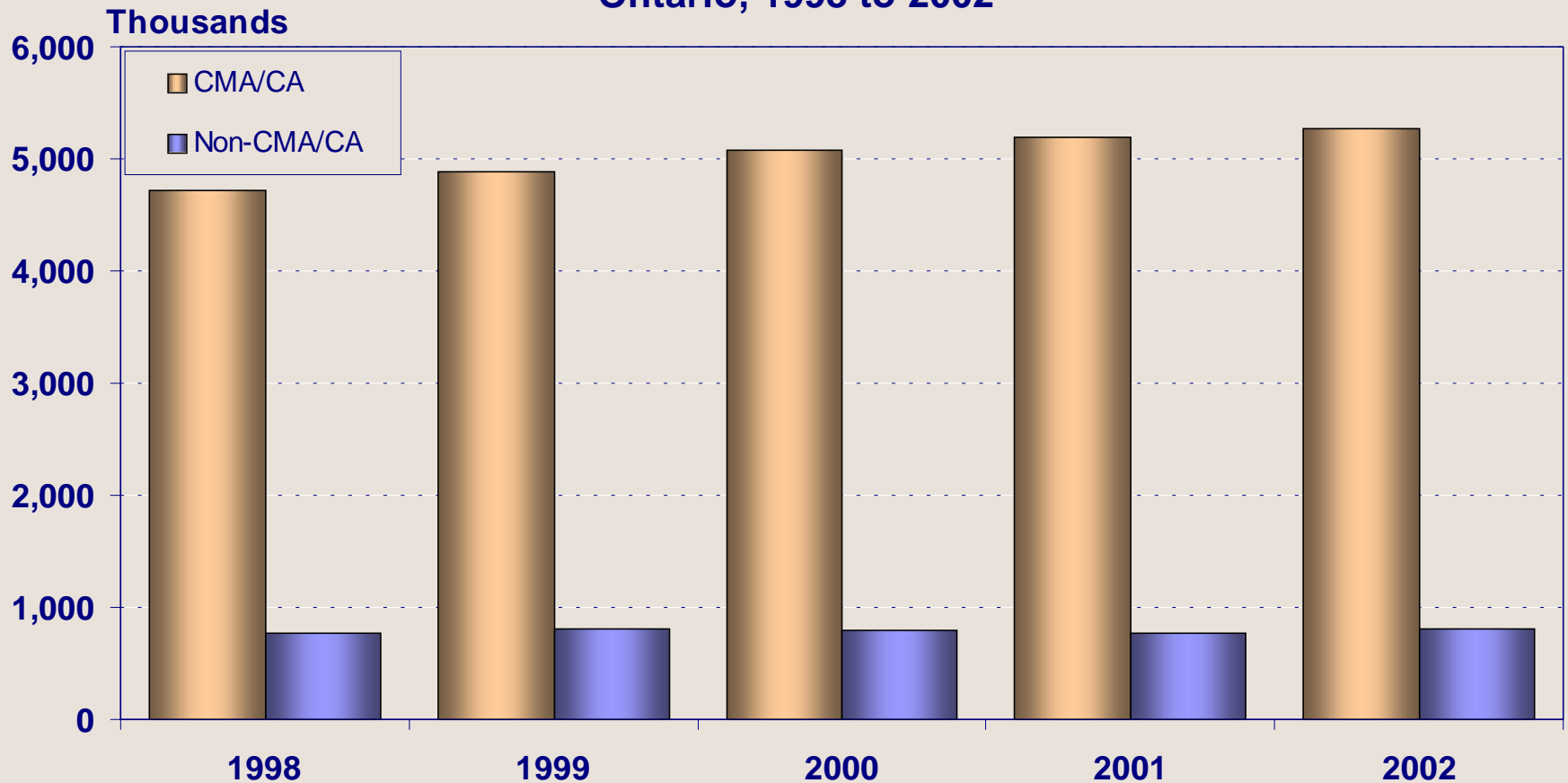
**Employment by Urban and Rural
Newfoundland and Labrador, 1998 to 2002**



Source: Statistics Canada, Labour Force Historical Review, CD1T37AN
April 2003

“High Urban Employment”

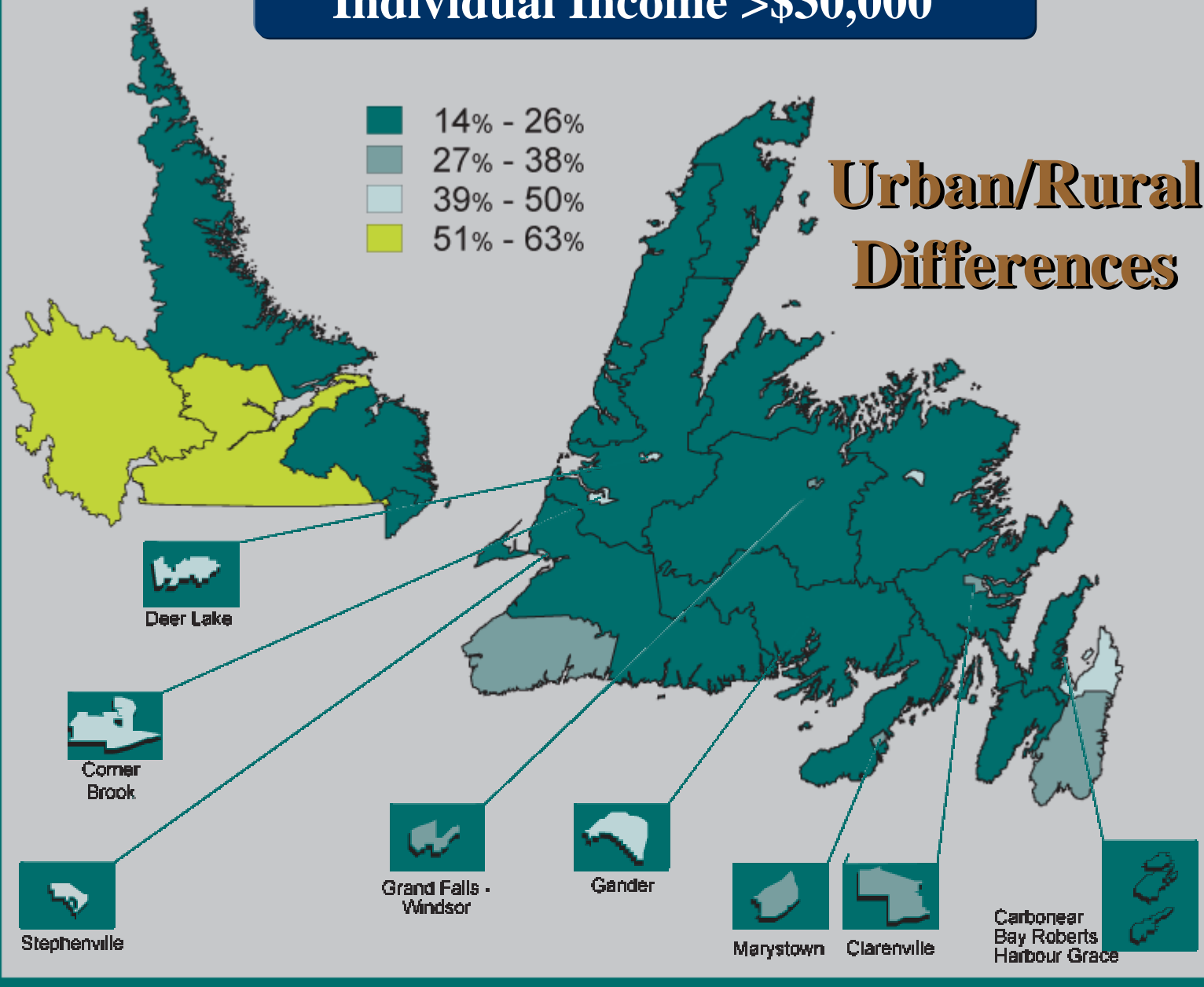
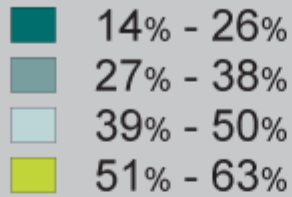
Employment by Urban and Rural
Ontario, 1998 to 2002



Source: Statistics Canada, Labour Force Historical Review, CD1T37AN
April 2003

Individual Income >\$30,000

Urban/Rural Differences



National Comparisons - 1998

Population 25-54 (LAS 2001)	Urban	Rural
Employment Rate	81%	78%
Unemployment Rates (Never Worked in the year)	2%	4%
Unemployment Rates (At some point in the year)	14%	21%

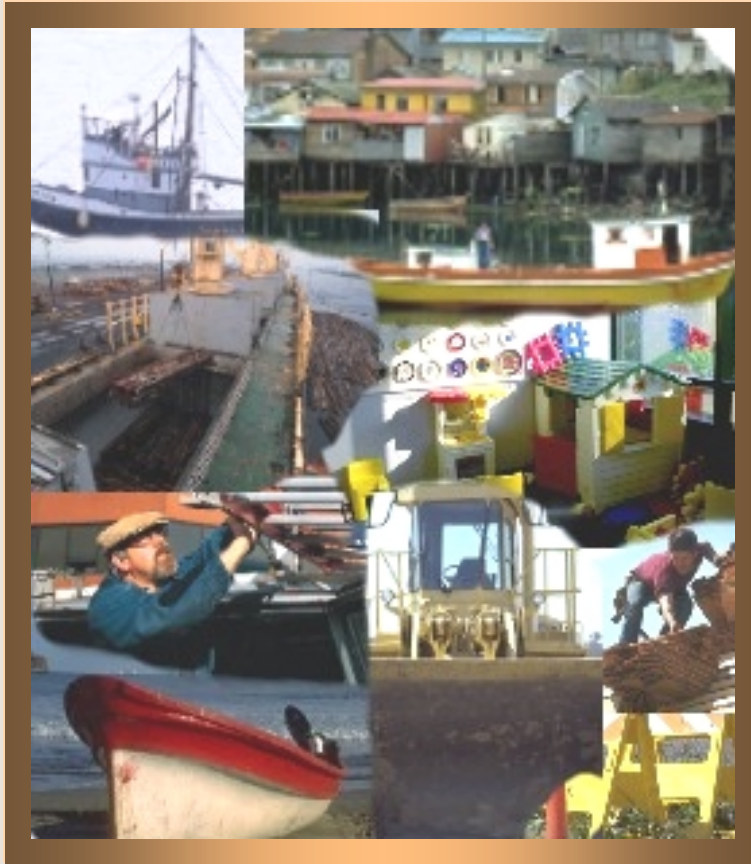
Age 25 to 54 - 1998	Canada	NL	NS	ON
Employment Levels (000's)	11,964.5	194.9	353.3	4,541.4
Employment Rates	86.5%	77.3%	83.2%	87.2%
Unemployment Rates (Never Worked in the year)	3.5%	8.7%	3.5%	3.3%
Unemployment Rates (At some point in the year)	18.1%	36.5%	21.0%	14.7%
Average Annual Income	\$31,230	\$22,708	\$26,044	\$35,710
Avg. Hours Worked per Week	37.7	37.7	37.8	37.7

Key Indicators: Other Perspectives

Age 25 to 54	LFS 1999	SLID 1999	Taxfiler 1999	LAS 1999/00	Census 2001
Employment Levels	160.4	193.6	190.3	194.9	182.7
Employment Rates	64.2%	77.1%	75.8%	77.6%	62.5% *
Unemployment Rates (Never Worked in the year)	15.3%	8.3%	-	4.3%	19.8% *
Unemployment Rates (At some point in the year)		30.2%	-	17.1%	
Average Annual Income	-				-
Avg. Hours Worked per Week	38.6	37.8			-

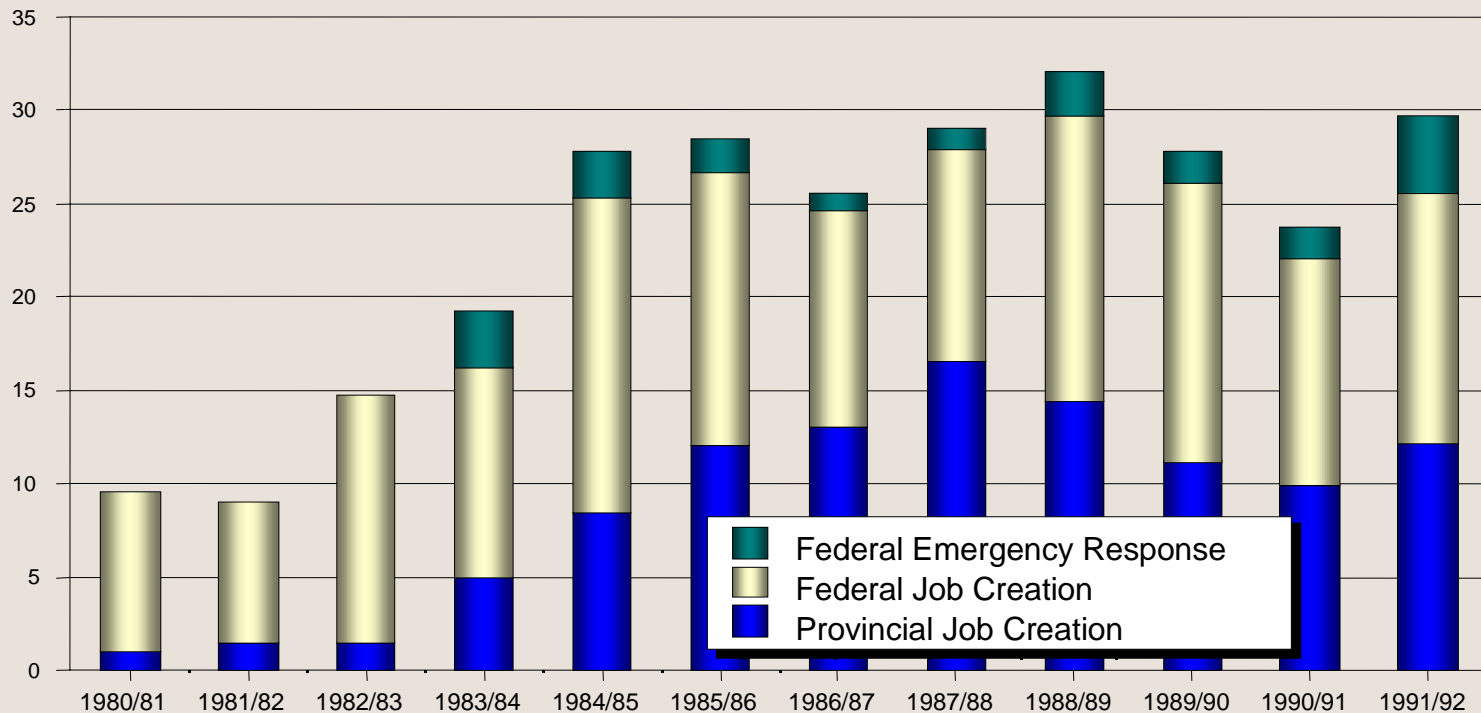
* Refers to persons who were either employed or unemployed during the week prior to Census Day

Role of Government



Job Creation

FEDERAL AND PROVINCIAL GOVERNMENT JOB CREATION PLACEMENTS NEWFOUNDLAND AND LABRADOR, 1980/81 TO 1991/92

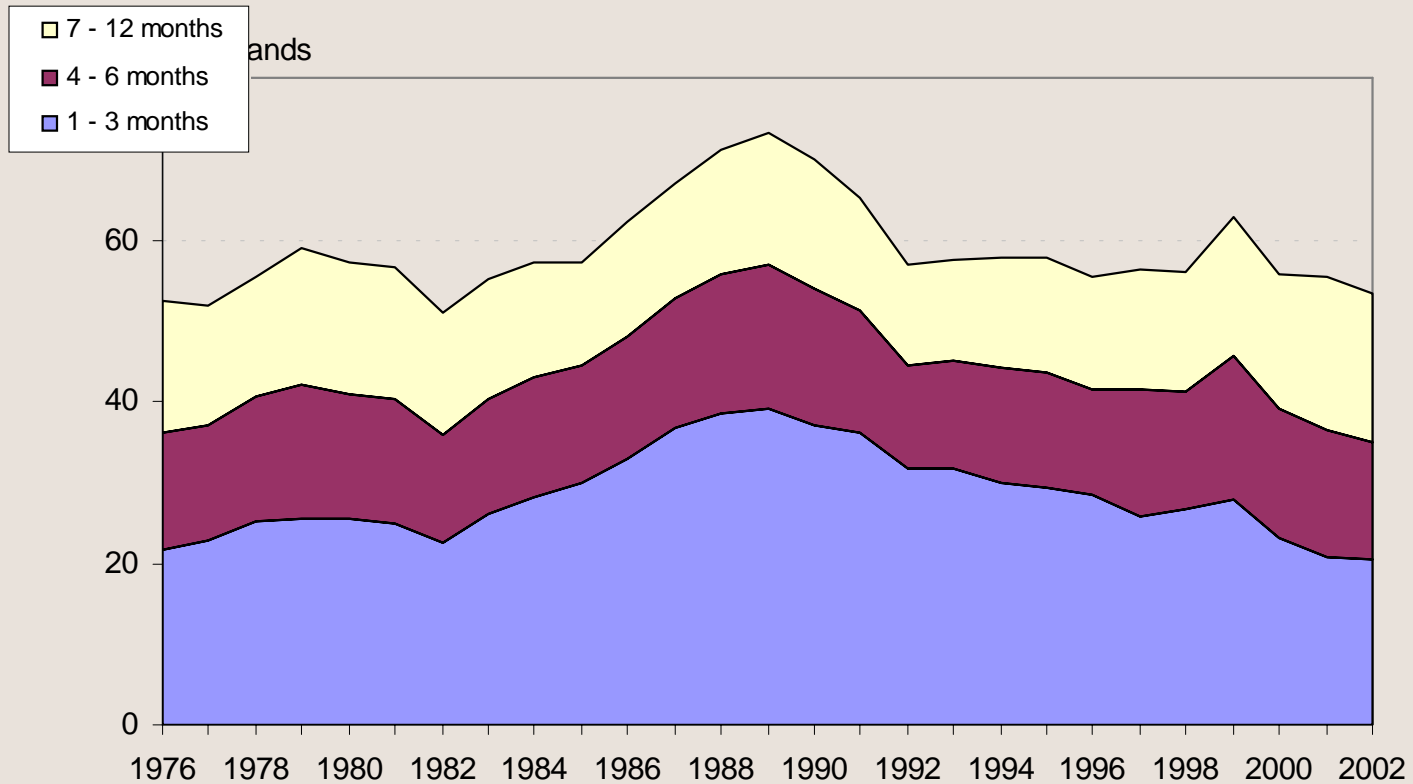


- Notes: (1) In the above figure, job creation includes those projects in which participants receive government sponsored (or subsidized) wages and/or obtain UI insurable weeks of employment and/or receive enhanced UI benefits while working.
- (2) Federal Emergency Response for fisherpersons has been excluded from federal job creation totals and added as a separate category.

SOURCE: EMPLOYMENT AND IMMIGRATION CANADA: SPECIAL TABULATION; NEWFOUNDLAND STATISTICS AGENCY; DEPARTMENT OF SOCIAL SERVICES; EMPLOYMENT AND LABOUR RELATIONS; ECONOMIC RECOVERY COMMISSION

Employment by Job Tenure

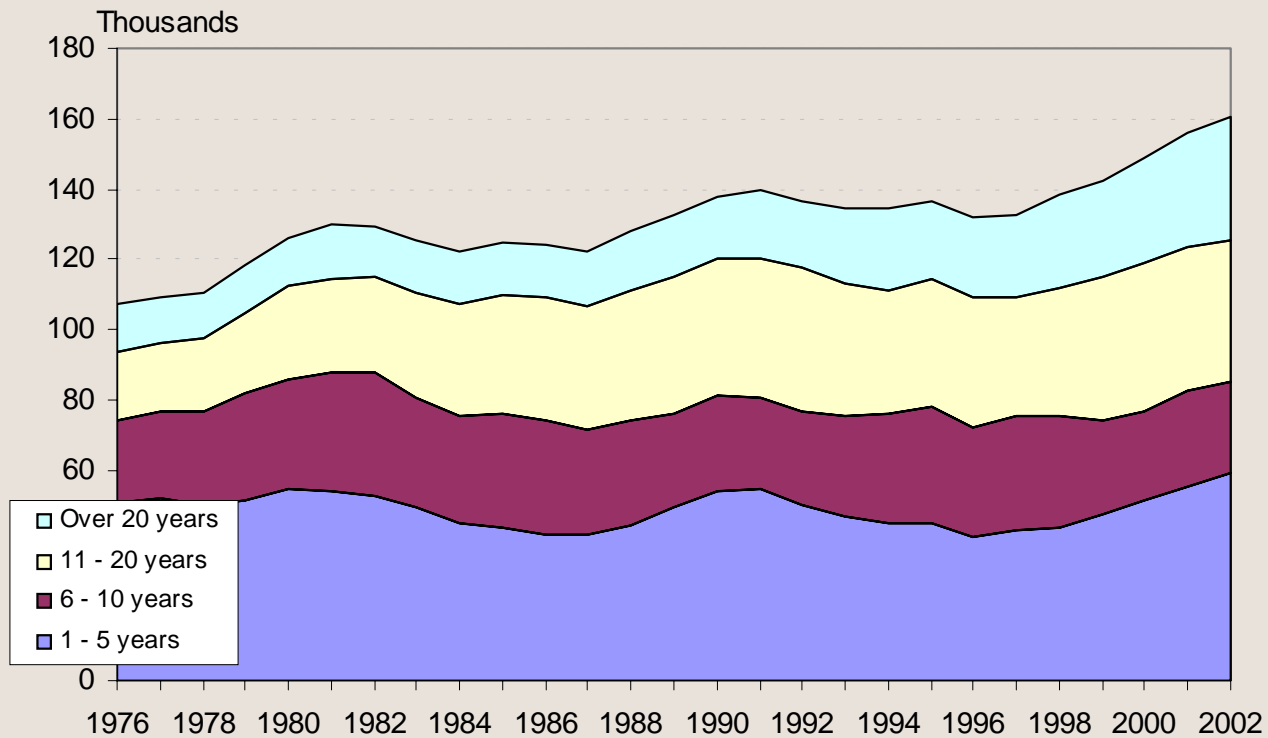
Employment by Job Tenure
Part Year, Annual Average
Newfoundland and Labrador, 1976 to 2002



Source: Statistics Canada, Labour Force Historical Review, CD1T21AN

Employment by Job Tenure

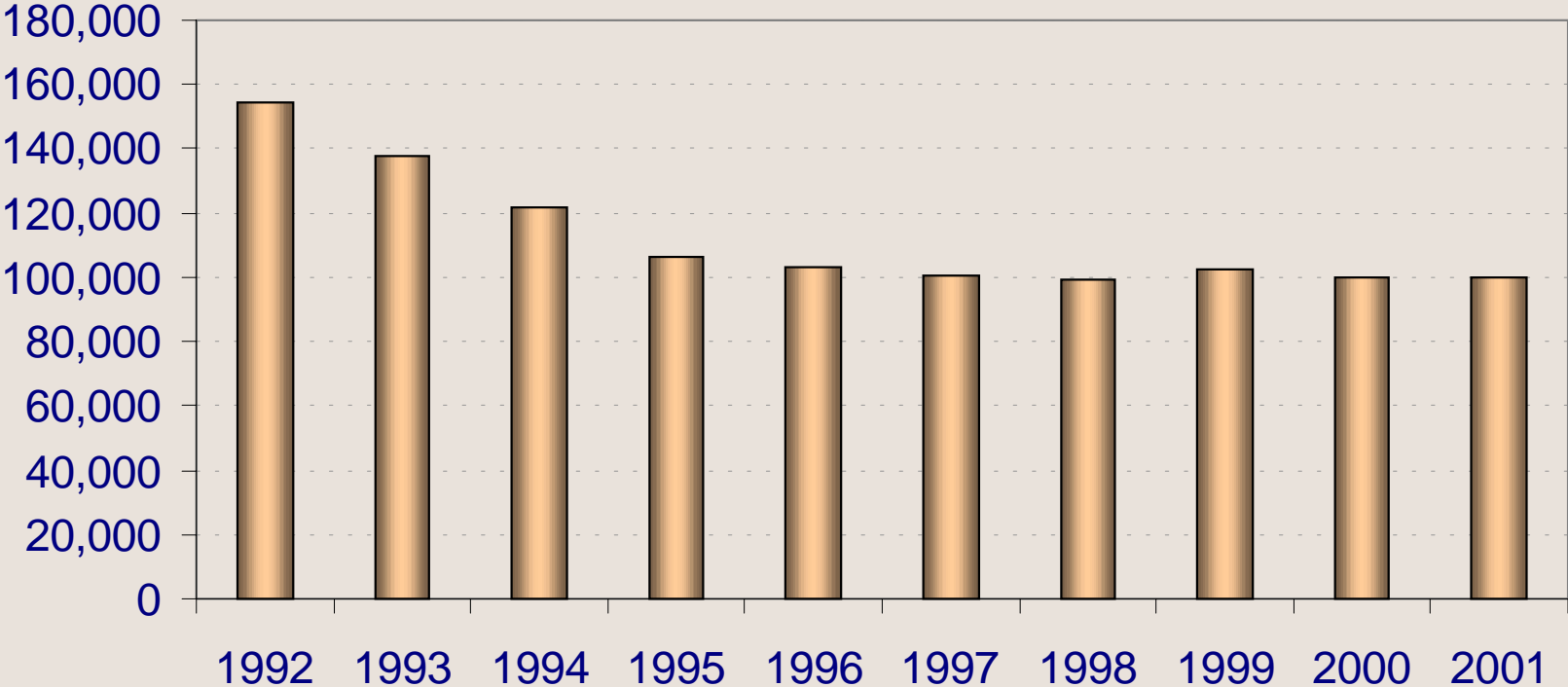
Employment by Job Tenure
Full Year, Annual Average
Newfoundland and Labrador, 1976 to 2002



Source: Statistics Canada, Labour Force Historical Review , CD1T21AN

Number of E.I. Beneficiaries

Employment Insurance Beneficiaries, Newfoundland and Labrador

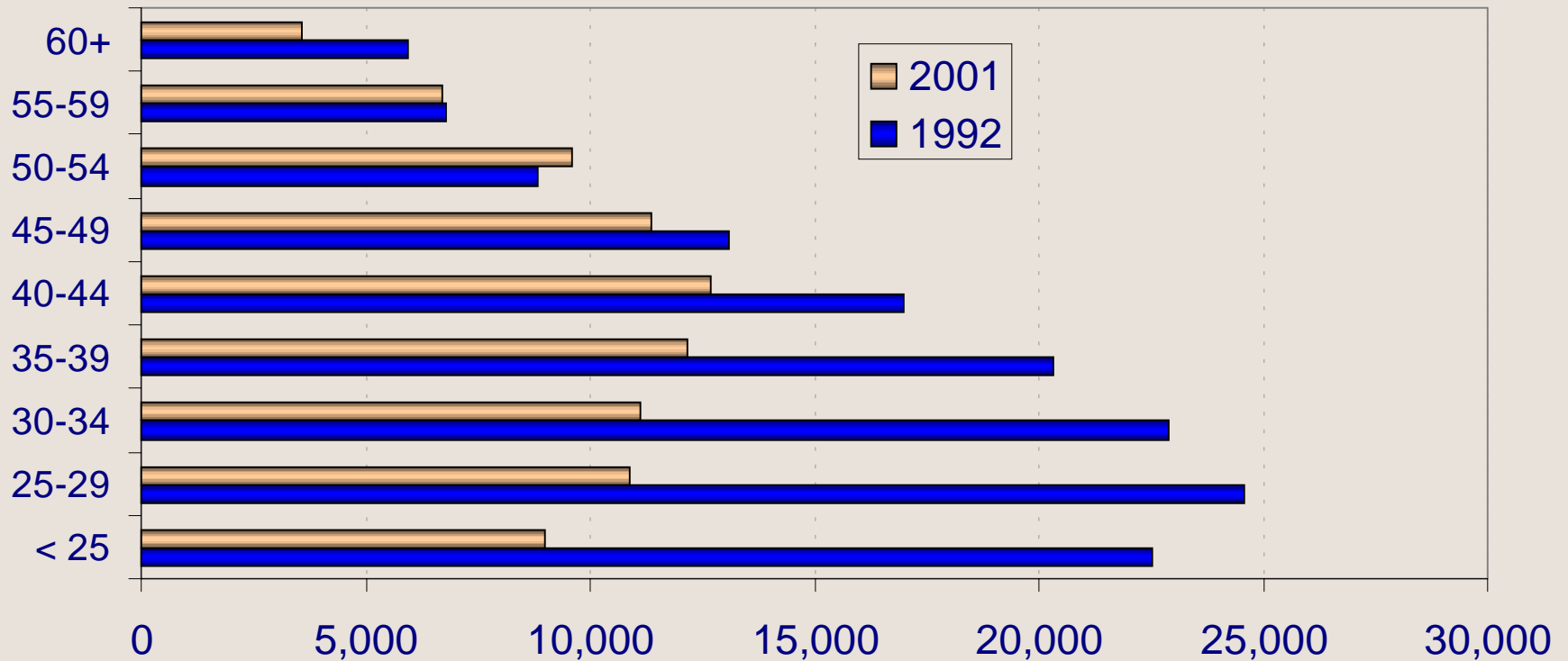


Source: Human Resources Development Canada

Note: The Employment Insurance data reported here includes only claims related to job loss and fishing activity. All other types of claims are excluded (maternity leave, sickness, parental/adoption, work sharing, job creation, training and self-employment).

E.I. Regular Beneficiaries by Age

Number of Regular E.I. Beneficiaries by Age Newfoundland & Labrador, 1992 and 2001



Source: Newfoundland Statistics Agency: Special Tabulation

April 2003

New Information

- Employers' Survey
- Labour Activity Survey (LAS)
- Productivity Analysis
- International Adult Literacy Survey (IALS)
- Labour Economic And Demographic (LED) Model



www.communityaccounts.ca



Documents



Presentations



Labour Market Forum (#3)