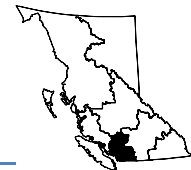


Regional Labour Market Outlook 2010-2020

MAINLAND/SOUTHWEST



The labour market outlook presented in this report is based on the results from the B.C. Labour Market Scenario Model developed in 2009 by the Ministry of Jobs, Tourism and Innovation in partnership with BC Stats and the Ministry of Finance. The model provides provincial labour market demand and supply forecasts including forecasts by development region and occupation.

Funding for the B.C. Labour Market Scenario Model has been provided by the Canada-British Columbia Labour Market Agreement and the Province of British Columbia.

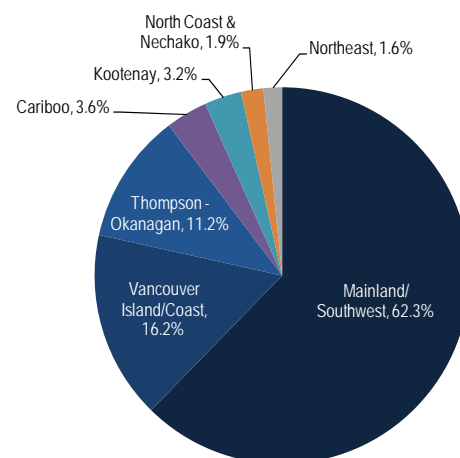
HIGHLIGHTS (2010-2020):

- The Mainland/Southwest region has the largest labour force in the province. At 1.5 million, it accounts for 62.4 per cent of B.C.'s total labour force.
- Eight out of 10 workers in the region are employed in the service-producing sector where jobs in *Retail and Wholesale Trade, Health Care and Social Assistance, Professional, Scientific and Technical Services, Accommodation and Food Services, and Educational Services* make up half of the region's employment.
- The demand for workers in the region is projected to exceed labour supply starting 2017.
- The fastest employment growth occupations over the next decade are expected in health related occupations such as *Physicians, Dentists and Veterinarians, Nurse Supervisors and Registered Nurses, Optometrists, Chiropractors and Other Health Diagnosing and Treating Professionals, and Medical Technologists and Technicians (Except Dental Health)*.
- Occupations with the highest number of expected job openings within the outlook period are in *Retail Salespersons and Sales Clerks, Clerical Occupations, General Office Skills, and Cleaners*.

CURRENT LABOUR MARKET CONDITIONS¹

As of 2011, the Mainland/Southwest region has an estimated labour force of 1.5 million. This accounts for three out of four workers who are either employed or are actively looking for jobs in British Columbia (Figure 1). In 2011, the region's unemployment rate was among the lowest in the province at 7.3 per cent, second only to Northeast region's unemployment rate of 4.9 per cent. Mainland/Southwest's unemployment rate is lower than North Coast & Nechako (8.6 per cent), Kootenay (8.2 per cent), Thompson-Okanagan (7.9 per cent), Vancouver Island/Coast (7.7 per cent), and Cariboo (7.6 per cent). Compared to 2010, the region's unemployment rate saw a decrease of 0.3 percentage points. Similarly, B.C.'s unemployment rate also decreased from 7.6 per cent in 2010 to 7.5 per cent in 2011.

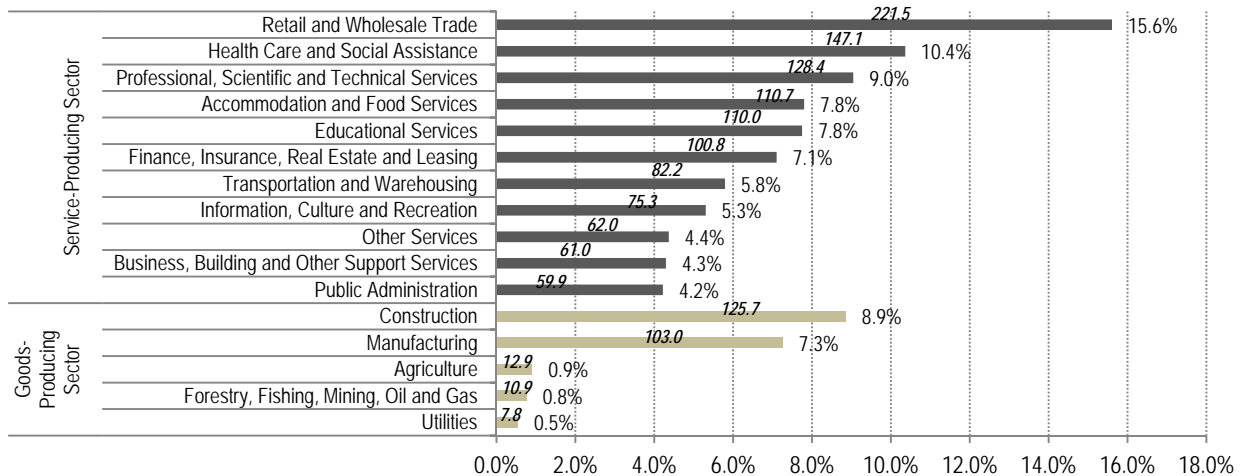
Figure 1. British Columbia's Labour Force by Region (2011)



¹ Data source for the figures in this section was the Labour Force Survey (2011), Statistics Canada.

Eight out of 10 jobs in the Mainland/Southwest region are in the service-producing sector. Within this sector, jobs in *Retail and Wholesale Trade*, *Health Care and Social Assistance*, *Professional, Scientific and Technical Services*, *Accommodation and Food Services*, and *Educational Services* industries make up half of the employment in the region (Figure 2). For the goods-producing sector, most of the employment is in *Construction* and *Manufacturing* industries. Combined, these two industries make up a further one in six jobs in the region.

Figure 2. Employment Distribution in Mainland/Southwest by Industry: 2011 ('000, %)



Note: "Other Services" includes Repair and Maintenance; Personal and Laundry Services; Religious, Grant-Making, Civic, and Professional and Similar Organizations; and Private Households.

REGIONAL LABOUR MARKET OUTLOOK²

Taking a closer look at future job opportunities, the Mainland/Southwest region is forecast to have 666,300 job openings³ between 2010 and 2020. This accounts for 65 per cent of B.C.'s projected job openings over the same period. Nearly two-thirds of these openings are due to the replacement of retiring workers or deaths and are forecast to steadily climb from about 37,000 openings in 2010 to 43,000 openings in 2020 (Figure 3). In contrast, job openings due to economic growth in the region are forecast to increase in the near term, peaking at around 44,000 job openings in 2016 and dropping to about 13,000 jobs in 2020. This decline is mainly due to the completion of most major projects incorporated in the forecasts coupled with uncertainty around planned future projects in the region.⁴

In 2011, the median age in Mainland/Southwest was 39.5 years, slightly younger compared to British Columbia's median age of 41.1 years.

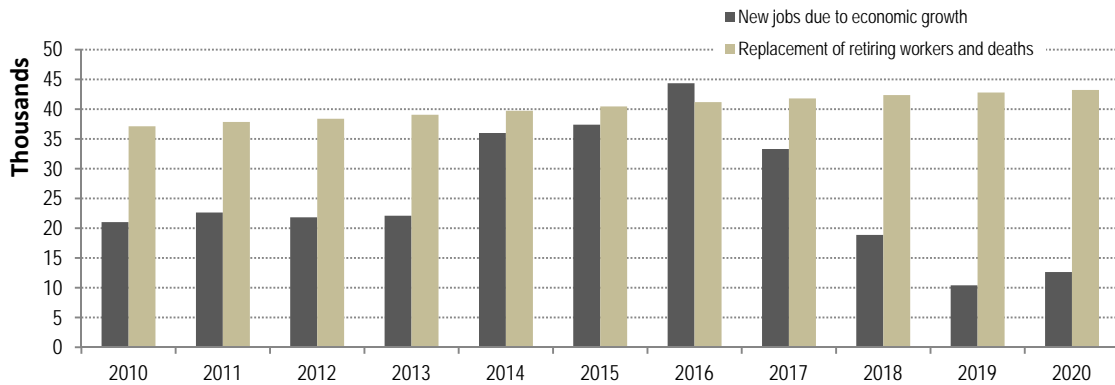
Source: BC Stats Population Estimates (2011)

² Data source for the forecasts in this section was the B.C. Labour Market Scenario Model (2010 - 2020).

³ Job openings include employment opportunities coming from economic growth and job vacancies due to retirements or deaths.

⁴ Forecasts of job openings due to economic growth in the latter half of the decade (2016-2020) may decrease as limited information is available for long-term major projects necessitating their exclusion from the model.

Figure 3. Projected Job Openings by Source, Mainland/Southwest (2010-2020)



Over the 10-year period, employment demand in the region is forecast to grow at an average rate of 1.6 per cent annually (Figure 4). This rate is slightly higher compared to B.C.'s projected demand growth of 1.4 per cent.

On the supply side, the region's labour force is forecast to grow at a slower rate compared to demand at 1.3 per cent annually. As a result, tightening in the region's labour market conditions is expected to occur over the next decade. The region is expected to see an excess in labour supply between 2010 and 2016 however as employment demand in the region is expected to increase, shortage in the supply of workers is forecast to occur starting in 2017 through 2020 (Figure 5).

Figure 4. Labour Supply and Demand Growth Rates for Mainland/Southwest and British Columbia (2010-2020)

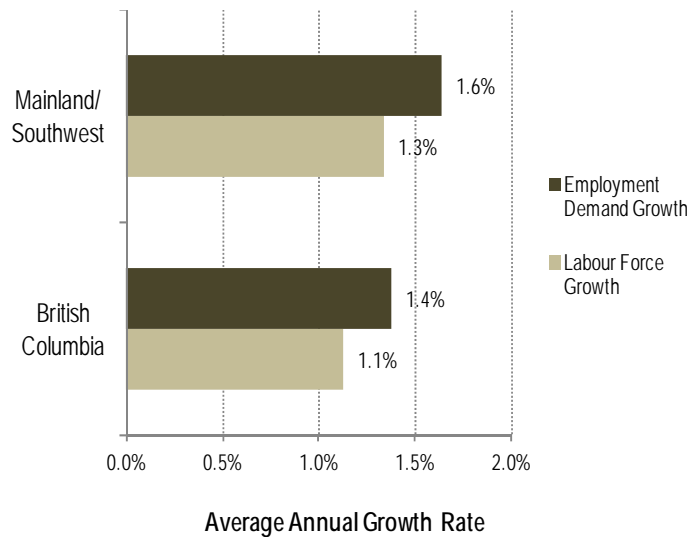
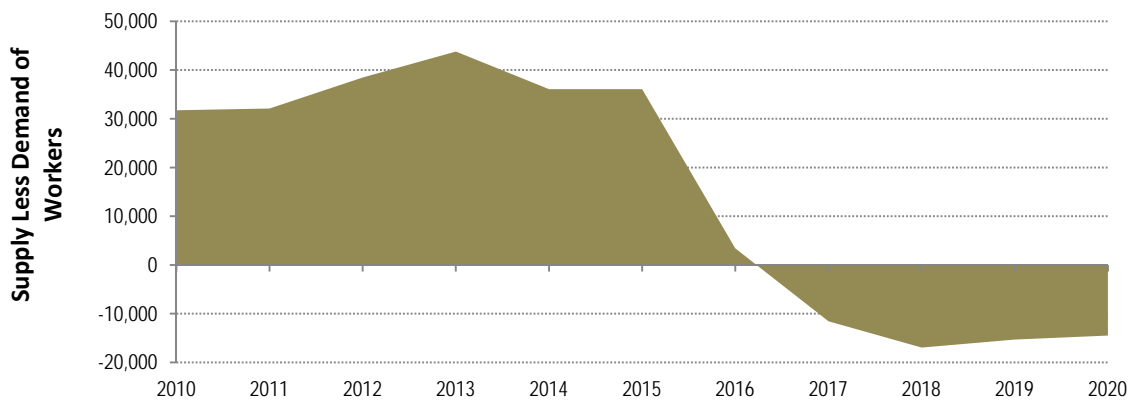


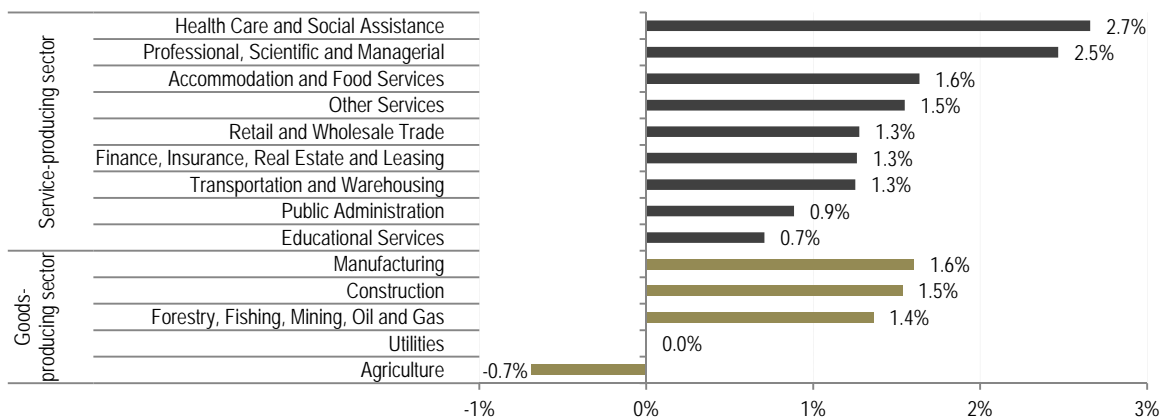
Figure 5. Excess Supply Outlook, Mainland/Southwest: 2010-2020



INDUSTRY EMPLOYMENT OUTLOOK

The highest employment growth in the region is expected to occur in *Health Care and Social Assistance* and *Professional, Scientific and Managerial* industries where expected annual average growth rates are 2.7 per cent and 2.5 per cent respectively (Figure 6). Employment in other service-producing industries such as *Accommodation and Food Services*, *Other Services*⁵, *Retail and Wholesale Trade*, *Finance, Insurance, Real Estate and Leasing*, and *Transportation and Warehousing* industries are forecast to grow at an average rate of 1.3 per cent to 1.6 per cent per year. In the goods-producing sector, employment in *Manufacturing* and *Construction* industries are forecast to experience moderate growth at 1.6 per cent and 1.5 per cent respectively. Within the same period, employment in *Agriculture* is expected to decline at a rate of 0.7 per cent annually.

Figure 6. Industry Annual Average Employment Growth Rates for Mainland/Southwest Region (2010-2020)



Note: "Professional, Scientific and Managerial" includes Professional, Scientific and Technical Services, Management of Companies and Enterprises, Administrative and Support and Waste Management and Remediation Services.

OCCUPATIONAL OUTLOOK

The *B.C. Labour Market Scenario Model* categorizes occupations based on the three-digit 2006 National Occupational Classification (NOC) from Human Resources and Skills Development Canada.⁶ For Mainland/Southwest, occupations in *Retail Salespersons and Sales Clerks*, *Clerical Occupations*, *General Office Skills*, and *Cleaners* are forecast to have the highest number of job openings ranging from 19,700 to 22,900 openings between 2010 and 2020 (Table 1). The number of workers employed in these occupations in 2010 is also shown in the table. The ratio of job openings for the 10-year period and the 2010 employment levels gives an additional indication of where hiring challenges may be encountered in the future. For example, anticipated labour market pressures are greater for occupations with a relatively high number of job openings compared to 2010 employment, such as *Cleaners* as compared to *Retail Salespersons and Sales Clerks*, which has similar job openings but with the latter having a much higher 2010 employment.

⁵ "Other Services" includes "Other Services" as defined in page 2 and Information, Culture and Recreation.

⁶ For more information on NOC (2006), see <http://www30.hrsdc.gc.ca/NOC/English/NOC/2006/Welcome.aspx>

Table 1. Occupations with the Highest Expected Job Openings in Mainland/Southwest, 2010-2020

Occupations with Highest Job Openings (Skill Level) ⁷	Job Openings 2010-2020	2010 Employment
NOC642 Retail Salespersons and Sales Clerks (C)	22,940	63,090
NOC141 Clerical Occupations, General Office Skills (C)	20,710	43,290
NOC666 Cleaners (D)	19,670	34,370
NOC122 Administrative and Regulatory Occupations (B)	17,780	34,010
NOC421 Paralegals, Social Services Workers and Occupations in Education and Religion, n.e.c. (B)	16,890	33,550
NOC741 Motor Vehicle and Transit Drivers (B)	16,830	36,280
NOC315 Nurse Supervisors and Registered Nurses (A)	16,550	24,690
NOC062 Managers in Retail Trade (O)	15,710	31,160
NOC111 Auditors, Accountants and Investment Professionals (A)	15,540	30,060
NOC414 Secondary and Elementary School Teachers and Educational Counsellors (A)	15,250	35,850

Cumulative shortages occur when the projected number of job openings exceeds the supply of workers coming from new entrants, net in-migration and other net in-mobility sources over the forecast period. Between 2010 and 2020, the highest projected labour shortages are expected to occur in *Retail Salespersons and Sales Clerks*, *Clerical Occupations, General Office Skills*, and *Cleaners*. Specifically, the region is forecast to have a cumulative shortage of about 2,000 workers for *Retail Salespersons and Sales Clerks*, 1,400 workers for *Clerical Occupations, General Office Skills* and 1,200 *Cleaners* over the 10-year period.

Table 2. Occupations with the Highest Expected Shortages in Mainland/Southwest, 2010-2020

Occupations with Highest Cumulative Shortages ⁸ (Skill Level)	Cumulative Shortage 2010-2020 (# of workers)
NOC642 Retail Salespersons and Sales Clerks (C)	2,040
NOC141 Clerical Occupations, General Office Skills (C)	1,420
NOC666 Cleaners (D)	1,190
NOC421 Paralegals, Social Services Workers and Occupations in Education and Religion, n.e.c. (B)	1,150
NOC741 Motor Vehicle and Transit Drivers (B)	1,120
NOC122 Administrative and Regulatory Occupations (B)	1,080
NOC414 Secondary and Elementary School Teachers and Educational Counsellors (A)	1,060
NOC111 Auditors, Accountants and Investment Professionals (A)	980
NOC062 Managers in Retail Trade (O)	970
NOC647 Childcare and Home Support Workers (C)	950

⁷ Occupations classified as skill level A usually require university education; skill level B usually require college education or apprenticeship training; skill level C usually require secondary school and/or occupation specific training; and skill level D usually require on-the-job training. Occupations categorized as skill type O refer to management occupations which may vary in education and experience requirements.

⁸ Cumulative shortage over the outlook period is the difference between total job openings and new job seekers (which includes new entrants, net in-migration and other net in-mobility) from 2010 to 2020.

Similar to most regions in B.C., health-related occupations are predicted to have the fastest employment growth in Mainland/Southwest (Table 3). These occupations include *Physicians, Dentists and Veterinarians, Nurse Supervisors and Registered Nurses, Optometrists, Chiropractors and Other Health Diagnosing and Treating Professionals, and Medical Technologists and Technicians (except Dental Health)*.

Growth in employment demand represents the increase in the number of jobs from 2010 to 2020. Occupations with similar growth rates may differ in the number of new jobs depending on the current size of the occupations within the region. For example, while a 2.6 per cent annual average employment growth rate for *Physicians, Dentists and Veterinarians* translates to 3,460 new jobs, the same growth rate translates to an increase of 7,490 new jobs for *Nurse Supervisors and Registered Nurses*.

Table 3. Occupations with the Highest Expected Growth in Employment Demand in Mainland/Southwest, 2010-2020

Occupations with Highest Average Annual Employment Demand Growth 2010-2020 (Skill Level)	Average Annual Employment Demand Growth Rate (%)	Growth in Employment Demand (# of new jobs)
NOC311 Physicians, Dentists and Veterinarians (A)	2.6	3,460
NOC315 Nurse Supervisors and Registered Nurses (A)	2.6	7,490
NOC312 Optometrists, Chiropractors and Other Health Diagnosing and Treating Professionals (A)	2.6	280
NOC321 Medical Technologists and Technicians except Dental Health (B)	2.6	2,290
NOC314 Therapy and Assessment Professionals (A)	2.5	1,220
NOC341 Assisting Occupations in Support of Health Services (C)	2.5	6,380
NOC322 Technical Occupations in Dental Health Care (B)	2.5	720
NOC323 Other Technical Occupations in Health Care except Dental (B)	2.3	2,330
NOC522 Photographers, Graphic Arts Technicians and Technical and Co-ordinating Occupations (B)	2.3	1,700
NOC665 Security Guards and Related Occupations (C)	2.2	2,010

USEFUL LINKS

More information related to jobs, careers, and labour market statistics are available at <http://www.workbc.ca/> and <http://www.bcjobtrendtracker.ca/lmf/>. If you have any questions about the information in this report, please email workbcinformation@gov.bc.ca.