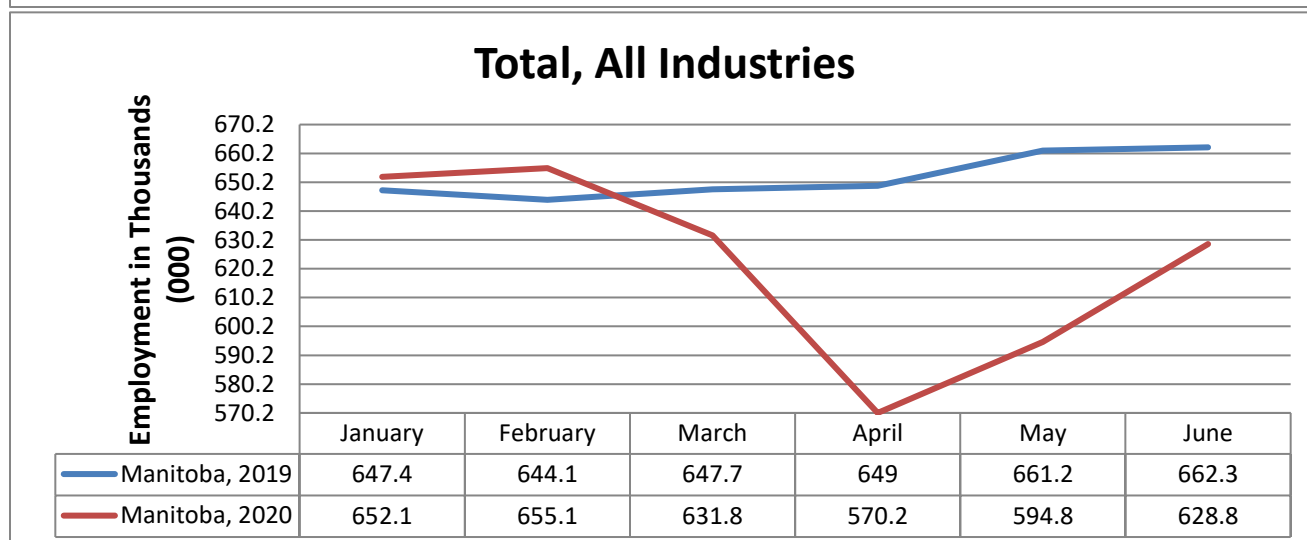
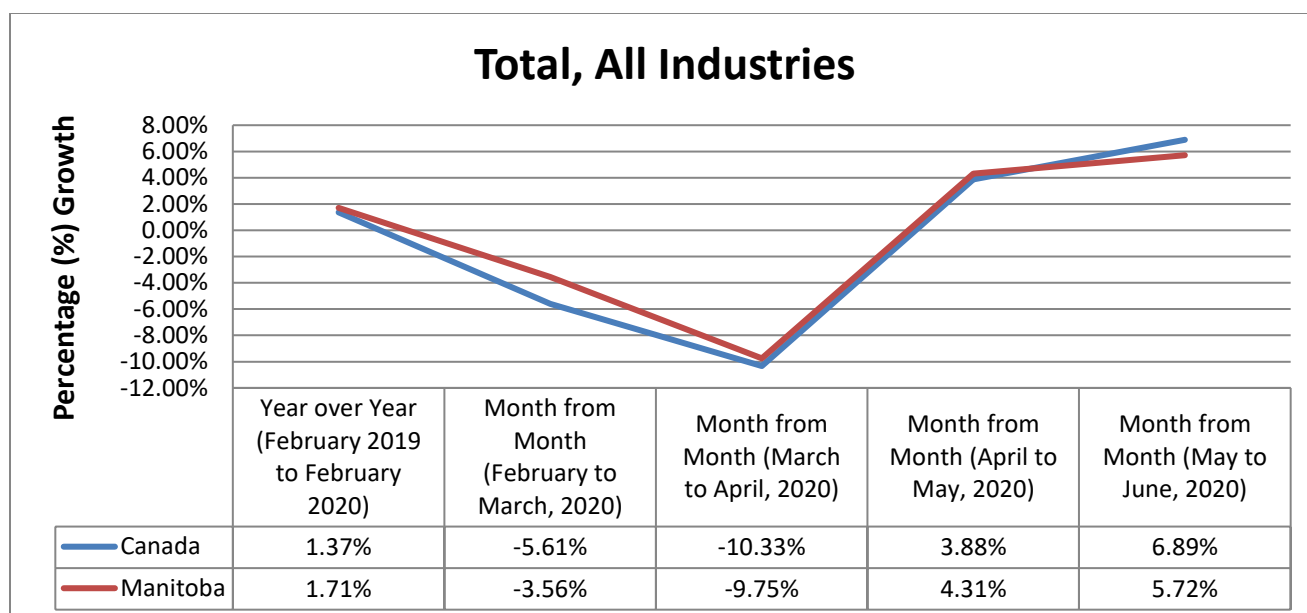


Graphs of Pre - and Post - COVID Percentage Growth in Employment and Actual Employment Numbers in Select Industries by NAICS Code

The following graphs track the effects of COVID-19 to core Sector Council Program (SCP) industries and other select NAICS. The first point on each top graph indicates how the two areas (Manitoba and Canada) were performing prior to COVID-19 by calculating the year-over-year percentage change (February 2019 to 2020). The second point measures the February 2020 to March 2020 percentage change (impact #1). The third point measures March 2020 to April 2020 percentage change (impact #2). April 2020 to May 2020 is then computed (recovery period #1), followed by May 2020 to June 2020 (recovery period #2). The second graph for each NAICS compares 2019 January to June to 2019 with January 2020 to June 2020 to investigate how Manitoba was performing compared to last year.

Labour market planners can use these graphs to monitor the effects of COVID-19 to labour markets and compare to Canada to identify which sectors have been impacted/recovered relatively worse/better than the average.

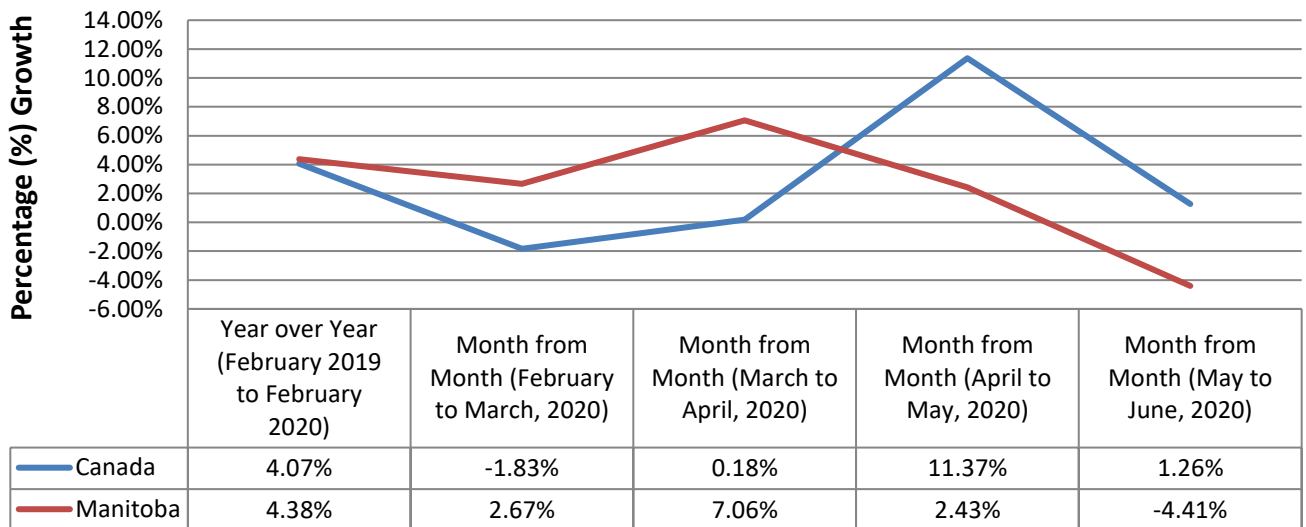
With respect to gross domestic product, between February and March 2020, Canadian GDP declined by 7% and by 11.6% between March and April 2020.



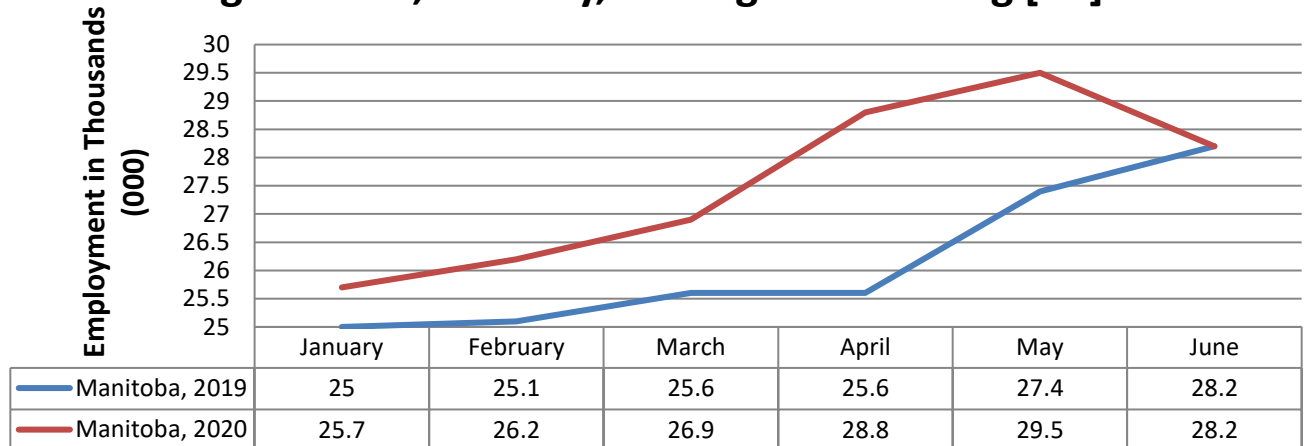
In 2020, Manitoba had shown year-over-year employment growth in January and February. COVID-19 resulted in a loss of 23,300 jobs in March followed by another 61,600 in April. 24,600 jobs were recovered in May and a further 34,000 in June. Compared to Canada, Manitoba's February year-over-year gain was slightly higher at 1.71%. It is demonstrated in the first graph above that the impact of COVID-19 to Canada was greater than to Manitoba. Manitoba also recovered faster between April and May 2020. Overall, between February and June, Canada's employed labour force declined by 6% compared to 4% in Manitoba.

These findings are consistent with other sources such as the Conference Board of Canada and RBC that predicted the impact of COVID-19 being less severe to Manitoba labour markets than other provinces. Manitoba is characterized by a diverse economy with many strong sectors. This typically results in less severe recessions than other regions. Also, the COVID-19 disease itself was not as severe in Manitoba leading to earlier reopening than many other provinces. It is important to note that prior to COVID-19, Manitoba was poised for large employment gains over 2020 demonstrated by the large January and February 2020 year-over-year gains from 2019.

Agriculture, Forestry, Fishing and



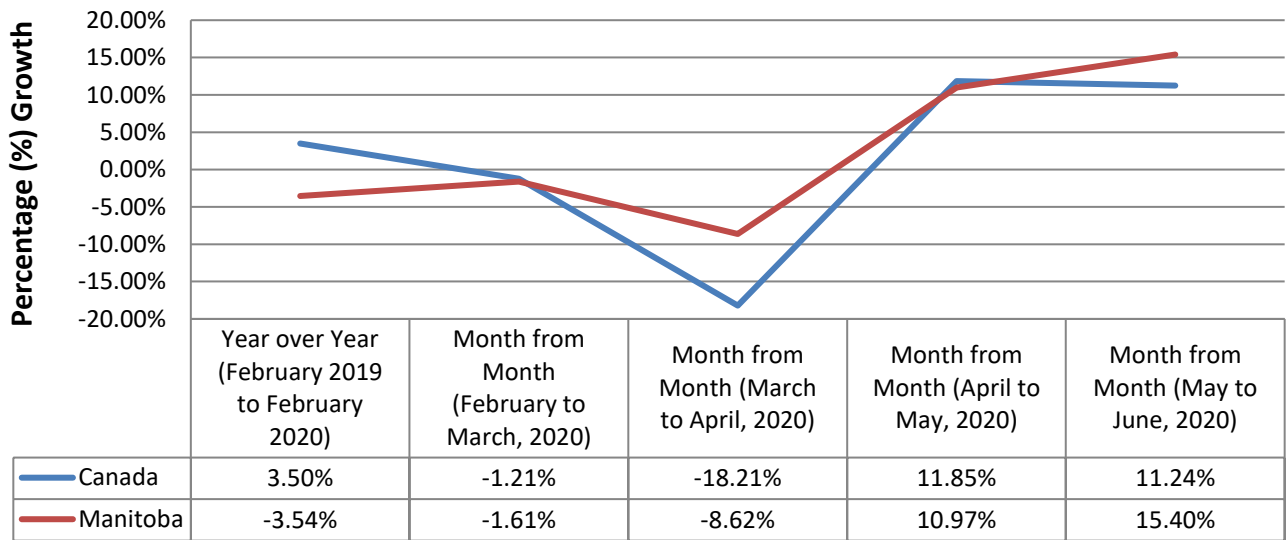
Agriculture, Forestry, Fishing and Hunting [11]



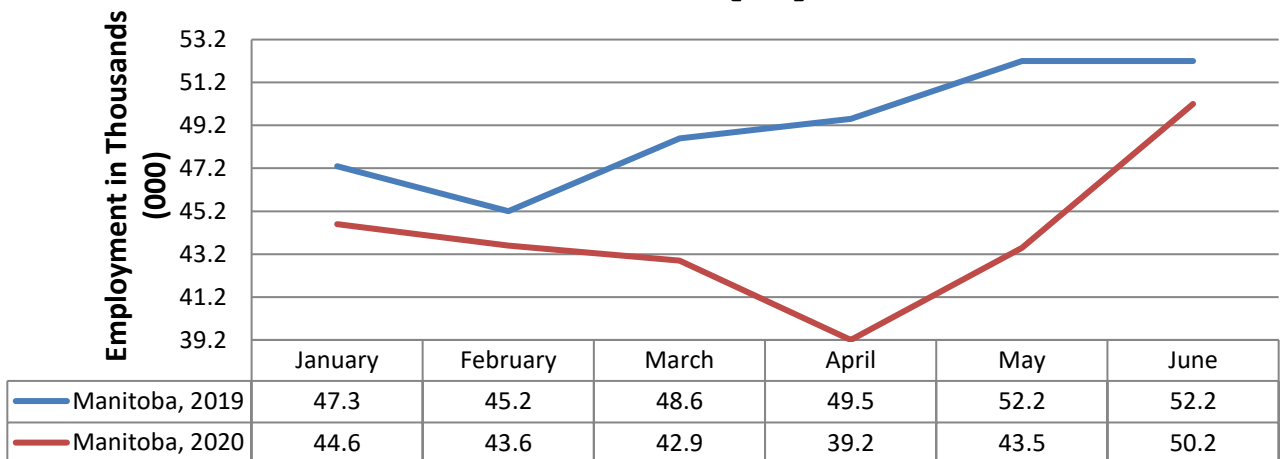
Agriculture, forestry, fishing and hunting was not impacted by COVID-19 substantially with employment levels in 2020 equal or above 2019 for all months (January to June). It was hypothesized early in the pandemic that agriculture would not be significantly affected by COVID-19 other than the loss in temporary foreign workers permitted in Manitoba caused by shutdowns at the border. It appears that employment has still been able to rise despite the existence of COVID-19.

Manitoba grew slightly faster than Canada between February 2019 and 2020 at 4.38% compared to 4.07%. Manitoba's labour market was virtually unaffected by COVID-19 with employment growth in both March and April. Canada's labour market was affected. However, far less severe than other industries. In May, Canada's employment growth surpassed Manitoba's at 11.37% compared to 2.43%. This industry appears to be stable since June 2020 employment is the same as it was in June 2019.

Construction [23]



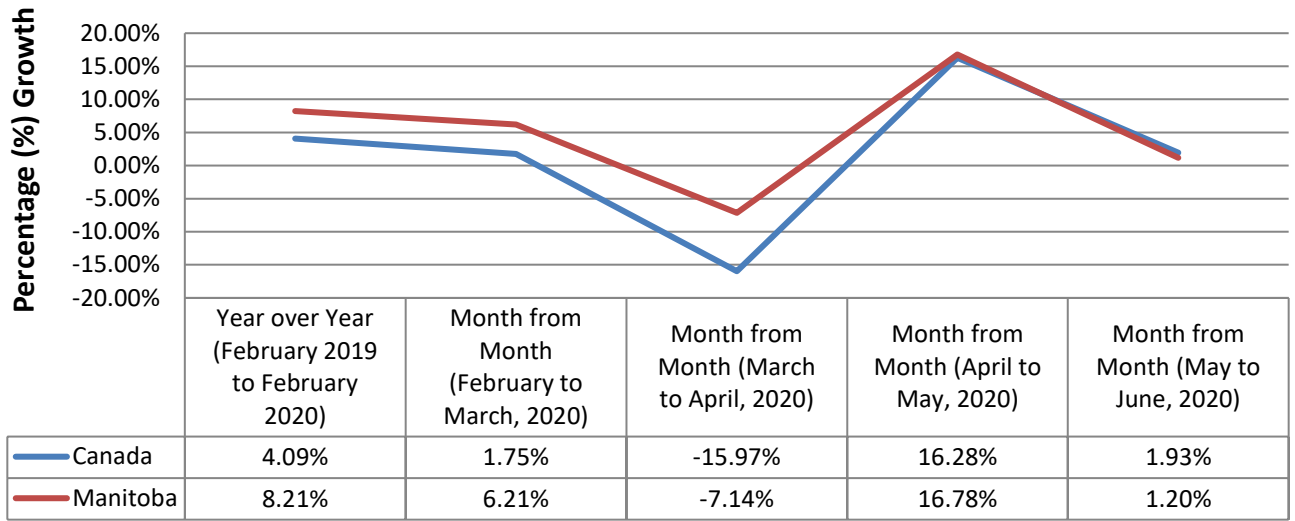
Construction [23]



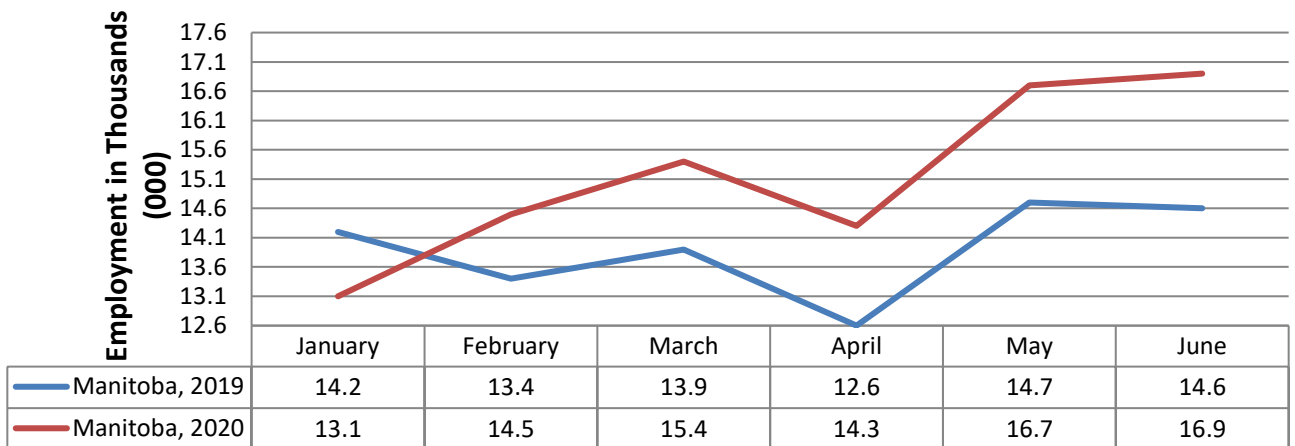
Construction was significantly impacted by COVID-19 in both Manitoba and Canada. In Manitoba, employment in January and February were below 2019 levels. COVID-19 further reduced employment by 1.61% in March and 8.62% in April. Compared to Manitoba, April Construction employment in Canada dropped by 18.21%. Both recovered in May with 10.97% and 11.85% growth respectively and 15.4% and 11.24% in June. Construction was an industry expected to be affected by COVID-19 since social distancing on construction sites was anticipated to be difficult. However, low interest rates likely led to more housing starts and with the reopening plans in place, construction employment is expected to quickly rise throughout 2020.

As shown below, the loss in construction jobs is primarily attributable to heavy and civil engineering construction and specialty trade contractors with employment significantly below 2019 levels.

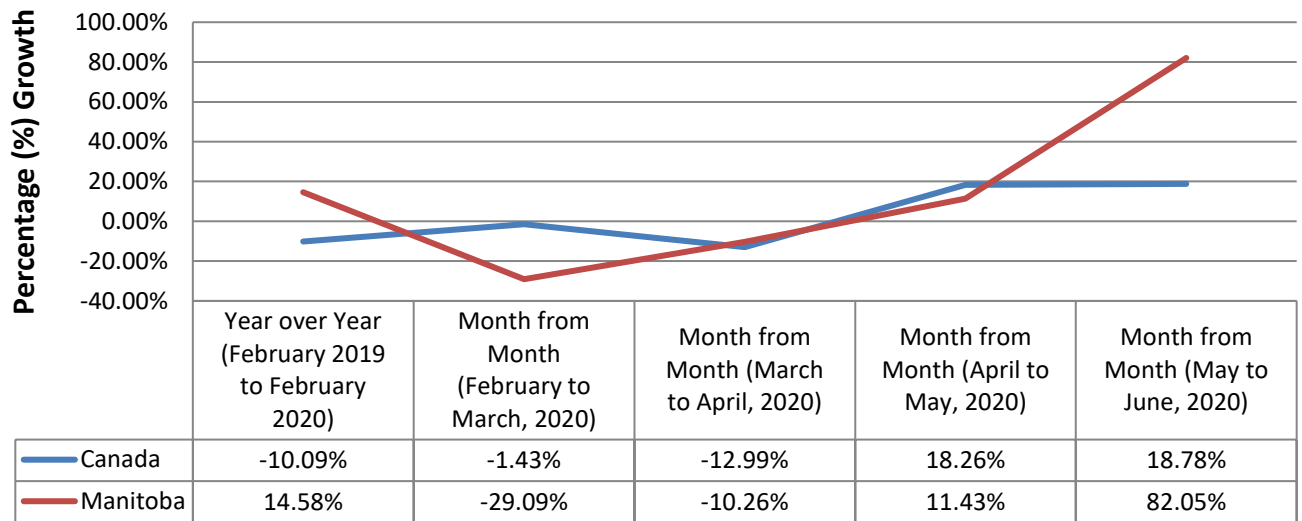
Construction of Buildings [236]



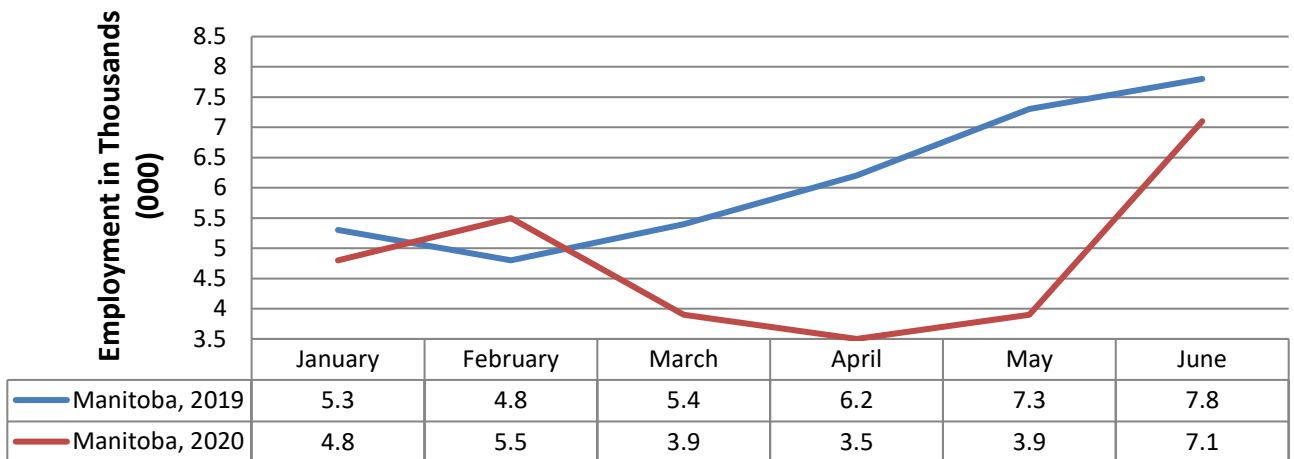
Construction of Buildings [236]



Heavy and Civil Engineering Construction [237]

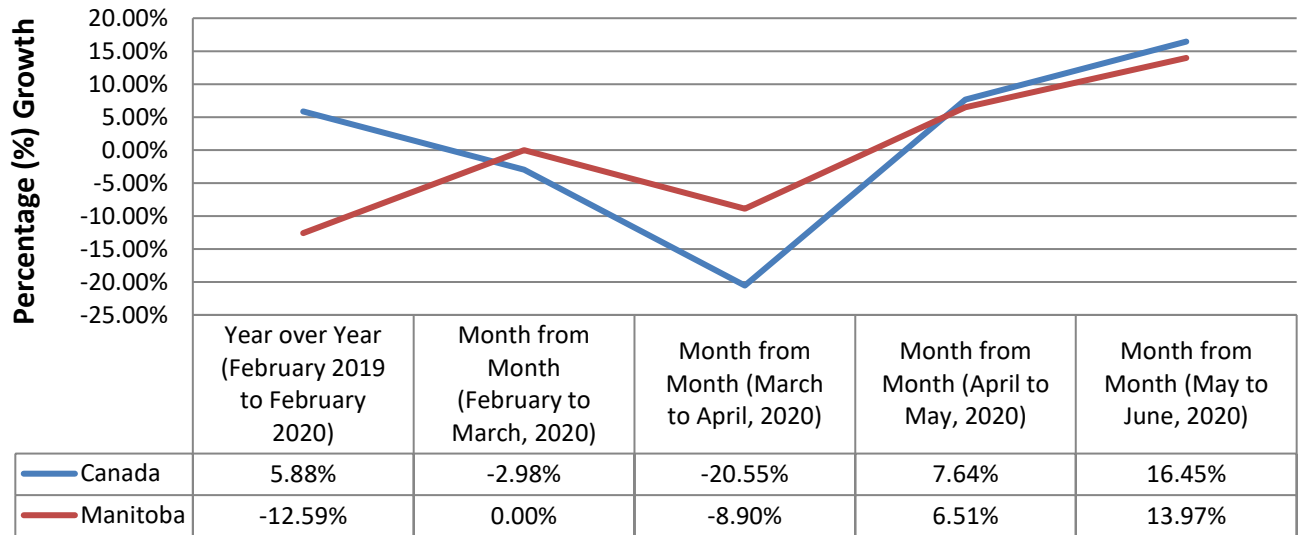


Heavy and Civil Engineering Construction [237]

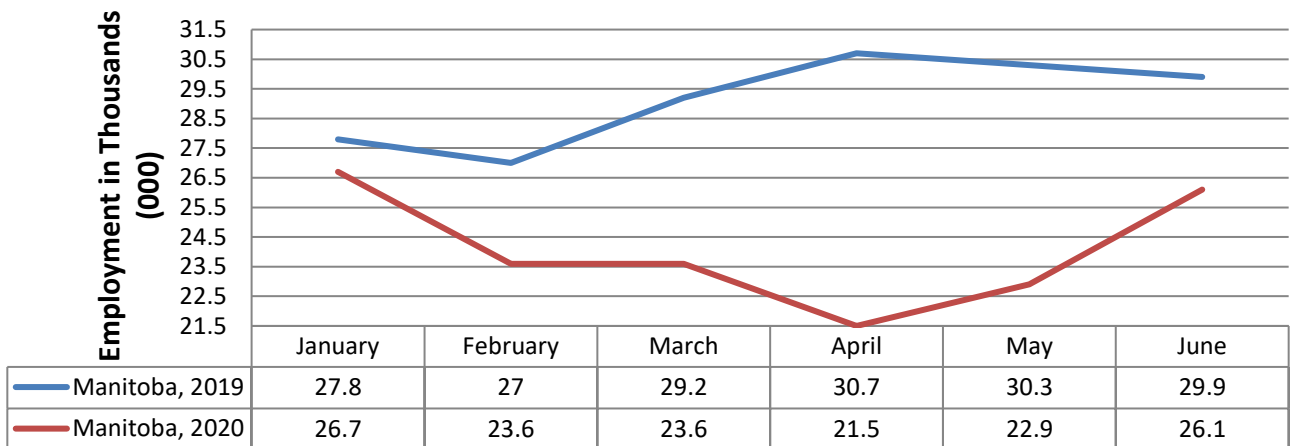


In June 2020, this industry has recovered significantly in both Manitoba and Canada to where it is almost at 2019 levels.

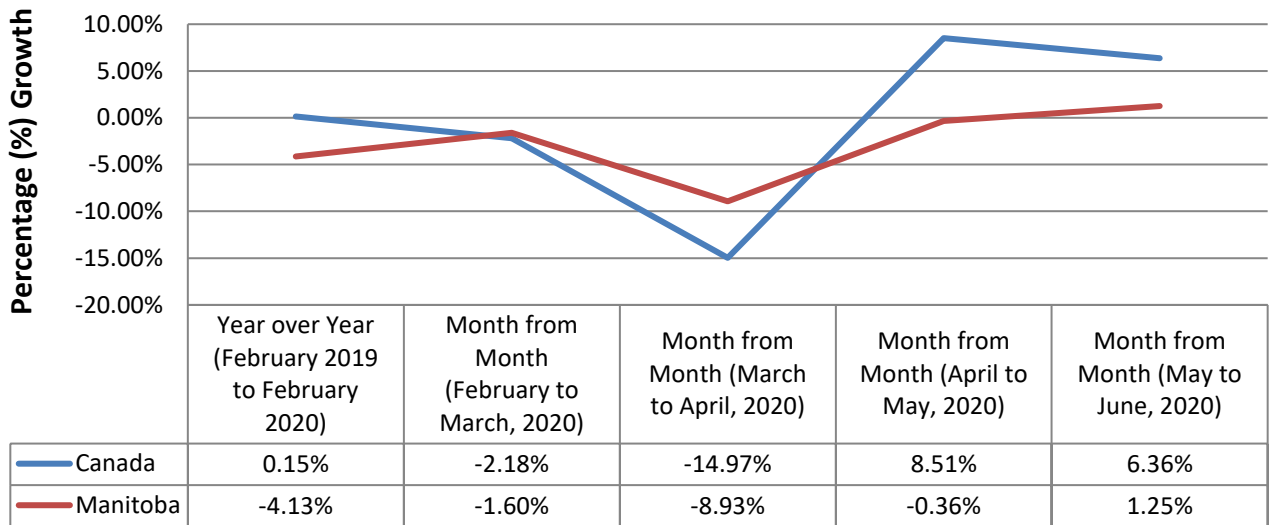
Specialty Trade Contractors [238]



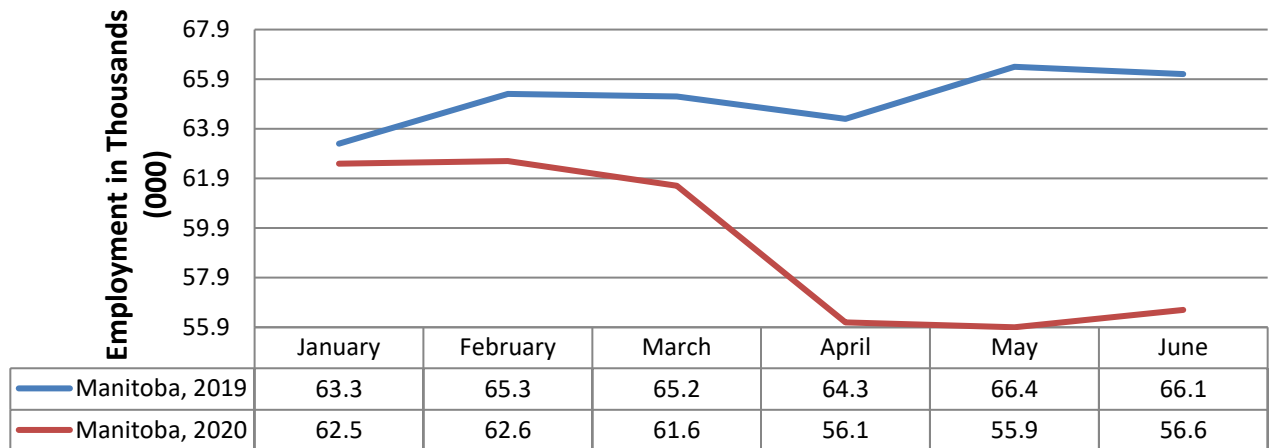
Specialty Trade Contractors [238]



Manufacturing [31-33]

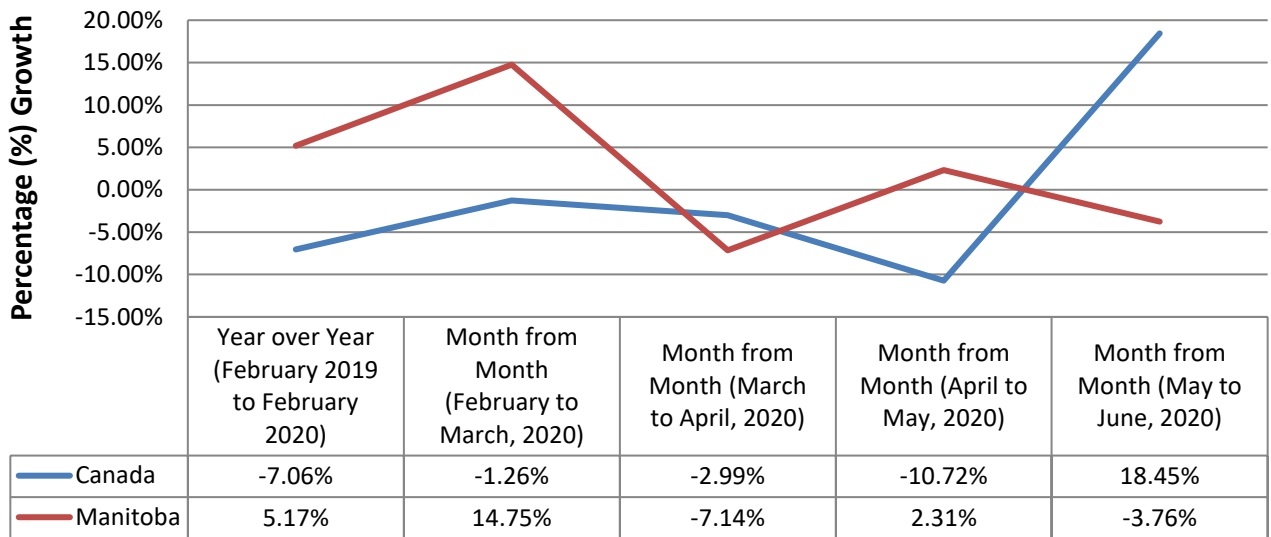


Manufacturing [31-33]

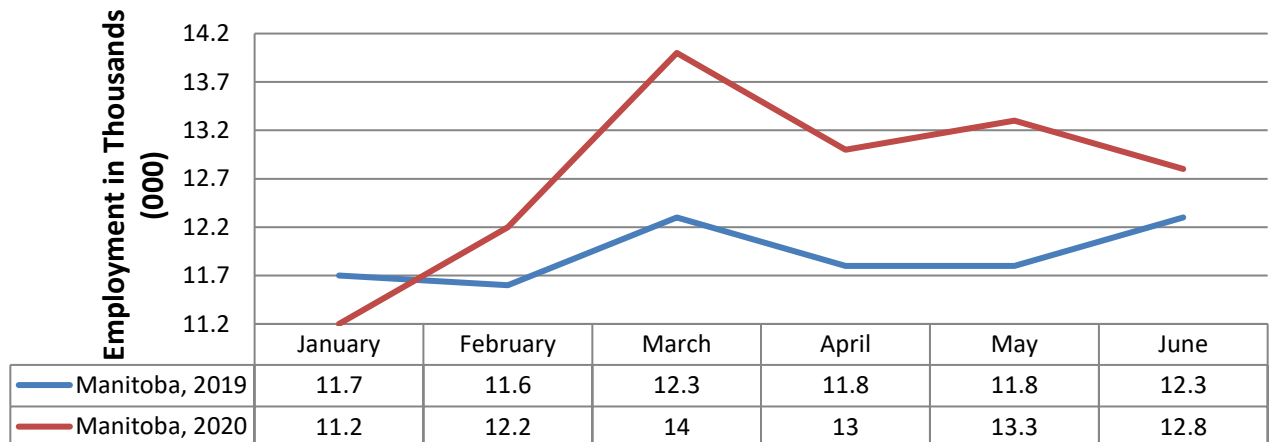


Manitoba manufacturing was one of the industries predicted by the [2020 Provincial Budget Document](#) to be heavily impacted by COVID-19. It has been long thought that regardless of COVID-19 automation in manufacturing would lead to lower levels of employment. February year-over-year showed a 4.13% decline in the Manitoba manufacturing workforce. March 2020 showed modest decreases as well. There has been a decline in the manufacturing workforce since February 2020 with 6,700 job losses between February and May. While May showed recovery for Canada's manufacturing workforce, Manitoba did not. June demonstrated significant recovery in Canada and an additional 1.25% in Manitoba. Still, June 2020 in Manitoba is significantly below June 2019 levels. Manitoba has a large durable goods manufacturing sector (transportation manufacturing such as aerospace and busses) that was heavily impacted by COVID-19 as anticipated. June 2020 employment levels in Manitoba transportation equipment manufacturing is 3,900 individuals less than June 2019 with motor vehicle manufacturing jobs being the most heavily affected.

Food Manufacturing [311]

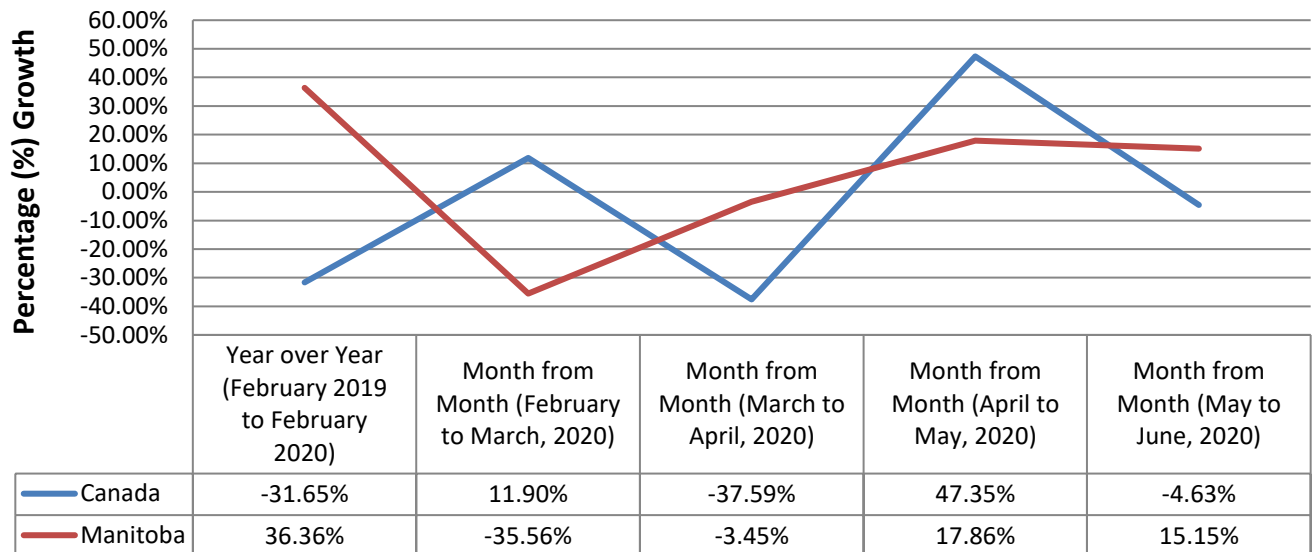


Food Manufacturing [311]

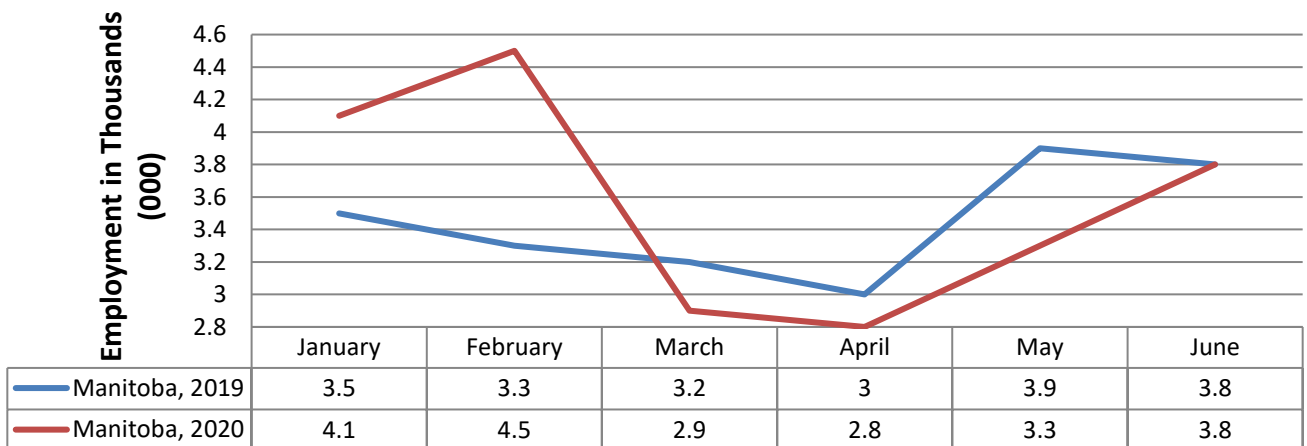


Unlike manufacturing as a whole, food manufacturing has demonstrated gains throughout the COVID-19 period with employment levels above 2019 in all months except January. Manitoba's employed workforce grew by 14.75% between February and March 2020 and then declined by 7.14% in April. In May, it has recovered by 2.31% while Canada's has decreased by 10.72%. June in Manitoba demonstrated a decline of 3.76%. However, June 2020 employment is still greater than June 2019.

Printing and Related Support Activities [3231]

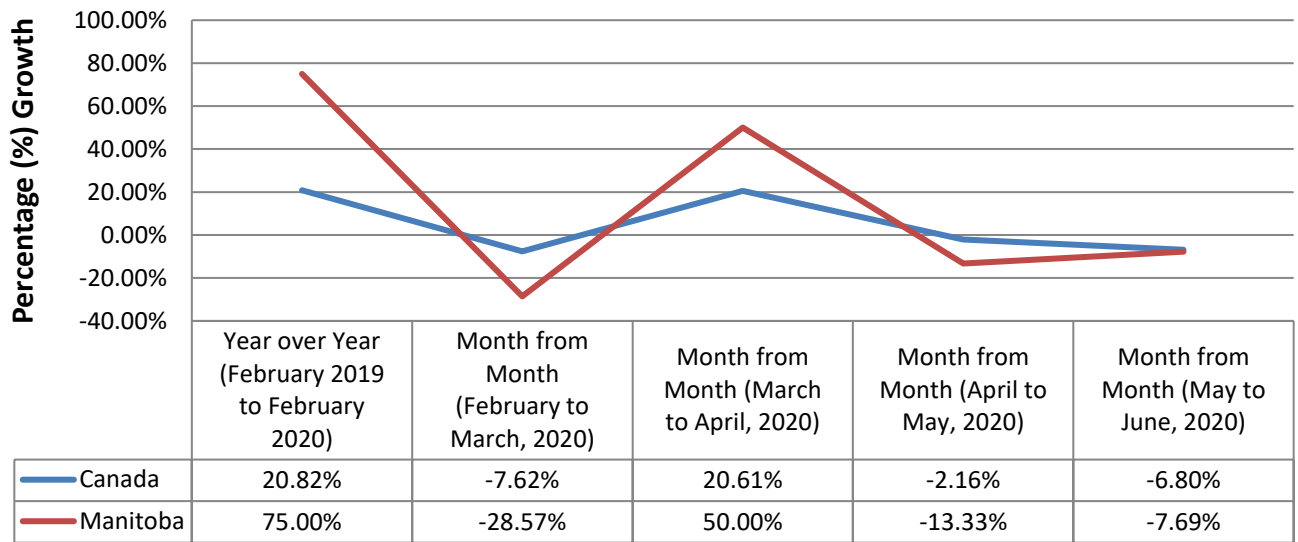


Printing and Related Support Activities [3231]

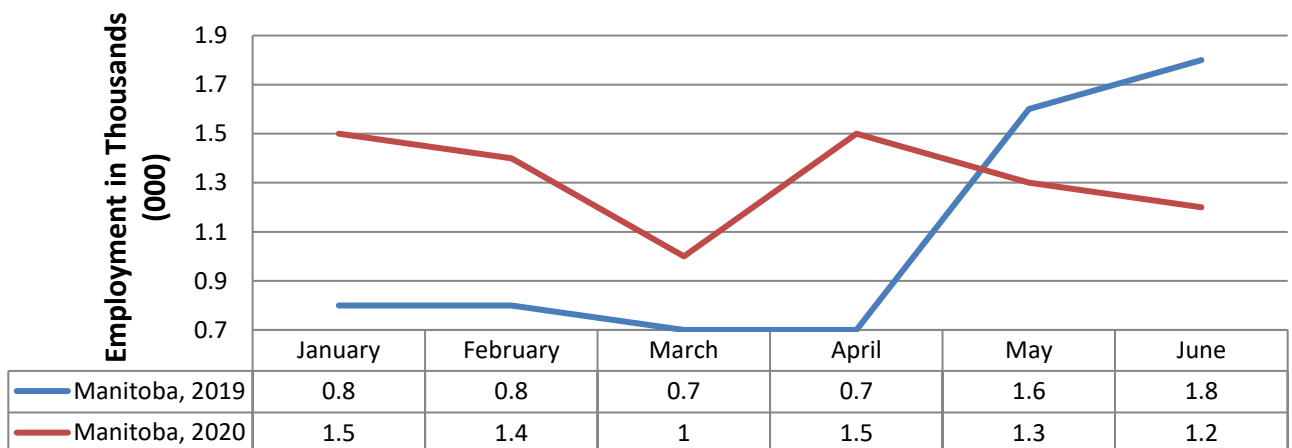


Printing and related support activities was growing significantly with 1,200 more jobs in February 2020 than 2019. COVID-19 resulted in 1,600 jobs lost in March followed by 100 more in April. May has shown recovery with 17.86% increase and 15.15% in June.

Pharmaceutical and Medicine Manufacturing [3251]

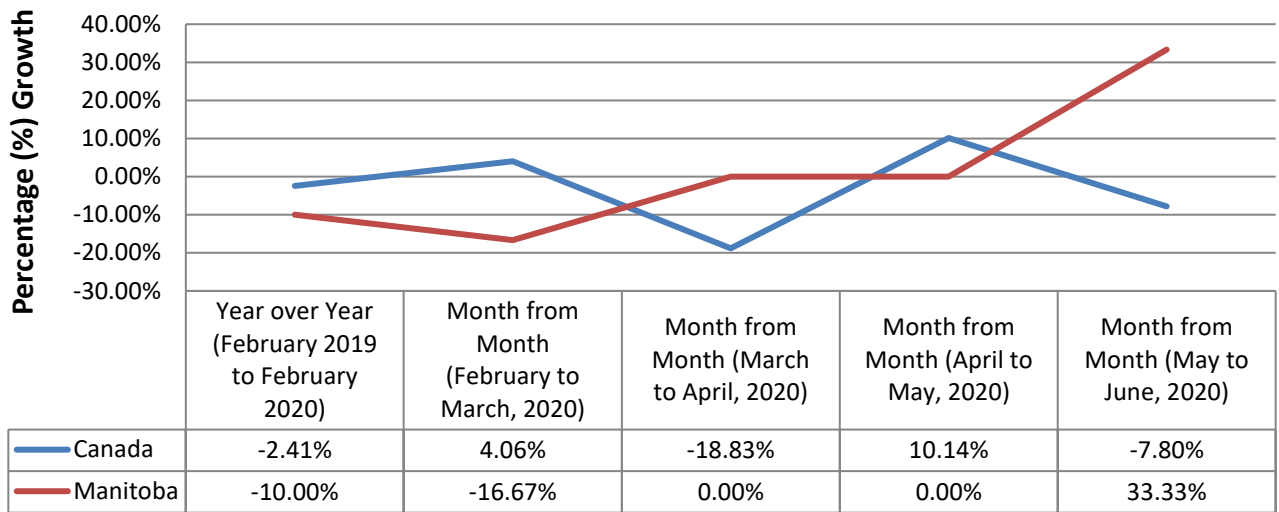


Pharmaceutical and Medicine Manufacturing [3251]

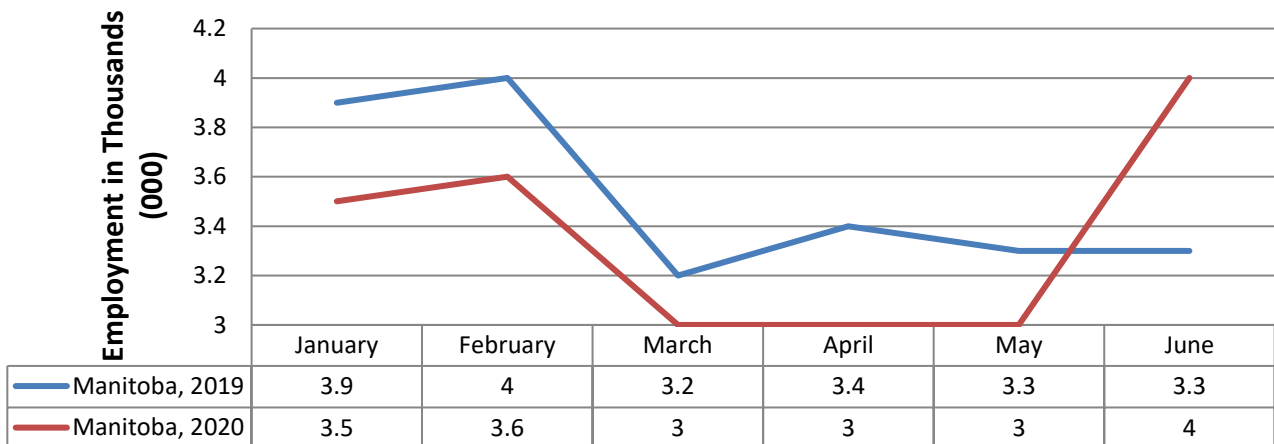


Pharmaceutical and medicine manufacturing is one of Manitoba's fastest growing industries in terms of output and exports. However, since it is highly capital intensive, it does not employ a large number of workers. Typically, jobs in this sector are high paying as well. This industry cannot be analyzed properly using the labour force survey data as employment levels are too small for meaningful comparisons. However, it should be noted that this industry in Manitoba showed a similar pattern to Canada with February year-over-year growth, followed by March decline, April increase, and May and June declines.

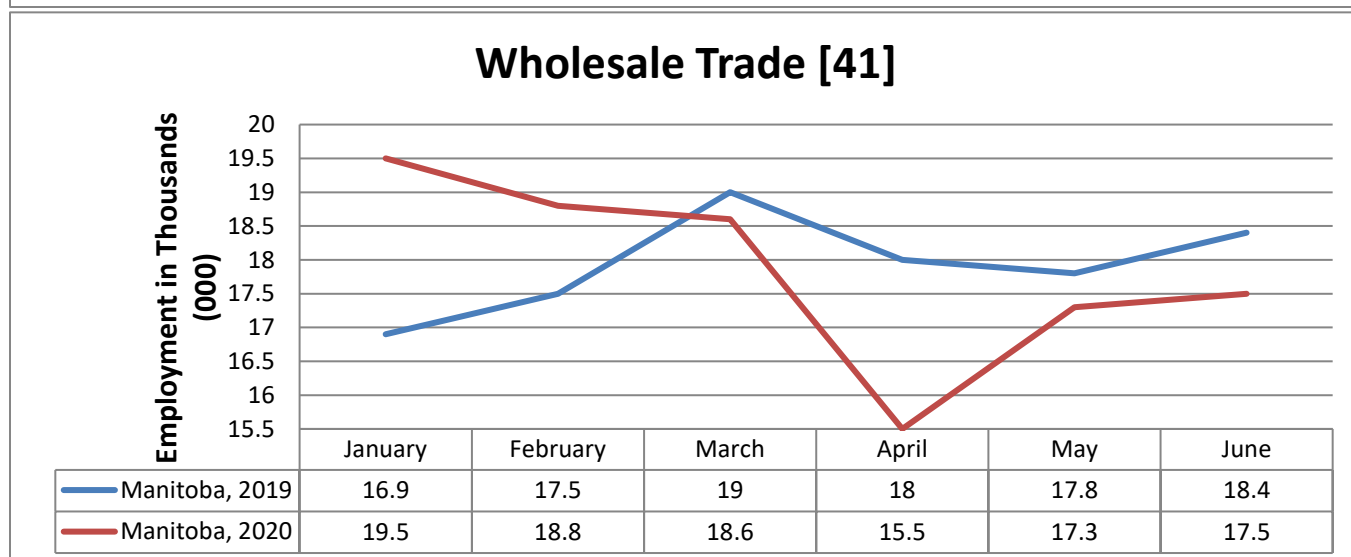
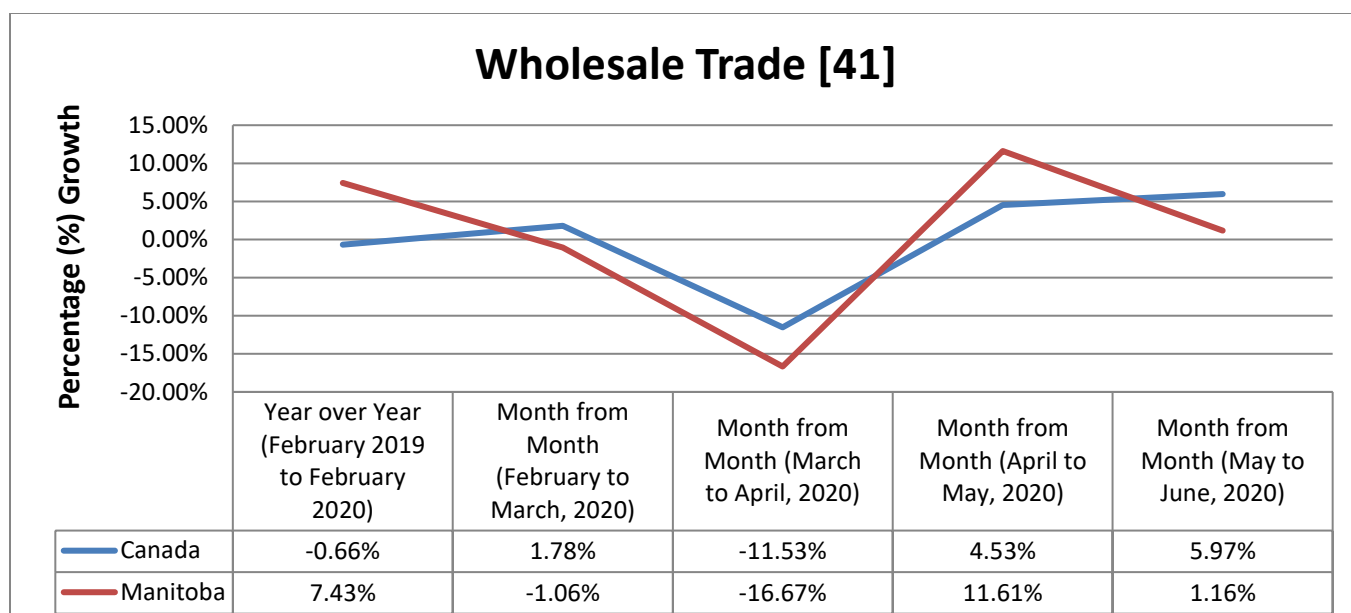
Aerospace Product and Parts Manufacturing [3364]



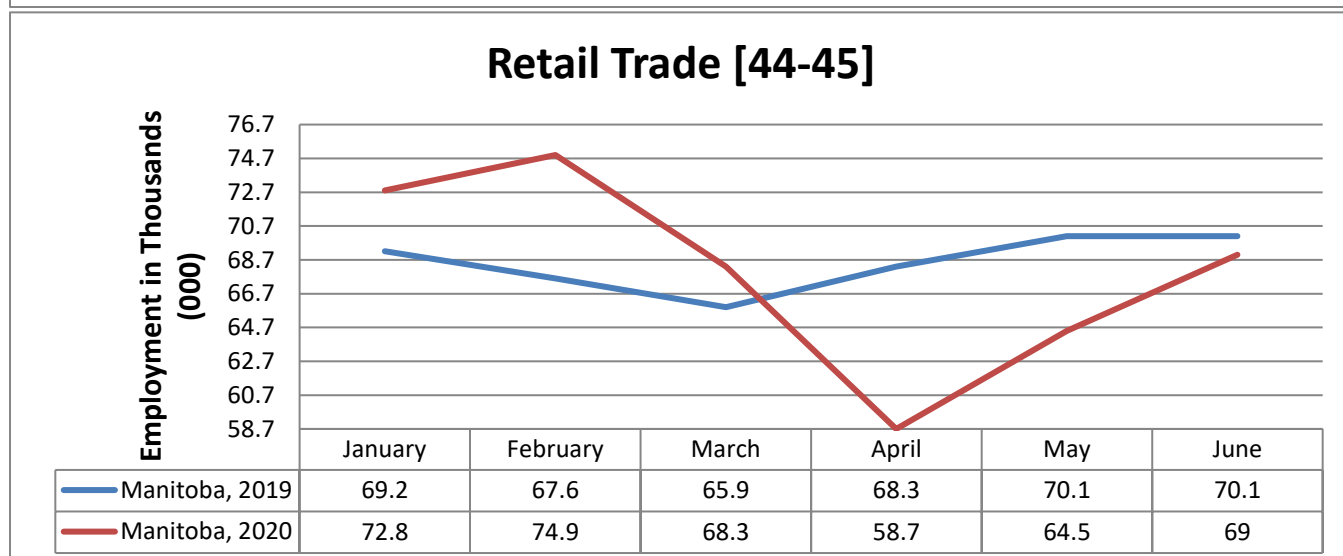
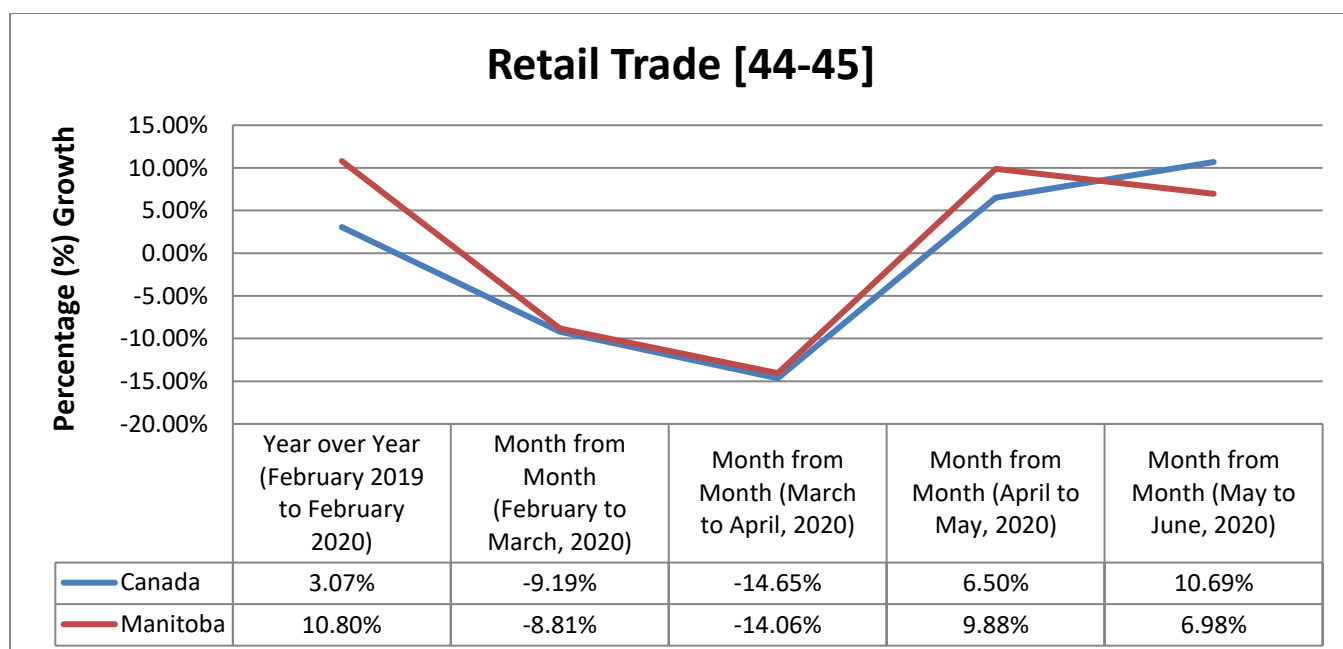
Aerospace Product and Parts Manufacturing [3364]



Since the air transportation industry was one of the industries hit hardest by COVID-19, aerospace manufacturing was also heavily impacted. As discussed above, Boeing, one of Manitoba's largest aerospace employers recently laid off approximately 400 workers – approximately 10% of the Manitoba aerospace workforce. It is unknown when this industry will recover and will likely depend on air health and safety measures being approved and trusted by passengers, or, a successfully COVID-19 vaccine. June 2020 shows that this industry has recovered to above June 2019 levels.

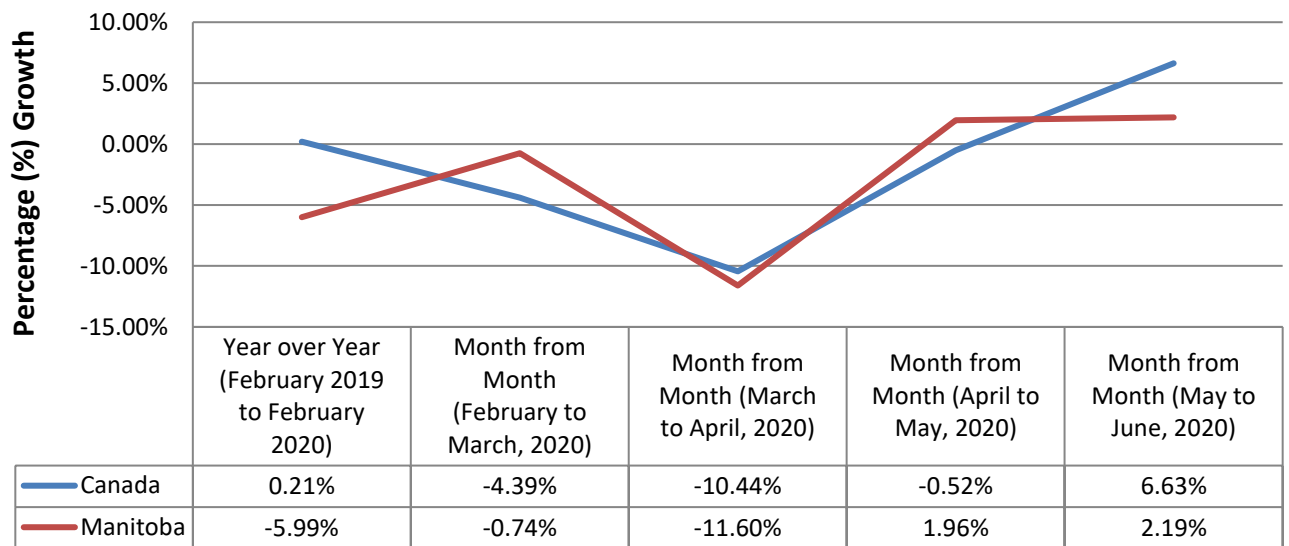


Wholesale trade was a Manitoba industry showing significant growth between January and February 2019 and 2020. However, COVID-19 resulted in significant losses in Manitoba April employment. This industry has since moderately recovered.

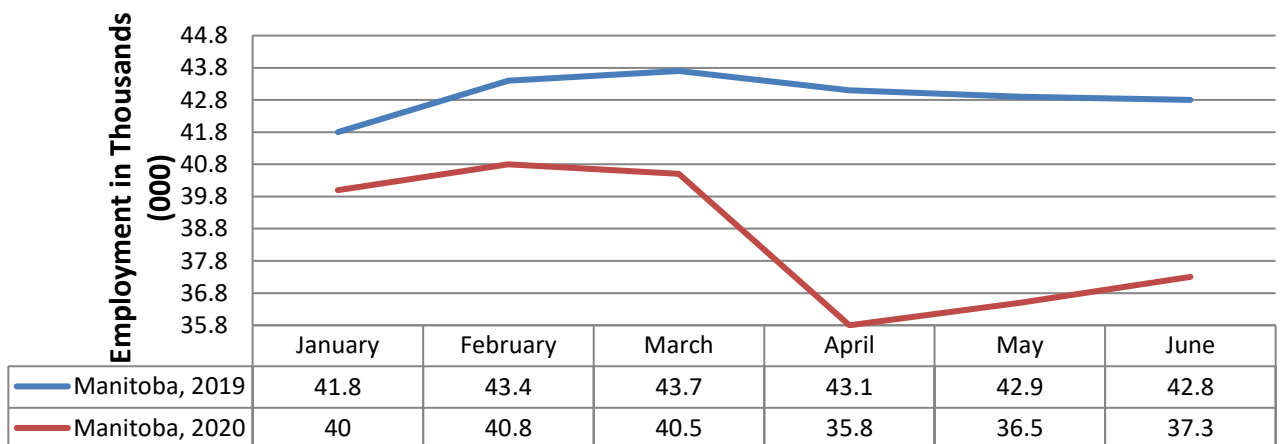


Retail trade was heavily impacted by COVID-19 but has since recovered slightly. Still, between February 2020 and May 2020, 10,400 jobs have been lost and both April and May 2020 are significantly below 2019 levels. Compared to Canada, Manitoba was impacted slightly less and recovered stronger in May. This industry significantly recovered in June 2020. Also, many retailers are closing doors in Manitoba and throughout North America due to losses of sales, caused largely by online retailers such as Amazon. Amazon is counted under NAICS 44-45 Retail trade.

Transportation and Warehousing [48-49]



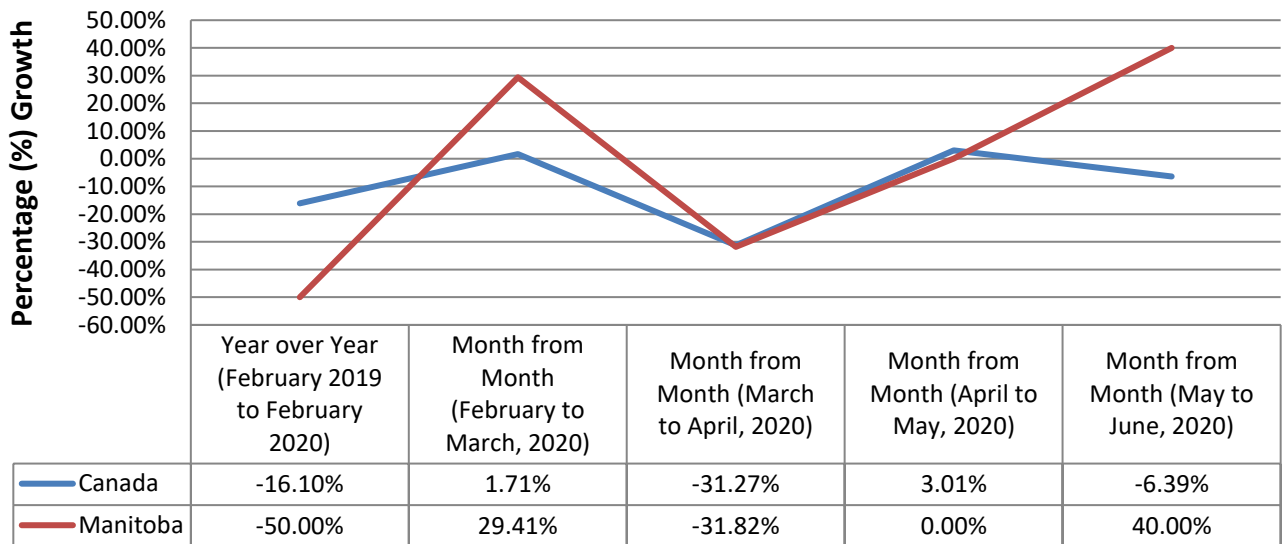
Transportation and Warehousing [48-49]



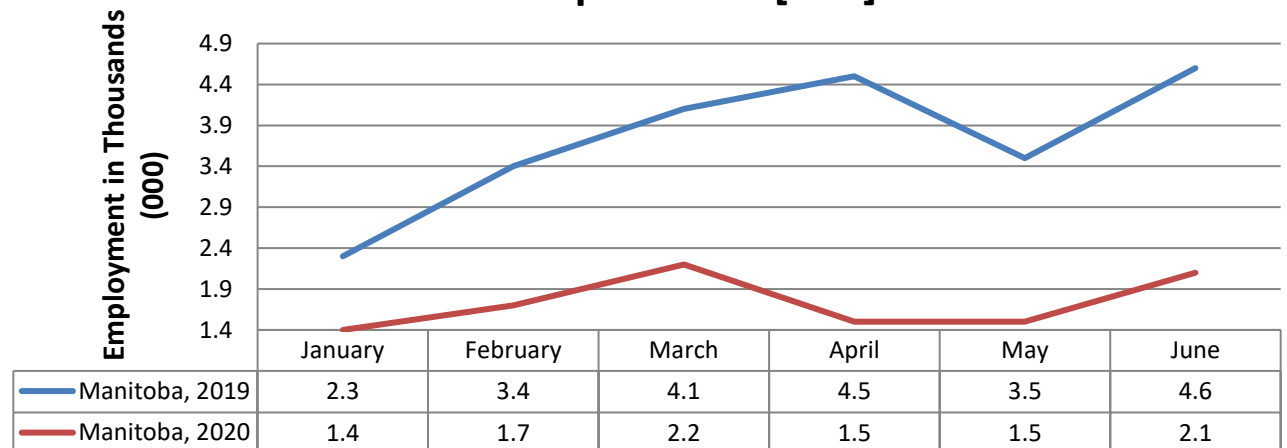
Manitoba's transportation and warehousing industry was affected by COVID-19. However, it appears that employment was decreasing in this industry prior to COVID-19 with January and February employment below those months in 2019. Within the transportation and warehousing industry, the air transportation, truck transportation, and warehousing and storage sectors were all below 2019 employment levels prior to COVID-19.

Manitoba's transportation and warehousing industry was affected in a manner and magnitude similar to Canada.

Air Transportation [481]

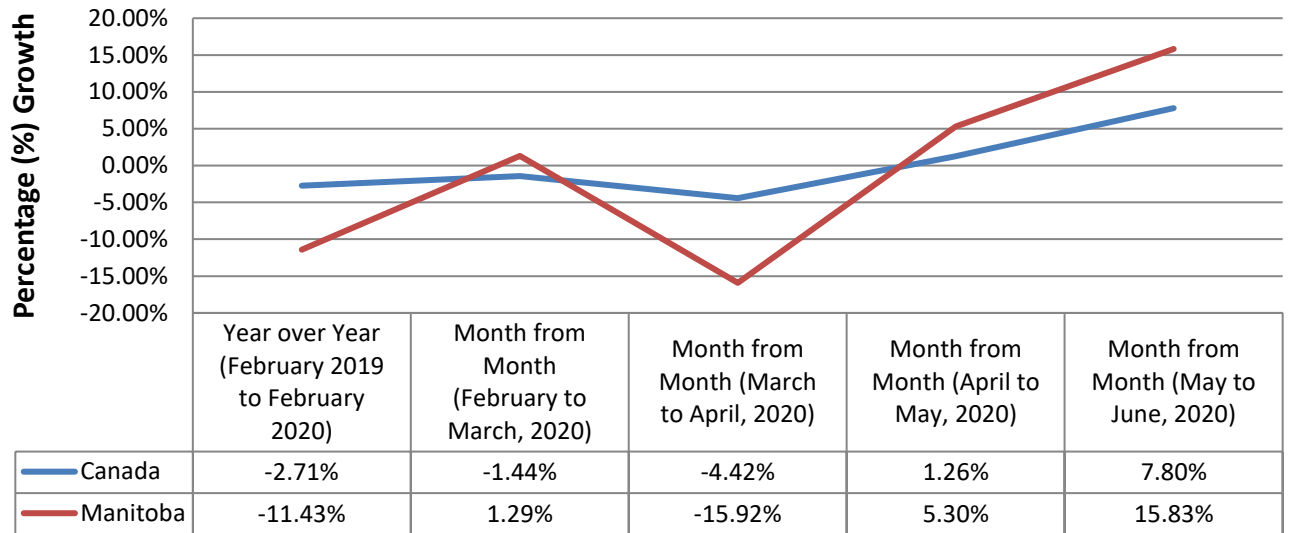


Air Transportation [481]

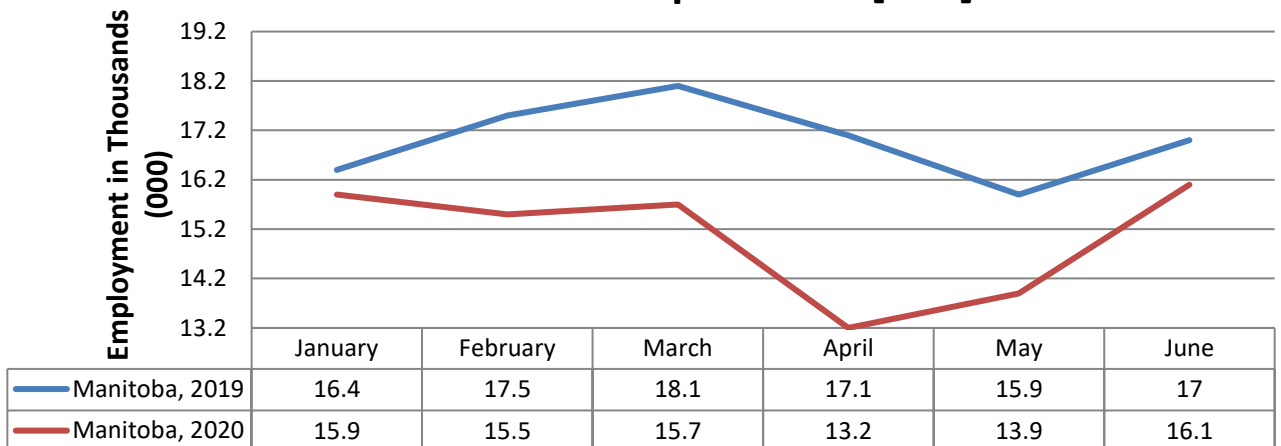


Air transportation was significantly affected by COVID-19 in both Manitoba and Canada with Manitoba's workforce in 2020 approximately half of what it was in 2019. In both Canada and Manitoba, employment declined by approximately 31% between March and April 2020. Although June showed recovery signs, this industry is still far below 2019 levels. This employment decline is expected to persist until air travel becomes safe around COVID-19. This will require significant approved and trusted health and safety measures in the aviation industry, or, a successful COVID-19 vaccine.

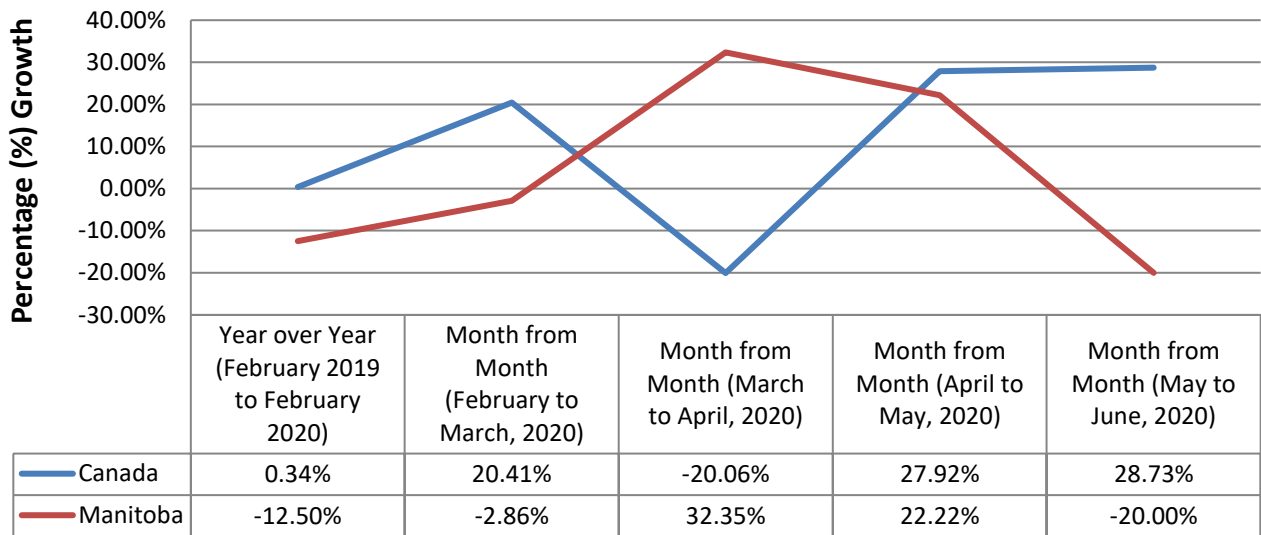
Truck Transportation [484]



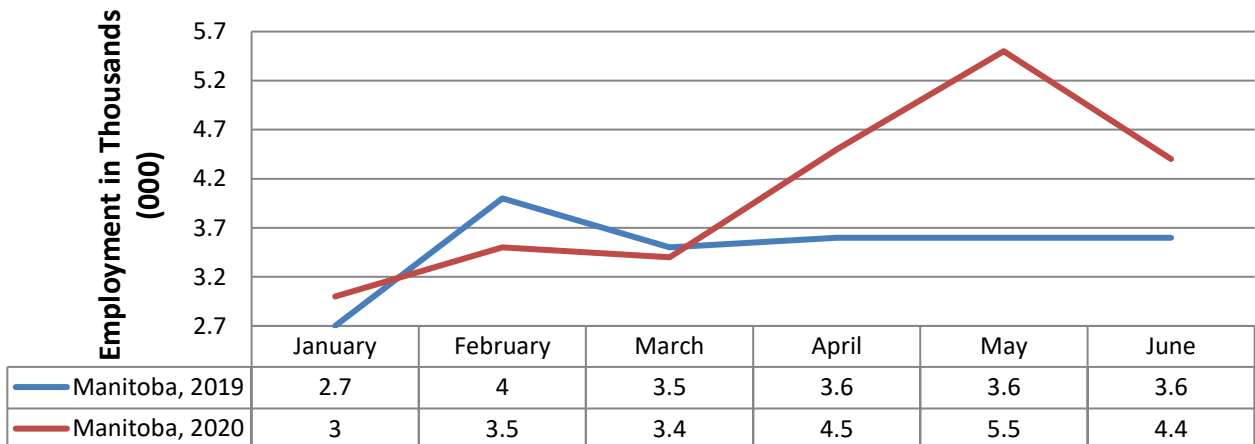
Truck Transportation [484]



Local Messengers and Local Delivery [4922]

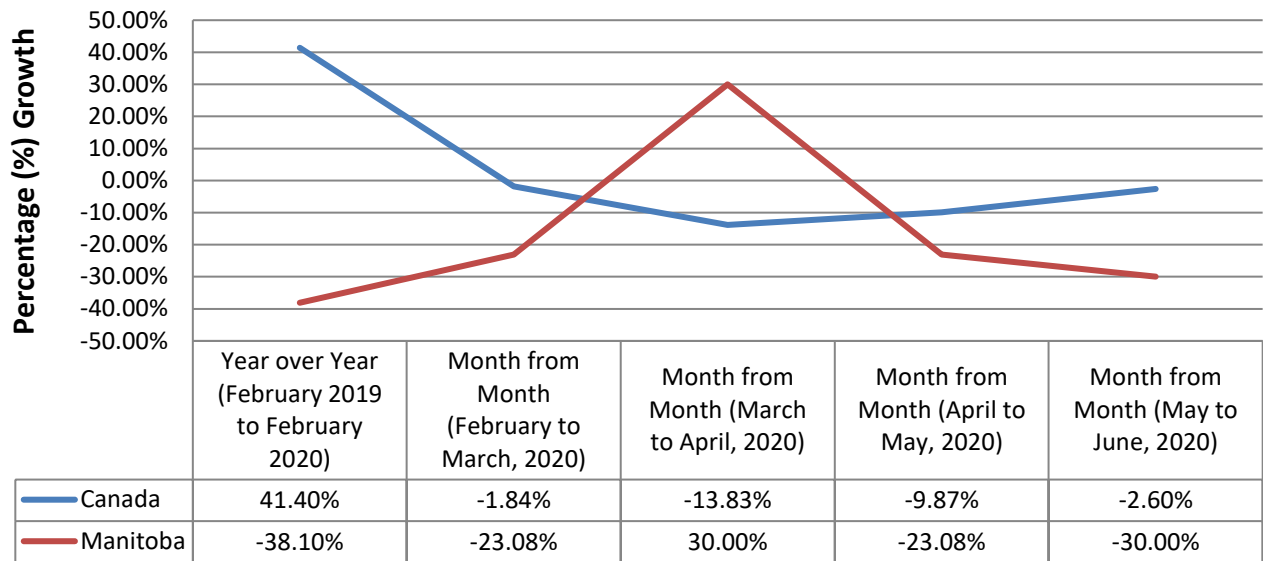


Local Messengers and Local Delivery [4922]

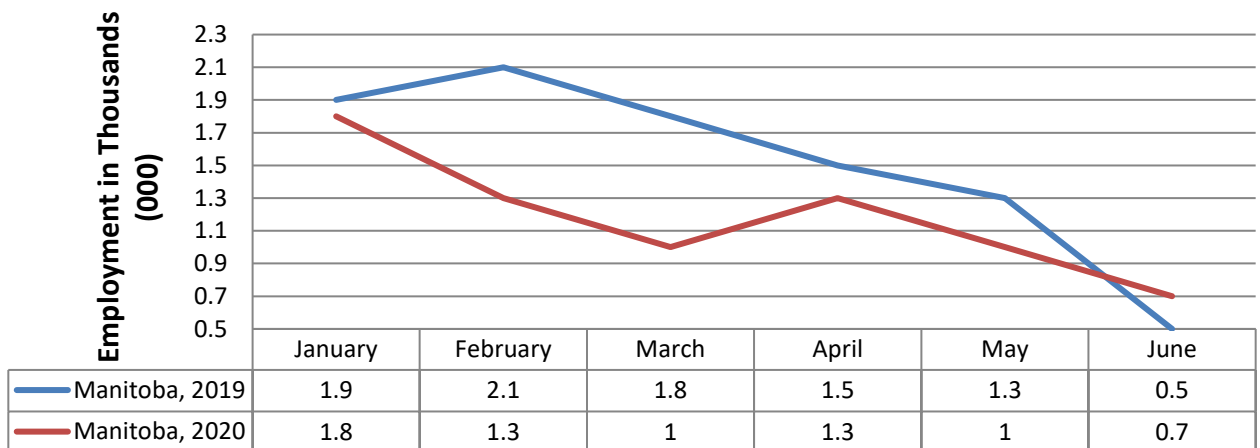


This industry contains organizations like Skip the Dishes. June 2020 employment levels are significantly above June 2019 levels. The decline in Manitoba from May to June 2020 is likely the result of restaurant openings for dine-in.

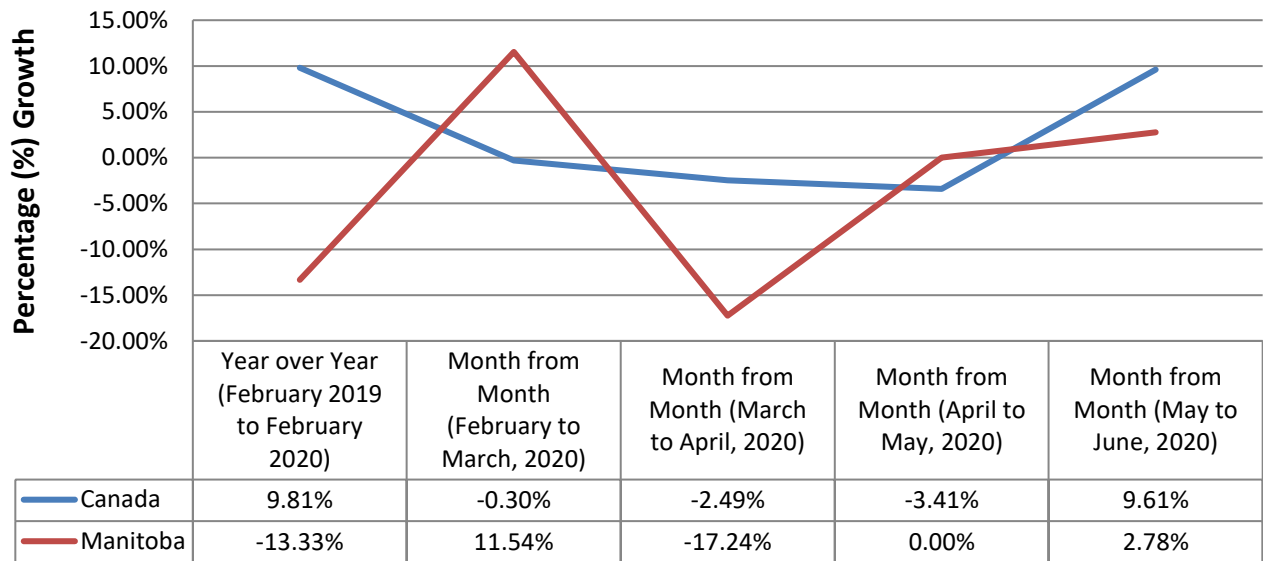
Warehousing and Storage [493]



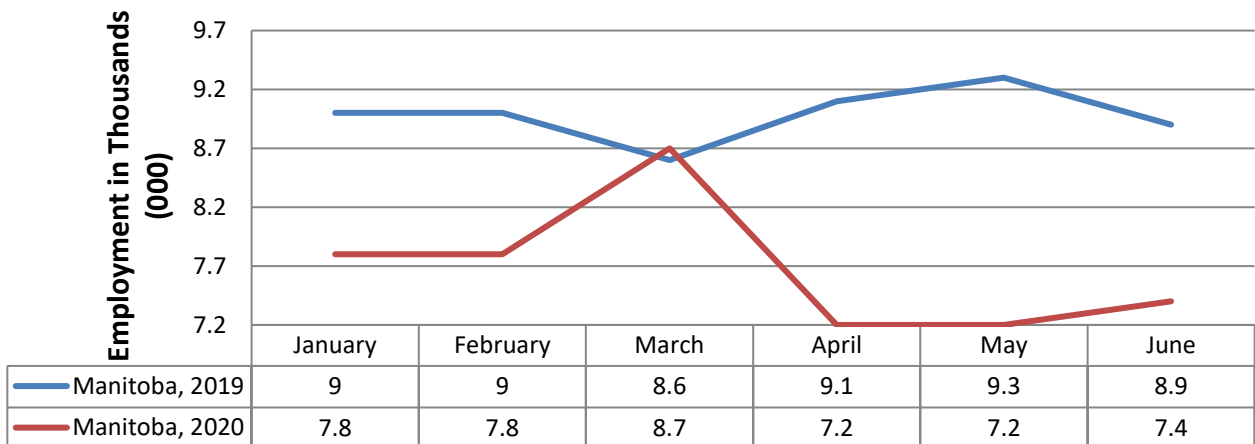
Warehousing and Storage [493]



Information and Cultural Industries [51]

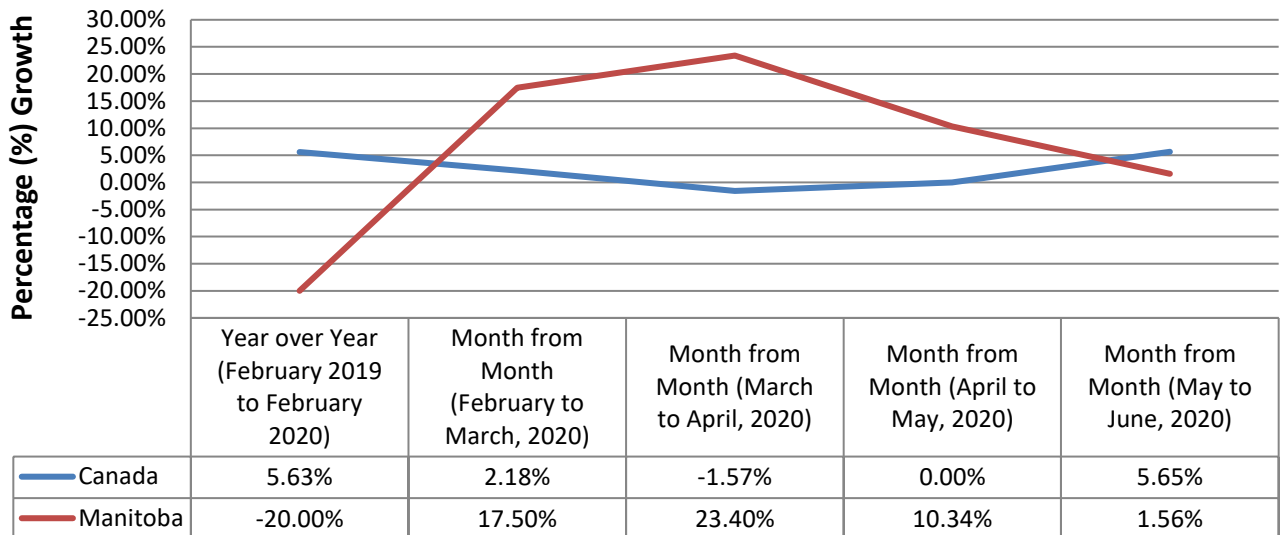


Information and Cultural Industries [51]

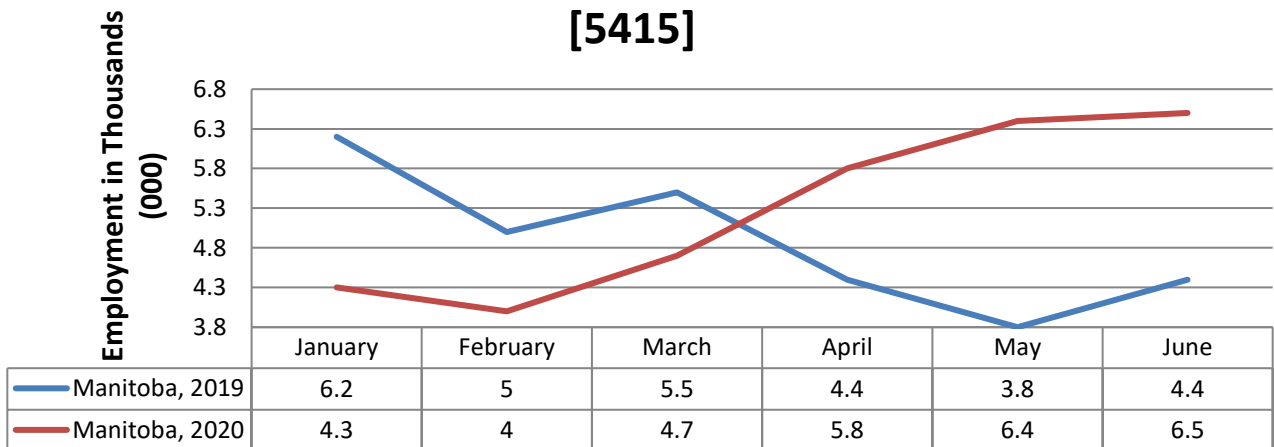


Information and cultural industries were affected by COVID-19 slightly more than the rest of Canada. Employment in January and February 2020 were below 2019 levels. Employment increased in March and then declined in April. This industry has recovered better in Canada than in Manitoba.

Computer Systems Design and Related Services [5415]

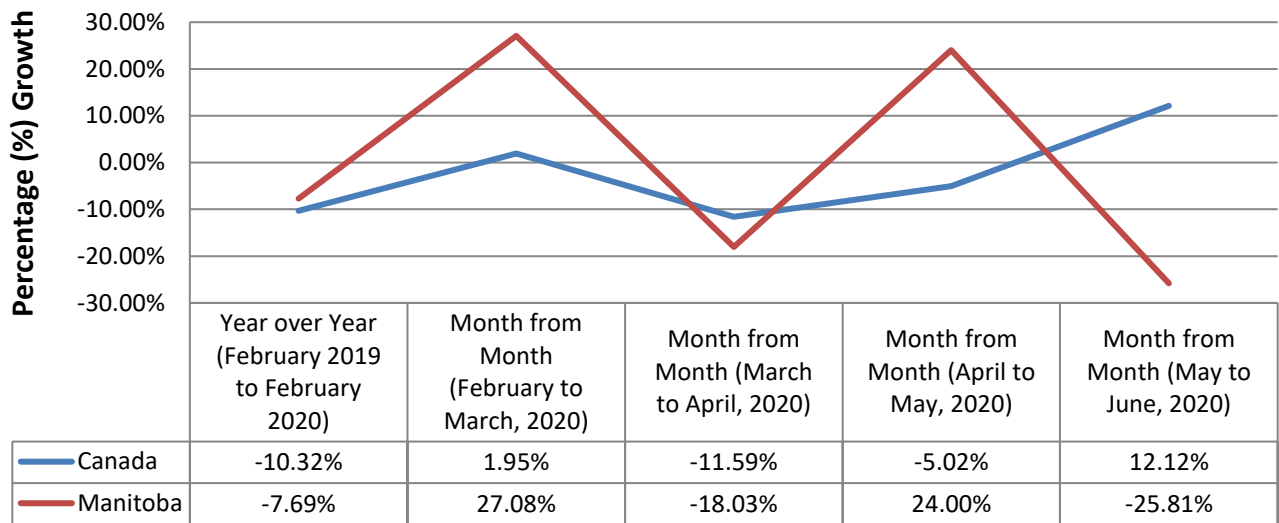


Computer Systems Design and Related Services [5415]

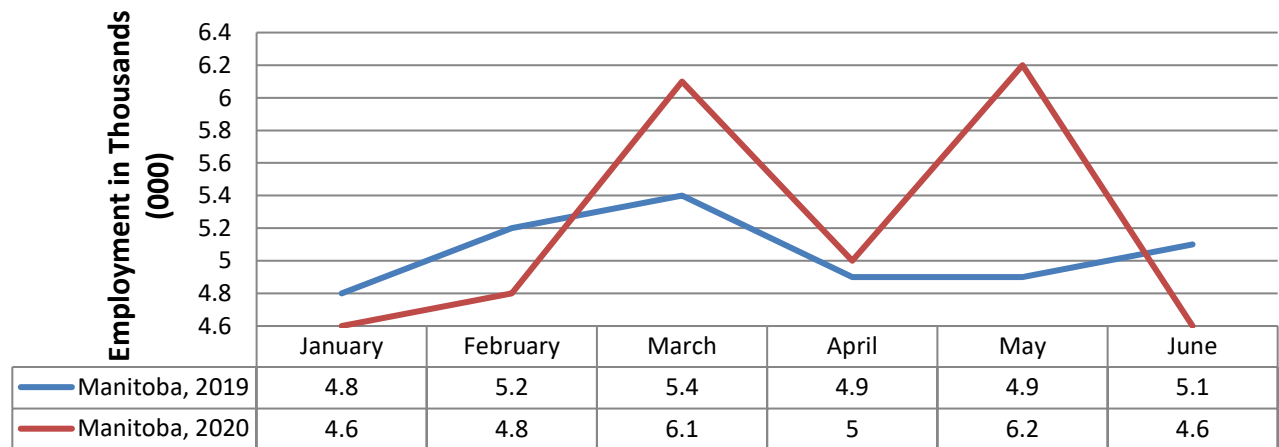


Computer systems design and related services has demonstrated significant growth throughout COVID-19 with no periods of negative employment growth since February 2020. Canada's industry was also unaffected; however, it did not demonstrate employment growth like in Manitoba. In fact, Manitoba May 2020 employment is almost double the 2019 May level. June 2020 has remained strong for this industry.

Business Support Services [5614]

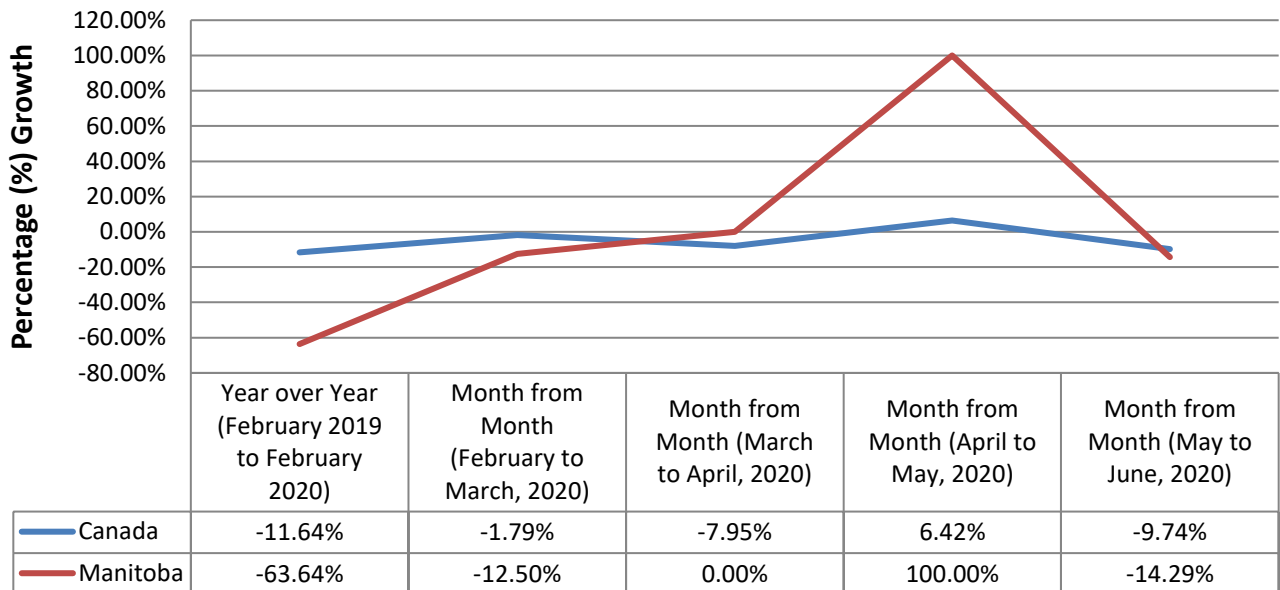


Business Support Services [5614]

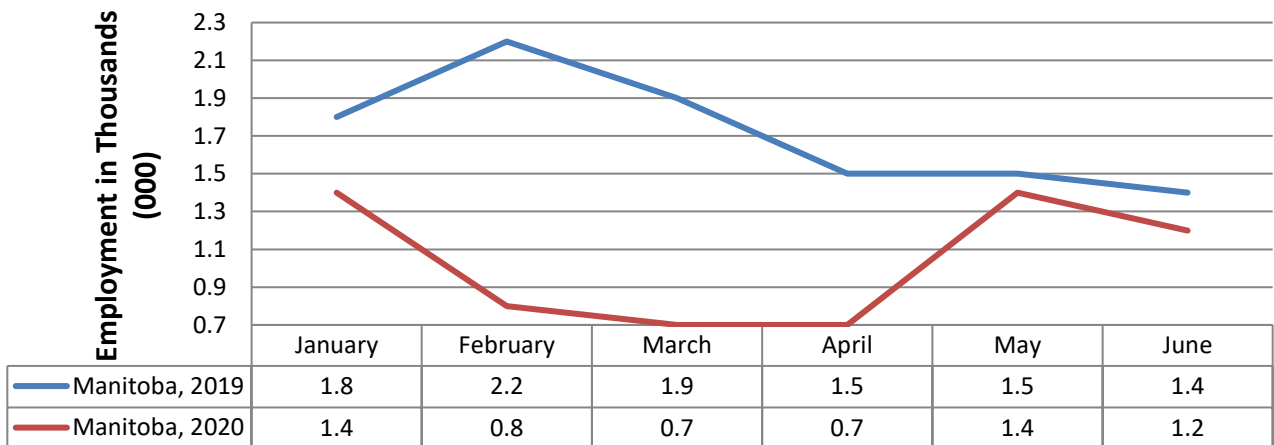


Business support services, which includes call centers and other related services, has seen significant employment growth over the COVID-19 period, despite January and February 2020 being slightly below 2019 levels. It was stated by MCCA that many of its larger call center members are increasing employment in Manitoba. It is unknown why June 2020 showed a 26% decline in Manitoba.

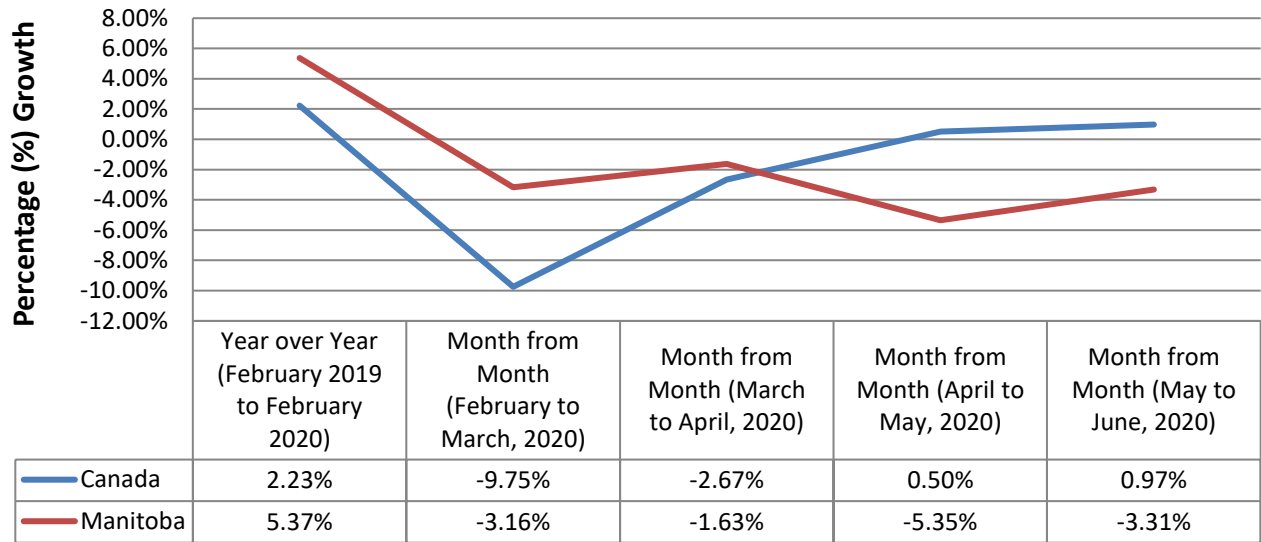
Waste Management and Remediation



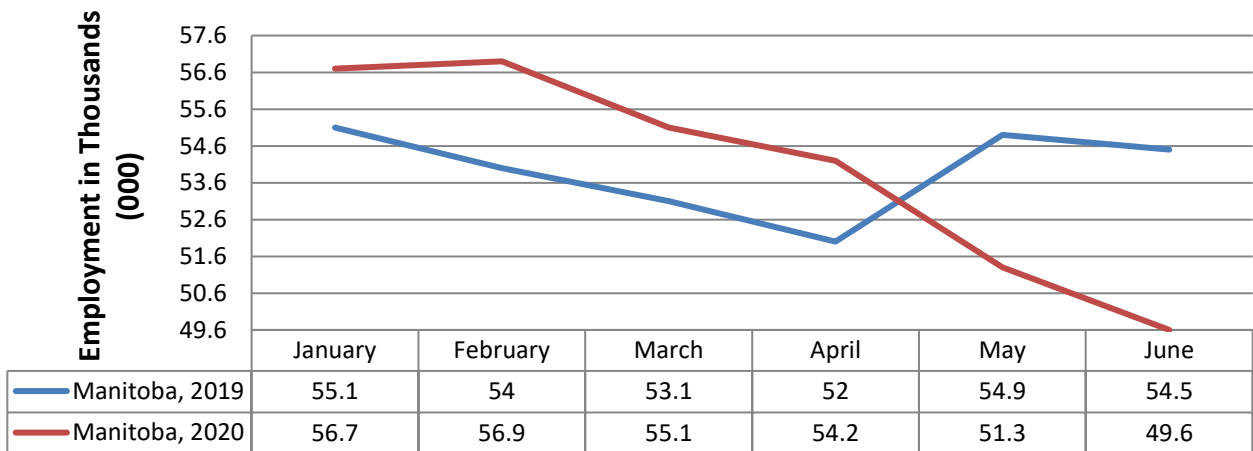
Waste Management and Remediation Services [562]



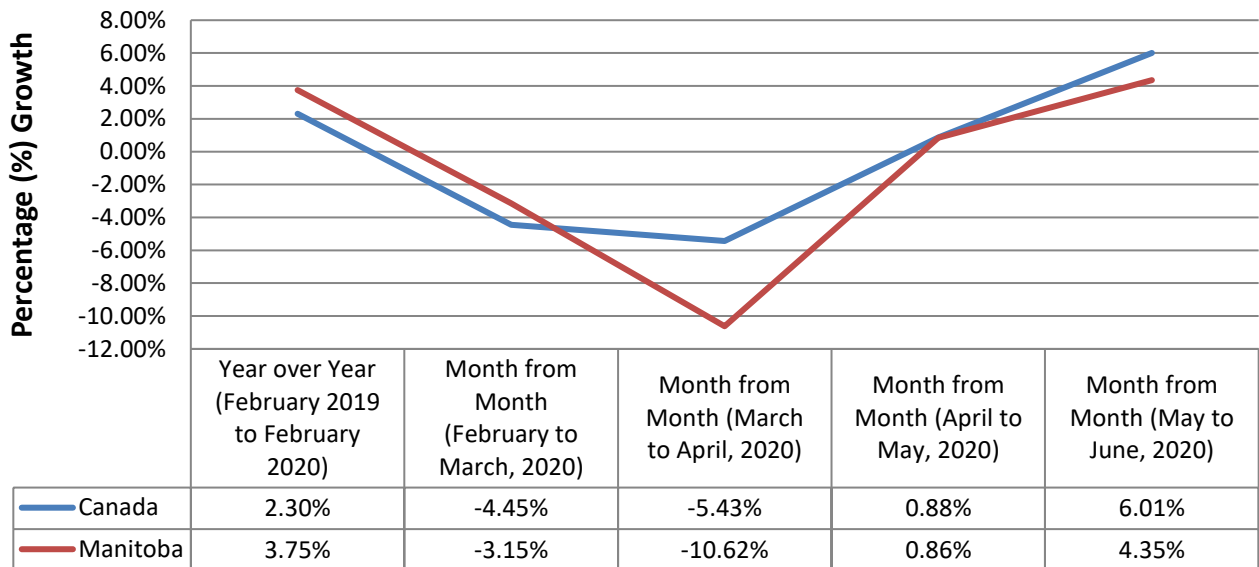
Educational Services [61]



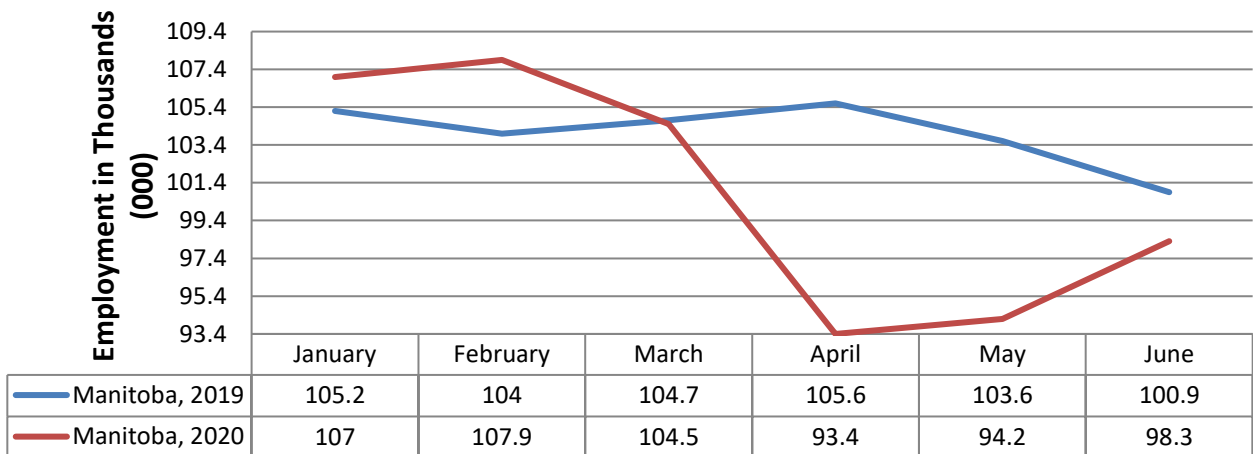
Educational Services [61]



Health Care and Social Assistance [62]

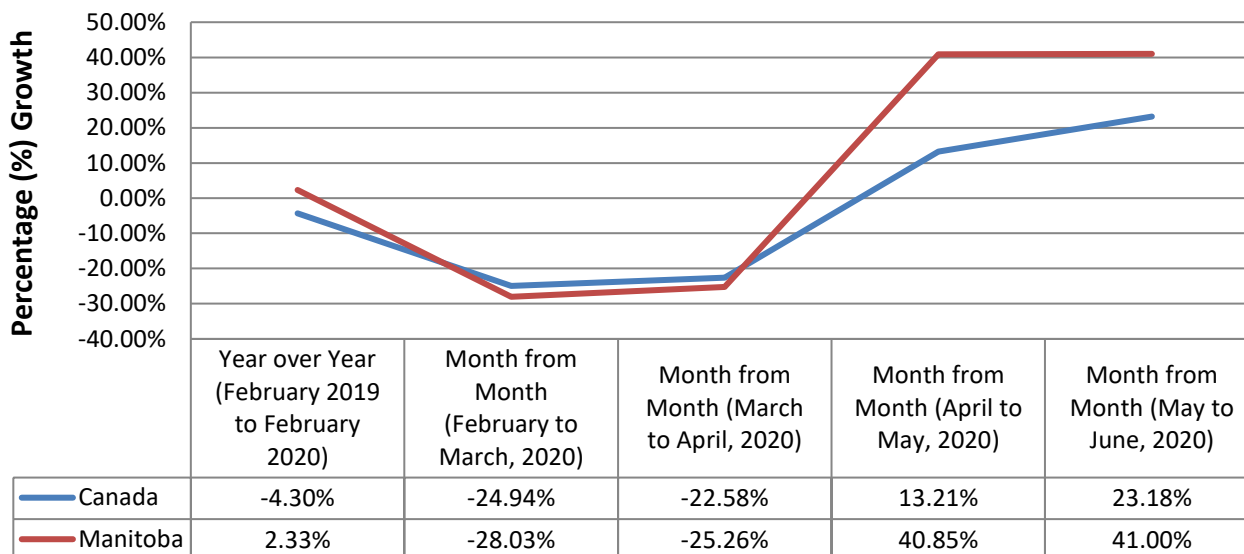


Health Care and Social Assistance [62]

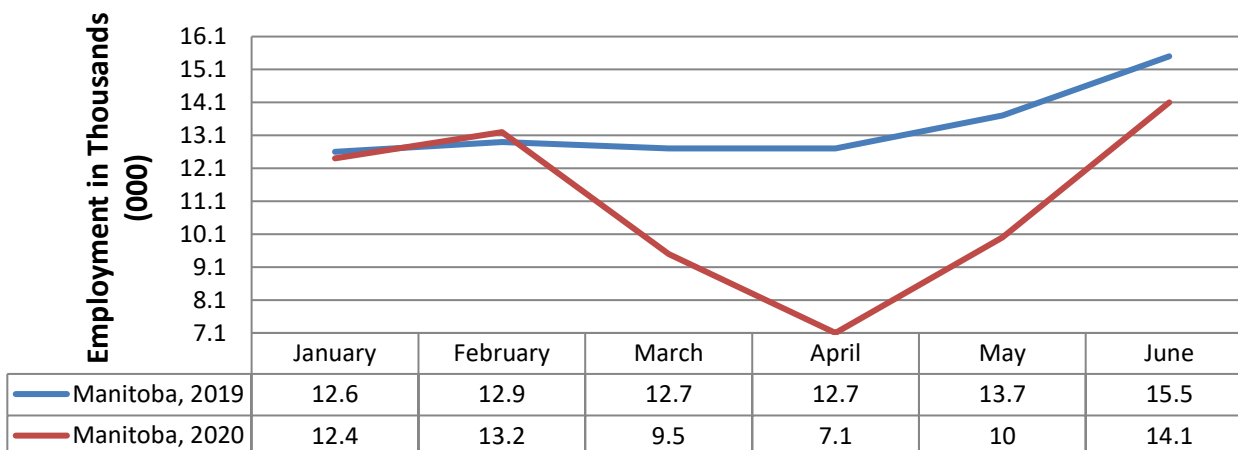


Since many non-emergency health services were shut down during COVID-19, employment fell significantly from 104,500 in March 2020, to 93,400 in April. This industry was affected relatively the same as Canada as whole.

Arts, Entertainment and Recreation [71]

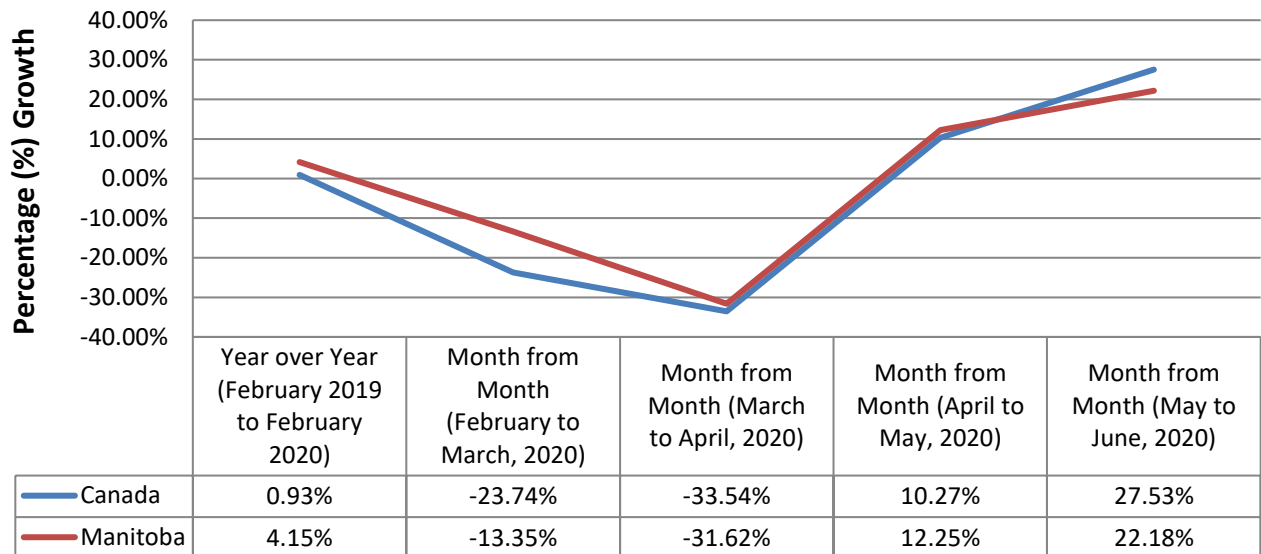


Arts, Entertainment and Recreation [71]

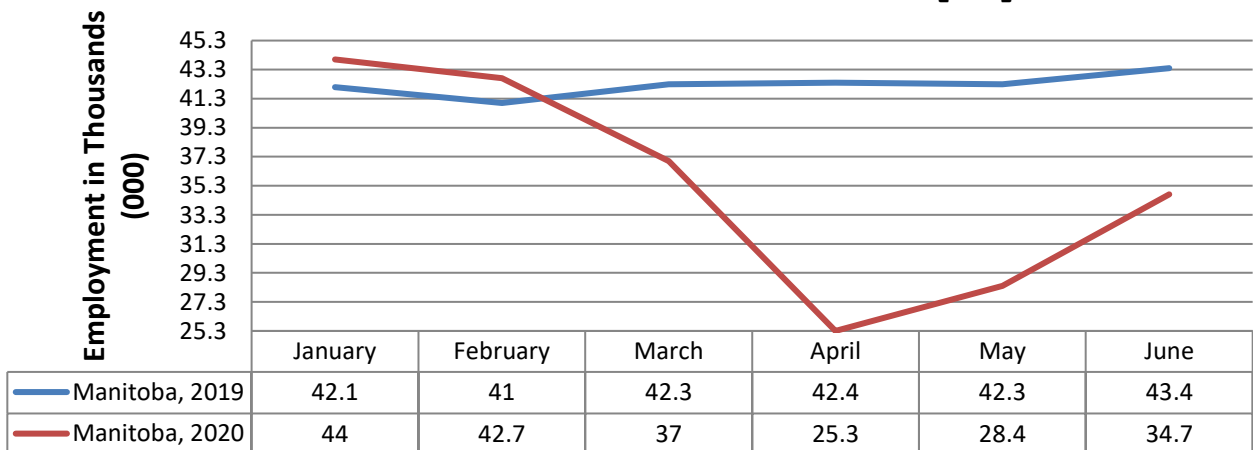


Arts, entertainment and recreation was heavily impacted by COVID-19. However, in Manitoba, this industry significantly rebounded in May. This is one industry where Manitoba was impacted more than Canada as a whole, however, recovered substantially in May and June.

Accommodation and Food Services [72]

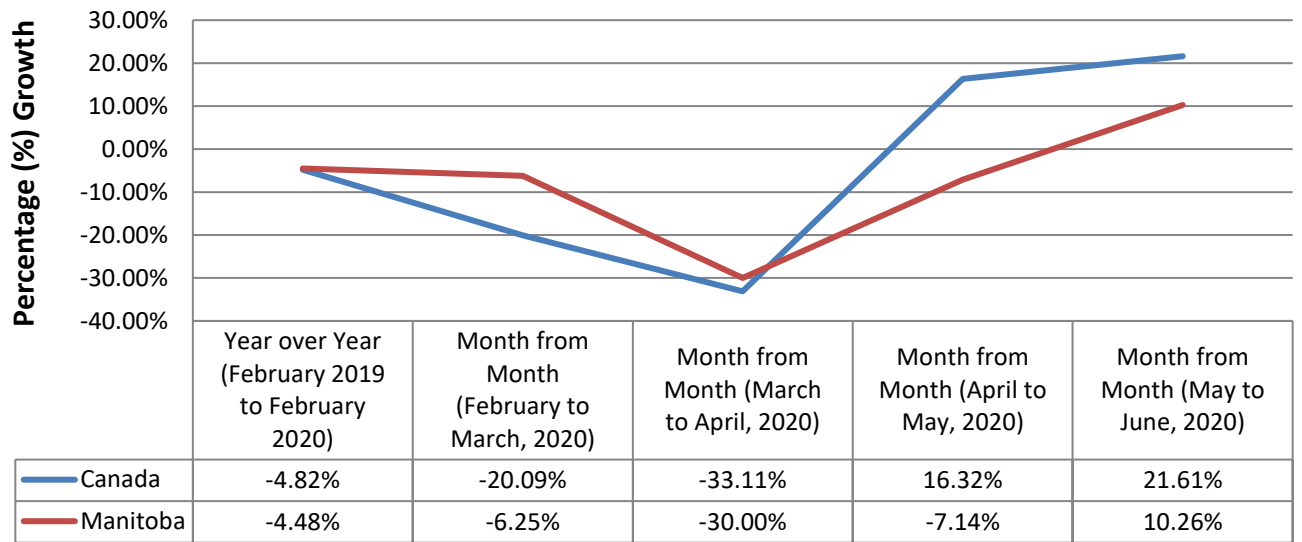


Accommodation and Food Services [72]

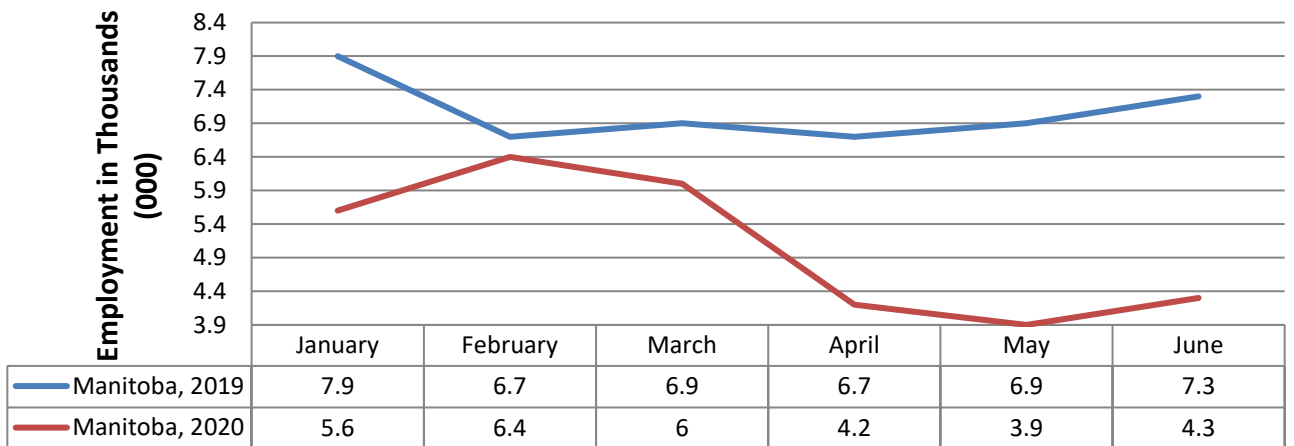


Accommodation and food services were heavily affected in Manitoba. However, less than Canada as a whole.

Accommodation Services [721]

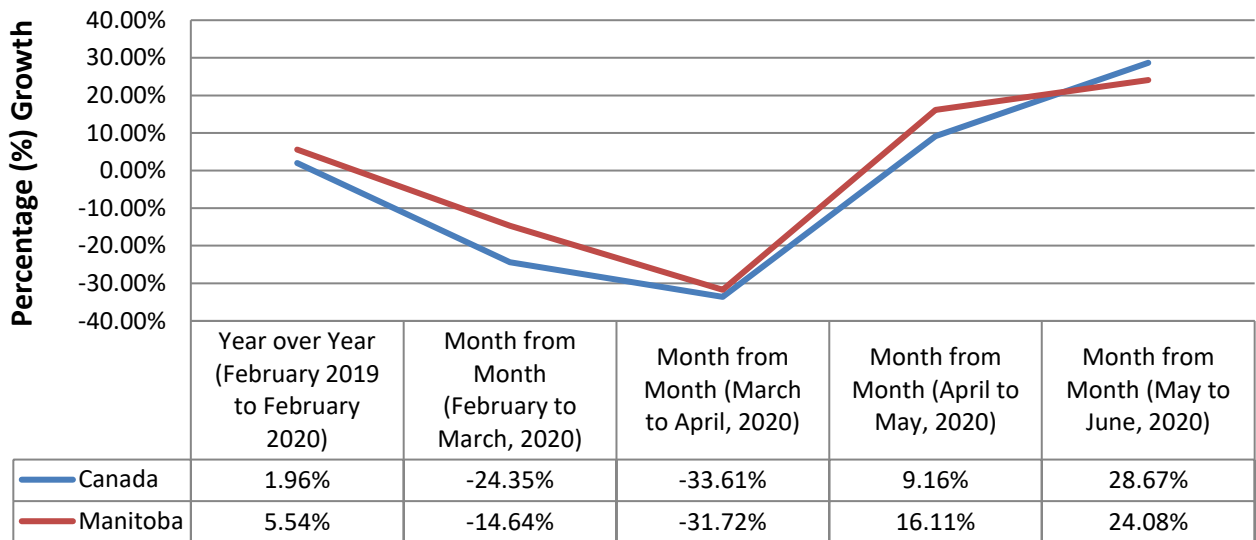


Accommodation Services [721]

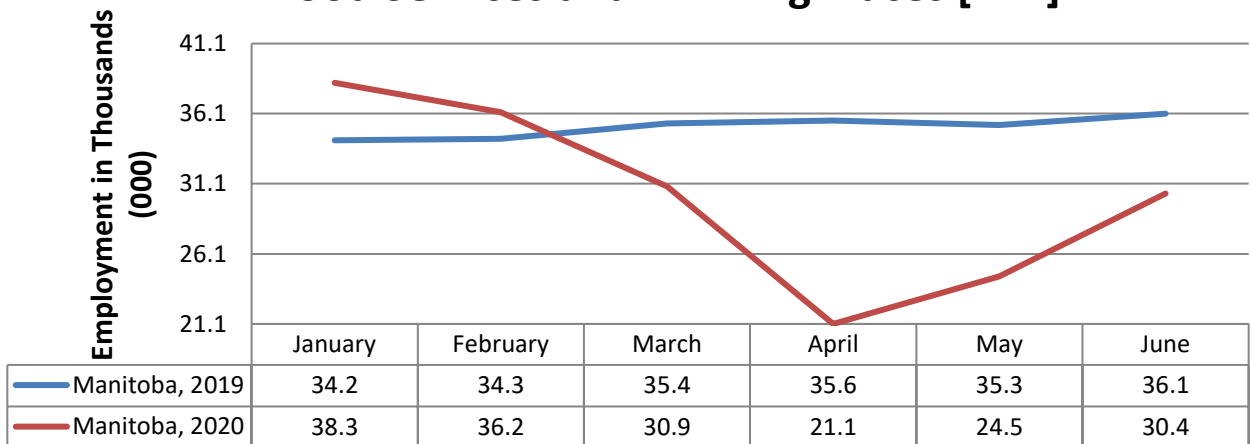


This industry was severely impacted in both Manitoba and Canada with very negligible recovery so far.

Food Services and Drinking Places [722]

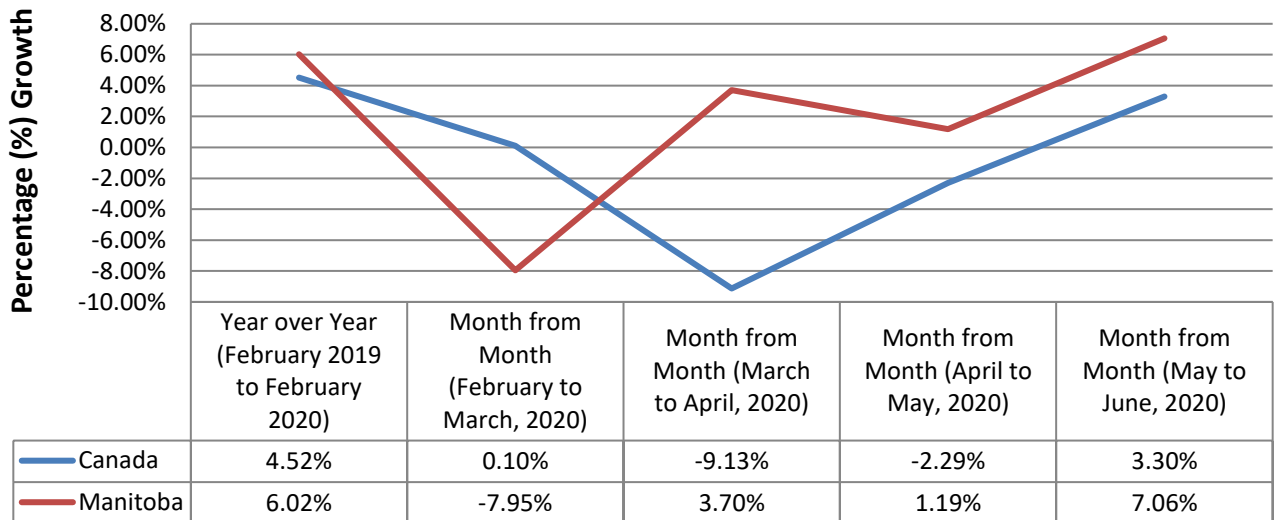


Food Services and Drinking Places [722]

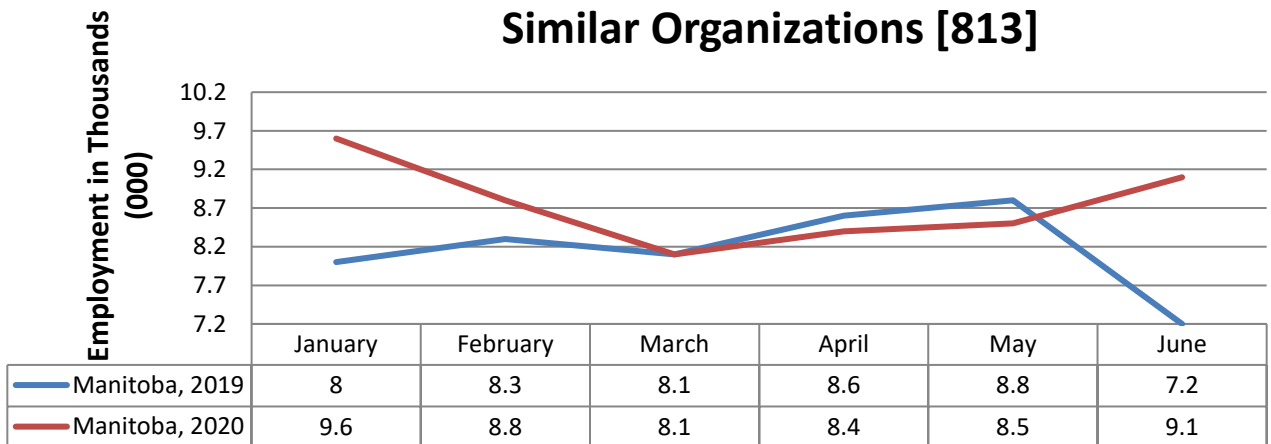


Food services and drinking places were among the most impacted by COVID-19 with 15,100 jobs lost between February and April, and only 3,400 recovering in May. June 2020 saw another 5,900 jobs gained in Manitoba but employment is still far below 2019 levels. Large bar and restaurant closures resulted in significant layoffs. Similar to other industries, Manitoba was not affected as much as Canada as a whole.

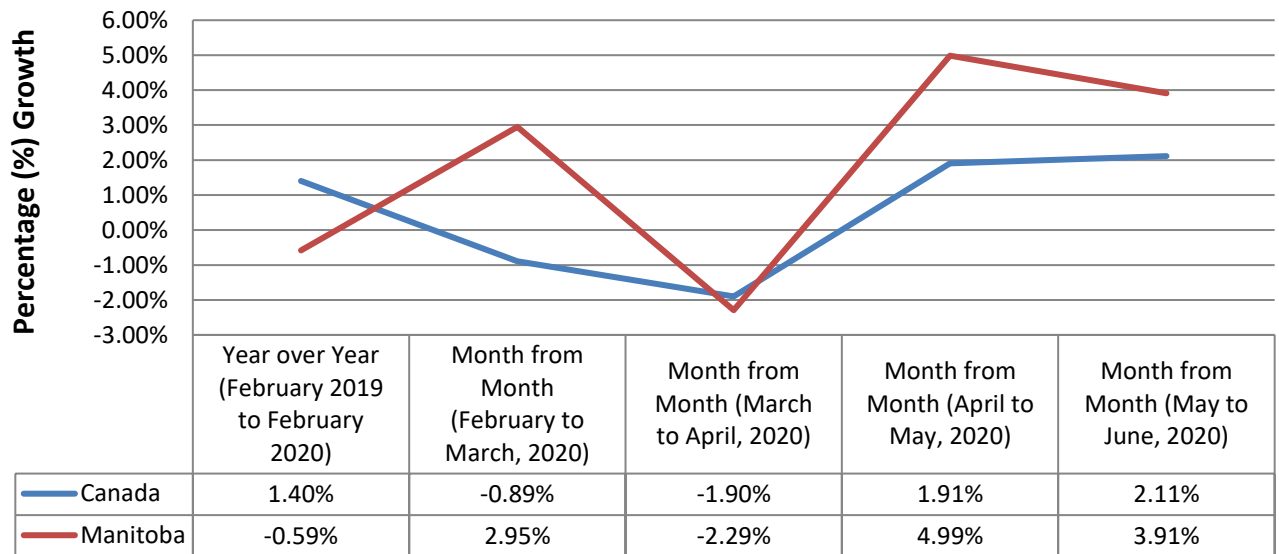
Religious, Grant-Making, Civic, and Professional and Similar Organizations [813]



Religious, Grant-Making, Civic, and Professional and Similar Organizations [813]



Public Administration [91]



Public Administration [91]

