



WORKFORCE RESET

Surrey Labour Market Intelligence and Impact Reports

NOVEMBER 2020 LMI Report #4

****THE ONLY SURREY-FOCUSED LABOUR MARKET REPORT****

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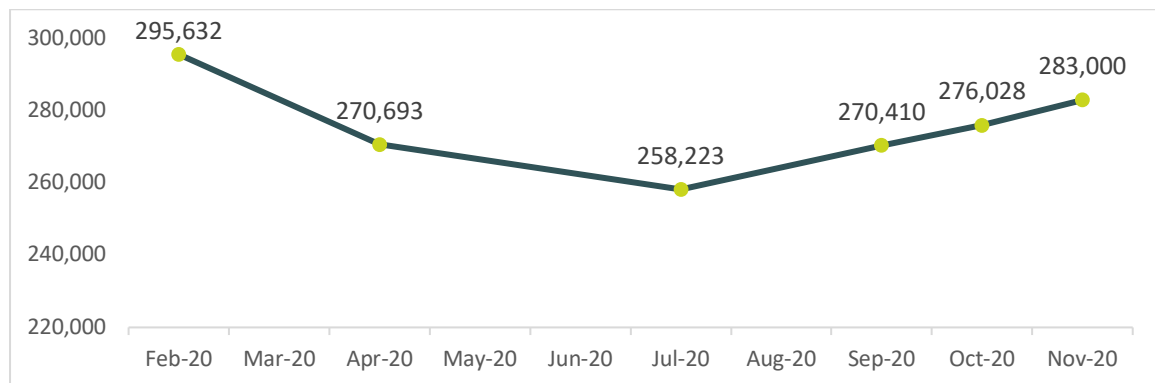
****THE ONLY SURREY-FOCUSED LABOUR MARKET REPORT****

For the first time, there is up-to-date and regular Surrey-specific labour market data.

This is the fourth of a series of monthly SBOT Surrey Labour Market Intelligence Reports on COVID-related impacts on the Surrey labour market, including the best available quantitative, qualitative and anecdotal information on implications for Surrey employers, workers and service providers. This includes a brief baseline summary on how Surrey's labour market looked before 2020 and how it is evolving during the pandemic, particularly from a business and workforce perspective to inform decision-making and planning on recovery and resilience.

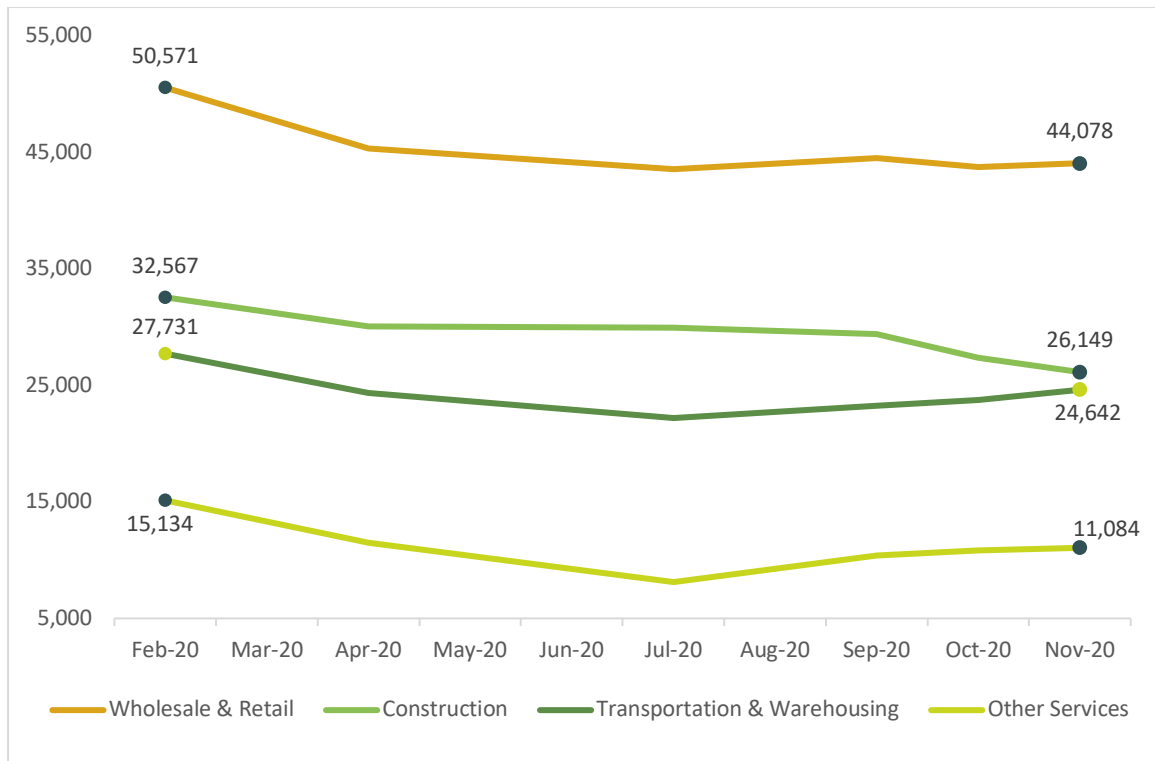
HIGHLIGHTS

- The total estimated net deficit of jobs in Surrey since February is now just over 12,000 jobs, down from a peak of over 37,000 jobs lost.
- Since the end of July, Surrey has recovered over 24,000 jobs (over 66%) with 6,972 of those being attributed to the month of November (Last month's report indicated 17,000 jobs recovered). The number of jobs recovered since July is almost the equivalent to the number of jobs lost in the first two months of the COVID-19 pandemic.



Employment in Surrey (Feb 2020 – Nov 2020)
Adapted from Table 14-10-0097-01, Statistics Canada

- Although the Utilities sector gained jobs in the first 7 months of the pandemic, it has faced a loss of almost 14% of jobs since October, with the majority of job losses coming in November 2020.
- Surrey continues to see an increase in jobs in Accommodation & Food Services with 7.7% more jobs in the industry by November 2020 than those in February 2020 (pre-pandemic) and almost 7,000 jobs recovered since July 2020.
- The greatest gains in the number of jobs recovered in November 2020 were seen in Educational Services (approximately 1,741 jobs); followed by Information, Culture and Recreation (approximately 901 jobs) and Transportation & Warehousing (approximately 878 jobs). These three industries made up for more than 50% of the job gains in November 2020.
- The greatest overall losses since March 2020 were seen in the Retail & Wholesale Trade (over 6,400 jobs lost), followed by Construction (over 6,400 jobs lost). Over 3,200 (or 50%) of the jobs lost in the Construction industry came in October and November 2020, though at least some of this loss could be attributed to the seasonality of this industry.



Industries with the Greatest Overall Job Loss Since February 2020
Adapted from Table 14-10-0097-01, Statistics Canada

- The greatest employment losses by occupation in November 2020 in Surrey were seen in Health occupations (7.3%), and Art, Culture, Recreation & Sport occupations (5.5%).
- The following classifications of occupations have seen a net gain in jobs when compared to February 2020 (pre-pandemic): Natural & Applied Sciences occupations (over 3,400 jobs); Business, Finance & Administration occupations (over 2,000 jobs); and Manufacturing & Utilities (over 1,600 jobs).
- Over 55% of businesses in BC were forced to change their business status as a result of the COVID-19 pandemic.
- Over 34% of businesses in BC laid off at least one staff member since the beginning of the COVID-19 pandemic.
- More than 54% of Accommodation & Food Service industry businesses in BC have laid off staff, 20% higher than the BC average.
- Seventeen percent of businesses in BC expect 100% of their staff to continue primarily tele-working or working remotely, even after the pandemic.
- More than 50% of businesses indicated that they expect less than 10% of their staff to tele-work or work remotely, after the pandemic:
 - Other Services (except Public Administration (72%))
 - Manufacturing (70%)
 - Arts, Entertainment & Recreation (59%)
 - Wholesale Trade (54%)

- Overall, Canadians reported a significantly lower Mental Health Index score compared to the pre-pandemic benchmarks.
- Those working for employers with 51-100 employees reported the lowest score and those that are self-employed / sole proprietors reported the best score, in November 2020.
- Overall, British Columbians have indicated a slightly better Mental Health Index score (in November 2020) when compared to Canada as a whole.
- Visible minorities reported a significantly lower mental health score than their white counterparts.
- Those who are employed but saw reduced hours or reduced salary reported lower mental health scores than those who were unemployed, while those who saw no change to their employment indicated the highest mental health score.
- Full-time students have reported the lowest mental health score for six consecutive months.
- The highest mental health scores in November are stated among those in Real Estate, Rental and Leasing, Agriculture, Forestry, Fishing and Hunting, and Mining and Oil and Gas Extraction.

Sources:

BC Stats – *Statistics Canada, Labour Force Survey, November 2020*. Released December 4, 2020. Retrieved from <https://www2.gov.bc.ca/gov/content/data/statistics/employment-labour/labour-market-statistics>.

BC Women’s Foundation ‘Unmasking Gender Inequity: Revealing the Socio-Economic Impacts of COVID-19 on Women’s Health’ <https://assets.bcwomensfoundation.org/2020/11/20122829/BCWHF-Unmasking-Gender-Inequity-Report-2020-1.pdf>

Morneau Shepell ‘The Mental Health Index Report’ – Canada November 2020. Retrieved from https://www.morneaushepell.com/sites/default/files/assets/paragraphs/resource-list/canadamhinnovember2020final2_0.pdf

Statistics Canada. [Table 14-10-0097-01 Employment by industry, three-month moving average, unadjusted for seasonality, census metropolitan areas \(x 1,000\)](#)

Statistics Canada. [Table 14-10-0313-01 Employment by census metropolitan areas and occupation, three-month moving average, unadjusted for seasonality \(x 1,000\)](#)

Statistics Canada. [Table 33-10-0276-01 Impact of COVID-19 on business or organization status, by business characteristics](#)

Statistics Canada. [Table 33-10-0279-01 Layoffs since the start of the COVID-19 pandemic, by business characteristics](#)

Statistics Canada. [Table 33-10-0274-01 Percentage of workforce teleworking or working remotely, and percentage of workforce anticipated to continue primarily teleworking or working remotely after the pandemic, by business characteristics](#)

1. COVID-19 Employer, Labour Force and Workforce Impacts in November 2020

Surrey Employer COVID-19 Employment Impacts: Estimates extrapolated from Statistics Canada's 2016 Census and 2020 Statistics Canada Labour Force Survey (November 2020)

For the first time, Surrey has Surrey-specific labour market data! This section compares employment changes in Surrey from 2019 and for each month from February through November 2020 to show the employment impacts of COVID-19.

This report is prepared by Human Capital Strategies in conjunction with SBOT.

Surrey Employment COVID-19 Impacts BY INDUSTRY – 2019 to November 2020

Based on estimates from the *Labour Force Survey* (LFS), the table below shows the structure of the Surrey labour market in 2019 with almost 300,000 employed, and employment being led by service industries such as Wholesale & Retail Trade (over 48,000), Health Care & Social Services (over 33,000) and Transportation & Warehousing (almost 29,000). Strong goods industries in Surrey are Construction (over 32,000) and Manufacturing (almost 27,000). The smallest employment sectors, but nevertheless important, are Utilities (over 1,300) and Agriculture & Natural Resources (over 4,000). While some of these industries grew or contracted from 2019 to February 2020, all of these industries were impacted (to varying degrees) by COVID-19 between March and November 2020.

Table 1 shows employment change between February 2020 (Pre-COVID) and November 2020 in Surrey, by Industry.

North American Industry Classification System (NAICS)	2019	Feb	April	Change Feb to April		July	Change April to July		Sept	Change July to September		October	Change Sept to October		Nov	Change October to November		Change Feb to November	
	2020	2020	2020	Jobs	%	2020	Jobs	%	2020	Jobs	%	2020	Jobs	%	2020	Jobs	%	Jobs	%
Total Employed (all industries)	297,895	295,632	270,693	-24,939	-8.4%	258,223	-12,470	-4.6%	270,410	12,187	4.7%	276,028	5618	2.1%	283,000	6972	2.5%	-12,632	-4.3%
Agriculture, Forestry, Fishing, Mining, Quarrying, Oil & Gas	4,185	2,963	4,338	1,375	46.4%	5,102	764	17.6%	3,544	-1,558	-30.5%	3,361	-183	-5.2%	3,819	458	13.6%	856	28.9%
Utilities	1,361	1,691	2,255	564	33.4%	2,586	331	14.7%	2,742	156	6.0%	2,683	-58	-2.1%	2,372	-311	-11.6%	681	40.3%
Construction	32,331	32,567	30,078	-2,489	-7.6%	29,973	-105	-0.3%	29,397	-576	-1.9%	27,405	-1991	-6.8%	26,148	-1258	-4.6%	-6,419	-19.7%
Manufacturing	26,657	26,934	25,604	-1,330	-4.9%	24,191	-1,413	-5.5%	25,493	1,302	5.4%	26,491	998	3.9%	26,463	-28	-0.1%	-471	-1.7%
Wholesale & Retail Trade	48,589	50,571	45,364	-5,207	-10.3%	43,572	-1,792	-3.9%	44,500	928	2.1%	43,762	-738	-1.7%	44,078	316	0.7%	-6,493	-12.8%
Transportation & Warehousing	28,739	27,731	24,350	-3,381	-12.2%	22,204	-2,146	-8.8%	23,277	1,073	4.8%	23,764	488	2.1%	24,642	878	3.7%	-3,089	-11.1%
Finance, Insurance, Real Estate (rental & leasing)	21,170	18,545	16,806	-1,739	-9.4%	16,000	-806	-4.8%	16,680	680	4.2%	17,407	727	4.4%	18,245	838	4.8%	-300	-1.6%
Professional, Scientific & Technical Services	19,396	19,321	19,183	-138	-0.7%	19,822	639	3.3%	19,797	-25	-0.1%	19,709	-88	-0.4%	19,885	175	0.9%	564	2.9%
Business, Building & Other Support Services	16,729	13,904	13,543	-361	-2.6%	9,946	-3,597	-26.6%	12,408	2,462	24.8%	13,760	1352	10.9%	14,219	459	3.3%	315	2.3%
Educational Services	15,652	16,495	15,446	-1,049	-6.4%	13,915	-1,531	-9.9%	12,954	-961	-6.9%	14,005	1051	8.1%	15,746	1741	12.4%	-749	-4.5%
Health Care & Social Assistance	33,453	33,328	32,286	-1,042	-3.1%	32,078	-208	-0.6%	31,870	-208	-0.6%	32,411	542	1.7%	32,765	354	1.1%	-563	-1.7%
Information, Culture & Recreation	10,921	9,564	8,144	-1,420	-14.8%	7,811	-333	-4.1%	8,181	370	4.7%	8,860	679	8.3%	9,761	901	10.2%	197	2.1%
Accommodation & Food Services	18,964	19,642	14,141	-5,501	-28.0%	14,214	73	0.5%	19,735	5,521	38.8%	20,688	954	4.8%	21,147	459	2.2%	1,505	7.7%
Other Services (except public administration)	13,926	15,134	11,510	-3,624	-23.9%	8,120	-3,390	-29.5%	10,414	2,294	28.3%	10,820	406	3.9%	11,084	264	2.4%	-4,050	-26.8%
Public Administration	10,422	9,778	8,671	-1,107	-11.3%	8,631	-40	-0.5%	9,255	624	7.2%	9,838	583	6.3%	10,321	483	4.9%	543	5.6%

Table 1: Estimated Employment by Industry¹ – 2019, February 2020 through November 2020
Adapted from Table 14-10-0097-01, Statistics Canada

¹ Estimates based on Surrey share of Metro Vancouver (Census Metropolitan Area) by Industry in 2016.

The key information to note from this table is as follows:

- Since the end of July, Surrey has recovered over 24,000 jobs (over 66%) with 6,972 of those being attributed to the month of November. The number of jobs recovered since July is almost the equivalent to the number of jobs lost in the first two months of the COVID-19 pandemic.
- The total net deficit since February is now just over 12,000 jobs.

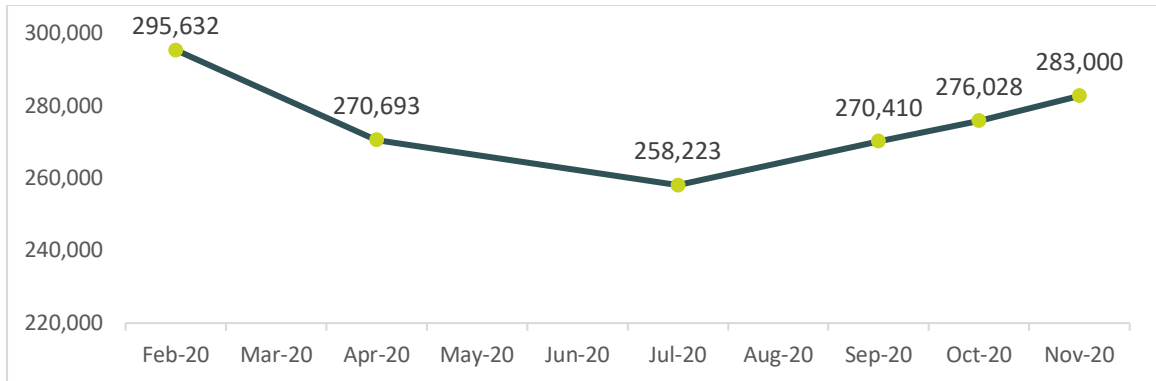


Figure 1: Employment in Surrey (Feb 2020 – Nov 2020)
Adapted from Table 14-10-0097-01, Statistics Canada

- Although the Utilities industry gained jobs in the first 7 months of the pandemic, it has faced a loss of almost 14% of jobs since October, with the majority of job losses coming in November 2020.
- Surrey continues to see an increase in jobs in Accommodation & Food Services with 7.7% more jobs in the industry by November 2020 than those in February 2020 (pre-pandemic) and almost 7,000 jobs recovered since July 2020.

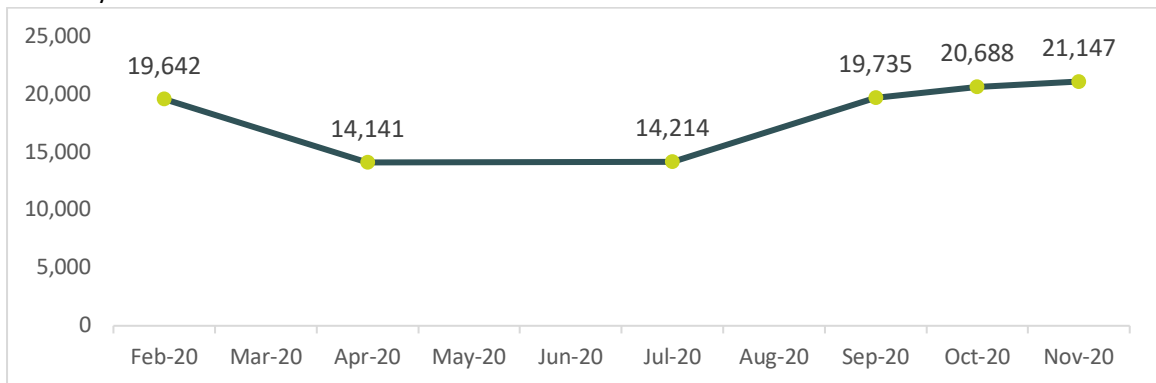


Figure 2: Gain/Loss of Jobs in Accommodation & Food Services in Surrey (Feb 2020 - Nov 2020)
Adapted from Table 14-10-0097-01, Statistics Canada

- By October 2020, the Vancouver region was the only major region in Canada in the Accommodation & Food Services industry to have a net surplus in jobs when compared to February 2020.

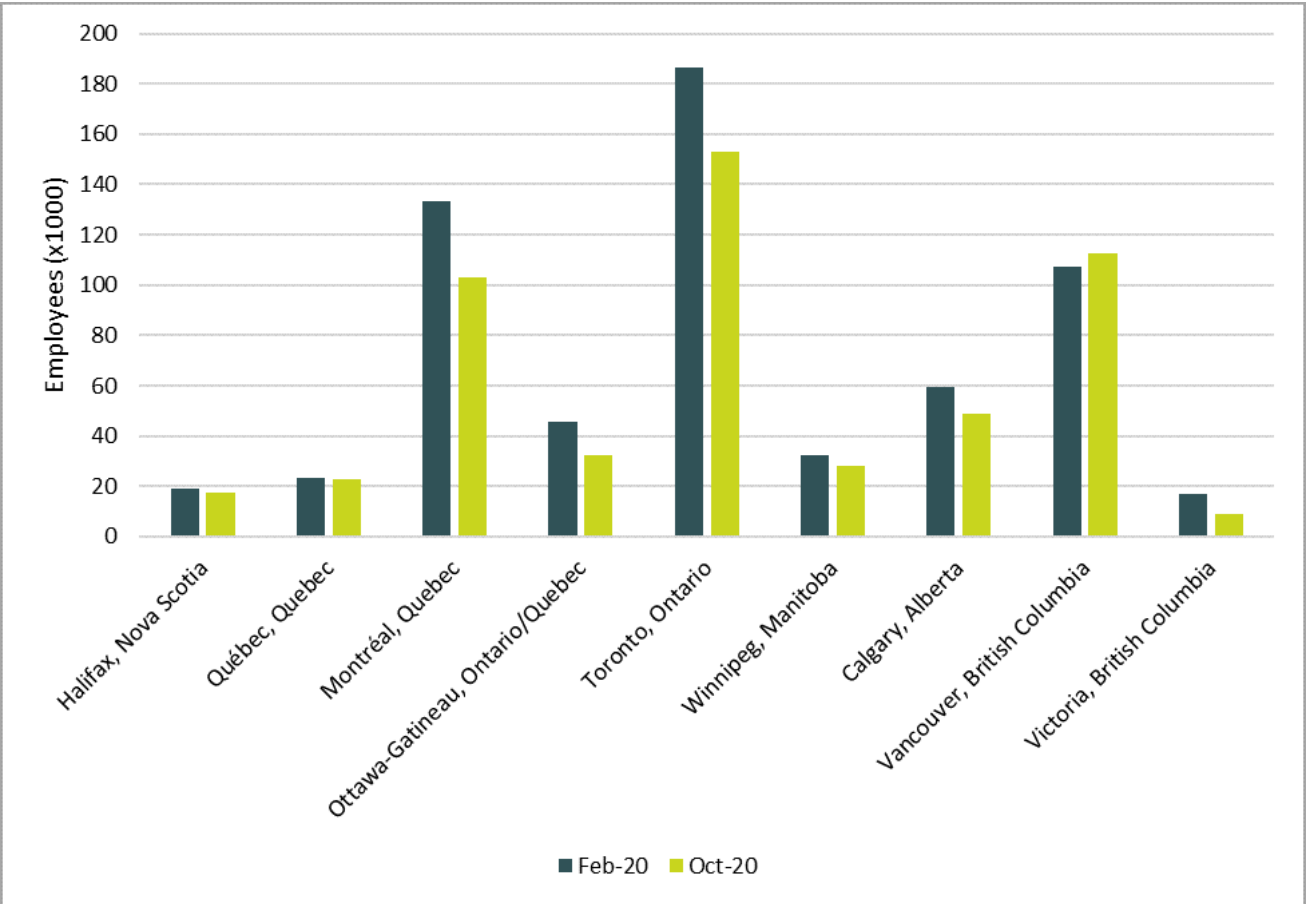


Figure 3: Gain/Loss of Jobs in Accommodation & Food Services in Major Canadian Cities (Feb 2020 vs Oct 2020)
Adapted from Table 14-10-0097-01, Statistics Canada

- The greatest gains in the number of jobs recovered in November 2020 were seen in Educational Services (approximately 1,741 jobs); followed by Information, Culture and Recreation (approximately 901 jobs) and Transportation & Warehousing (approximately 878 jobs). These three industries made up for more than 50% of the job gains in November 2020.
- Other industries that have seen a strong recovery, in terms of number of jobs recovered since July, include: Business, Building and Other Support (over 4,200 jobs); Manufacturing (over 2,200 jobs); and Finance, Insurance & Real Estate (over 2,200 jobs).
- The greatest overall losses since March 2020 were seen in the Wholesale & Retail (over 6,400 jobs lost), followed by Construction (over 6,400 jobs lost). Over 3,200 (or 50%) of the jobs lost in the Construction industry came in October and November 2020, though at least some of this loss could be attributed to the seasonality of this industry.

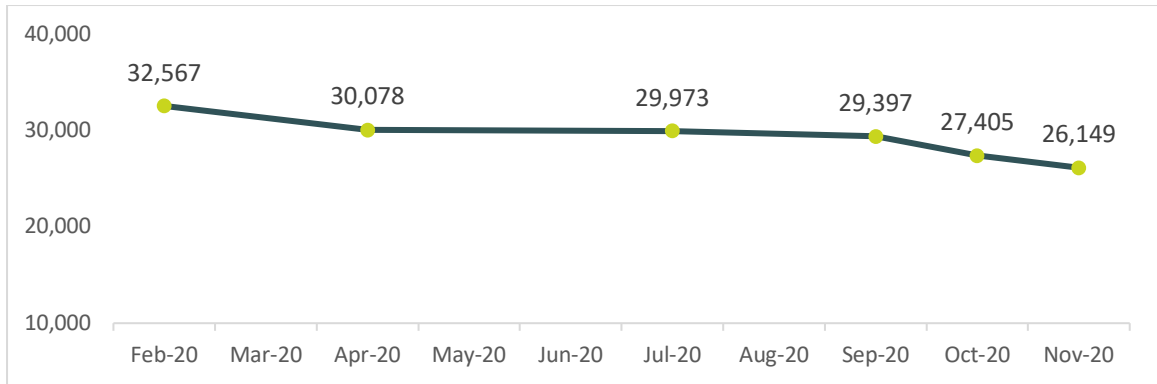


Figure 4: Loss of Jobs in Construction in Surrey (Feb 2020 - Nov 2020)
Adapted from Table 14-10-0097-01, Statistics Canada

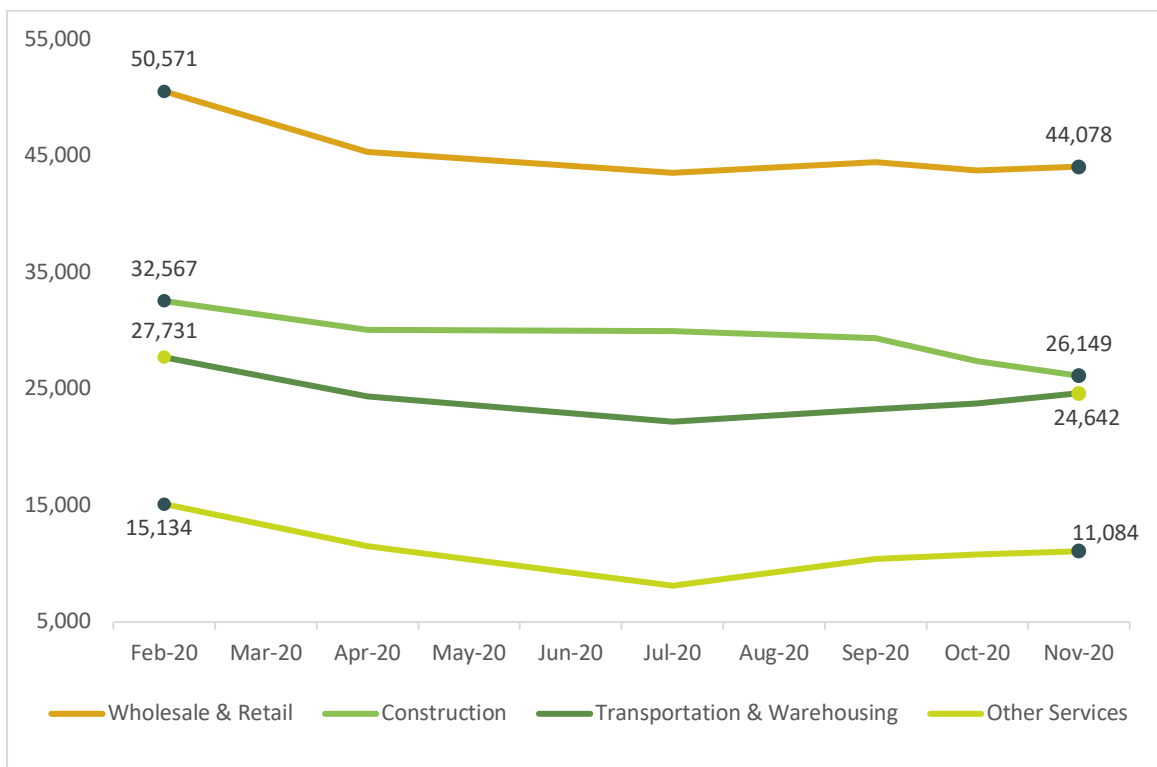


Figure 5: Industries with the Greatest Overall Job Loss Since February 2020
Adapted from Table 14-10-0097-01, Statistics Canada

- Seemingly, the most tumultuous industry, Wholesale & Retail Trade jobs took a hit from September to October, losing 738 of the 928 jobs gained in September, some gains were made in this industry in November 2020 with the addition of approximately 316 jobs.

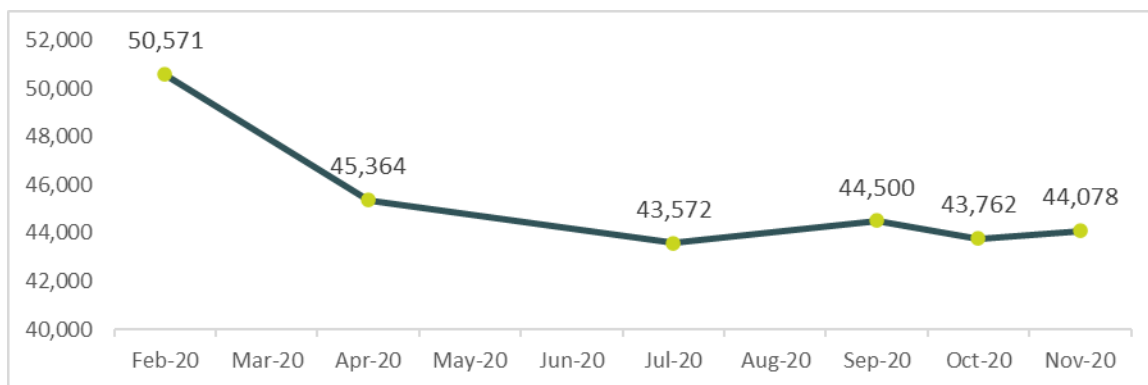


Figure 6: Gain/Loss of Jobs in Wholesale & Retail Trade in Surrey (Feb 2020 - Nov 2020)
Adapted from Table 14-10-0097-01, Statistics Canada

Surrey Employment COVID-19 Impacts BY OCCUPATION – 2019 to November 2020

When we consider employment by occupation in Surrey and impacts by occupation, Table 2 below shows the greatest number of positions were in Sales & Services (over 83,000); Trades, Transport & Equipment Operators (over 55,000); Business, Finance & Administration (over 44,500); Education, Law, Social, Community & Government Services (almost 26,000); and Management Occupations (over 23,500) as of 2019.

National Occupational Classification One-Digit Categories	2019	2020		Change February to April		July		Change April to July		Sept		Change July to September		October		Change Sept to October		Nov		Change October to November		Change Feb to November	
		Feb 2020	April 2020	Jobs	%	Jobs	%	Jobs	%	Jobs	%	Jobs	%	Jobs	%	Jobs	%	Jobs	%	Jobs	%	Jobs	%
Total Employed (all occupations)	297,895	295,632	270,693	-24,939	-8.4%	258,223	-12,470	-4.6%	270,410	12,187	4.7%	276,028	5,618	2.1%	283,000	6,972	2.5%	-12,632	-4.3%				
Management	23,521	22,572	22,688	116	0.5%	22,855	167	0.7%	21,655	-1,200	-5.3%	21,888	233	1.1%	22,405	517	2.4%	-167	-0.7%				
Business, Finance & Administration	44,567	41,700	40,535	-1,165	-2.8%	40,947	412	1.0%	43,420	2,473	6.0%	43,151	-269	-0.6%	43,778	627	1.5%	2,078	5.0%				
Natural & Applied Sciences and related	19,276	19,670	17,729	-1,941	-9.9%	17,898	169	1.0%	20,330	2,432	13.6%	21,722	1,392	6.8%	23,156	1,434	6.6%	3,486	17.7%				
Health	19,511	20,733	20,206	-527	-2.5%	23,388	3,182	15.7%	21,892	-1,496	-6.4%	20,881	-1,011	-4.6%	19,364	-1,517	-7.3%	-1,369	-6.6%				
Education, Law & Social, Community and Government Services	25,946	26,195	24,584	-1,611	-6.1%	21,945	-2,639	-10.7%	21,015	-930	-4.2%	22,642	1,627	7.7%	24,833	2,191	9.7%	-1,362	-5.2%				
Art, Culture, Recreation & Sport	6,715	6,557	5,305	-1,252	-19.1%	4,960	-345	-6.5%	5,956	996	20.1%	6,064	108	1.8%	5,729	-335	-5.5%	-828	-12.6%				
Sales & Services	83,179	82,882	68,403	-14,479	-17.5%	56,387	-12,016	-17.6%	65,049	8,662	15.4%	67,788	2,739	4.2%	71,184	3,397	5.0%	-11,698	-14.1%				
Trades, Transport & Equipment Operators & related	55,223	58,549	55,680	-2,869	-4.9%	49,609	-6,071	-10.9%	49,456	-153	-0.3%	50,616	1,159	2.3%	50,494	-122	-0.2%	-8,055	-13.8%				
Natural Resources, Agriculture & related Production	4,150	3,368	4,992	1,624	48.2%	5,533	541	10.8%	4,511	-1,022	-18.5%	3,909	-601	-13.3%	3,879	-30	-0.8%	511	15.2%				
Manufacturing & Utilities	14,982	13,359	11,012	-2,347	-17.6%	15,430	4,418	40.1%	16,120	690	4.5%	15,188	-932	-5.8%	15,050	-138	-0.9%	1,691	12.7%				

Table 2: Estimated Employment by Occupation² – 2019, February 2020 and November 2020 Surrey, BC
Adapted from Table: 14-10-0313-01, Statistics Canada

² Estimates based on Surrey share of Metro Vancouver (Census Metropolitan Area) by Industry in 2016.

Table 2 above shows employment change between February 2020 and November 2020 in Surrey, by occupation.

The key information to note from this table is as follows:

- The greatest employment losses by occupation in November 2020 were seen in Health occupations (7.3%), and Art, Culture, Recreation & Sport occupations (5.5%) in Surrey.
- Trades, Transport & Equipment Operators & related occupations did see a small uptick in October 2020, however, November 2020 brought another decrease in jobs in these occupations. These occupations have seen the second most job losses in Surrey.

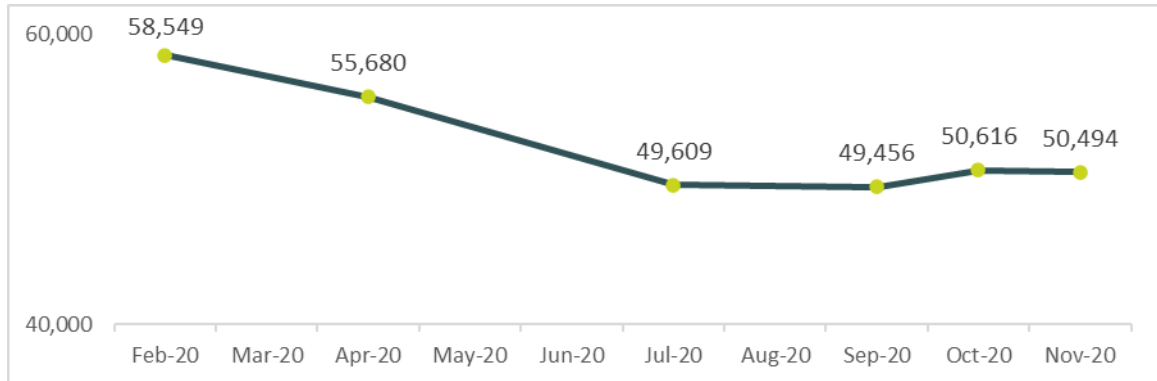


Figure 7: Gain/Loss of Jobs in Trades, Transport & Equipment Operators, etc. (Feb 2020 - Nov 2020)
Adapted from Table: 14-10-0313-01, Statistics Canada

- Overall, Sales & Services occupations have seen the greatest loss in Surrey (over 11,000 jobs lost), however, these occupations have seen a steady incline in jobs since July 2020.

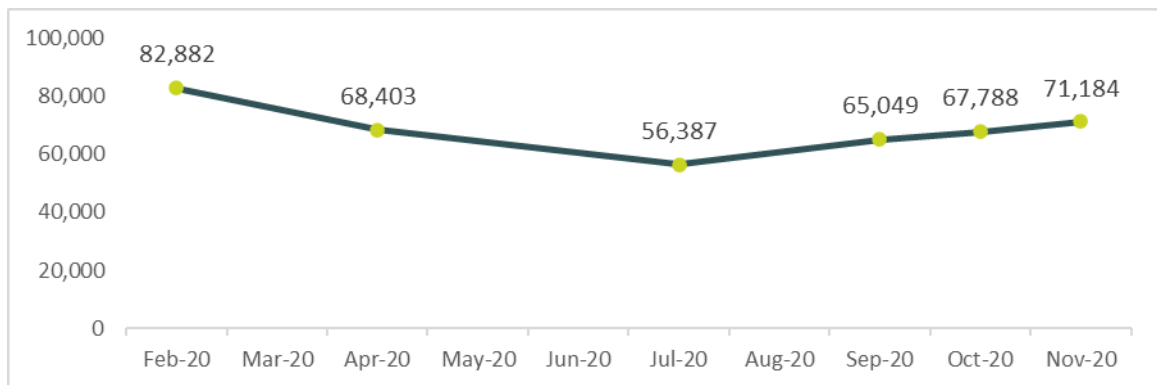


Figure 8: Gain/Loss of Jobs in Sales & Services Occupations (Feb 2020 - Nov 2020)
Adapted from Table: 14-10-0313-01, Statistics Canada

- The following classifications of occupations have seen a net gain in jobs when compared to February 2020 (pre-pandemic): Natural & Applied Sciences occupations (over 3,400 jobs); Business, Finance & Administration occupations (over 2,000 jobs); and Manufacturing & Utilities (over 1,600 jobs).

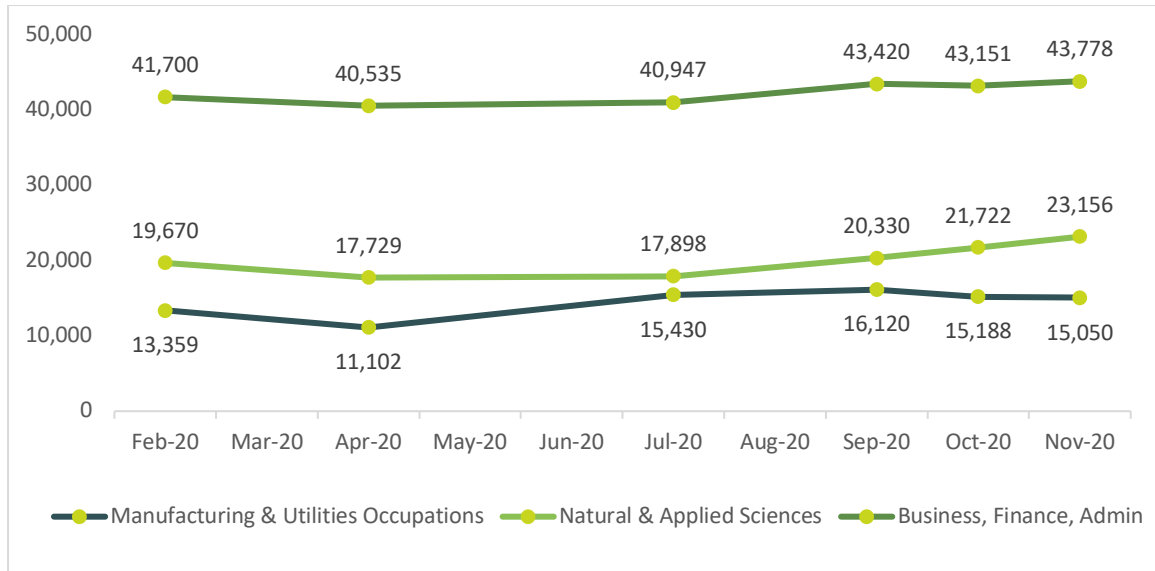


Figure 3: Gain/Loss of Jobs in Manufacturing & Utilities, Natural & Applied Sciences and Business, Finance & Administration Occupations (Feb 2020 - Nov 2020); Adapted from Table: 14-10-0313-01, Statistics Canada

- Occupations in Education, Law & Social, Community & Government Services continued to see an upward trend, with an increase of more than 18% since September 2020.

COVID-19 Impacts on Businesses BY INDUSTRY IN BC – February 2020 to November 2020

Table 3, Table 4 and Table 5 below indicate the impacts of COVID-19 on businesses in BC by industry.

North American Industry Classification System	Temporarily shut down but has since re-opened	Temporarily shut down and remains closed	Remained partially operational	Remained fully operational
All Industries	23.6%	2.4%	29.3%	44.7%
Agriculture, Forestry, Fishing & Hunting	17.0%	2.5%	19.8%	60.7%
Mining, Quarrying and Oil & Gas extraction	13.9%	1.5%	30.0%	54.5%
Construction	23.9%	0.0%	34.9%	41.2%
Manufacturing	26.6%	2.3%	33.7%	37.4%
Wholesale Trade	10.0%	0.0%	32.2%	57.8%
Retail Trade	23.9%	0.0%	19.0%	57.1%
Transportation & Warehousing	11.7%	7.8%	30.3%	50.2%
Information & Culture	29.2%	3.7%	36.2%	30.9%
Finance & Insurance	8.9%	0.0%	28.8%	62.3%
Real Estate, Rental, Leasing	16.2%	4.8%	18.3%	60.7%
Professional, Scientific & Technical Services	7.2%	5.4%	23.9%	63.6%
Administrative and Support, Waste Management and Remediation	17.2%	3.0%	33.4%	46.5%
Health Care & Social Assistance	41.6%	0.0%	21.5%	37.0%
Arts, Entertainment & Recreations	52.0%	8.9%	28.3%	10.8%
Accommodation & Food Services	45.8%	3.4%	46.8%	4.1%
Other Services (except public admin)	33.5%	2.3%	41.1%	23.2%

Table 3: Operational Status Changes for Businesses in BC resulting from COVID-19 (2020)
Adapted from Table: 33-10-0276-01, Statistics Canada

Table 3 above focuses on how the operational status of businesses in BC changed in 2020 as a result of the pandemic, as released by Statistics Canada in November 2020. The key information to note from this table is as follows:

- Over 55% of businesses in BC were forced to change their business status as a result of the COVID-19 pandemic.
- Both Arts, Entertainment & Recreation and Transportation & Warehousing businesses have well exceeded the BC average with, respectively, 8.9% and 7.8% of businesses temporarily shutting down and not re-opening to date.
- The Accommodation & Food Services industry (4.1%) and the Arts, Entertainment & Recreation industry (10.8%) had the fewest businesses fully operational, compared to the provincial average of 44.7%.
- The following industries saw the fewest changes to operational status, with more than 60% of businesses remaining fully operational, compared to the provincial average of 44.7%:
 - Professional, Scientific & Technical Services (63.6%);
 - Finance & Insurance (62.3%);
 - Agriculture, Forestry, Fishing & Hunting (60.7%); and,
 - Real Estate and Renting & Leasing (60.7%).

Table 4 shows layoffs in BC since the start of the COVID-19 pandemic, by industry. The key information to note from this table is as follows:

North American Industry Classification System	Laid off at least one staff	Did not layoff any of its workforce	Has no staff	Workforce status unknown
All Industries	34.5%	55.3%	7.2%	3.0%
Agriculture, Forestry, Fishing & Hunting	14.9%	69.4%	10.8%	4.9%
Mining, Quarrying and Oil & Gas extraction	25.6%	69.5%	4.9%	0.0%
Construction	43.2%	45.6%	5.0%	6.1%
Manufacturing	37.1%	55.8%	7.0%	0.0%
Wholesale Trade	46.5%	43.2%	10.3%	0.0%
Retail Trade	39.9%	53.9%	6.2%	0.0%
Transportation & Warehousing	33.2%	59.7%	10.0%	3.1%
Information & Culture	27.5%	64.1%	8.3%	0.1%
Finance & Insurance	15.8%	67.7%	11.0%	5.5%
Real Estate, Rental, Leasing	25.6%	59.2%	8.1%	7.1%
Professional, Scientific & Technical Services	14.9%	65.9%	16.4%	2.9%
Administrative and Support, Waste Management and Remediation	37.5%	49.7%	3.7%	9.1%
Health Care & Social Assistance	38.0%	56.3%	4.7%	0.9%
Arts, Entertainment & Recreations	44.5%	43.2%	10.3%	2.0%
Accommodation & Food Services	54.8%	39.0%	3.1%	3.1%
Other Services (except public admin)	38.7%	55.3%	7.2%	3.0%

Table 4: Layoffs in BC by Industry since COVID-19 (2020)
Adapted from Table: 33-10-0279-01, Statistics Canada

- Over 34% of businesses in BC laid off at least one staff member since the beginning of the COVID-19 pandemic.
- More than 54% of Accommodation & Food Service industry businesses in BC have laid off staff, 20% higher than the BC average.
- Both the Agriculture, Forestry, Fishing & Hunting industry and Professional, Scientific and Technical Services industry were the least affected by layoffs, with less than 15% of businesses in these industries laying off staff.
- More than 65% of businesses in the following industries were unaffected by layoffs since the beginning of the pandemic:
 - Agriculture, Forestry, Fishing & Hunting (69.7%);
 - Mining, Quarrying, Oil & Gas Extraction (69.7%);
 - Transportation & Warehousing (67.7%); and,
 - Professional, Scientific & Technical Services (65.9%).

Table 5 examines the percentage of the workforce anticipated to continue primarily tele-working or working remotely after the pandemic in BC, by industry. The key information to note from this table is as follows:

North American Industry Classification System	0% - 1%	1% - 9%	10% - 19%	20% - 29%	30% - 39%	40% - 49%	50% - 59%	60% - 69%	70% - 79%	80% - 89%	90% - 99%	100%
All Industries	39%	6%	7%	11%	4%	2%	10%	1%	1%	2%	0%	17%
Agriculture, Forestry, Fishing & Hunting		7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Mining, Quarrying and Oil & Gas extraction	42%	7%	2%	3%	3%	0%	22%	0%	0%	0%	0%	21%
Construction		15%	0%	1%	0%	0%	11%	0%	0%		0%	0%
Manufacturing	47%	23%	0%	8%	5%	0%	11%	0%	0%	0%	0%	6%
Wholesale Trade	49%	5%	10%	6%	8%	0%	2%	0%	6%	2%	0%	13%
Retail Trade		0%	0%	12%	0%	11%	0%	0%	2%	11%	0%	2%
Transportation & Warehousing		30%	4%		1%	0%	6%	0%	0%	0%	0%	0%
Information & Culture	28%	9%	12%	2%	9%	0%	11%	2%	0%	5%	8%	15%
Finance & Insurance	36%	9%	3%	18%	2%	0%	15%	0%	1%	0%	0%	16%
Real Estate, Rental, Leasing	46%	1%	4%	5%	0%	0%	6%	6%	1%	2%	0%	30%
Professional, Scientific & Technical Services	23%	5%	7%	18%	0%	1%	11%	0%	0%	1%	0%	34%
Administrative and Support, Waste Management and Remediation	24%	1%	15%	16%	3%	0%	25%	2%	2%	0%	0%	13%
Health Care & Social Assistance	42%	9%	8%	7%	19%	3%	9%	0%	2%	0%	0%	2%
Arts, Entertainment & Recreations	55%	4%	12%	4%	7%	0%	2%	2%	0%	0%	0%	13%
Accommodation & Food Services		5%	0%	0%	11%	0%		0%		0%	0%	0%
Other Services (except public admin)	70%	2%	15%	2%	3%	5%	5%	0%	0%	0%	0%	0%

Table 5: Anticipated Tele-work or Remote Work Post-Pandemic in BC by Industry (2020)³

Adapted from Table: 33-10-0274-01, Statistics Canada

- 17% of businesses in BC expect 100% of their staff to continue primarily tele-working or working remotely, even after the pandemic.
- More than 30% of businesses in the Real Estate, Rental & Leasing Industry, and 34% of businesses in the Professional, Scientific & Technical Services industry, expect that 100% of their staff will continue to primarily tele-work or work remotely after the pandemic.
- More than 50% of businesses indicated that they expect less than 10% of their staff to tele-work or work remotely, after the pandemic:

³ Blank cells indicate that data quality was too unreliable to be published.

- Other Services (except Public Administration (72%);
- Manufacturing (70%);
- Arts, Entertainment & Recreation (59%); and,
- Wholesale Trade (54%).

2. A Focus on Mental Health and the Labour Force

As the seasons have turned and the dark, dreary days of early winter take over, mental health is normally expected to decline for Canadians. This year, with a pandemic and continued restrictions to battle the second wave, this decline is intensified.

It may seem obvious that Healthcare workers and those on the frontlines have been facing a decline in mental health, however, according to a survey conducted by Statistics Canada, 88% of respondents to the survey indicated experiencing at least one symptom of anxiety in the two weeks prior to completing the survey.

According to the Mental Health Index⁴ published by Morneau Shepell each month, November marks the eighth consecutive month where Canadians indicated a strain on mental health. At an indicator of -11.1 points on the index, the score for Canadians has decreased by 11 points from their pre-pandemic benchmark.



Figure 6: Overall Mental Health Index April 2020 to November 2020
Morneau Shepell 'The Mental Health Index Report' – Canada November 2020

⁴ https://www.morneaushepell.com/sites/default/files/assets/paragraphs/resource-list/canadamhinovember2020final2_0.pdf

Further, the Work Productivity sub-score correlates with the above Overall Mental Health Index, showing a score well below pre-pandemic levels.

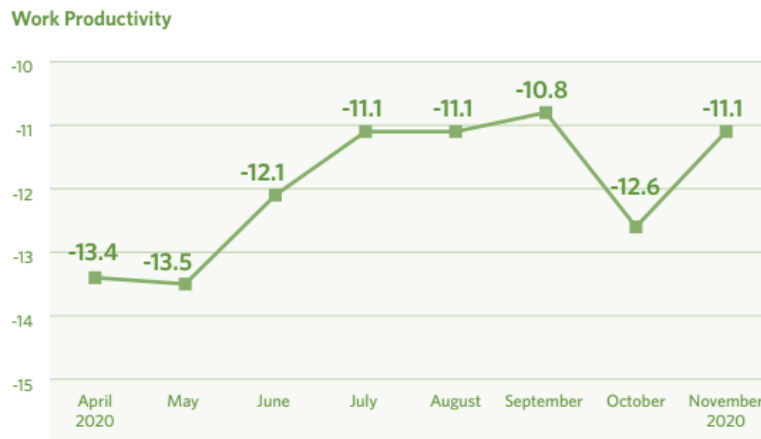


Figure 7: Work Productivity Sub-Indicator April 2020 to November 2020
Morneau Shepell 'The Mental Health Index Report' – Canada November 2020

Demographics and Mental Health

Overall, British Columbians have indicated a slightly better Mental Health Index score (-10.6 in November 2020) when compared to Canada as a whole. This report also found that Black Canadians indicated a significantly lower score (-19.3) when compared to white Canadians (-9.9). Similarly, other visible minorities in Canada indicated lower Mental Health Index scores in November 2020: South Asian (-17.4); Arab/Middle Eastern/ West Asian (-16.6); Latin, South or Central American (-16.3); Indigenous (-16.2); and mixed (-16.4).

In a report published by the BC Women's Foundation titled, "Unmasking Gender Inequity: Revealing the Socio-Economic Impacts of COVID-19 on Women's Health,"⁵ more than 50% of women in BC were employed in industries and occupations most affected by the public health measures implemented to combat the COVID-19 pandemic, including Healthcare, Retail, Education and Accommodation and Food Services. In BC, this resulted in women losing 60% more jobs in March 2020 than men. According to the same report, working women with children indicated six times more lost work hours each week to family responsibility than men, and women are facing greater mental health issues including mental health and depression.

Employment and Mental Health

Based on employment status, the report states that those who were still employed but saw a reduction in salary indicated the lowest score (-20.2), while those who had a reduction in their number of working hours indicated a score of -18.0. Those who were unemployed had a Mental Health Index score of -17.2 (slightly better than those who had seen changes to their employment status in the last month) and those who were employed and saw no changes to their salary or hours indicated the best score at -9.9.

The report also breaks down the Mental Health Index by Employer Size, with those working for employers with 51-100 employees showing the lowest score at -14.5 and those that are self-employed / sole proprietors showing the best score at -6.3, in November 2020.

⁵ <https://assets.bcwomensfoundation.org/2020/11/20122829/BCWHF-Unmasking-Gender-Inequity-Report-2020-1.pdf>

The Morneau Shepell Mental Health Index breaks down mental health score by industry in the following table:

Industry	November 2020	October 2020	Improvement
Accommodation and Food Services	-12.3	-18.3	6.0
Utilities	-10.6	-13.4	2.9
Other	-8.2	-10.7	2.5
Professional, Scientific and Technical Services	-7.9	-10.1	2.2
Full-time student	-24.3	-26.3	2.0
Finance and Insurance	-12.1	-12.9	0.9
Agriculture, Forestry, Fishing and Hunting	-7.4	-8.0	0.6
Health Care and Social Assistance	-10.7	-11.2	0.6
Manufacturing	-9.7	-10.2	0.5
Other services (except Public Administration)	-11.2	-11.7	0.5
Transportation and Warehousing	-10.8	-11.0	0.2
Retail Trade	-11.8	-11.8	0.0
Wholesale Trade	-10.7	-10.5	-0.1
Educational Services	-13.1	-12.9	-0.3
Real Estate, Rental and Leasing	-7.0	-6.6	-0.4
Public Administration	-10.0	-9.1	-0.9
Mining and Oil and Gas Extraction	-7.7	-6.6	-1.1
Construction	-11.9	-9.4	-2.5
Arts, Entertainment and Recreation	-15.6	-12.9	-2.7
Automotive Industry	-9.1	-5.9	-3.2
Management of Companies and Enterprises	-17.4	-12.0	-5.4
Information and Cultural Industries	-20.4	-14.4	-6.0

Table 6: Mental Health Score by Industry April 2020 to November 2020
Morneau Shepell 'The Mental Health Index Report' – Canada November 2020

Those working in the Accommodation and Food Services industries showed the greatest improvement in mental health score from October 2020 to November 2020. Meanwhile, those in the Information and Cultural Industries indicated the greatest decline. According to this report, full-time students have reported the lowest mental health score for six consecutive months.

The highest mental health scores in November are stated among those in Real Estate, Rental and Leasing (-7.0); Agriculture, Forestry, Fishing and Hunting (-7.4); and Mining and Oil and Gas Extraction (-7.7).

What Does this Mean?

The long-term impact of continued mental health concerns means lower productivity, higher health and disability costs for businesses, and a decline in the available labour force. Expanding mental health support and shifting your business to offer greater flexibility can help navigate the many challenges associated with mental health in the labour force.

McKinsey & Company, in their article, "Five Ways to Design a Better Mental-Health Future for a Stressed-Out Workforce"⁶, share the following tips:

⁶ <https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/five-ways-to-design-a-better-mental-health-future-for-a-stressed-out-workforce?cid=other-eml-alt-mip-mck&hdpid=cb498b94-6398-436f-a597-3544deb712a1&hctky=9523424&hlkid=2ad13fc40d4a420e9f429a968be9eace>

1. **Open the Lines of Communication.** It is important for leaders to communicate that it is important to address mental health and illness – this can be done through simple check-in emails and providing reminders on how to access mental health resources for those in need.
2. **Understand and Meet the Needs.** McKinsey & Company share that understanding the impacts of the varying types of mental health issues affecting your labour force is important. This can be done through surveys, reviewing benefits reports or disability claims and productivity assessments. This can help an organization understand if it is meeting its employee’s needs or which areas may be at the greatest risk.
3. **Know the Signs of Distress.** It is important to invest in training that ensures your leadership team can recognize distress and support your team.
4. **Make Help Available.** Making it easy to access help and ensuring resources are visible can help improve mental health in the workplace.
5. **Embrace and Encourage Self-Care.** Creating a culture where those that seek treatment and self-care feel supported can prevent a lot of mental health issues in the workplace and address them quickly when an issue does occur.

More resources on mental health in the workplace can be found in the [Workforce Reset Playbook](#). As part of the [Workforce Reset](#) Labour Market Partnership project funded by the BC Ministry of Social Development and Poverty Reduction, the Surrey Board of Trade released the first COVID-19 Playbook for Workforce and Employer Resilience. The Playbook is a digital document produced through a collaboration of Surrey service providers, the Surrey Board of Trade, employers, and industry groups, working together in a coordinated and collaborative approach on workforce priorities in a real-time, rapid-response structure to help with economic recovery.

3. URGENT POST-SCRIPT: Statistics Canada's November 2020 Labour Force Survey Results

SURREY BUSINESS LEADERSHIP PERSPECTIVE

BC Labour Force Survey Data

Statistics Canada Labour Force Survey, November 2020 (Released December 4, 2020)

November 2020 Labour Force Statistics Present Optimism and Vulnerabilities in BC Economy as Vaccine News Develops

The Surrey Board of Trade, in conjunction with Human Capital Strategies, releases their analysis of the November 2020 Labour Force statistics.

"The job recovery in Canada and BC since April 2020 has continued but has tapered off in October and November, with less growth in jobs than in previous months," said Anita Huberman, CEO, Surrey Board of Trade.

"We also have to keep our eye on how upcoming vaccines will be rolled out and distributed in Canada and in BC, with implications for businesses, workforces and communities. Businesses will need to look at how they can help expedite their employees' vaccination. Their policies will need to reflect a new reality (e.g. proof of vaccination, refusal to get vaccinated, managing a mixed workforce of vaccinated and non-vaccinated)."

CANADA: Canada gained 62,000 jobs between October and November 2020. Employment in Canada still remains almost 574,000 or -3.0% lower than pre-pandemic levels in February 2020.

BC: BC's employment growth further slowed, +1.0% in November vs. +1.4% in October. November's job growth was 23,900 in BC. Like the national trend, most of the increase in BC jobs was in full-time employment (+77.5%).

GENERAL: The 'shining stars' in BC job growth were natural resources (a gain of 4,500 jobs or +10.5% in November) and construction (up by 5,700 jobs or 2.9%). While natural resources employment is up 9,300 jobs or +24.3% since February, construction employment is still down 34,400 or -14.3% since then. Employment levels in November 2020 in agriculture, natural resources, utilities and manufacturing are continued to exceed pre-pandemic levels (February 2020). However, the youth (age 15-24) unemployment rate in BC dropped slightly to 14.1% in November from 15.6% in October. Further, female youth unemployment rate dropped to 11.1% in November.

More Information:

Surrey Business Leadership Perspective BC Labour Force Survey Data
Statistics Canada Labour Force Survey, November 2020 (Released December 4, 2020)

Overall – Canada

- Employment recovery continued across most of the country but at a slower pace than previous months. Ontario, BC and the four Atlantic provinces showed job gains in November, while Manitoba experienced its first employment decline since April.
- Canada gained 62,000 jobs between October and November 2020, +0.3% growth compared to a monthly average of +2.7% since May. Almost all of the net job growth was in full-time employment. The back to work trend has increased employment by 2.43 million jobs for a 15.0% increase since April.
- The unemployment rate further dropped to 8.5% in November from 8.9% in October, however it remains appreciably higher than the 5.6% in February 2020.
- Employment in Canada still remains almost 574,000 or -3.0% lower than pre-pandemic levels in February 2020.

- Nationally, employment fell in November in industries most directly impacted by public health restrictions, especially in accommodation and food services. Conversely, job levels exceeded or approached pre-pandemic levels in industries where working from home and/or physical distancing is more possible (e.g. sectors in professional, scientific and technical services).
- Despite this job recovery, 448,000 Canadians – a 55.5% increase since February – were employed but worked less than half their usual hours.

Overall – BC

- Consistent with the rest of the country, BC’s employment growth further slowed, +1.0% in November vs. +1.4% in October. November’s job growth was 23,900 in BC. Like the national trend, most of the increase in BC jobs was in full-time employment (+77.5%).
- This means BC has had an increase in employment of almost 359,100 jobs (or +16.8%) since the BC recovery started in April, a monthly average of 2.4% over 7 months.
- BC’s unemployment rate dropped to 7.1% in November from 8.0% in October; it remains higher than the rate of 5% in February 2020, but substantially lower than the peak of 13.4% in May 2020.
- The drop in BC’s unemployment rate was the largest decrease in Canada outside of the Atlantic provinces and well below the national average of 8.5%. Alberta’s rate increased to 11.1% in November from 10.7% the previous month.
- Employment in BC remains down by 37,400 jobs since February, a -1.5% deficit.

Goods-Producing Industries

- Overall, goods-producing industries in BC saw a +0.3% gain of 1,600 jobs with some ‘winners’ and ‘losers’ (see below).
- Collectively goods industries have gained over 38,700 jobs since April but are still down -1.6% or -7,700 jobs since February.
- Agriculture and utilities dropped 2,300 (-7.0%) and 1,700 (-8.3%) jobs in November, respectively. Manufacturing shed the most jobs, losing 4,700 (-2.7%) in November. However, all 3 of these goods sectors have employment levels above the pre-pandemic period (February 2020), and have recovered significantly since the April trough of their job levels (a combined increase of 17,300 jobs).
- The ‘shining stars’ in BC job growth were natural resources (a gain of 4,500 jobs or +10.5% in November) and construction (up by 5,700 jobs or +2.9%). While natural resources employment is up 9,300 jobs or +24.3% since February, construction employment is still down 34,400 or -14.3% since then.
- In summary, employment levels in November 2020 in agriculture, natural resources, utilities and manufacturing have continued to exceed pre-pandemic levels (February 2020).

Service-Producing Industries

- Employment in the service sector in BC grew by 22,300 jobs (+1.1%) in November (similar to October growth), meaning a total recovery of over 320,500 (+18.8%) since April. However, employment in the sector remains almost 30,000 lower than in February 2020 (-1.4%).

- In November, all but 3 of the service industries saw employment increases since October. It was good to see increases of 7,300 (+4.0%) and 6,200 (+1.7%) in two hard hit sectors – accommodation and food services and retail and wholesale trade, respectively. Other increases in jobs over the last month were seen in: transportation and warehousing (6,300 or +5.1%); professional, scientific and technical services (4,300 or +1.9%); and public administration (3,800 or +3.3%).
- In terms of catching up to pre-pandemic employment benchmarks, the BC service sector growth saw a mix of four service industries down and four others up from pre-pandemic job levels. Those most impacted:
 - Retail is still down 26,500 or -6.6%;
 - Other services (high-touch and hard to physically distance) is 24,800 or -7.2% below February levels; and,
 - Transportation and warehousing and accommodation and food services jobs remain 7,600 (-5.5%) and 7,200 (-3.7%) below employment in February 2020.
- Four BC service sector ‘bright spots’ in terms of recovering to pre-pandemic levels by November 2020 are:
 - Professional, scientific and technical services (PSTS) employment in November exceed pre-COVID levels by 17,100 jobs or +7.9%;
 - Public administration employed 11,600 more workers (+10.3%) in November than before COVID-19 job impacts;
 - Educational services employed 8,000 more workers (+4.5%) in November than in February; and,
 - Health care & social assistance has 4,900 or +1.6% more jobs in November than in February.

Occupations

- Employment growth and changes in unemployment rates were mixed in occupational categories in BC. The BC unemployment rate has dropped to 7.1% and 6 of 10 occupational categories experienced reductions in this rate in November, led by a 1.4-point drop in natural & applied sciences (2.6% to 0.8%) and a surprising drop in art, culture, recreation & sport (ACRS) from 12.5% to 5.6%. The latter may be due to more discouraged workers in this sector leaving the labour force.
- The biggest gains in jobs over the last month were in positions: in sales and service (19,000 or +3.2%), driven by gains in retail and accommodation and food services; in management jobs (16,000 or +6.9%); and in natural and applied sciences (6,500 or +2.8%).
- The biggest employment losses in November were in a number of occupational categories: ACRS employment dropped by 11,500 or -13.5%; trades, transport & equipment operator jobs declined by 8,000 or -2.3%; health jobs (not the industry) decreased by 7,500 or -4.0% in November; and jobs in manufacturing & utilities dropped by 4,500 or -5.4%.
- Employment in five occupational categories in BC are now at levels above February 2020 (pre-pandemic):
 - Natural resources/agriculture: Over +45% above pre-pandemic levels or 19,200 additional jobs;
 - Manufacturing & Utilities: Up +22.5% or 14,500 above February job levels;
 - Natural & applied sciences: Almost +22% or 43,500 jobs more in November than in February;

- Education, law, social, community & government (ELSCG): A +2,9% or 7,700 increase over pre-pandemic levels; and,
- Management: 4,300 or +1.8% more jobs last month than in February 2020.
- Two job categories account for a deficit of just over 80,000 jobs lost since February. Sales and service employment is still down by over 48,700 jobs (-7.4%) and trades, transport & equipment operators are down by over 32,400 (-8.8%). The former driven by the 'high-touch' and big-event services and the latter by trades outside of construction.
- Jobs in the ACRS and health categories are also down since February by 13,800 or -15.7% and 4,400 or -2.4%, respectively.

Regions

- Good news that the unemployment rate in each BC development region and urban centre declined to varying degrees in November over October. The lowest rates were in the northeast region (4.8%), the North Coast & Nechako region (6.0%) and the Kelowna census region (5.0%).
- The biggest employment changes were in Vancouver Metro (34,500 or +2.5%), Kelowna (3,500 or +3.4%) and Abbotsford-Mission (2,600 or +2.7%). Very small job level drops were experienced in Victoria, Vancouver Island/Coast region and a few of the rural regions.
- Thompson/Okanagan region (+7,200), Kelowna (+3,600) and the Cariboo region (+2,800) all had employment levels in November 2020 that exceeded their February job levels.

Age, Gender and Other

- The youth (age 15-24) unemployment rate in BC dropped slightly to 14.1% in November from 15.6% in October. Female youth unemployment rate dropped to 11.1% in November, still appreciably higher than 6.8% rate for female youth in February. The male youth rate decreased to 16.8% from 18.0%, and it is still much higher than the 11.2% pre-pandemic rate. The rate for all ages of women (6.3%) was below men of all ages (7.9%) in November.
- Overall, over 28,300 less youth are employed in BC now compared to February (-12,000 males and -16,300 females); and there 17,100 more unemployed youth (10,300 males and 6,800 females) since the pandemic started.
- Of the net jobs (-37,400) lost since February in BC, 57.0% were filled by men and 43.0% by women.
- In terms of part-time work as a percentage of total employment in BC, it dropped slightly in November (22.5% down from 23.5%), and not much higher than the pre-pandemic era.
- Part-time employment as a percentage of total jobs in November was 29.5% for women and 16.2% for men in BC.
- With growth in full-time employment of 42,100 and a decline of part-time employment of 18,200 in November in BC, the part-time growth has eased a bit. Now, during the April-November recovery period, part-time job growth was 46% of total employment compared to the 54% it was at in October (April-October period).
- In terms of 'class of worker', a significant impact has been experienced by those self-employed, losing 8,100 jobs in the last month for -2.8% drop; but more significantly, while the BC labour market has seen substantial growth in job recovery since April, self-employed positions have declined by 38,400 or -8.3% during that period.
- While private sector employment increased by +2.4% in November in BC and public sector jobs decreased by -0.4%, private sector jobs are down by 31,000 (-1.9%) since February and public sector jobs are up 21,900 (+4.7%).

Summary

- The job recovery in Canada and BC since April 2020 has continued but has tapered off in October and November, with less growth in jobs than in previous months. BC led job growth in October 2020 and was second to Ontario in November. Its unemployment rate has continued to decline and led all provinces outside of Atlantic Canada. The BC labour market picture in November 2020 includes some 'bright spots':
 - Employment levels in November 2020 in agriculture, natural resources, utilities and manufacturing are continuing to exceed pre-pandemic levels (February 2020);
 - Four BC service sectors' employment has recovered to pre-pandemic levels by November 2020: PSTS; public administration; educational services; and health care and social services;
 - Employment in five occupational categories in BC are also now at levels above February 2020 (pre-pandemic): natural resources/agriculture; manufacturing and utilities; natural and applied sciences; ELSCG; and management;
 - All regions and major metro areas in the province saw unemployment rate drops and many experienced modest employment growth; and,
 - BC youth and BC women continue to be inordinately impacted by unemployment and part-time job growth, but this trend was moderated by shifts in November employment changes.
- However, some vulnerabilities and uneven recovery in BC employment remain:
 - While it grew by 2.9% in November, BC's construction employment remains 34,400 (-14.3%) below pre-pandemic levels;
 - Retail and wholesale trade, -other services-, transportation and warehousing and accommodation and food services have a combined job deficit of 80,000 compared to February 2020;
 - Arts and culture jobs dropped by 11,500 or almost -14% in November and is down by 13,800 since before the pandemic;
 - Sales and service and trades, transport and equipment operator job categories remain 80,000 less than in February 2020;
 - Women and youth are disproportionately represented in part-time employment and in unemployment growth;
 - Self-employed workers have been going through a hard time and despite some recovery, the number of such positions has declined by 38,400 or -8.3% since the pandemic took effect.
- BC remains well-positioned fiscally, economically and public health-wise to survive any further adverse labour market impacts of this pandemic. However, our economy and labour market continue to be in a volatile period of uncertainty with a COVID-19 'second wave' surge and health care pressures, the onset of flu and cold season and more pressures on high-touch and service businesses, households and social networks to double-down. One only has to look at Alberta, Manitoba and their recent labour market impacts for even higher pandemic surges.
- We must keep in mind these statistics reflect labour market behaviour in mid-November. With further restrictions on the movement, socializing, operations and behaviour of businesses, workers and consumers in the last few weeks and throughout the coming holiday season and possibly beyond, business and job growth may be threatened.

- Governments, employers and employees, consumers and parents, students and educators, households, extended families and social groups all have important roles in mitigating COVID-19 impacts and averting an economic and employment contraction.

- The November 2020 LFS data provides continued positive momentum for BC. As our October analysis warned, “economic recovery will require effective public policies and support, innovative business practices, increased digital transformation, business resilience and a collaborative approach among governments, businesses, workers and public sector service providers.”

Source: BC Stats – Statistics Canada, Labour Force Survey, November 2020. Released December 4, 2020.
Retrieved from <https://www2.gov.bc.ca/gov/content/data/statistics/employment-labour/labour-market-statistics>.

Composed by:

Kerry Jothen, B.A., M.A.
CEO + Principal, HUMAN CAPITAL STRATEGIES
kjothen@humancapitalstrategies.ca

and

Anita Huberman
CEO, Surrey Board of Trade
anita@businessinsurrey.com

Source: BC Stats – *Statistics Canada, Labour Force Survey, November 2020*. Released December 15, 2020. Retrieved from <https://www2.gov.bc.ca/gov/content/data/statistics/employment-labour/labour-market-statistics>.



WORKFORCE RESET

Surrey Labour Market Intelligence and Impact Reports

****THE ONLY SURREY-FOCUSED LABOUR MARKET REPORT****