



Sectoral Profile

Retail Trade

Region of Western Canada and the Territories

2018-2020



EXECUTIVE SUMMARY

The retail trade sector in Western Canada and the territories (W-T) experienced strong growth in 2017. Overall, the value of retail sales increased 7.7% in 2017 from the previous year, outpacing the national growth of 7.1%.¹ Conversely, retail employment climbed 1.6% in the region, while the number of retail jobs in Canada rose 3.3%.² The creation of full-time jobs in Western Canada supported the growth in retail employment, more than offsetting the slight decline in part-time positions. Over the next few years, retail employment is projected to continue rising in Western Canada, led by growth in Alberta and British Columbia (BC); however, the growth is expected to be softer as gradually rising interest rates could dampen consumer spending.

KEY DRIVERS

- Relatively low interest rates, a growing population, and steady gains in employment and average weekly wages, have contributed to greater consumer consumption across the W-T, helping the retail sector.
- The moderately weaker loonie against the greenback, the arrival of international retailers in Canada, and the growing popularity of Black Friday and Cyber Monday may encourage Canadians to spend more domestically.
- Retail sales in some trade groups are more responsive to changes in economic conditions such as motor vehicle sales, luxury goods, furniture, and household appliances. With historically low interest rates, W-T consumers had the highest spending on new cars and trucks in 2017, followed by food and beverages,³ which are the least sensitive to economic conditions.
- Spending in health and personal care stores nearly doubled in the last 10 years, while expenditures in motor vehicles and parts; and general merchandise stores, have grown approximately 50 percent during this period.

BACKGROUND

Retail trade in the W-T region is an important industry for both employment and Gross Domestic Product (GDP). In 2017, this industry comprised 4.8% of GDP in the region⁴, and employed more than 676,000 workers⁵. Sales in retail stores within the W-T rose by 41% over the past ten years to almost \$206 billion in 2017.⁶ Although the number of retail jobs has grown 8.2% from 2007 to 2017, it is low compared to overall job growth in the region (+13%). The share of retail jobs has fallen slightly over this period to 11% from 12%.⁷ Online shopping and its growing significance in the sector may have contributed to this trend. Non-store⁸ retail sales totalled \$21 billion for Canada in 2016, having expanded 8.3% since 2013.⁹ Employment in the retail industry is expected to grow 0.7% annually, on average, between 2018 and 2026, which is in line with the average annual estimated growth for all industries (+0.8%).¹⁰

Retail Trade's Provincial % Share of Employment and GDP, 2007 vs. 2017

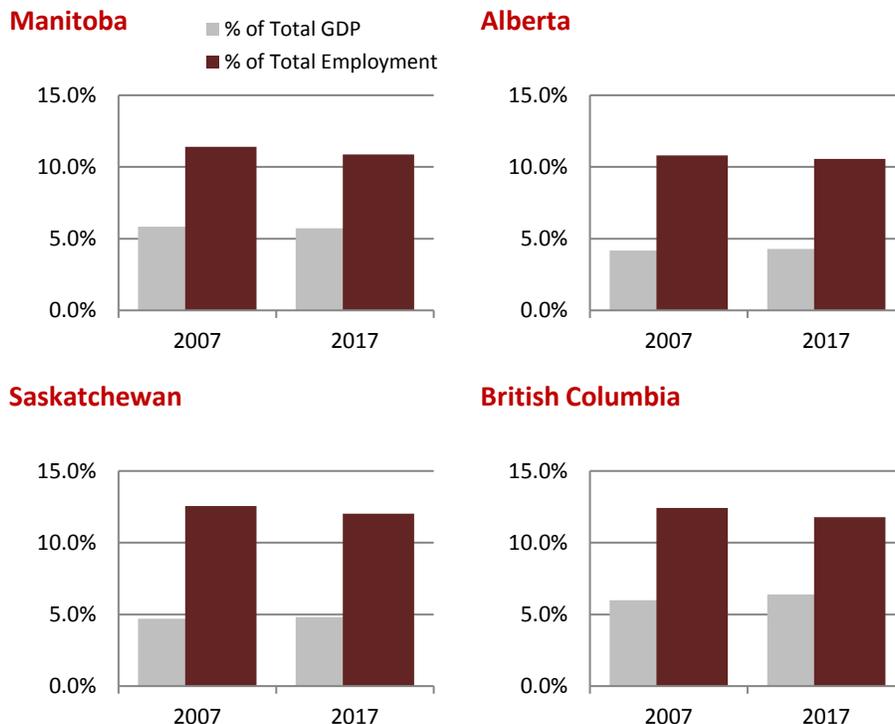
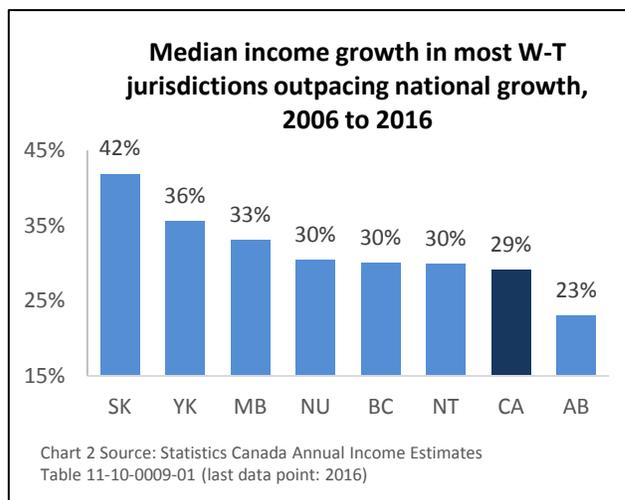


Chart 1 Sources: 1. Statistics Canada CANSIM Table 379-0030 - GDP at basic prices, by North American Industry Classification System (NAICS), provinces and territories, annual (chained 2007 dollars). 2. Statistics Canada Labour force estimates by detailed industry, age, sex, class of worker.

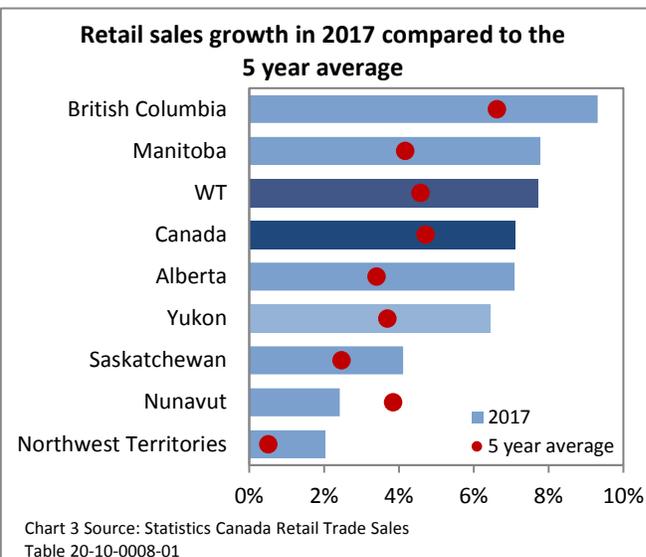
Between 2007 and 2017, more people added to Alberta's population than to any other province in Canada, except for Ontario. However, in terms of percentage growth, Alberta's population grew by 22% during this period, which was about double the growth rate in Ontario (+11%) and nationally across Canada (+12%). As a whole, W-T's population rose by 16%.¹¹ Overall employment for region expanded by 13% during that timeframe, surpassing the growth in Canada (+9.8%), despite a slight pull back in Saskatchewan and the territories last year.¹²

Growing incomes in the region reflect the higher employment. As shown in Chart 2, all western provinces and territories except for Alberta, saw median total family incomes grow faster than the Canadian average between 2006 and 2016.¹³ In 2016, the bottom 50% of tax filers increased their share of total income by 0.6 percentage points to 17.8% compared to a year earlier. In contrast, the top 1% of tax filers experienced a 1.9 percentage point drop in the share of total income to 9.3% in 2016.¹⁴ A rise in income for lower earners tend to have a greater effect on stimulating the economy through increased spending. Average weekly earnings in the W-T grew at an average annual pace of 1.5% between 2012 and 2017, slightly lower than the pace for Canada overall (+1.7%). By province and territory, Nunavut led the country in average annual growth of weekly wages during this period (+3.5%), with Saskatchewan (+2.1%) and Manitoba (+2.0%) following behind Newfoundland (2.3%) and PEI (2.2%) to have the fourth and fifth highest average growth in Canada. Despite average weekly wage growth in Alberta (+1.1%) and Northwest Territories (+1.2%) being the weakest during this five year period, together with Nunavut, these jurisdictions had the highest weekly earnings in the country.¹⁵

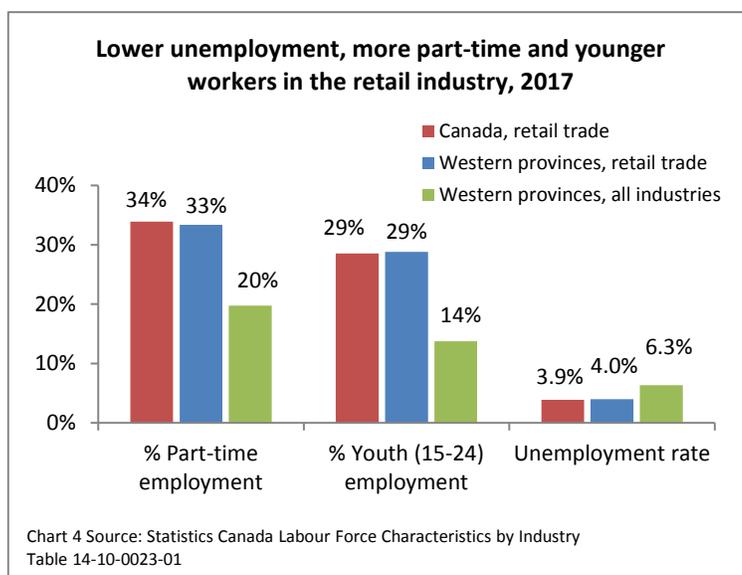


INDUSTRY TRENDS

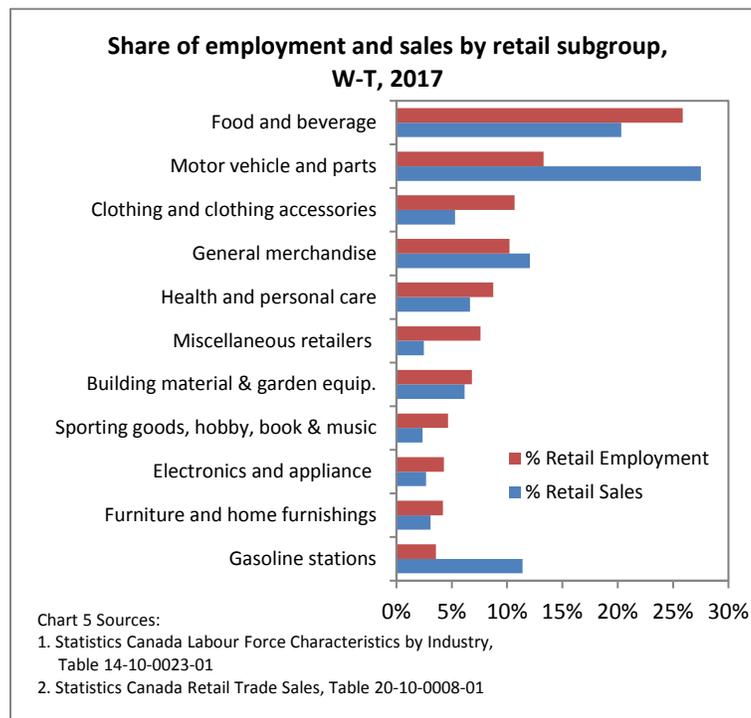
The retail sector has performed well, with 2017 marking the eighth consecutive year of growth in sales for the W-T region. Sales were higher in all western provinces and territories, and advanced an average of 4.7% each year during this period.¹⁶ BC led the region for 2017, accounting for almost half of the \$14.8 billion increase in the W-T. This growth in 2017 represents a quarter of the net BC retail sales increase over the last ten years. BC also had the highest average annual growth in the region between 2012 and 2017 at 6.6% (Chart 3). Going forward, retail spending is expected to slow down from 2017 levels following three overnight rate hikes by the Bank of Canada in 2018. With the debt-to-disposable income ratio in BC well above the national average, rising interest rates have a greater impact on British Columbians than the rest of the country. As a result, consumer confidence in BC has moved lower in recent months, as is the case in Alberta with softening oil prices and oil-transportation bottlenecks.¹⁷



The retail sector has a greater proportion of part-time workers, younger workers between the age of 15 and 24, and a lower unemployment rate compared to all industries combined (Chart 4). These observations are true for both the W-T region and Canada. A higher share of part-time and youth employees, as well as a low skill and education requirement, are contributing factors to lower earnings in this sector. Average weekly earnings for retail workers in W-T were \$595 in 2017, significantly lower than the \$1,015 for all industries in the region. Nonetheless, W-T's average annual growth in weekly earnings for the retail sector (+1.4%) was comparable to overall growth (+1.5%) during the last five years.¹⁸



Within the retail sector, food and beverage stores, and motor vehicle and parts dealers, are the largest contributors to both retail employment and sales (Chart 5). Over the past 10 years, sales in health and personal care stores almost doubled (+92%).¹⁹ The aging demographics across the region may be adding to this trend. Retail employment in health and personal care stores grew by 43% throughout the last decade, reflecting this subsector's growing importance. Aside from health and personal care stores, retail employment at clothing and clothing accessories stores (+20%) and motor vehicle and parts dealers (+16%) recorded notable gains between 2007 and 2017. In contrast, the number of jobs in general merchandise stores (-12%), and gas stations (-10%) contracted considerably.²⁰



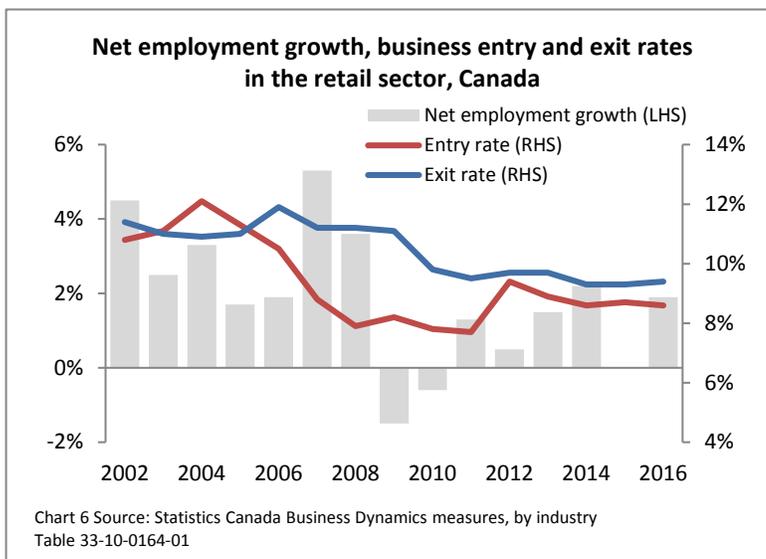
Retail employment in Canada has been growing despite the retail industry having a business exit rate greater than its entry rate (Chart 6). The growth in existing retailers has been accounting for most of the net job growth, while the percentage of retail jobs added by new entrants and lost by exiting retailers remained relatively stable between 2011 and 2016.²¹

The way Canadians shop has changed in recent years, with a growing shift from physical stores to shopping online. Moreover, the value sector and discounters such as dollar store chains, TJX Canada and

global fast fashion brands, have been gaining market share at the cost of mid-tier retailers. Various stores have been slow to adapt to an omnichannel shopping experience and to the changing tastes of consumers, and this has resulted in store closures. Meanwhile, non-store retailers such as Amazon continue to expand and increase competition for customers with traditional retailers. In the first ten months of 2018, average monthly retail e-commerce sales grew 15%, year-over-year, compared to 3.3% for store retailers.²²

While the online segment of retail remains small in Canada, it is growing at a rapid pace. For store-based retailers that also sell online, e-commerce sales comprised 2.4% of total retail sales in 2016, having increased by 72% between 2012 and 2016 – over four times greater than the growth in store-based sales (+16%).²³ Sales at non-store retailers rose 8.7% from 2013 to 2016, averaging \$21.3 billion in annual sales during this period. Retail subgroups that experienced the greatest growth over this period were clothing, footwear and accessories (+86%); home furniture, furnishings, housewares, appliances and electronics (FHAE) (+82%); and motor vehicles, recreational vehicles, motor

vehicles parts and accessories (+81%). In contrast, the largest decline over the 2013 to 2016 period was in automotive and household fuels (-25%). In 2016, the largest share of non-store sales were in automotive and household fuels (37%), followed by FHAE (18%), and health, personal and household products (12%).²⁴



Distribution and Growth of Retail Non-Store Sales, Canada

Retail Non-Store Commodities	% Share of Non-Store Sales, 2016	% Growth 2016/2013
Automotive and household fuels	37.3%	-25.2%
Home furniture, furnishings, housewares, appliances and electronics	17.6%	81.7%
Health, personal and household products	12.0%	42.0%
Sporting and leisure products	10.4%	50.7%
Clothing, footwear and accessories	8.3%	86.3%
Food and beverages	6.7%	-1.5%
Miscellaneous retail products	3.1%	-2.3%
Hardware, tools, renovation and lawn and garden product	2.6%	69.8%
Motor vehicles, recreational vehicles, motor vehicles parts and accessories	1.9%	80.9%

Table 1 Source: Statistics Canada Annual non-store retail survey commodity sales
Table 20-10-0069-01 (last data point: 2016)

Industry Outlook

The most recent forecast from the Conference Board of Canada shows that Canada's overall trade sector will continue to grow in 2018 (+2.5%) and 2019 (+1.6%)²⁵, stimulated by income, population, and economic growth. Alberta, along with Quebec, is expected to lead all provinces in real GDP growth this year with gains of 2.6%. Meanwhile, GDP for BC and Manitoba is projected to rise by a solid 2.1% and 1.9%, respectively, while Saskatchewan's economy is forecast to expand 0.5%.²⁶ Consumer spending will be reinforced by rising household disposable incomes²⁷ and continued population growth between 2018 and 2020.²⁸ Adding to this trend, the Canadian government has recently raised its immigration target for the next three years²⁹ and the Canada Child Benefit has risen to match inflation starting in 2018.³⁰

The moderately weaker loonie against the greenback, the arrival of international retailers in Canada such as Saks Fifth Avenue and UNIQLO, and the growing popularity of Black Friday sales, is expected to keep more Canadians spending domestically. Indeed, the number of nights domestic travellers spent in W-T census metropolitan areas, and their associated expenditures, were up 10% and 6.5% respectively in 2017 compared to a year earlier.³¹ The number of international travellers staying overnight, who entered Canada through the W-T, also increased during this time, growing by 3.0%.³²

Other factors that may affect the outlook include the pace at which interest rates may go up in the future, consumption trends, trade agreements, and the aging population. Low interest rates have supported the growth of retail sales in recent years, especially for big-ticket items like new cars and trucks. However, the central bank raised the benchmark rate five times since the summer of 2017. With further rate hikes expected, households would need to put more money towards servicing debt in the years ahead and have less money leftover for retail spending. Canada has reached a new deal with the US and Mexico to replace NAFTA, and is continuing work on a number of trade agreements to gain greater market access in the Asia-Pacific region and the European Union, which could benefit retailers. However, the lower value of the Canadian dollar could make importing goods to Canada more expensive. The way people consume has also been changing, as products are increasingly becoming services. For example, the availability of movie streaming and car sharing may reduce the sales of DVDs and motor vehicles in some areas. Retirees are typically on a reduced income, and how their spending habits may change also provides a degree of uncertainty to the outlook.

EMPLOYMENT OUTLOOK

Retail employment is expected to increase by approximately 13,500 jobs across Canada's western provinces between 2018 and 2020, with the highest growth in Alberta and BC. The number of jobs in the combined industry of wholesale and retail trade is forecast to expand 1.4% and 2.4% in Yukon and Nunavut respectively, and contract 1.2% in Northwest Territories as overall employment in this territory pulls back slightly.

Projected employment change for the retail trade sector during the 2018-2020 forecast period

Economic Region	Projected Change in Employment	Projected Annual Growth
Manitoba	1,100	0.5%
Southern Manitoba		0.7%
Winnipeg		0.5%
Northern Manitoba		0.3%
Saskatchewan	1,200	0.6%
Regina & Southern Saskatchewan		0.6%
Saskatoon & Northern Saskatchewan		0.6%
Alberta	8,900	1.2%
Calgary & Southern Alberta		1.3%
Edmonton, Red Deer, Camrose, & Drumheller		1.1%
Northern Alberta and Banff		1.3%
British Columbia	7,200	0.8%
Vancouver Island & Coast		0.4%
Lower Mainland - Southwest		1.1%
Okanagan - Kootenay		0.4%
Northern BC		0.4%
Yukon	120	1.4%
Northwest Territories	-90	-1.2%
Nunavut	110	2.4%

Source: Service Canada Regional Occupational Outlooks in Canada, 2018-2020

Note: Due to data limitations, the territorial forecast represents employment for the both the Wholesale and Retail Trade industries.

REGIONAL OVERVIEW**British Columbia**

BC employs the highest number of retail workers across the W-T, totalling 290,400 workers in 2017³³, with an average weekly wage of \$585³⁴. The retail industry in this province also makes up a greater proportion of GDP (6.0%) compared to the other provinces and territories in the W-T.³⁵ After the Toronto economic region (ER), the Lower Mainland-Southwest ER employed the most retail workers in Canada in 2017. All ERs in BC except for North Coast & Nechako and Northeast, the two smallest ERs in the province, had more retail jobs in 2017 compared to the previous year. Recent retail developments include the Mayfair Centre expansion in Victoria that added 100,000 square feet of new retail space³⁶, a Canadian Tire in the new Sandown Park Shopping Centre in North Saanich³⁷, and the opening of 14 MINISO, four UNIQLO, and three Muji stores in the Greater Vancouver³⁸. On the contrary, Sobeys closed 10 Safeway stores in the Lower Mainland, although five of these locations may be reopened under the FreshCo brand in the future.³⁹

Alberta

Among the western provinces, Alberta experienced the highest growth in retail employment over the past 10 years (+12%). In 2017, the province had 241,600 retail workers,⁴⁰ with an average weekly wage of \$611 in the sector.⁴¹ Although retail sales in Alberta grew 7.1% in 2017 following a couple of years of pull back, retail employment receded 1.9% – lower in all economic regions except for Edmonton (+4.5%) and Lethbridge – Medicine Hat (+1.4%). Adding to the growth in the Greater Edmonton Area, a new 154,000-square-foot Costco warehouse, The Premium Outlet Collection Mall with over with over 100 retailers, a Nordstrom Rack, a Freson Bros. grocery store with 200 employees, and a new Lowe’s store with over 180 positions, opened in 2018.⁴² Another Lowe’s store opened around the same time in south Red Deer, however, one Rona location and a Reno-Depot will be closing in Calgary.⁴³ Meanwhile, occupancy of the more than 500 stores at a new Asian-style mall in the Calgary region has been slow and the official grand opening of the mall has been delayed to 2019.⁴⁴ Nonetheless, major retailers have also opened in Calgary, including two Saks OFF 5TH stores and a Nordstrom Rack.⁴⁵ Going forward, recent challenges in the energy sector are expected to reduce the province’s economic growth and contribute to lower overall retail spending by Albertans.

Manitoba

Manitoba employed 70,000 retail workers in 2017, up 3.6% from 2007.⁴⁶ Over that period, average weekly earnings in the province (\$571) experienced the greatest growth (+32%) in the W-T after Yukon (+33%).⁴⁷ The change in retail employment was positive across Manitoba’s ERs between 2016 and 2017, except for Parklands and North. The Winnipeg ER, which accounts for almost two-thirds of all retail employment in the province, rose by 1.6%.⁴⁸ In 2017, the opening of Outlet Collection Winnipeg, a 400,000 square-foot mall with 100 stores, added over one thousand positions.⁴⁹ This shopping centre is expected to provide a boost to retail employment despite the closures of other retailers including several Sears stores.⁵⁰ Moreover, Lowe’s Canada opened an 115,000 square-foot retail store in Winnipeg in early 2018, creating approximately 170 jobs.⁵¹

Saskatchewan

In 2017, Saskatchewan had 68,300 people⁵² working in the retail industry with average weekly earnings of \$605⁵³. Saskatchewan’s two largest ERs, Saskatoon – Biggar (+7.6%) and Regina - Moose Mountain (+1.1%), make up two-thirds of retail employment in the province and experienced job growth from 2016 to 2017. Notable increases in retail jobs were also recorded in Swift Current – Moose Jaw (+16%) and Yorkton – Melville (+15%), while Prince Albert & Northern experienced a slight pull back (-1.9%). Supporting the growth of retail jobs is the opening and expansion of major retailers in recent years including Costco⁵⁴, Save-on-Foods⁵⁵, Rona,⁵⁶ Lowes,⁵⁷ and Walmart.⁵⁸

Territories

The retail sector in the territories is fairly different from Canada’s western provinces. In the north, the retail industry comprises primarily of small businesses such as corner stores, auto dealers, video rentals and gas stations. Nonetheless, there are a few larger retail stores including Walmart, The Northern Store, Real Canadian Superstore, Save-on-Foods, and the retail segment of Arctic Co-operatives Limited.

In the last couple of years, a number of retail stores have closed including Sears stores in Yellowknife⁵⁹ and Whitehorse.⁶⁰ On the contrary, a new Save-On-Foods store opened in Whitehorse in August 2017, employing 210 workers.⁶¹ In 2017, there were 2,829 people working in the retail industry in Yukon, 2,486 in Northwest Territories and 1,752 retail workers in Nunavut. Across the W-T, retail employment grew most significantly in Nunavut (+63%) and Yukon (+17%), with minimal growth in Northwest Territories (+1.5%) between 2007 and 2017.⁶² Retail workers in Northwest Territories continued to lead the W-T region in average weekly earnings (\$675) last year. Although average weekly earnings were lower in Yukon (\$604) and Nunavut (\$548), these two territories had greater wage growth than Northwest Territories (+11%) from 2007 to 2017, growing 33% and 25%, respectively.⁶³

Distribution of employment in the retail trade sector across Western Canada (%)

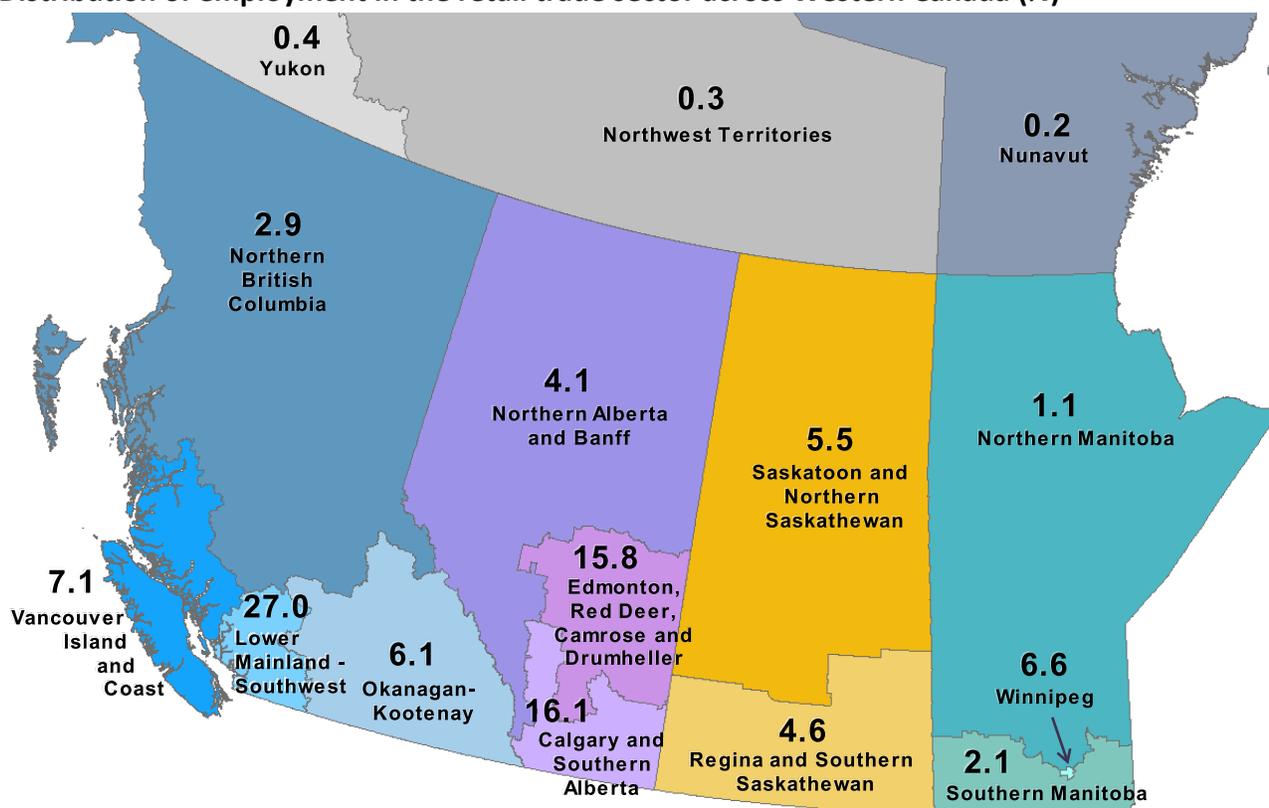


Chart 7 Source: Service Canada Regional Occupational Outlooks in Canada, 2018-2020

Note: Territorial estimates include employment for the both the wholesale trade and retail trade sectors.

Note: In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.

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² Statistics Canada. Table 14-10-0023-01 Labour force characteristics by industry, annual (x 1,000). Accessed December 18, 2018.

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⁴ Statistics Canada. Table 36-10-0402-01 Gross domestic product (GDP) at basic prices, by industry, provinces and territories (x 1,000,000). Accessed December 17, 2018

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