

CANADA'S OIL AND GAS EMPLOYMENT AND LABOUR MARKET DATA

Q1 2017

181,400

Directly employed by Canada's upstream and midstream oil and gas industry

197,700

Employed or available and actively seeking work in the oil and gas industry

8.2%

Percentage of Canada's oil and gas labour force that is unemployed

-1% -1,500 jobs from Q4 2016

-7% -14,500 jobs from Q1 2016

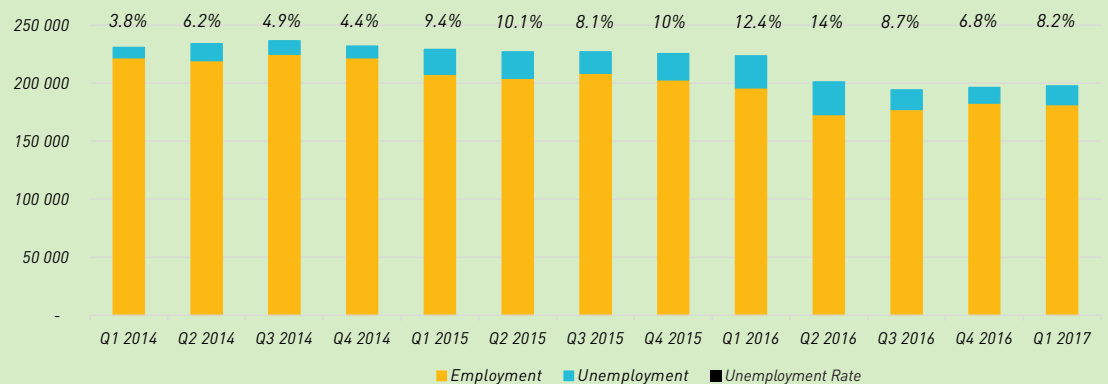
+1% +1,500 people from Q4 2016

-1% -26,100 from Q1 2016

+1% +1.4% from Q4 2016

-4% -4.2% from Q1 2016

Oil + Gas Labour Force Statistics



Source: Statistics Canada's Labour Force Survey employment estimates, seasonally unadjusted and quarterly averages within the following sectors: exploration and production (including oil sands), oil and gas services and pipeline transmission.

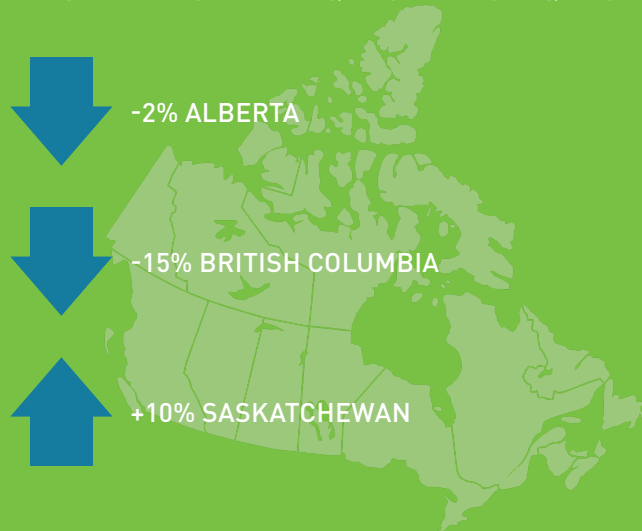
WESTERN CANADA PROVINCIAL HIGHLIGHTS

In Q1 2017, Alberta made up 74% of Canada's direct oil and gas employment. Between Q4 2016 and Q1 2017, Alberta's oil and gas employment declined 2%. Across Canada, the industry declined 0.8%. The labour force across both Alberta and Canada remained the same.

British Columbia (BC) and Saskatchewan represented 6% of Canada's total oil and gas employment. BC saw a 15% decline, or a decrease of just under 1,600 jobs during the period. Saskatchewan experienced a 10% increase, or just over 1,100 jobs.

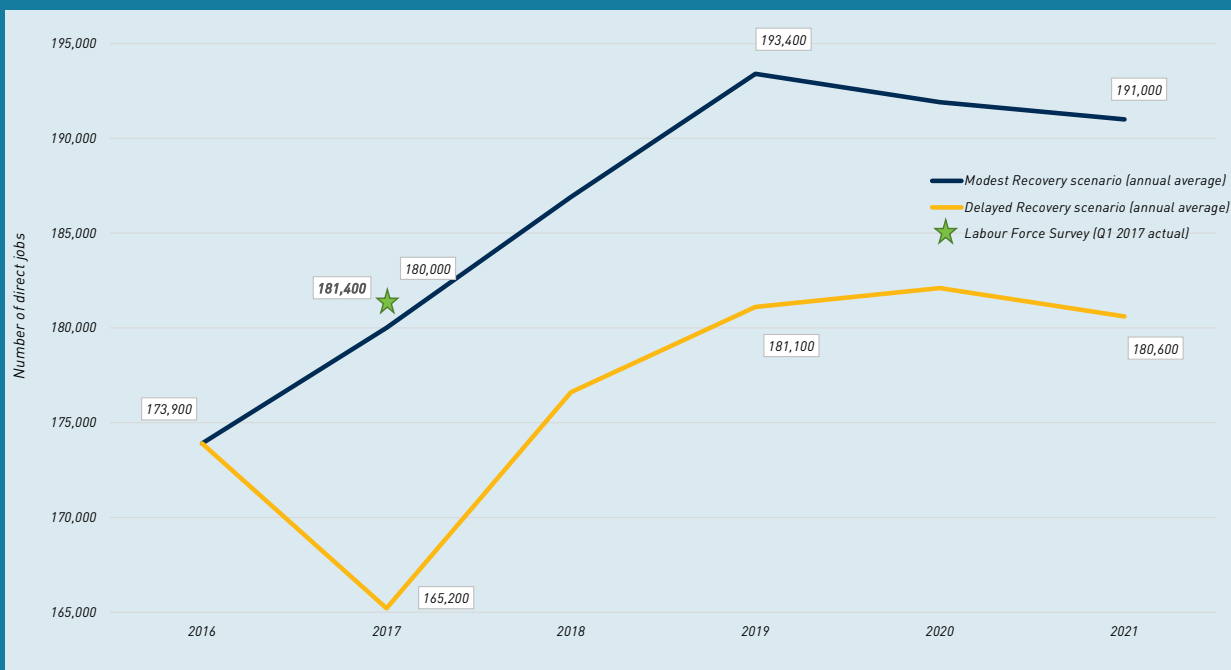
Across all industries, including oil and gas, Alberta and Saskatchewan experienced a 1% decline in employment while BC had a slight gain of 0.1%.

DIRECT EMPLOYMENT Q1 2017 FROM Q4 2016



Oil + Gas Employment Forecast vs. Actual

Source: PetroLMI's Labour Market Outlook 2017 to 2021 for Canada's Oil and Gas Industry employment scenario projections; Statistics Canada's Labour Force Survey employment estimates, seasonally unadjusted and quarterly averages within the following sectors: exploration and production (including oil sands), oil and gas services and pipeline transmission.



INSIGHTS - LOOKING FORWARD

Canada's oil and gas industry appears to be tracking toward the Modest Recovery scenario, highlighted in PetroLMI's [Labour Market Outlook 2017 to 2021 for Canada's Oil and Gas Industry report](#). That said, spring break up within the oil and gas services sector tends to move employment downward in the second quarter.

Canada

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