on Rural Ontario

RURAL ONTARIO INSTITUTE
Vision, Voice and Leadership

Non-metro employment: arts, recreation & information

Vol. 3, No. 14, 2015

Highlights

- **Employment in the sector of arts, entertainment and recreation was 1.8% of the total employment in non-metro census divisions in 2014.**
- **This sector grew from 2001 to 2014, in part, due to job increases at golf courses, ski hills and marinas.**
- **Employment in 2014 in information and cultural industries was 0.9% of the non-metro total.**
- **This sector declined from 2001 to 2014, due, in part, to the overall decline in employment in newspaper, magazine and book publishing.**
- **Subsectors with non-metro employment growth more than expected, based on national patterns, included Internet publishing, the sector of independent artists, writers and performers and the sector of heritage institutions.**

Why look at employment in the sectors of information, arts and recreation?
Culture-related sectors are often credited with the instigation of development trajectories in rural communities. Some of these sectors are or may become exportable[1] sectors.

We focus on the sectors of information and cultural industries[2] and the arts, entertainment and recreation industries[3].

Findings[4]
The number employed in non-metro census divisions (CDs) in arts, entertainment and recreation increased from 15K[5] in 2001 to 17K in 2014 (Figure 1 and Row #18 in Table 1). This sector represented 1.8% of the employment in non-metro CDs in 2014, up from 1.7% in 2001 (Row #18 as a percent of Row #30).

More than ½ of the employment in this sector was in “other” recreation industries which include golf courses, ski hills and marinas (Row #29). From 2001 to 2014, the number employed grew by 1.6K.

We report an employment “performance” indicator that compares the “expected” change in employment”[6] in each sector, based on national patterns, and the “actual” change in employment[7]. Sectors with a positive value are leading national patterns while ones with negative values are lagging.

For “other” recreational industries (Row #29), job “performance” was -0.7K, where the growth of 1.6K from 2001 to 2014 was less than the expected growth, based on Canadian patterns of growth.

Employment in non-metro CDs in information industries (Row #1) declined from 9K in 2001 to 8K in 2014. This represented 0.9% of employment in non-metro CDs in 2014, down from 1.1% in 2001.

Telecommunications (mostly telephone services) (Row #11) was one of the larger subsectors and where the job decline was 0.4K more than the expected decline. Another larger sector was publishing (except Internet publishing) (Row #2) with an employment decline that was 1.2K greater than the expected decline. Another subsector was “other”

[1] An “exportable” good or service is one that can be sold to those in other jurisdictions – either sent to the customer (e.g. a box of chocolates) or the customer comes to your jurisdiction to consume the item (e.g. a day on a ski hill).
[2] Includes book, newspaper and Internet publishing, telephone and cable telecommunications and library and archives services.
[3] Includes performing arts companies, independent artists, writers and performers and recreational facilities (such as golf courses, ski hills and marinas).
[4] For the level of employment in each subsector, see **Appendix Table**: Employment in non-metro CDs by industry sector.
[5] Where “K” indicates “thousand”.

[6] As defined in Footnote #1 in Table 1.
[7] The shift-share analysis generates a useful indicator for those seeking to understand how employment is faring in a given region. Employment across all sectors in non-metro CDs grew by 78K from 2001 to 2004 but this growth was about ½ of expected growth, based on national patterns (last line of Table 1). However, this analysis does not tell the whole story -- the change in output per worker provides a different indicator of economic performance of a sector. Perhaps obviously, one way to improve labour productivity (i.e. GDP per worker) is to substitute machines for workers.

information services (Row #17) which includes libraries, archives and Internet publishing. In this subsector, employment grew by 0.4K more than expected. The positive job “performance” for this sector indicates a (potential) ability to export Internet publishing services from non-metro Ontario.

Positive job “performance” also occurred in motion picture and video industries (Row #6), for independent artists, writers and performers (Row #24) and in heritage institutions (Row #25).

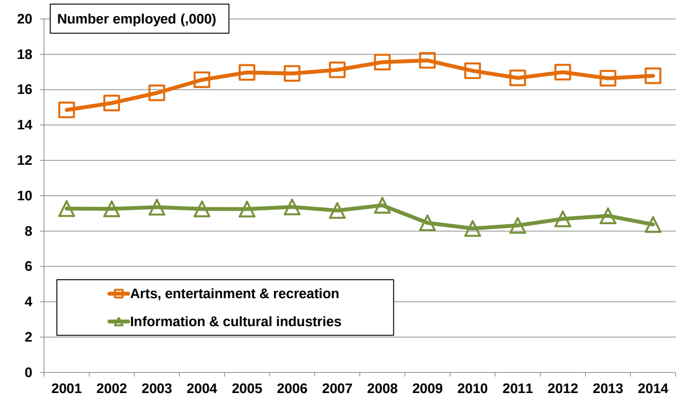
Summary

From 2001 to 2014, employment in arts, entertainment and recreation grew in non-metro CDs but employment declined in information and cultural industries.

Subsectors with employment growth more than expected, based on national patterns, included Internet publishing, the sector of independent artists, writers and performers and the sector of heritage institutions.

Figure 1

ARTS / ENTERTAINMENT / RECREATION employment was 17,000 and INFORMATION / CULTURE employment was 8,000 in 2014 in non-metro census divisions, Ontario



Source: Ontario Ministry of Agriculture, Food and Rural Affairs, ANALYST EMSI database.

Table 1

Non-metro employment in the sectors of INFORMATION, CULTURE, ARTS, ENTERTAINMENT and RECREATION, employment change & performance relative to national patterns, Ontario, 2001 to 2014

Row #	NAICS Code	Level	Industry sector (displayed for each category of NAICS = North American Industry Classification System)	Estimated number employed (,000) 2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	Expected change (based on national patterns) (1), 2001 to 2014 (,000)	Actual change, 2001 to 2014 (,000)	"Performance" = Actual minus Expected (,000)	Intensity(2) (LQ) relative to: Ontario 2001	Ontario 2014	Canada 2001	Canada 2014
1	**51**	**1**	**Information & cultural industries**	**9.3**	**9.3**	**9.3**	**9.3**	**9.2**	**9.4**	**9.2**	**9.5**	**8.5**	**8.1**	**8.3**	**8.7**	**8.9**	**8.4**	**0.0**	**-0.9**	**-0.9**	**0.4**	**0.4**	**0.5**	**0.5**
2	511	2	Publishing industries (except internet)	3.3	3.2	3.3	3.3	3.3	3.3	3.1	3.2	2.7	2.5	2.7	2.6	2.3	2.0	-0.1	-1.3	-1.2	0.6	0.4	0.7	0.5
3	5111	3	. . Newspaper, periodical, book & directory publishers	3.1	3.1	3.2	3.1	3.2	3.1	3.0	3.0	2.5	2.3	2.5	2.5	2.1	1.9	-0.7	-1.3	-0.5	0.7	0.6	0.9	0.7
4	5112	3	. . Software publishers	0.2	0.1	0.1	0.1	0.1	0.2	0.1	0.1	0.1	0.2	0.1	0.1	0.2	0.2	0.1	0.0	-0.1	0.1	0.1	0.1	0.1
5	512	2	Motion picture & sound recording industries	0.8	0.8	0.7	0.7	0.7	0.7	0.9	1.1	1.1	0.9	0.7	0.8	1.2	1.1	0.0	0.3	0.3	0.3	0.4	0.3	0.4
6	5121	3	. . Motion picture & video industries	0.7	0.7	0.7	0.6	0.7	0.7	0.9	1.1	1.0	0.8	0.6	0.8	1.0	1.0	0.0	0.3	0.3	0.3	0.4	0.3	0.4
7	5122	3	. . Sound recording industries	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.3	0.2	0.3
8	515	2	Broadcasting (except internet)	0.9	0.9	0.9	1.0	1.0	1.0	1.0	1.0	0.9	0.9	0.9	0.9	0.9	0.8	0.0	-0.1	-0.1	0.4	0.4	0.4	0.4
9	5151	3	. . Radio & television broadcasting	0.8	0.9	0.9	0.9	1.0	1.0	1.0	0.9	0.8	0.9	0.9	0.9	0.9	0.7	0.0	-0.1	-0.1	0.4	0.4	0.4	0.4
10	5152	3	. . Pay & specialty television	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.5	0.2	0.6	0.4
11	517	2	Telecommunications	2.9	2.8	2.6	2.5	2.4	2.3	2.2	2.2	2.0	2.1	2.1	2.2	2.2	2.1	-0.4	-0.8	-0.4	0.4	0.4	0.4	0.4
12	5171	3	. . Wired telecommunications carriers	1.6	1.6	1.5	1.5	1.4	1.3	1.3	1.3	1.2	1.3	1.4	1.4	1.3	1.4	-0.2	-0.2	0.0	0.4	0.4	0.4	0.4
13	5172	3	. . Wireless telecommunications carriers (except satellite)	0.5	0.5	0.5	0.4	0.4	0.4	0.3	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.1	-0.3	-0.4	0.4	0.1	0.4	0.1
14	5174	3	. . Satellite telecommunications	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.1	0.1	0.1	0.1	0.0	0.0	0.1	0.4	1.1	0.6	1.4
15	5179	3	. . Other telecommunications	0.7	0.6	0.5	0.5	0.5	0.5	0.5	0.6	0.5	0.4	0.4	0.5	0.5	0.5	-0.4	-0.3	0.1	0.5	0.6	0.7	1.0
16	518	2	Data processing, hosting, & related services	0.2	0.2	0.2	0.2	0.3	0.4	0.3	0.3	0.3	0.2	0.2	0.2	0.3	0.3	0.1	0.1	0.0	0.2	0.2	0.3	0.3
17	519	2	Other information services (e.g. libraries, archives, Internet publishing)	1.2	1.4	1.6	1.6	1.6	1.7	1.7	1.7	1.5	1.6	1.7	1.8	2.0	2.0	0.4	0.8	0.4	0.6	0.9	0.9	1.3
18	**71**	**1**	**Arts, entertainment & recreation**	**14.9**	**15.2**	**15.8**	**16.6**	**17.0**	**16.9**	**17.1**	**17.6**	**17.7**	**17.1**	**16.7**	**17.0**	**16.6**	**16.8**	**4.1**	**1.9**	**-2.1**	**0.9**	**0.9**	**1.0**	**0.9**
19	711	2	Performing arts, spectator sports & related industries	4.2	4.3	4.4	4.7	4.8	5.0	5.1	4.9	5.2	5.0	4.7	4.7	4.5	4.4	1.1	0.3	-0.8	0.6	0.6	0.7	0.7
20	7111	3	. . Performing arts companies	1.1	1.2	1.1	1.3	1.2	1.2	1.4	1.4	1.6	1.6	1.5	1.3	1.5	1.5	0.4	0.3	-0.1	0.9	0.8	0.9	0.9
21	7112	3	. . Spectator sports	0.9	0.9	0.9	1.0	0.8	0.7	0.9	0.9	0.8	0.7	0.5	0.6	0.5	0.5	-0.1	-0.4	-0.3	0.6	0.5	0.9	0.6
22	7113	3	. . Promoters (presenters) of performing arts, sports & similar events	0.5	0.4	0.4	0.5	0.5	0.6	0.5	0.4	0.3	0.3	0.3	0.2	0.3	0.3	0.3	-0.3	-0.5	0.7	0.2	0.7	0.2
23	7114	3	. . Agents & managers for artists, athletes, entertainers & other public figures	0.1	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.1	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.5	0.4	0.5	0.5
24	7115	3	. . Independent artists, writers & performers	1.5	1.7	2.0	2.0	2.2	2.5	2.2	2.2	2.5	2.4	2.3	2.5	2.2	2.2	0.5	0.6	0.2	0.5	0.7	0.6	0.7
25	712	2	Heritage institutions	0.5	0.7	0.6	0.7	0.8	0.7	0.8	0.9	1.2	1.2	1.2	1.2	1.1	1.3	0.3	0.8	0.5	0.8	1.5	0.6	1.1
26	713	2	Amusement, gambling & recreation industries	10.2	10.3	10.8	11.1	11.3	11.1	11.2	11.7	11.2	10.9	10.8	11.1	11.0	11.1	2.6	0.9	-1.7	1.1	1.1	1.1	1.1
27	7131	3	. . Amusement parks & arcades	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	-0.1	-0.1	0.4	0.2	0.5	0.3
28	7132	3	. . Gambling industries	2.5	2.3	2.5	2.6	2.7	2.6	2.7	2.4	2.2	2.1	2.1	2.1	1.9	1.9	0.3	-0.7	-1.0	0.9	0.9	1.2	0.9
29	7139	3	. . Other amusement & recreation industries (e.g. golf, ski hills, marinas, etc.)	7.5	7.9	8.1	8.4	8.6	8.5	8.5	9.2	8.8	8.6	8.6	8.9	8.9	9.1	2.3	1.6	-0.7	1.3	1.2	1.2	1.2
30	**Total: All sectors in non-metro Ontario**			**874.6**	**890.3**	**901.6**	**910.7**	**922.1**	**932.6**	**930.6**	**960.1**	**923.5**	**913.0**	**919.7**	**938.4**	**948.4**	**952.4**	**150.6**	**77.8**	**-72.8**				

1. The expected change is estimated from a shift-share calculation that shows the change that would have occurred if non-metro employment had changed at the same rate as national employment and if the employment in the given sector had changed at the same rate as the national employment in the given sector.
2. A location quotient (LQ) indicates the relative intensity of a sector (in this case, in non-metro census divisions), relative to the provincial pattern and relative to the national pattern. It is calculated as the non-metro percent employed in a sector divided by the provincial (or national) percent employed in a sector.
Source: Ontario Ministry of Agriculture and Food, ANALYST EMSI database.

Rural Ontario Institute gratefully acknowledges the work of Ray Bollman in preparing this edition of Focus on Rural Ontario. Questions on data sources can be directed to RayD.Bollman@sasktel.net. Any comments or discussions can be directed to NRagetlie@RuralOntarioInstitute.ca.