



# Sectoral Profile

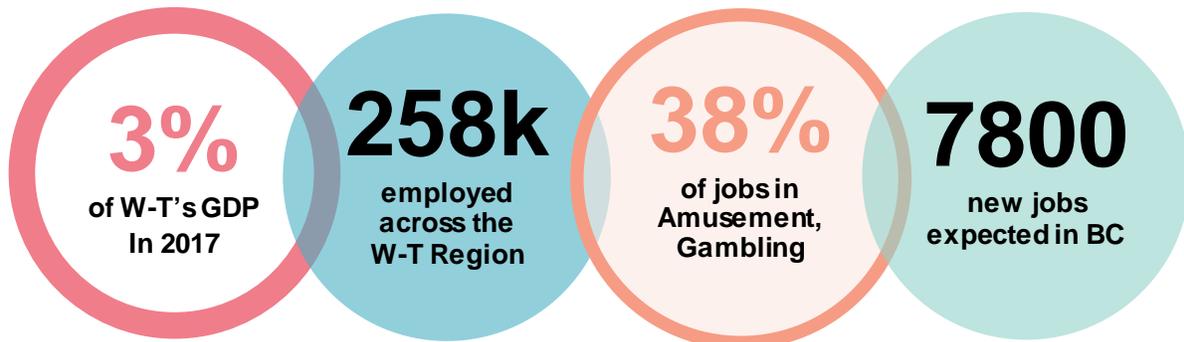
Information, Culture, and Recreation

Region of Western Canada and the Territories

2018-2020



## EXECUTIVE SUMMARY



Accounting for about 3% of the Western Canada and Territories' gross domestic product (GDP), the information, culture, and recreation (ICR) sector employed approximately 258,000 people across this region in 2017. After experiencing a steady decline for several years, growth in this industry has improved in the past couple of years primarily due an improvement in the economy leading to an increase in discretionary spending. Going forward, the outlook for the information, culture, and recreation sector remains positive as the economy continues to grow.

## KEY DRIVERS

- Consumer discretionary spending has a significant impact on this sector<sup>1</sup>. While a strengthening regional economy will help support growth, credit market debt continues to soften the amount of household disposable income.<sup>2</sup>
- Global demand for Internet streaming services of television and film content has contributed to growth in this sector. And a lower Canadian currency relative to the U.S. makes Canada attractive to the film industry. Further, the filming infrastructure built up in British Columbia, as well as Vancouver's proximity to Los Angeles, have contributed in making the province the leading place to film in the country.<sup>3</sup>

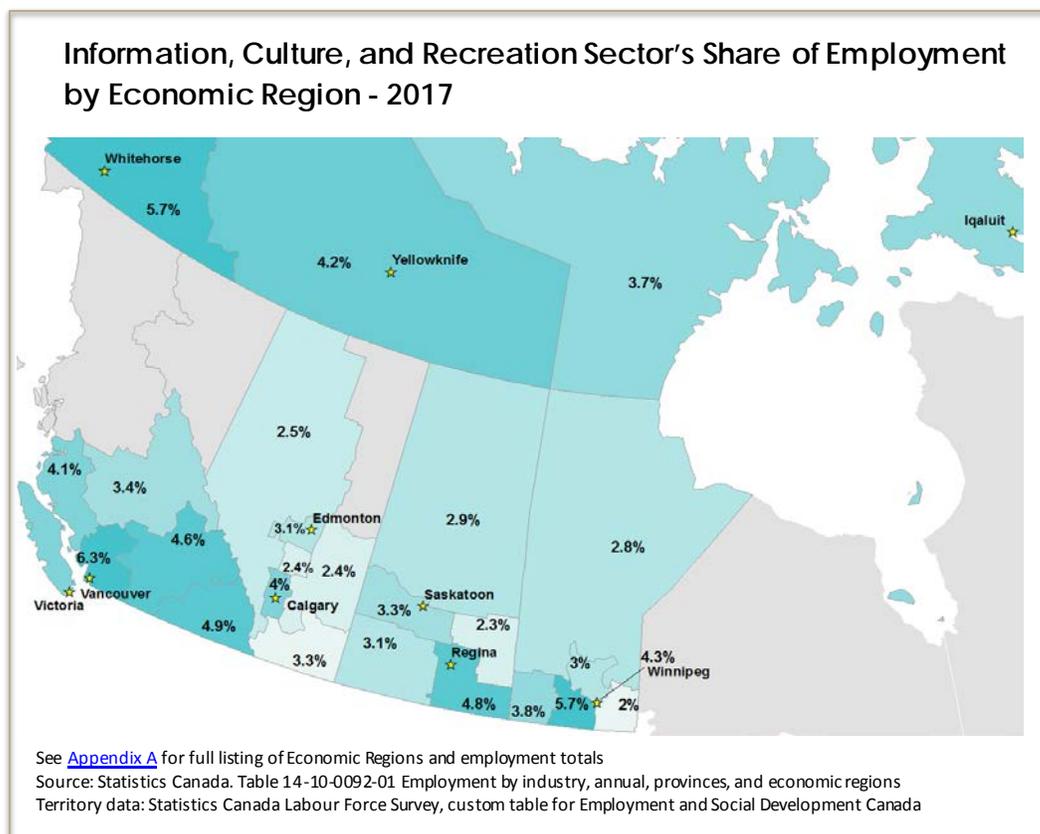
- Advancement in telecommunications technology, such as 5G mobile networks that are expected to roll out over the next few years, will require telecom companies to invest in substantial capital. And recent federal tax changes, which allow businesses to write off a larger share of newly acquired assets, will help to encourage the investment required.<sup>4</sup>

## BACKGROUND

The information, culture, and recreation (ICR) sector has two segments: **information and cultural activities**; and **arts, entertainment and recreation activities**. The former includes: book, newspaper and software publishing; motion picture and record production; telecommunications and broadcasting; data processing and hosting, and Internet publishing. The latter part contains: cinema, performing arts and sports spectator establishments; museums and historic sites; amusement parks and casinos.

In 2017, the entire sector employed approximately **255,000** people in W-T-Region, mainly concentrated in **British Columbia (53%) and Alberta (29%)**. While employment is relatively evenly split between the two segments, the information and cultural segment accounts for a larger share of economic output because it contains more high skilled occupations that produce additional value for every hour worked.

In BC, ICR represented over six per cent of all employment for the Vancouver area in 2017, and more than four per cent in Victoria and southern BC. In Yukon, the sector employed 5.7 per cent of all workers in 2017, while across the prairies, ICR registered above four cent of all employment in Calgary, Regina, and Winnipeg.



## INDUSTRY TRENDS

Subindustries of ICR contain a varied range of occupations, including **computer and information systems professionals (NOC 217)**, **athletes, coaches, referees and related occupations (NOC 525)**, and **library, correspondence and other clerks (NOC 145)**. ICR also has **telecommunications positions (NOCS 7245, 7246, and 7247)**, along with jobs relating to leisure activities such as **outdoor sport and recreation (NOC 6532)** and **casino operations (NOC 6533)**.<sup>5</sup>

Over half of the region's employment in the ICR sector is contained in two sub-sectors: **Amusement, Gambling and Recreation Industries (38%)**; and, **Broadcasting and Telecommunications (17%)**.

Of all the subindustries, **Telecommunications** produced the most output in 2017 – generating 52 per cent of the sector's GDP. The next largest groups were **Amusement, Gambling, and Recreation Industries** and **Publishing industries (except internet)**, both producing 13 per cent.

### Amusement, Gambling and Recreation



In the western provinces, this segment employs 97,500 workers, representing 1.6% of employment across all industries. Continues to trend upwards – employment up 34% between 2007 and 2017.

### Broadcasting and Telecommunications



Broadcasting employment declined 25% between 2007 and 2017. Telecommunications saw steady GDP growth over the past decade, reaching just over \$11 billion in 2017.

### Information Services and Data Processing Services



Improved employment in 2017 – up 16% in the western provinces. Information Services – which includes Internet publishing – continues to grow. Segment contains web hosting, video, and audio streaming services.

### Motion Picture and Sound Recording



Employment in western provinces (33,100) for this segment has doubled since 2014. Jobs in the region are primarily in B.C. (80%). Employment patterns fluctuate annually – around 20% up or down over the past decade.

### Performing Arts, Spectator Sports, and Heritage Institutions



Employment in the western provinces has been improving over the last five years, up 27% between 2012 and 2017. Segment buoyed by stronger consumer spending and more international tourists.

### Publishing



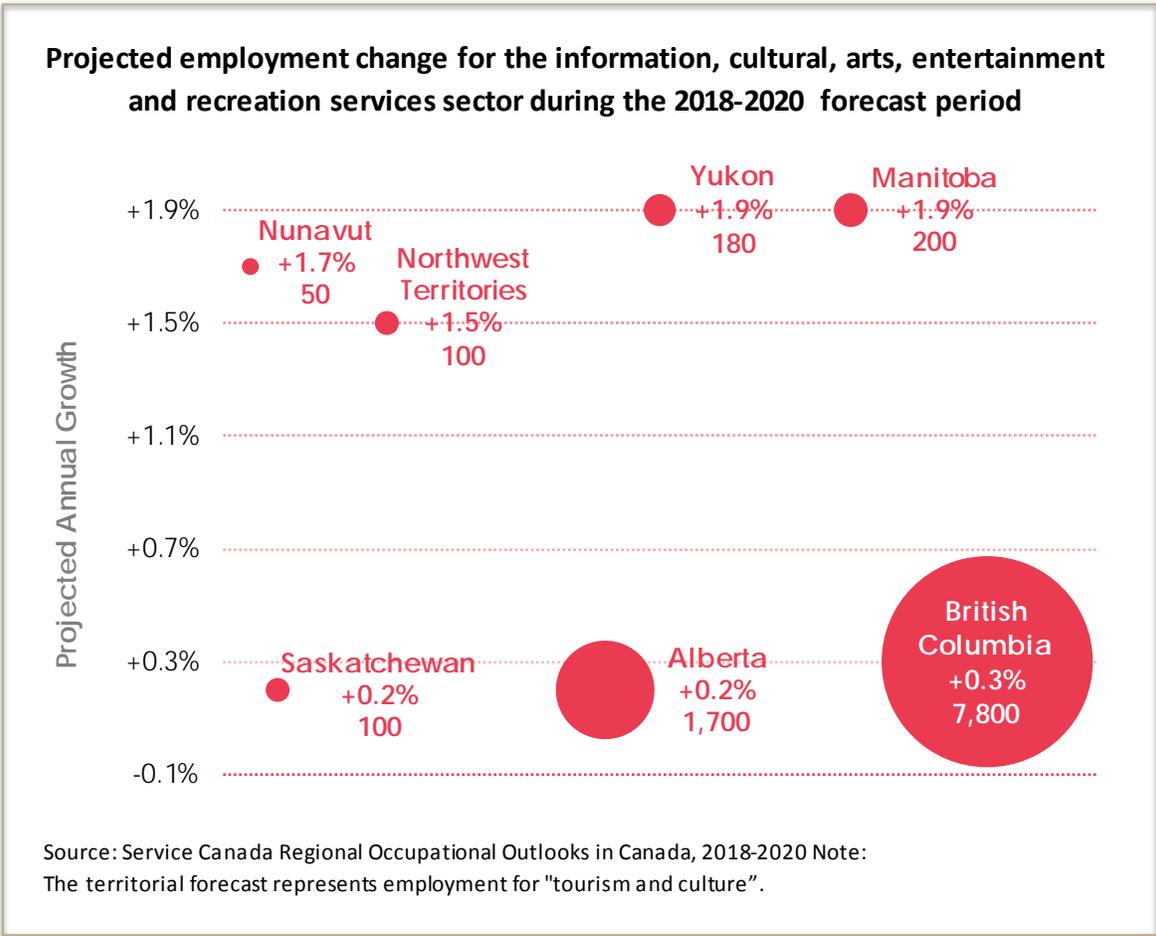
Declining employment in traditional newspapers and books. Software publishing produces the majority of output (64%) in this segment, while having less employment than traditional forms.

## EMPLOYMENT OUTLOOK

All Western Canadian provinces will experience employment growth in information, cultural, arts, entertainment, and recreation services between 2018 and 2020. British Columbia has the largest projected employment increase at 7,800, followed by Alberta with an increase of 1,700.

Among the territories, Yukon and the Northwest Territories should see the largest employment growth (+180 and +100 respectively) over the forecast period, while Nunavut will also see a slight boost in employment (+50).

Manitoba and Saskatchewan should see modest employment gains in ICR between 2018 and 2020 (+200 and +100 respectively).



## REGIONAL OVERVIEW

### Software Publishing:

- Growth in video game developing continues in the region. Ubisoft opened an office in **Winnipeg** in the fall of 2018. The company plans to invest \$35M and create 100 jobs in Manitoba over the next five years.<sup>6</sup> In addition, a London-based video game company, Improbable, is opening an office in Edmonton.<sup>7</sup>
- In November 2018, Brazilian software firm Daitan Group opened a development lab in **Victoria**. The company anticipates recruiting up to 100 developers over the next two years.<sup>8</sup>

### Motion Pictures:

- Parts of **Alberta** remain serving as sets for television shows on Space Channel and Netflix. In 2018, film crews returned to **Didsbury** for the third straight year for production of Wynonna Earp.<sup>9</sup> In addition, Lost in Space is filming its second season in a canyon near **Drumheller**.<sup>10</sup>

### Newspaper Publishing:

- The decline of traditional newspaper publishing persists in the region— particularly in smaller communities. During 2018, Postmedia announced the closure of printing operations for **Saskatchewan** newspapers, including the Melfort Journal, the Nipawin Journal, and the Northeast Sun<sup>11</sup>. In **Alberta**, Postmedia will stop producing the Camrose Canadian and the Strathmore Standard<sup>12</sup>—and the company eliminated 26 full-time and 26 part-time positions in Calgary by outsourcing printing of the Calgary Sun newspaper.<sup>13</sup>

### Internet Services:

- Investment in improving Internet access for remote and rural areas grows around the region. In the **North**, 2018 saw the completion of the Northwest Territories Broadband Infrastructure project, which made 4G wireless and high-speed Internet service available in 33 communities.<sup>14</sup> Also, NorthwesTel, the Government of Canada, and the Government of the Yukon are funding up to \$79M to build a 777 km fibre network across the Yukon, Nunavut, the Northwest Territories, and northern B.C.<sup>15</sup>
- In **Saskatchewan**, the federal government is granting \$12.6M, under its Connect to Innovate program, in order to improve and increase access to high-speed Internet in the province. As a result, thirty rural communities and up to 163 institutions will benefit from the funding.<sup>16</sup> Furthermore, SaskTel announced it will invest \$301M in 2018-2019 in its Saskatchewan network and infrastructure.<sup>17</sup>

### Museums and History:

- In 2018/19, Library and Archives Canada will provide funding to three projects in **Manitoba** dedicated to preserving documentary heritage.<sup>18</sup>

- In June 2018, Twelve Yukon museums and First Nations cultural centres were the recipients of \$348,000 in funding from the Special Capital Projects Assistance Program. The program assists recipients in protecting, preserving, and interpreting their collections.<sup>19</sup> Also in June, Parks Canada awarded a contract for the gathering of oral histories about the Franklin Expedition, as well as a contract to develop the Inuit Guardians Program to monitor and protect the vessel sites.<sup>20</sup>
- The Government of Canada announced in June 2018 that it is providing \$27.5M in funding over five years to support conservation efforts in Wood Buffalo National Park and to ensure its status as a world heritage site.<sup>21</sup>

### **Casinos and Recreation:**

- In 2018, the Starlight Casino in West **Edmonton** Mall reopened following a \$57M renovation that added new features, which prompted the casino's owner to add an extra 300 staff in order to accommodate the extra amenities<sup>22</sup>
- VI Fitness filed for bankruptcy in 2018 and closed all eight of their locations on Vancouver Island. Over 100 employees and contract workers were laid off as a result of the closures.<sup>23</sup>
- The Government of **Yukon** has awarded nearly \$61,000 through its Youth Investment Fund to 23 community group projects that provide social, recreational, and other positive lifestyle activities.<sup>24</sup> And – in partnership with Yukon Lottery Commission and Sport Canada – Yukon government is offering \$1.4 million in financial support towards recreational groups in the territory, as well as to individual athletes for advancing their athletic development.<sup>25</sup>

## APPENDIX A

## Information, Culture, and Recreation Employment by Economic Region – 2017

(see [Map](#) on page eight)

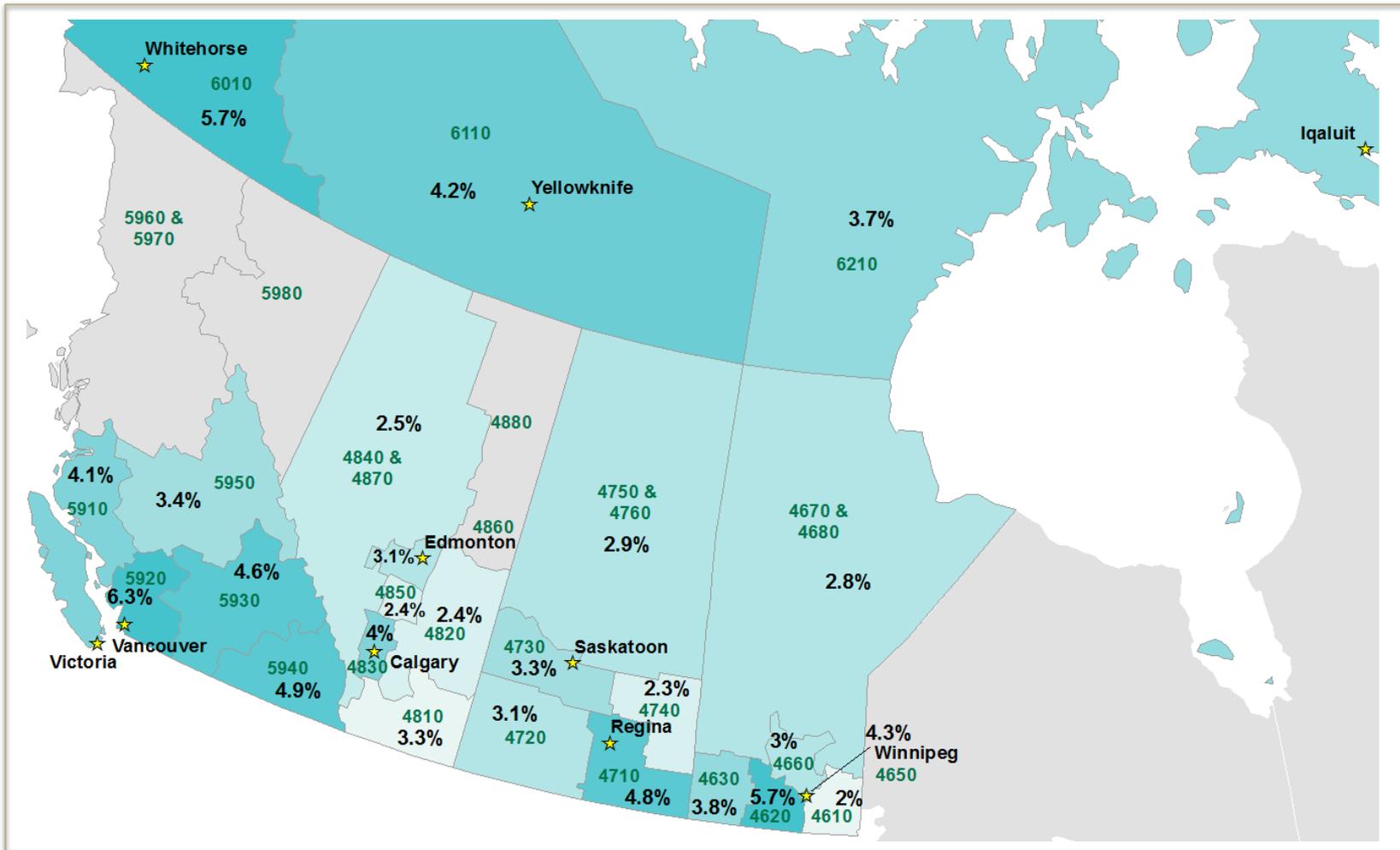
| Region   | 2017    | % of Total Employment |
|--|---------|-----------------------|
| 4610 - Southeast   | 1,300   | 2.1%                  |
| 4620, 4640 - South Central and North Central   | 1,200   | 2.2%                  |
| 4630 - Southwest   | 2,100   | 3.8%                  |
| 4650 - Winnipeg  | 16,900  | 4.3%                  |
| 4660 - Interlake   | 1,400   | 3.0%                  |
| 4670 & 4680 - Parklands & North  | 1,000   | 2.8%                  |
| 4710 - Regina - Moose Mountain   | 8,800   | 4.8%                  |
| 4720 - Swift Current - Moose Jaw   | 1,600   | 3.1%                  |
| 4730 - Saskatoon - Biggar  | 6,500   | 3.3%                  |
| 4740 - Yorkton - Melville  | 900     | 2.3%                  |
| 4750 & 4760 - Prince Albert & Northern   | 2,800   | 2.9%                  |
| 4810 - Lethbridge - Medicine Hat   | 2,500   | 1.7%                  |
| 4820 - Camrose - Drumheller  | 2,400   | 2.4%                  |
| 4830 - Calgary   | 35,600  | 4.0%                  |
| 4840, 4870 - Banff - Jasper - Rocky Mountain House et Athabasca - Grande Prairie - Peace River | 4,600   | 2.5%                  |
| 4850 - Red Deer  | 2,700   | 2.4%                  |
| 4860 - Edmonton  | 24,500  | 3.1%                  |
| 4880 - Wood Buffalo - Cold Lake  | x       | -                     |
| 5910 - Vancouver Island and Coast  | 15,900  | 4.1%                  |
| 5920 - Lower Mainland - Southwest  | 100,500 | 6.3%                  |
| 5930 - Thompson - Okanagan   | 12,000  | 4.6%                  |
| 5940 - Kootenay  | 3,600   | 4.9%                  |
| 5950 - Cariboo   | 2,800   | 3.4%                  |
| 5960 & 5970 - North Coast & Nechako  | x       | -                     |
| 5980 - Northeast   | x       | -                     |
| 6010 - Yukon   | x       | 5.7%                  |
| 6110 - NWT   | x       | 4.2%                  |
| 6210 - Nunavut   | x       | 3.7%                  |

x: suppressed to meet the confidentiality requirements of the Statistics Act

Sources: 1. Statistics Canada. Table 14-10-0092-01 Employment by industry, annual, provinces, and economic regions

2 Statistics Canada Labour Force Survey, custom table for Employment and Social Development Canada (6010, 6110, &amp; 6210)

Map - Information, Culture, and Recreation Employment by Economic Region – 2017



Data for areas in grey is suppressed to meet the confidentiality requirements of the Statistics Act.

Sources: 1. Statistics Canada. Table 14-10-0092-01 Employment by industry, annual, provinces, and economic regions

2. Territory data: Statistics Canada Labour Force Survey, custom table for Employment and Social Development Canada

**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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<sup>1</sup> Canadian Occupational Projection System (COPS) - Industrial Summary <http://occupations.esdc.gc.ca/sppc-cops/l.3bd.2t.1ils@-eng.jsp?lid=52> (accessed: 10/X/18)

<sup>2</sup> Statistics Canada. <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3810023801>

<sup>3</sup> Profile 2017 - published by the Canadian Media Producers Association (CMPA) in collaboration with the Department of Canadian Heritage, Telefilm Canada, the Association québécoise de la production médiatique (AQPM) and Nordicity. <https://cmpa.ca/wp-content/uploads/2018/12/Profile-2017-.pdf>

<sup>4</sup> Forbes, Richard. Canadian Industrial Outlook: Telecommunications—Autumn 2018. Ottawa: The Conference Board of Canada, 2018.

<sup>5</sup> Canadian Occupational Projection System (COPS) - Industrial Summary <http://occupations.esdc.gc.ca/sppc-cops/l.3bd.2t.1ils@-eng.jsp?lid=52> (accessed: 10/X/18)

<sup>6</sup> British video game startup opens first Canadian office in Edmonton's downtown (2018, September 19). Edmonton Journal. <https://edmontonjournal.com/business/local-business/note-embargo-british-video-game-startup-opens-first-canadian-office-in-edmontons-downtown>

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<sup>9</sup> Wynonna Earp film crews return (2018, 05, 01). Mountain View Gazette. <https://www.mountainviewgazette.ca/article/wynonna-earp-film-crews-return-20180501>

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