

Sector Profile

Arts, Entertainment and Recreation

Atlantic Region

2024

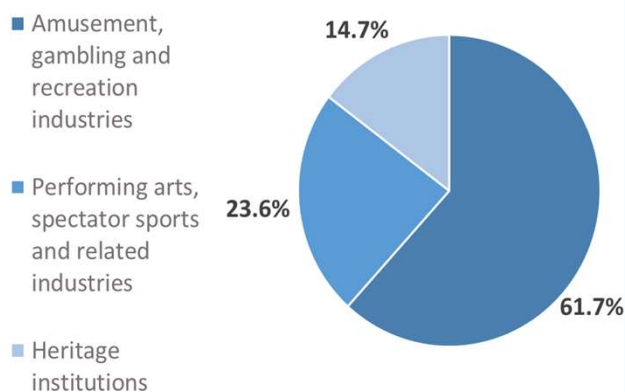


HIGHLIGHTS

- The arts, entertainment and recreation sector is one of the Atlantic Region's smaller sectors, employing just over 25,000 individuals in 2023, or 2.1% of the region's workforce.
- The sector's workforce is relatively young, with 44% of workers being 15 to 29 years of age, compared to 24% of region's overall workforce. Slightly more than half of workers in this sector are male. The shares of workers in part-time or temporary positions are more than twice as high as the average figures for all industries.
- The level of employment in this sector has fully recovered from job losses that occurred during the COVID-19 pandemic. Sectoral employment grew at a record pace over the last two years, adding over 8,000 workers since 2021, including 3,800 in 2023 alone.
- Job growth in the arts, entertainment and recreation sector is projected to average 2.3% annually during the 2024-2026 period, exceeding overall employment growth in the region by 0.6 percentage points.

ABOUT THE INDUSTRY

Employment Share by sub-industry



Source: Statistics Canada, Labour Force Survey 2023

Composition and Importance of the Sector

The arts, entertainment and recreation sector consists of three broad sub-sectors. The amusement, gambling and recreation subsector accounted for more than half of sectoral employment (61.7%) in 2023, while the next-largest—performing arts, spectator sports and related industries—employed fewer than one quarter. The heritage institutions sub-sector, which is mostly comprised of museums, historic sites, nature parks, zoos, and botanical gardens, made up the remaining 14.7% of employment.

In 2023, the sector employed 2.1% of Atlantic Canada's workforce, totaling 25,100 workers. Most employers in this sector are small, with 95% having fewer than 50 workers. Only eight large employers (0.6%) had 200 or more workers in 2023, most of which were businesses or organizations that manage sports facilities, amusement, gaming, and gambling activities.

The sector contributed \$525.4 million to Atlantic Canada's output, up \$40.5 million from 2022, but still \$31 million below the pre-pandemic level in 2019.



Geographic Distribution of Employment

In 2023, employment in the arts, entertainment and recreation sector as a share of total employment varied among the Atlantic provinces, ranging from 1.7% to 2.4%. Nova Scotia (N.S.) and Prince Edward Island (P.E.I.) had the highest concentration of workers (2.4% and 2.2%, respectively), while New Brunswick (N.B.) had the lowest.

Of the more than 25,000 workers employed in this sector in the region, Nova Scotia had the largest share, employing nearly half of the sectoral workforce (48.2%; 12,100).

| | Employed 2023 | Industry Share (%) |
|---------------------------|------------------|-----------------------|
| Atlantic Canada | 25,100 | 2.1% |
| Newfoundland and Labrador | 4,400 | 1.9% |
| Prince Edward Island | 2,000 | 2.2% |
| Nova Scotia | 12,100 | 2.4% |
| New Brunswick | 6,600 | 1.7% |

Source: Statistics Canada, Labour Force Survey

WORKFORCE

Workforce Characteristics

The workforce in this sector is relatively young, with more than 66% of workers aged 15 to 44 in 2023, compared to just over 55% for all workers in Atlantic Canada. Furthermore, the share of young adults (15 to 29 years) increased sharply from 32.4% in 2021 to 43.8% in 2023, while those aged 65 and above declined from 9.4% to 8.4%.

The share of the workforce with a university degree (30.6%) is similar to the overall educational attainment of Atlantic Canada's workforce (30.4%). However, this sector has a higher share of workers with less than a high school education (16.1%)—more than double the all-industry average of 7.6%. This is likely related to the higher share of young workers in the sector (aged 15 to 24; 36.4%), many of which are still in the process of attaining higher levels of education.

Employment in this sector is divided nearly-evenly between males and females. In 2023, females accounted for slightly less than half of workers (47.3%), down from just over half (51.5%) the year prior.

Main Occupations

Employment in this sector includes a diverse range of occupations. Consequently, only the two largest occupations—program leaders and instructors in recreation, sport and fitness (21.5%), and operators and attendants in amusement, recreation and sport (9.6%)—constituted a significant share of employment in 2023. Together, these two occupations employed 7,800 individuals, nearly a third of the sectoral workforce. Individually, the remaining occupations represent small shares of total sectoral employment.

Inversely, the arts, entertainment and recreation sector accounts for the majority of workers in some occupations, such as registrars, restorers, interpreters, and other occupations related to museums and art galleries (NOC 53100), and painters, sculptors, and other visual artists (NOC 53122) in Atlantic Canada.

| Top 5 largest occupations | Employed 2023 | % Share of Industry |
|---|------------------|------------------------|
| Program leaders and instructors in recreation, sport and fitness | 5,400 | 21.5% |
| Operators and attendants in amusement, recreation and sport | 2,400 | 9.6% |
| Landscaping and grounds maintenance labourers | 1,000 | 4.0% |
| Painters, sculptors and other visual artists | 725 | 2.9% |
| Registrars, restorers, interpreters and other occupations related to museum and art galleries | 650 | 2.6% |

Source: ESDC/Service Canada

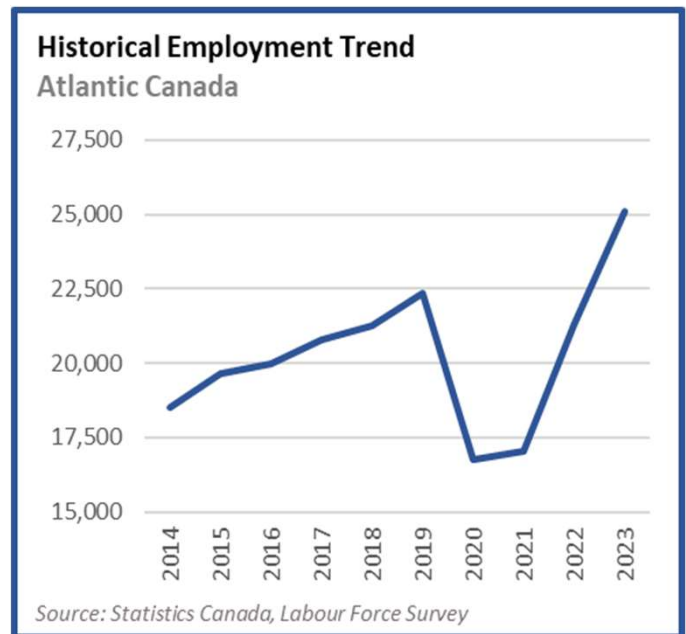


RECENT HISTORY

Employment in the arts, entertainment and recreation sector has varied substantially over the last decade. Sectoral employment grew at a moderate pace between 2014 and 2019, ranging from 1.5% to 6.5% year-over-year. However, this sector was one of the hardest hit during the COVID-19 pandemic with 5,600 jobs lost in 2020, a decline of one-quarter. Employment levels remained low in 2021 as pandemic containment measures stayed in effect to varying degrees, rebounding by just 1.8%. However, the end of most containment measures in 2022 coincided with a rapid recovery of employment (+25.3%) that continued in 2023 (+17.8%). This rebound has driven the number of workers in the sector higher than pre-pandemic levels in all four Atlantic provinces. Employment grew the fastest in Nova Scotia (+31.5%) and the slowest in Prince Edward Island (+5.3%) in 2023 compared to 2022. Of the 3,800 new jobs created in 2023, Nova Scotia accounted for 2,900.

In 2023, Atlantic Canada experienced its first tourism season unaffected by pandemic containment measures since 2019. Tourism visitations have mostly returned to normal. For example, Prince Edward Island welcomed nearly 403,000 air passengers in 2023, 18% and 5% more than in 2022 and 2019, respectively, while Nova Scotia received 2.2 million visitors—an increase of 14% compared with 2022, and just 6% fewer than in 2019. The recovery of the sector's employment and output after pandemic containment measures were lifted can be largely attributed to the resurgence of tourism and resumption of in-person services and activities, as well as recent population growth.

Labour trends in this sector follow a seasonal pattern, with employment levels and job vacancies peaking during the spring and summer months. In Nova Scotia, for example, there were 190 vacant positions in Q1 2024 in this sector, which increased to 345 the following quarter (Q2 2024) as weather conditions became more favourable. This largely reflects the seasonal nature of many activities in the sector, such as golfing, sports, music or arts festivals, and concerts. Consequently, temporary employment is more prevalent, with 34.4% of the workforce in temporary positions compared to the all-industry average of 13.4%.



All subsets of the arts, entertainment and recreation sector have returned to pre-pandemic employment levels, with the exception being heritage institutions, which employed 200 fewer workers in 2023 than in 2019. Despite these generally positive employment figures, industry associations have reported that precarious work and low incomes are prompting many arts and cultural workers to consider a career change, thus making it difficult to find experienced workers with artistic skills.

A recent national survey by Hill Strategies Research Inc. underscores these concerns, finding that 66% of artists earned less than \$40,000 in 2023 from all their arts-related work, and that most needed a second job to supplement their incomes. Furthermore, heightened inflation and interest rates in recent years have made it more difficult for businesses and consumers to afford the goods and services of skilled artisans and entertainers.



OUTLOOK

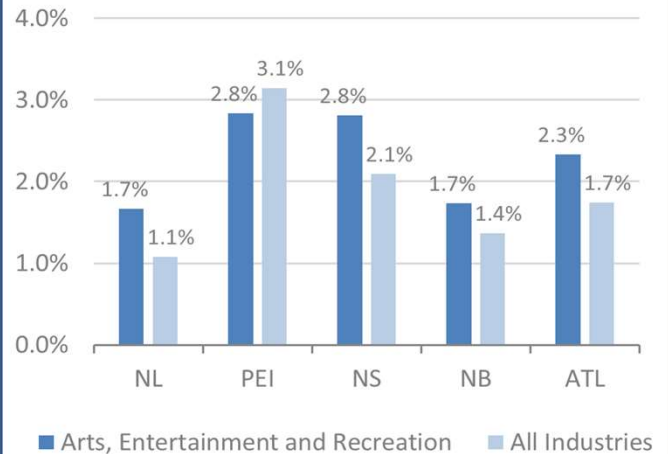
In Atlantic Canada, employment in the arts, entertainment and recreation sector is forecasted to grow at an average annual rate of 2.3% from 2024 to 2026, exceeding the overall projected employment growth rate in the region by 0.6 percentage points. Nearly half of the expected growth is anticipated to occur in the first year (2024) of the forecast period.

Solid job growth in this sector is expected in all four Atlantic provinces. Employment is forecasted to expand by 2.8% annually in Nova Scotia and Prince Edward Island during the projection period, while in Newfoundland and Labrador and New Brunswick, a slower average annual rate of 1.7% is anticipated. Sectoral employment growth is expected to surpass overall provincial job growth rates in all provinces except Prince Edward Island.

The population of Atlantic Canada increased by almost 170,000 between July 1, 2019, and July 1, 2023, and is projected to rise by another 130,000 between 2024 and 2030, according to the Atlantic Economic Council. This population growth, along with further recovery in tourist visitations and the return to higher levels of in-person attendance at cultural events and activities, is expected to support demand for goods and services provided by this sector and by extension, employment growth.

The federal government allocated \$1.3 billion over 10 years (2019 to 2028) across Canada for community, culture, and recreation infrastructure. The Atlantic provinces' share is estimated to be \$170 million. Moreover, St. John's, N.L., will host the 2025 Canada Summer Games, which is expected to generate up to \$110 million in economic activity and create jobs (mostly temporary) in the province.

Projected Average Annual Employment Growth Rate (%), Atlantic Provinces, 2024-2026



Source: ESDC/Service Canada

These investments, along with redevelopment or construction of facilities such as the New Brunswick Museum expansion, the creation of a new national park reserve at Pituamkek, P.E.I., and the redevelopment of the Halifax Forum in N.S., are also expected to contribute to activity and job growth in this sector.

Demand for goods and services provided by this sector is expected to remain somewhat elevated through 2026, driving moderate employment growth. However, heightened inflation and interest rates, along with cost-of-living concerns and reduced discretionary spending, may weigh on demand and could dampen further growth in non-essential leisure activities in this sector.

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.

The analysis in this report was finalized as of **October, 2024**.

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APPENDIX

| Real GDP (2023) and Employment (2023) for Atlantic Canada | | | | | | |
|---|------------------------------------|----------|-------|----------------|----------|-------|
| | Arts, Entertainment and Recreation | | | All Industries | | |
| | Number | Share of | | Number | Share of | |
| | | Total | AAGR* | | Total | AAGR* |
| Real GDP (M\$) | \$525.4 | 100.0% | -0.2% | \$114,774.4 | 100.0% | 0.9% |
| Newfoundland and Labrador | \$88.9 | 16.9% | -0.4% | \$28,950.2 | 25.2% | -0.5% |
| Prince Edward Island | \$72.3 | 13.8% | 2.1% | \$7,267.1 | 6.3% | 2.5% |
| Nova Scotia | \$208.6 | 39.7% | 0.2% | \$43,765.1 | 38.1% | 1.5% |
| New Brunswick | \$155.6 | 29.6% | -1.5% | \$34,792.0 | 30.3% | 1.1% |
| Employment (000s) | 25.1 | 100.0% | 3.1% | 1210.0 | 100.0% | 0.8% |
| Male | 13.2 | 52.7% | 3.0% | 613.0 | 50.7% | 0.8% |
| Female | 11.9 | 47.3% | 3.2% | 597.0 | 49.3% | 0.8% |
| 15-24 years old | 9.1 | 36.4% | 3.5% | 161.8 | 13.4% | 0.8% |
| 25-54 years old | 10.9 | 43.4% | 3.7% | 765.4 | 63.3% | 0.5% |
| 55 years and older | 5.1 | 20.3% | 1.4% | 282.7 | 23.4% | 1.6% |
| Worked full-time | 15.5 | 61.9% | 3.2% | 1015.6 | 83.9% | 0.9% |
| Worked part-time | 9.6 | 38.1% | 2.9% | 194.4 | 16.1% | 0.2% |
| Self-employed | 3.8 | 15.1% | -0.5% | 124.5 | 10.3% | -0.7% |
| Employees | 21.3 | 84.9% | 3.9% | 1085.4 | 89.7% | 1.0% |
| Permanent job | 12.7 | 50.6% | 5.5% | 923.3 | 76.3% | 1.4% |
| Temporary job | 8.6 | 34.4% | 2.0% | 162.1 | 13.4% | -1.1% |
| Less than high school | 4.0 | 16.1% | 1.3% | 92.1 | 7.6% | -2.6% |
| High school graduate | 7.9 | 31.3% | 2.3% | 284.9 | 23.5% | -0.4% |
| Postsecondary cert. or diploma | 5.5 | 22.1% | 2.6% | 465.0 | 38.4% | 0.6% |
| University degree | 7.7 | 30.6% | 5.7% | 367.9 | 30.4% | 3.3% |
| Newfoundland and Labrador | 4.4 | 17.6% | 3.6% | 236.8 | 19.6% | -0.1% |
| Prince Edward Island | 2.0 | 7.8% | 1.1% | 89.0 | 7.4% | 2.0% |
| Nova Scotia | 12.1 | 48.4% | 3.0% | 497.8 | 41.1% | 1.1% |
| New Brunswick | 6.6 | 26.2% | 3.6% | 386.5 | 31.9% | 0.8% |

Source: Statistics Canada, Labour Force Survey - Custom Table; Table 36-10-0402-01

*Average annual growth rate for last ten years of available data (GDP 2014-23 and Employment 2014-23)

