Vancouver Coast Mountains Tourism Region (Excluding Sea-to-Sky Corridor) Tourism Labour Market Study

Final Report

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The views expressed in this paper are those of the author.
The author is responsible for all errors and omissions.

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Executive Summary

In this report, Roslyn Kunin and Associates (RKA) has examined available information regarding overall employment levels and human resource requirements for the tourism industry as a whole in the Mainland/Southwest region. We have examined statistical data sources and survey reports, etc. to gain background information to the tourism industry in the province and in the Vancouver, Coast, and Mountains tourism region specifically.

We then provide estimates of employment in core tourism related occupations in the region in year 2007 and 2008, and provide projections of the same in the period from 2009 to 2015. We have also presented statistical data available concerning different sources of labour that provides for the workforce in the tourism and hospitality industry in the region. In addition, we have provided our estimates and projections of the labour force growth in the region based upon population growth patterns and labour force participation patterns among different age cohorts and gender groups.

Employment in core tourism occupations in this study in the region will continue to grow positively, despite a set-back in 2009. In addition, attrition will result in additional openings for replacement needs. Total potential labour demand is summarized in the Table that follows. Labour force growth in the future years in the region is expected to be able to keep up with employment growth for almost all of the core tourism occupations in the region, and as such no general labour shortage in many of the occupations is expected to prevail in the future period up to 2015.

Results shown in this report are also reflective of the two focus group sessions we conducted as well as interviews with industry stakeholders on current labour market conditions, demographic profiles, projected future labour requirements, and challenges faced by employers in recruitment and retention issues.

Summary Table I Estimated Number of Total Job Openings Due to Growth and Attrition for Core Tourism Occupations in Core Tourism Related Industries, Mainland/Southwest Region, 2009 to 2015

	Total 2009 to 2015
A211.0621 Retail Trade Managers	6,523
A221.0631 Restaurant and Food Service Managers	2,654
A222.0632 Accommodation Service Managers	399
B316.1226 Conference and Event Planners	55
F154.5254 Program Leaders and Instructors in Recreation and Sport	375
G011.6211 Retail Trade Supervisors	668
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	476
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	45
G211.6421 Retail Salespersons and Sales Clerks	8,598
G311.6611 Cashiers	3,016
G411.6241 Chefs	464
G412.6242 Cooks	1,707
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	315
G512.6452 Bartenders	349
G513.6453 Food and Beverage Servers	2,380
G715.6435 Hotel Front Desk Clerks	394
G721.6441 Tour and Travel Guides	51
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeing guide, rafting guide	45
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slc	295
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	181
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	118
G93.666 Cleaners	2,715
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	3,040
Total of Selected Occupations	34,864

Source: RKA

We have found that in general, the industry has been able to find enough people to fill in most positions throughout the year, even during the summer months. There is a large enough pool of labour attracted to the tourism and hospitality industry because of the many job opportunities available and relatively low skill level required for many of the occupations in our analysis. On the other hand, the high cost of living in the metropolitan areas, combined with relatively low compensation for many jobs, makes it difficult to retain qualified personnel. In many cases employers do report having to take a long time to fill in the positions during periods when the overall labour market is tight, and some may have to take less experienced or qualified workers to fill vacancies. The positions that industry stakeholder agreed as facing the most challenges include:

- Culinary staff, specifically line cooks

- Entry level restaurant (i.e. bus people) and kitchen (i.e. dishwashers), as well as food service attendants in quick service restaurants

Other occupations frequently mentioned as being difficult to fill and/or hold onto good, qualified staff include:

- Foodservers (the Vancouver area tourism and hospitality industry is in need of more people who are qualified/experienced). This includes foodservers working for caterers as well as banquet/event staff at the Tradex convention centre in the Fraser Valley. In some restaurants there is also a need for restaurant managers as many food servers do not wish to move into management positions due to the fact that the pay is less (no tips are provided to management).

- Housekeepers retiring in the near future will need to be replaced.

There was also mention of the difficulty to retain semi-skilled building maintenance and janitorial people.

Additionally, Vancouver has a perpetual shortage of taxi drivers.

Many areas of the industry face a challenge in recruiting young people into the sector as well as maintaining a level of apprenticeship enrolment that is sustainable to the industry. It is important to communicate to young people the kinds of jobs available in the industry, including career and managerial positions that are in need of young recruits. High school career counsellors and parents also need to be involved to encourage more young people to enter these seemingly unskilled jobs but with potential career opportunities. Certain factors impacting apprenticeship training completions have been identified.

We have also examined other issues related to recruitment and retention of skilled workers for the industry. Utilization of non-traditional types of labour supply, temporary use of foreign workers, seasonal nature of the work, inconsistency of the availability of work, multi-tasking, wages and compensation, and other factors have been thoroughly explored and discussed throughout the report.

Finally, we present recommendations from industry stakeholders on potential ways to better utilize existing sources of labour, and to develop additional sources of labour supply to meet the industry's needs.

1. Introduction

Tourism is travel for recreational, leisure or business purposes. The goods and services associated with tourism create the opportunity for employment in many service industries. These service industries include: transportation services, such as airlines, cruise ships and taxis; hospitality services, such as accommodations, including hotels and resorts, and all types of restaurants and food services; entertainment venues, such as amusement parks, casinos, various music venues and the theatre; and retail shopping.

Tourism worldwide has grown to become the largest and fastest growing industry in the world. The tourism industry in British Columbia is a similarly significant and essential component of the provincial economy. In B.C., tourism generates over $9 billion in revenue. While already on a steady path of growth, the provincial government has further tasked the tourism industry with the goal of doubling tourism revenues to almost 20 billion by the year 2015 and to grow B.C.'s role as a prime all-season resort and tourism destination.

As a result of its remarkable expansion over the last 20 years, the British Columbia tourism industry has not only matured impressively but has also developed to become increasingly collaborative, coordinated and forward-thinking. To this end, B.C. tourism businesses recognize the need to research, plan and prepare for their industry's imminent labour requirements. This task must be done in a way that will ensure maximum benefits from the industry's upcoming growth while sustaining the world class tourism destination and workforce standards that tourists of the future will continue to expect when they visit British Columbia.

There is recognition of a need for long term tourism labour force planning and preparation that meets not only provincial tourism goals but also supports local and regional needs. go2 - the B.C. tourism industry's voice on province-wide tourism labour and employment matters, together with the federal and provincial governments, is coordinating a research initiative to project the future demand and supply for tourism and hospitality labour in the Vancouver, Coast and Mountains tourism region (excluding the Sea-to-Sky corridor).

Roslyn Kunin & Associates, Inc. (RKA) has been retained to conduct region specific labour market analysis for the Vancouver, Coast and Mountains tourism region. Specifically, the study's Project Objectives include the following:

1. To estimate labour demand in the Vancouver, Coast and Mountains tourism region to 2015;

2. To estimate labour supply and potential demand-supply gaps in the tourism region;

3. To ensure industry training requirements are aligned to provincial and regional needs;

4. To engage regional tourism stakeholders in the process to provide direction to the labour market analysis process and to provide regional input into the provincial Human Resources strategy;

5. To use this process as a means of assessing the need for a region-specific Human Resources strategy and, where appropriate, identify organizations(s) willing to develop and implement these strategies.

The following report presents the findings of this study. It should be noted that the term "**tourism**" is used interchangeably with "**tourism and hospitality**". The hospitality industry is clearly a significant and very important component of the total tourism industry.

The layout of the report is as follows. In the next section, we will describe the approaches we adopted in collecting data and information for the report. In Sections 3 through 7, we will provide labour market data and analysis from our research. Finally, in Section 8, we will conclude on our findings.

2. Methodology

The methodology for the Vancouver, Coast and Mountains (excluding Sea-to-Sky) Tourism Labour Market study includes both secondary and primary research involving tourism and hospitality industry stakeholders throughout the Vancouver area and the Fraser Valley, as well as provincial tourism sector representatives.

2.1. Secondary Research

RKA has reviewed existing data on visitation to the Vancouver Coast and Mountains tourism region and research studies on tourism and hospitality labour demand, job occupations and human resource requirements and issues related to recruitment, training and retention of the tourism and hospitality workforce. The following provided relevant research data and information:

- *go2*
- *Tourism Vancouver*
- *Vancouver, Coast and Mountains Tourism Association*
- *Tourism British Columbia*
- *British Columbia Council of Tourism Associations*
- *Canadian Tourism Commission*
- *Tourism Industry Association of Canada*
- *BC Stats*
- *Statistics Canada Census and Labour Force Survey*
- *Various sources of tourism indicators which provide monthly and current year-to-date data including BC Ferries, airport passenger volume, visitor information centre visitor parties and other key industry tracking statistics*

The References section of this report provides a more detailed listing of the materials used in preparing this report.

2.2. Primary Research

The primary research for this project was conducted during February, March and April 2009. There were two independent yet interrelated approaches adopted during information/data gathering, including:

- Round Table/Focus Groups in Vancouver; and
- Follow-up interviews with employers and other industry stakeholders

The purpose of the round table/focus groups was to discuss the current labour situation with regards to tourism and hospitality growth, occupation needs, issues and requirements and to present and "test" different growth scenarios for the industry's labour market needs to the year 2015. The round table/focus group discussions were set up with assistance from go2, who also hosted the focus group meetings in their downtown Vancouver boardroom.

A meeting agenda and handouts with Vancouver Coast Mountain region tourism employment data, charts and statistics on job occupations were prepared for each focus group and handed out to the participants.

Follow-up interviews were subsequently conducted with selected industry stakeholders to gather additional details on key points. Appendix I and II provide materials for validation at the focus group meetings and also lists the meeting participants.

3. Regional Tourism Market Overview

In this Section, we provide an overview of tourism market information for the Vancouver Coast and Mountain Tourism Region. We also provide information on recent trends in the tourism market.

3.1. Geographic Area

The Vancouver, Coast and Mountains tourism region is situated in the southwest corner of British Columbia. The area offers the cosmopolitan and natural beauty of the city of Vancouver, along with mountains, oceans, lakes, rivers and beaches in close proximity. All this provides a spectacular setting for a vast array of outdoor adventures including cycle, hike, camp, kayak, sail, golf, ski and snowboard activities.

The Vancouver, Coast & Mountains region expands outwards from the city of Vancouver along three main arteries - the Sunshine Coast, the Sea-to-Sky Corridor as well as the Fraser Valley and Canyon. The city of Vancouver itself has a population of approximately 600,000 residents, however, Greater Vancouver - spread out along the banks of the lower Fraser River - has a population of nearly two million. The Vancouver, Coast & Mountains tourism region accounts for just four per cent of BC's total land mass, but 60 per cent of its population.

Vancouver and Whistler have been chosen by the International Olympic Committee for the Vancouver 2010 Olympic and Paralympic Winter Games. Awarding the Games is an honour that recognizes not just the physical capacity of the region to host them, but the international status of the city and its sophisticated amenities: fine dining, high-end shopping, museums, galleries, theatres, parks and entertainment options.

The Olympic event has brought Vancouver the infrastructure development which will have a lasting impact on the tourism product supply. This includes a new trade and convention centre, so that the city can now host much larger events, the Richmond Speed Skating Oval, repairs and renovations to existing facilities, and major improvements to the Sea-to-Sky Highway.

Note that throughout the report, due to availability of data, we will provide statistical data and projections and other information pertaining to the Mainland/Southwest Development Region. The geographic boundaries of tourism regions and development regions in the province are shown in Appendix III.

3.2. Visitation Trends

The Vancouver, Coast and Mountains tourism region has experienced a decline in its visitor volumes in recent years. U.S. and international visitation have declined due to worldwide economic conditions.

- According to Tourism Vancouver, the Vancouver area attracts over 8.5 million overnight visitors annually but the area has not seen significant growth in visitation over the last 10 years. Since 2000, there has only been an overall increase in annual overnight visitors of just over 200, 000 visitors or 2% over the 7 year period.

Figure 1: Annual Overnight Visitor Volume to Metro Vancouver, 2000-2008

	2000	2001100.0%	2002	2003	2004	2005	2006	2007	2008
Overnight Visitors	8,448,542	8,347,153	8,321,683	7,967,198	8,523,304	8,604,870	8,692,925	8,912,525	8,629,103
% change	2.0%	-1.2%	-0.3%	-4.3%	7.0%	1.0%	1.0%	2.5%	-3.2%

Source: Tourism Vancouver's Visitor Volume Model, PricewaterhouseCoopers

- Tourism Vancouver projects at least a 2.5% drop in visitation in 2009 compared to 2008. Much of the buoyancy in the Vancouver visitor market at present is tied to pre-Olympic activity, i.e. meetings, events etc. and this is expected to drop-off post-Olympics.

- Despite the present economic and visitor downturn, there are some bright spots in the tourism market outlook for the Vancouver area, including the new Vancouver Convention and Exhibition centre, one of the Olympic 2010 venues. This facility will fulfill the demand for meeting space so that the City can host much larger international meetings and events. Recognizing the fact that these types of events are planned years ahead, the outlook at this time for bookings is positive, even as far forward as 2014.

- Long term, the Vancouver, Coast and Mountains region and all of B.C. tourism are likely to benefit from the media exposure and impact of the 2010 Olympics.

- The origin of visitors to the Vancouver, Coast and Mountains tourism region is highly dependent on B.C. residents, as well as Ontario, Alberta and the western U.S.A.

- Vancouver relies heavily on the geographic markets most affected by the current recession, i.e., Ontario and the United States. The economic downturn in these markets, especially in the United States, has been noticeably felt by Vancouver area tourism and hospitality operators. Similarly, Ontario and overseas visitor volumes are also down for 2009, by at least 10%-15% year to date over 2008.

Figure 2: Market Origin of Overnight Visitors to Metro Vancouver, 2008

	Total	Percent
B.C. Residents	2,684,814	31.1%
Ontario	1,023,517	11.9%
Alberta	764,904	8.9%
Other Canada	836,962	9.7%
Washington	488,701	5.7%
California	493,549	5.7%
Other U.S.A.	971,242	11.3%
Asia/Pacific	764,061	8.9%
Europe	448,208	5.2%
Other International	153,145	1.8%
Total	**8,629,103**	100.0%

Source: Tourism Vancouver's Visitor Volume Mode

- The market origin of visitors to areas of Vancouver, Coast and Mountains outside Vancouver itself, i.e. Sunshine Coast and Fraser Valley communities, is largely B.C. and regional residents.

- The area around Abbotsford enjoys a strong tourism industry with growth in visitation and tourism revenues. Abbotsford has an international airport and is well positioned to attract both sport tourism visitor segments as well as convention/trade show business via its Tradex facility. New construction of other supporting tourism infrastructure includes the Art Gallery and Museum as well as the Entertainment and Sports Centre.

3.3. Transportation Indicators

Vancouver is the main gateway to Vancouver, Coast and Mountains and the rest of the province, capturing nearly 84% of air arrivals. Statistics show the recent drop in visitor volumes to the Vancouver area from all geographic markets.

- Air arrivals from all international markets are down significantly, year-to-date for 2009 over 2008. Total arrivals are down nearly 12%.

Figure 3: Air Arrivals 2009 versus 2008 (First Quarter)

Total	-11.80%
Canada	-6.60%
U.S. and Latin America	-12.60%
Overseas	-19.90%

Source: Tourism Indicators Data Tables, Tourism B.C.

- Statistics Canada data on vehicle travellers at border entries also show a drop in U.S. visitation. Total entries into Canada from the U.S. were down 12% in 2008 over 2007. All other international markets were also down.

- For 2009, January and February, U.S. entries were down 9%. All the other international markets were down at least 10%.

- The cruise industry is another important component of Vancouver's tourism trade, however, 2008 passenger volumes were down 11% and 2009 has already experienced the disappointing announcement that two of the major cruise lines will no longer be including Vancouver on their itinerary during the 2009 cruise season. The more cost-competitive port of Seattle has gained this business. Vancouver will lose both tourist visitation and revenues as a result.

3.4. Accommodation Trends

BC Stats provides data on the Mainland/Southwest region which is used in this report as a baseline indicator of tourism activity in the Vancouver, Coast and Mountains region (excluding Sea-to-Sky).

- The provincial data on room revenues shows some growth, especially in the years 2004 to 2007.

- During the period from 2000 to 2008, annual room revenues for the Vancouver, Coast and Mountains area increased 25% in total or an average of 2.9% per annum.

- Since visitor volumes did not increase significantly during this same time period, the revenue growth would be due to increases in average room rates.

Figure 4: Mainland/Southwest and British Columbia Annual Room Revenue and Percent Change, 2001-2008 ($ thousands)

Room Revenue	2000	2001	2002	2003	2004	2005	2006	2007	2008
Mainland/Southwest	847,624	854,898	850,258	809,809	863,430	902,633	970,884	1,043,209	1,056,157
% Change		0.9%	-0.5%	-4.8%	6.6%	4.5%	7.6%	7.4%	1.2%
British Columbia	1,442,901	1,474,160	1,506,360	1,485,670	1,590,956	1,688,343	1,815,312	1,967,921	1,975,793
% Change		2.2%	2.2%	-1.4%	7.1%	6.1%	7.5%	8.4%	0.4%

Source: British Columbia Tourism Room Revenue, B.C. Stats

- The BC Stats data shows that the supply of hotel properties did not increase much during the period from 2000 to 2007.
- According to Tourism Vancouver, as of February 2009 there are 14,161 units in Vancouver; 4,206 in Richmond and a total of 23,814 in Metro Vancouver.
- The Shangri-la Hotel opened in Vancouver in 2008.
- There are up to 8 new hotel projects currently underway or planned in the Vancouver, Richmond and surrounding metro areas which could contribute nearly 1500 additional room by the year 2011.
- Recently, however, at least three new hotel property projects for the downtown Vancouver area have been placed on hold due to the economic slowdown.

Figure 5: Mainland/Southwest and British Columbia Annual Accommodation Property Inventory and Percent Change, 2001-2007

Properties	2000	2001	2002	2003	2004	2005	2006	2007	2008
Mainland/Soutwest	492	510	522	517	520	541	536	517	n/a
% Change		4%	2%	-1%	1%	4%	-1%	-4%	
British Columbia	2,422	2,473	2,493	2,499	2,553	2,567	2,542	2,501	n/a
% Change		2.1%	0.8%	0.2%	2.2%	0.5%	-1.0%	-1.6%	

Source: British Columbia Tourism Room Revenue, B.C. Stats

- Room inventory data also shows generally flat growth in the accommodation supply for the Vancouver, Coast and Mountains area.

Figure 6: Mainland/Southwest and British Columbia Annual Accommodation Room Inventory and Percent Change, 2001-2007

Room Inventory	2000	2001	2002	2003	2004	2005	2006	2007	2008
Mainland/Soutwest	37,775	39,368	40,568	39,366	40,219	41,859	42,343	39,341	n/a
% Change		4.2%	3.0%	-3.0%	2.2%	4.1%	1.2%	-7.1%	
British Columbia	93,729	97,016	97,340	96,922	100,315	101,945	102,556	100,714	n/a
% Change		3.5%	0.3%	-0.4%	3.5%	1.6%	0.6%	-1.8%	

Source: British Columbia Tourism Room Revenue, B.C. Stats

4. Employment Projections

In evaluating tourism labour market conditions, it is first important to realize that tourism is not a stand-alone industry in the standard industry classification. Tourism activities span over a number of industries and as such tourism employment refers to the sum of employment in a number of industries.

There are at least two different ways of measuring tourism employment. Statistics Canada at the national level and at the provincial level the BC Stats define the tourism sector as one which “includes a number of different industries that directly sell goods and services to tourists. These include some types of retailers (e.g., food stores, general merchandise stores, gas stations, RV dealers, clothing stores, and small retailers who sell souvenirs and other gift items to visitors)”, as well as some in the transportation sector, some in the amusement and recreation industries, many in accommodation and food services industries, and some in other industries such as telecommunication services and auto repair services (Hallin, 2008). Since not all businesses in these industries serve tourists exclusively, only some of the total employment in these industries can be attributed to tourism activities.

There are issues regarding this way of measurement. There may be different ways of defining a tourist. Also to consider is the way shares in each of the above industries should be defined as attributing to tourism activities. Currently BC Stats allocates shares in each of the related industries in the following manner, with revisions made in 2007 (Hallin, 2008):

- For transportation, the tourist proportion of passenger air transportation was reduced from just under 100% to 95%, bringing it more in line with ratios used in other jurisdictions.
- The tourist proportion of passenger rail transportation was increased from 86% to 92%.
- For public passenger transit, the tourist proportion was increased from less than one percent to 3.5%.
- For retail trade, the tourist proportion for food and drug stores was reduced from 12.5% to 7.5%.
- For clothing stores, there was also a reduction, from 10% to 7%.
- In the accommodation industry, the tourist proportion for campgrounds was reduced to 95%. However, campgrounds account for a very small percentage of total industry output, so the effect of this change on the overall numbers is minimal. (Note that the proportion attributed to tourists in other types of accommodation arrangements remains unchanged.)

- For food and drinking places, the tourism proportions in use were reduced to 22.5% for full and limited service restaurants and drinking places. For other types of food services (which includes caterers plus mobile food services), the tourist share was reduced to 10%, since this industry primarily serves local residents.
- In amusement and recreation, the ratio for theatrical and staged entertainment was increased to 20% to account for regional shows throughout BC where most of the paying audience is tourists. Similarly, the golf course proportion was increased to 24.5%, based on information obtained from the BC Golf Association.
- For car and truck rentals, the tourism proportion was reduced to 70% to account for local usage of these services.
- The ratio for university and college education was reduced to 0.4%.

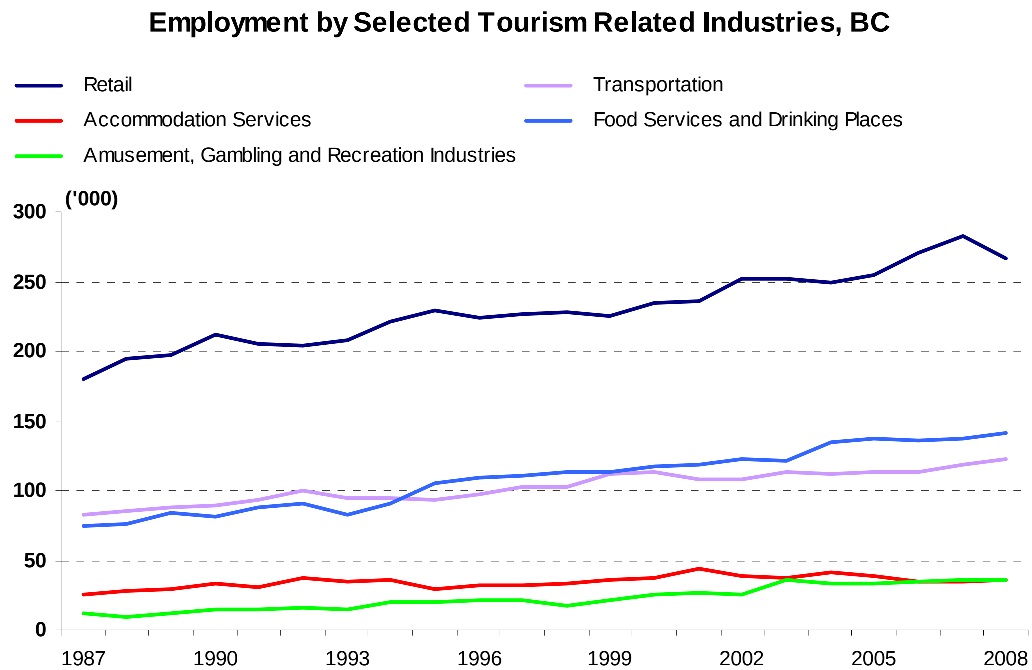
Unfortunately a similar method to assess tourism employment levels on a sub-provincial basis is not possible due to lack of regional level data in GDP and employment. Also, from a human resources planning perspective, differentiating a worker in the same industry depending on whether he serves a tourist or a local resident is misleading. This is because the skills acquired are mostly transferrable, and as such it is reasonable to estimate tourism employment focusing on industries and occupations that are core to tourism activities. This is also a method consistent with that utilized in two previous regional labour market studies completed in 2006 and 2007 for tourism regions in British Columbia.

For the purposes of this report, we will focus our analysis on the core industries of accommodation, food and beverage services, as well as amusement and recreation. Other industries that are closely related to serving tourists are retail trade and transportation. For occupational analysis, we will concentrate on key occupations in these industries serving tourists.

4.1. Core Tourism Employment in 2008

Within BC between the years of 2000 to 2008, overall employment growth in the economy was at an average growth rate of 2.3% per year. Employment growth of these core tourism related industries varied. The one that has experienced strongest growth is Amusement, Gambling, and Recreation Services, at an annual growth rate of 5.0%. Next is the Food and Beverage Services, at an annual growth rate of 2.4%. Employment growth in other three industries (Retail Trade, Transportation, and Accommodation Services) is lower than the provincial average. In fact, overall employment in the Accommodation Services industry experienced a slight decline at the rate of 0.4% per year. Actual employment in these industries is shown in Figure 7.

Figure 7:



Source: LFS, Statistics Canada

At the development region level, this level of detail on employment by industry is not available. Instead, the following Figure 8 makes comparison of employment growth in selected industries in the Mainland/Southwest Development Region and the BC total.

Figure 8: Employment in Core Tourism Industries, Mainland/Southwest Development Region and BC

	2000	2008	2000 to 2008	
	(in '000)		Growth	Average Annual %
Mainland/Southwest				
Trade	175.9	212.8	36.9	2.4%
Transportation and warehousing	78.4	84.1	5.7	0.9%
Information, culture and recreation	70.3	82.5	12.2	2.0%
Accommodation and food services	88.6	101.7	13.1	1.7%
BC				
Trade	300.8	354.8	54	2.1%
Transportation and warehousing	116.9	128	11.1	1.1%
Information, culture and recreation	98.5	118.1	19.6	2.3%
Accommodation and food services	154.5	178.1	23.6	1.8%

Source: LFS, Statistics Canada

It is noted that industry aggregation shown in Fig. 8 is broader than those shown in the previous Fig. 7, due to availability of data.

In estimating occupational employment for the region, our starting point is the estimated number of employed by occupation in 2006 for Development Regions in the province, through BC Stats' Regional Employment Projection Model (REPM) (BC Stats, 2007). We have made use of information on employment growth by industry in the region between 2006 and 2007 and between 2007 and 2008 to arrive at estimates of occupational employment in 2007 and 2008.

Our estimate of total employment in core tourism occupations in the Mainland/Southwest region (excluding the Sea-to-Sky Corridor) in 2008 was 207,900, a decline of 0.6% over 2007. From 2006 to 2007 core tourism occupations experienced relatively strong employment growth at 3.3%.

In 2008, occupations in tourism related industries in the region all experienced decline in the number of employed. Among them, employment in Trade and Transportation and Warehousing declined by 2.6% and 1.9% respectively. Those employed in Accommodation and Food Services industries experienced decline by 1.1%, while those in Information, Culture and Recreation experienced decline of 1.8%.

4.2. Employment Projections to 2011

In Figure 9 attached, we provide the occupation detail for projected employment levels in each of the core tourism related occupations in the Mainland/Southwest region to year 2011.

For estimating employment in 2009, the current economic downturn that is occurring globally and its resulting negative impact on employment in essentially every industry has been taken into account.

In looking at the overall economic picture, the following points come from the Tourism Industry Association of Canada (TIAC):

- Economy has been "drawn into the vortex of recession"(OECD)
- The present forecast for international tourism by the United Nations World Tourism Organization calls for between 0% and 2% decline in 2009.
- International tourism could decline by as much as 3% if the economy continues to falter.

Figure 9: Estimated Employment and Projections for Core Tourism Occupations, Mainland/Southwest Region (excluding Sea-to-Sky), 2006 to 2015

	Employed 2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Average Annual Growth 2006/11	2011/15
A211.0621 Retail Trade Managers	27,269	27,920	27,689	27,546	27,916	28,378	28,846	29,323	29,785	30,277	0.8%	1.6%
A221.0631 Restaurant and Food Service Managers	9,900	10,293	10,182	10,144	10,244	10,369	10,495	10,623	10,747	10,878	0.9%	1.2%
A222.0632 Accommodation Service Managers	2,150	2,211	2,182	2,153	2,155	2,163	2,171	2,180	2,187	2,195	0.1%	0.4%
B316.1226 Conference and Event Planners	1,043	1,073	1,104	1,098	1,114	1,134	1,154	1,175	1,195	1,216	1.7%	1.8%
F154.5254 Program Leaders and Instructors in Recreation and Sport	4,072	4,280	4,291	4,272	4,321	4,381	4,442	4,504	4,564	4,628	1.5%	1.4%
G011.6211 Retail Trade Supervisors	3,154	3,241	3,186	3,169	3,213	3,267	3,323	3,379	3,434	3,492	0.7%	1.7%
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	2,322	2,413	2,389	2,380	2,404	2,434	2,464	2,494	2,524	2,555	0.9%	1.2%
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	275	283	283	282	285	289	293	297	301	305	1.0%	1.3%
G211.6421 Retail Salespersons and Sales Clerks	45,893	47,252	46,568	46,325	46,953	47,735	48,531	49,341	50,125	50,961	0.8%	1.6%
G311.6611 Cashiers	18,553	19,112	18,760	18,668	18,906	19,203	19,504	19,810	20,106	20,421	0.7%	1.5%
G411.6241 Chefs	3,326	3,452	3,420	3,407	3,441	3,482	3,524	3,566	3,607	3,651	0.9%	1.2%
G412.6242 Cooks	12,340	12,805	12,669	12,622	12,745	12,898	13,053	13,210	13,361	13,522	0.9%	1.2%
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	1,977	2,056	2,036	2,028	2,048	2,074	2,100	2,126	2,151	2,178	1.0%	1.2%
G512.6452 Bartenders	2,346	2,428	2,424	2,415	2,439	2,468	2,498	2,528	2,557	2,588	1.0%	1.2%
G513.6453 Food and Beverage Servers	15,156	15,749	15,591	15,531	15,685	15,876	16,070	16,266	16,455	16,656	0.9%	1.2%
G715.6435 Hotel Front Desk Clerks	1,640	1,704	1,686	1,680	1,696	1,717	1,738	1,759	1,779	1,801	0.9%	1.2%
G721.6441 Tour and Travel Guides	698	726	724	708	713	721	729	738	746	755	0.6%	1.2%
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeing guide, rafting guide	298	315	305	304	307	311	314	318	322	326	0.8%	1.2%
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slo	1,443	1,534	1,482	1,455	1,457	1,467	1,483	1,499	1,514	1,530	0.3%	1.1%
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	1,051	1,128	1,114	1,109	1,121	1,137	1,153	1,169	1,184	1,201	1.6%	1.4%
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	667	714	708	705	711	719	726	734	742	749	1.5%	1.0%
G93.666 Cleaners	26,822	27,546	28,328	28,153	28,676	29,326	29,991	30,670	31,333	32,042	1.8%	2.2%
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	20,154	20,968	20,796	20,746	20,978	21,256	21,533	21,813	22,084	22,370	1.1%	1.3%
Total of Selected Occupations	202,549	209,200	207,916	206,900	209,528	212,806	216,137	219,523	222,802	226,297	1.0%	1.5%

Source: REPM, RKA

Focus group participant discussions offered the following in assessing tourist activity trends and employment impact of the current recession in their region:

- People travel closer to home, including domestic travel.
- Certain segments of travel, including Visiting Friends and Relatives (VFR), repeat visitors and independent travel are likely to be more resilient to economic conditions.
- People will still travel, but their trips will be more economical. Camping is likely to see some growth.
- Visitors stay for shorter periods of time.
- Visitors spend less.
- Travelers book later, waiting for the best offers and delaying the decision to travel until they are comfortable with the cost.
- Price is a determining factor with most travelers, but even more so during a recession.
- Destinations offering value to consumers – through pricing, adding value to the experience, and favorable exchange rates – will have a distinct advantage.
- Cost containment will be crucial for tourism businesses in the coming months as companies ensure that they are able to compete on price and value.
- Partnerships with other tourism businesses that attract similar demographics and are complementary to the service offering are an important way to add value to the tourism experience.

Based on our research and inputs from focus group participants and follow-up interviews, we are presenting our projections as follows. Detailed notes on techniques used to derive these numbers are presented in Appendix IV at the back of the report.

Overall, employment in core tourism occupations in 2009 is estimated at 206,900 in the Mainland/Southwest region, a decline of 0.5% over year 2008.

It is also expected that overall employment in core tourism industries will grow by 1.3% in the year 2010 and 1.6% in 2011. This is based upon the assumption that the global economic environment should start to improve in 2010. It is also expected that there will be modest increase in tourism activities from visitors who come for the 2010 Vancouver/Whistler Olympic Games, and increased business travel during the period of the Games.

Between 2006 and 2011, the total number of people employed in core tourism occupations is expected increase by about 10,300. Among all these occupations, the occupational group of Cleaners is expected to generate the largest number of openings (2,500 in total) due to increase in business activities.

However, this occupational group requires some further explanation. By itself, this is the third largest occupation in size (based on 2006 data), after Retail Salespersons and Retail Trade Managers. This is a fairly broad occupational group, including persons who perform light duty, heavy duty, and also specialized cleaning work. Hotel housekeeping staff are also included in this occupational group. Between 2006 and 2011, it is expected that there will be a total growth of approximately 2,500 new openings, and between 2011 and 2015, a total of 2,700. It is noted that about 20% in this occupational group work in the Accommodation and Food Services industry.

Retail Salespersons and Retail Trade Managers are the occupations that are expected to see large numbers of openings due to growth requirements. This is reflective of the retail trade industry in the region. The category of Food Counter Attendants, Kitchen Helpers and Related Occupations is also expected to see large increases in employment growth, for about 1,000 positions. The many positions resulting from these occupations are due to the fact that these are fairly large occupations in size and as such are able to generate many new positions, even at modest growth rates. Figure 10 shows the change in employment level in these occupations in each year. Industry feedback has also advised that the "quick service" sector of the restaurant industry is continuing to grow despite the current economy and these operators also experience difficulty finding staff.

The occupations that are expected to experience the highest average annual growth rates between 2006 and 2011 include Conference and Event Planners (1.7% per year), Operators and Attendants in Amusement, Recreation and Sport (e.g. amusement ride op., amusement park attendant, campground attendant) (1.6% per year). The Vancouver convention centre itself has created 10 new positions in the past year, in preparation of opening the new facility. However, this hiring was unique and overall these occupation categories are small in size, and as such the number of new openings generated is limited.

4.3. Projecting Ahead to 2015

Tourism activities are expected to further pick up their pace between 2011 and 2015, as global economic conditions should continue to improve from the current downturn. It is also possible that there will be increased tourism activities as a result of the extra promotions generated via the 2010 Winter Olympic Games.

Figure 10: Estimated and Projected Employment Growth for Core Tourism Occupations, Mainland/Southwest Region (excluding Sea-to-Sky), 2006 to 2015

	Year over Year Change		Projections								Total Growth	
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2006/11	2011/15
A211.0621 Retail Trade Managers		651	-231	-143	370	461	469	477	462	492	1,108	1,900
A221.0631 Restaurant and Food Service Managers		393	-111	-39	101	125	126	128	123	131	469	509
A222.0632 Accommodation Service Managers		61	-29	-29	3	8	8	8	7	8	14	32
B316.1226 Conference and Event Planners		29	32	-6	16	20	20	21	20	21	91	82
F154.5254 Program Leaders and Instructors in Recreation and Sport		208	11	-19	48	60	61	62	60	64	310	247
G011.6211 Retail Trade Supervisors		87	-55	-17	44	54	55	56	55	58	114	224
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)		90	-23	-9	24	30	30	31	29	31	112	122
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive housekeep		9	0	-1	3	4	4	4	4	4	14	16
G211.6421 Retail Salespersons and Sales Clerks		1,359	-685	-243	628	783	796	809	784	836	1,842	3,225
G311.6611 Cashiers		559	-352	-92	238	297	301	306	296	315	650	1,218
G411.6241 Chefs		126	-32	-13	33	41	42	42	41	43	156	169
G412.6242 Cooks		465	-136	-48	123	153	155	157	151	161	558	624
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)		79	-20	-8	21	26	26	26	25	27	97	104
G512.6452 Bartenders		82	-4	-9	24	29	30	30	29	31	122	120
G513.6453 Food and Beverage Servers		592	-158	-59	154	191	194	196	189	201	720	779
G715.6435 Hotel Front Desk Clerks		65	-18	-6	17	21	21	21	20	22	77	84
G721.6441 Tour and Travel Guides		27	-2	-16	5	8	8	9	8	9	23	34
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeng guide, rafting guide)		17	-10	-1	3	4	4	4	4	4	13	15
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slot superviso		91	-52	-27	2	11	16	16	15	16	24	63
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amusement ride (		77	-14	-5	13	16	16	16	16	17	86	64
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services attendant)		47	-6	-2	6	8	8	8	7	8	52	31
G93.666 Cleaners		724	782	-175	523	650	665	679	663	709	2,504	2,715
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations		814	-172	-50	232	278	277	280	271	287	1,103	1,114
Total of Selected Occupations		6,651	-1,284	-1,016	2,628	3,278	3,331	3,385	3,280	3,495	10,257	13,491

Source: REPM, RKA

On the other hand, some of the focus group participants also indicated that the current economic downturn could mean little or no employment growth in tourism activities for three to four years, as travel for pleasure expenditure is generally discretionary in nature.

Consequently, we project that overall employment of core tourism occupations will increase from 212,800 in 2011 to 226,300 by 2015, at an average growth rate of 1.5% per year. This is also shown in Fig. 9.

Among all core tourism occupations, Conference and Event Planners, Retail Trade Supervisors, Retail Sales Clerks, as well as Cleaners are expected to experience the strongest employment growth (in terms of average annual growth rates). However, the occupational group of Conference and Event Planners is very small in size, and as such total number of openings over this period is expected to be 32, or eight new positions per year.

Because of their large occupational size, Retail Sales Clerks, Retail Trade Managers, Cleaners, and Food Counter Attendants, Kitchen Helpers and Related Occupations are occupations that are expected to generate the largest number of openings amongst these core tourism occupations. Again, this ties in with the growth occurring in the “quick-service” food sector.

We have, in Figure 11 that follows, shown our estimates of employment by core tourism related occupation **in the core tourism related industries**. For this purpose, we have included the industries of Retail Trade, Transportation, Amusement, Gambling and Recreation, Accommodation Services, and Food Services and Drinking Places.

Figure 11: Estimated Employment and Projections for Core Tourism Occupations in Core Tourism Related Industries, Mainland/Southwest Region (excluding Sea-to-Sky), 2006 to 2015

	Employed		Projections								Average Annual Growth	
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2006/11	2011/15
A211.0621 Retail Trade Managers	21,208	21,714	21,535	21,423	21,711	22,070	22,435	22,805	23,164	23,547	0.8%	1.6%
A221.0631 Restaurant and Food Service Managers	9,599	9,980	9,873	9,835	9,933	10,054	10,176	10,301	10,420	10,547	0.9%	1.2%
A222.0632 Accommodation Service Managers	1,880	1,933	1,908	1,882	1,885	1,892	1,899	1,906	1,912	1,919	0.1%	0.4%
B316.1226 Conference and Event Planners	139	143	147	147	149	151	154	157	160	162	1.7%	1.8%
F154.5254 Program Leaders and Instructors in Recreation and Sport	2,406	2,529	2,535	2,524	2,553	2,589	2,625	2,662	2,697	2,735	1.5%	1.4%
G011.6211 Retail Trade Supervisors	2,729	2,805	2,758	2,743	2,781	2,828	2,876	2,924	2,972	3,022	0.7%	1.7%
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	2,177	2,262	2,240	2,231	2,254	2,282	2,310	2,339	2,366	2,396	0.9%	1.2%
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	201	207	207	206	209	211	214	217	220	223	1.0%	1.3%
G211.6421 Retail Salespersons and Sales Clerks	37,014	38,110	37,558	37,362	37,868	38,500	39,142	39,794	40,427	41,101	0.8%	1.6%
G311.6611 Cashiers	17,041	17,554	17,231	17,146	17,365	17,637	17,914	18,195	18,467	18,756	0.7%	1.5%
G411.6241 Chefs	3,063	3,178	3,149	3,137	3,168	3,206	3,245	3,284	3,321	3,361	0.9%	1.2%
G412.6242 Cooks	11,263	11,688	11,564	11,520	11,633	11,773	11,914	12,057	12,195	12,342	0.9%	1.2%
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	1,923	1,999	1,980	1,972	1,992	2,017	2,042	2,067	2,092	2,118	1.0%	1.2%
G512.6452 Bartenders	2,160	2,236	2,233	2,224	2,246	2,273	2,301	2,328	2,355	2,384	1.0%	1.2%
G513.6453 Food and Beverage Servers	14,747	15,323	15,169	15,112	15,261	15,448	15,636	15,827	16,011	16,206	0.9%	1.2%
G715.6435 Hotel Front Desk Clerks	1,640	1,704	1,686	1,680	1,696	1,717	1,738	1,759	1,779	1,801	0.9%	1.2%
G721.6441 Tour and Travel Guides	224	233	233	228	229	232	234	237	240	243	0.6%	1.2%
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeing guide, rafting guide	192	203	197	196	198	200	203	205	208	210	0.8%	1.2%
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slo	1,429	1,519	1,467	1,441	1,442	1,453	1,468	1,484	1,499	1,515	0.3%	1.1%
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	835	896	885	881	891	903	916	929	941	954	1.6%	1.4%
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	587	628	622	620	626	632	639	646	652	659	1.5%	1.0%
G93.666 Cleaners	6,929	7,116	7,318	7,273	7,408	7,576	7,748	7,923	8,094	8,277	1.8%	2.2%
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	17,733	18,449	18,298	18,254	18,458	18,703	18,946	19,193	19,431	19,683	1.1%	1.3%
Total of Selected Occupations	157,119	162,410	160,792	160,039	161,955	164,346	166,774	169,239	171,623	174,162	0.9%	1.5%

Source: RKA

4.4. Seasonal Employment

Seasonality in the Vancouver, Coast and Mountains tourism region is not as severe as in many other regions of the province. The Vancouver area is able to generate a reasonable level of year-round hotel traffic as a result of meetings/conventions and the urban tourism product being offered. This is the same in the Fraser Valley area of the region. The Sunshine Coast tourism product is much more seasonal in nature, with some operations closing during the winter months.

Major visitor attractions such as the Vancouver Aquarium, Capilano Suspension Bridge and Grouse Mountain all offer a year-round tourism product, albeit with significant peak visitation during the summer months and the need to manage staffing levels during these times accordingly.

In the Figure that follows, we make use of available statistical data from the Labour Force Survey to develop seasonal patterns for core tourism related occupations in the Mainland/Southwest Region. While data in the columns shows a seasonality pattern (winter) in 2007 for the region, the same pattern did not recur throughout the years in the data which we have reviewed. Therefore, for estimating a potential seasonality pattern for future years, we have derived our result based upon monthly non-seasonally-adjusted employment data for occupational groups in the region over the period of 1995 to 2008.

Overall employment in the region is heavily weighed towards employment in Greater Vancouver and surrounding areas, in which case seasonality is less of an issue. Overall the data indicates that in summer months, employment tends to be about three percent higher than average annual employment, while in the winter time, seasonality is related to increased economic activities during the Christmas season. Employment during the winter season was especially strong in 2007, but when we look at more long term data, the seasonality is minimal, at one percent of the yearly average workforce.

On the other hand, we note that even though overall employment levels did not show substantial change during the summer months, actual hours worked do increase, indicating that employers deal with seasonality by way of changing the hours by staff as opposed to cutting staff when business is less busy.

Figure 12: Estimated and Projected Seasonal Employment for Core Tourism Occupations in Core Tourism Related Industries, Mainland/Southwest Region (excluding Sea-to-Sky), 2007 and 2011

	2007 Average	Seasonal Added - Summer	Seasonal Added - Winter	2011 Average	Seasonal Added - Summer	Seasonal Added - Winter
A211.0621 Retail Trade Managers	21,714	206	577	22,070	263	263
A221.0631 Restaurant and Food Service Managers	9,980	0	80	10,054	354	0
A222.0632 Accommodation Service Managers	1,933	27	19	1,892	6	7
B316.1226 Conference and Event Planners	143	0	1	151	5	0
F154.5254 Program Leaders and Instructors in Recreation and Sport	2,529	0	20	2,589	91	0
G011.6211 Retail Trade Supervisors	2,805	53	149	2,828	67	68
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	2,262	0	36	2,282	161	0
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	207	6	4	211	1	2
G211.6421 Retail Salespersons and Sales Clerks	38,110	721	2,026	38,500	918	919
G311.6611 Cashiers	17,554	332	933	17,637	420	421
G411.6241 Chefs	3,178	0	51	3,206	226	0
G412.6242 Cooks	11,688	0	186	11,773	830	0
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	1,999	0	32	2,017	142	0
G512.6452 Bartenders	2,236	0	36	2,273	160	0
G513.6453 Food and Beverage Servers	15,323	0	244	15,448	1,089	0
G715.6435 Hotel Front Desk Clerks	1,704	48	34	1,717	11	12
G721.6441 Tour and Travel Guides	233	7	5	232	2	2
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeing guide, rafting guide	203	6	4	200	1	1
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slo	1,519	0	0	1,453	0	0
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	896	25	18	903	6	7
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	628	18	13	632	4	5
G93.666 Cleaners	7,116	200	143	7,576	49	55
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	18,449	518	371	18,703	122	136
Total of Selected Occupations	162,410	2,166	4,983	164,346	4,931	1,897

Source: RKA

4.5. Replacement Needs

One last source of labour demand that we will discuss here is due to attrition, that is, replacement needs due to workers leaving the labour force, for reasons such as retirement or going back to school for further education and training or disability. Note that this does not include replacement needs due to staff turnover.

As the workforce in tourism related occupations tends to be younger compared to the general workforce, (we will discuss this further in the next Section on labour supply,) replacement needs due to attrition are relatively modest. In the Table below, we have presented potential number of job openings in these occupations in core tourism related industries.

Figure 13: Estimated Number of Openings Due to Attrition for Core Tourism Occupations in Core Tourism Related Industries, Mainland/Southwest Region (excluding Sea-to-Sky), 2009 to 2015

	2009 to 2015	
	Attrition Rate	Number
A211.0621 Retail Trade Managers	2.7%	4,214
A221.0631 Restaurant and Food Service Managers	2.7%	1,941
A222.0632 Accommodation Service Managers	2.7%	362
B316.1226 Conference and Event Planners	3.6%	39
F154.5254 Program Leaders and Instructors in Recreation and Sport	0.9%	164
G011.6211 Retail Trade Supervisors	1.9%	389
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	1.9%	312
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	1.9%	29
G211.6421 Retail Salespersons and Sales Clerks	1.8%	4,859
G311.6611 Cashiers	1.1%	1,406
G411.6241 Chefs	1.1%	240
G412.6242 Cooks	1.1%	886
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	1.2%	169
G512.6452 Bartenders	1.2%	190
G513.6453 Food and Beverage Servers	1.2%	1,286
G715.6435 Hotel Front Desk Clerks	2.2%	273
G721.6441 Tour and Travel Guides	2.2%	36
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeing guide, rafting guide	2.1%	30
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slo	2.1%	221
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	1.7%	108
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	1.8%	79
G93.666 Cleaners	3.1%	1,710
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	1.2%	1,610
Total of Selected Occupations	1.0%	20,555

Source: COPS, RKA

The attrition rates we show here are based upon the total number of replacement needs for all occupations between 2005 and 2015 in the province, derived from the Canadian Occupational Projections System (COPS). We have applied attrition rates for these occupations on the projected number employed in these occupations in core tourism related industries each year to arrive at the total number of job openings due to attrition.

The occupations that are expected to generate the largest number of jobs due to attrition are Retail Sales Clerks and Retail Sales Managers. The attrition rate for managers is higher than average because of the age profile of these managers as well as the size of the occupation. For Salespersons, the large attrition needs are the result of the large size of the occupation, although attrition rate for the occupation is also higher than the average for all occupations in this group.

In sum, the total number of job openings in core tourism related occupations in core tourism related industries for the region over the years of 2009 to 2015 is summarized in the Figure below.

Figure 14: Estimated Number of Total Job Openings Due to Growth and Attrition for Core Tourism Occupations in Core Tourism Related Industries, Mainland/Southwest Region (excluding Sea-to-Sky), 2009 to 2015

	Total 2009 to 2015
A211.0621 Retail Trade Managers	6,523
A221.0631 Restaurant and Food Service Managers	2,654
A222.0632 Accommodation Service Managers	399
B316.1226 Conference and Event Planners	55
F154.5254 Program Leaders and Instructors in Recreation and Sport	375
G011.6211 Retail Trade Supervisors	668
G012.6212 Food Service Supervisors (e.g. canteen / catering / cate supervisor)	476
G013.6213 Executive Housekeepers (e.g. housekeeping manager, assistant executive	45
G211.6421 Retail Salespersons and Sales Clerks	8,598
G311.6611 Cashiers	3,016
G411.6241 Chefs	464
G412.6242 Cooks	1,707
G511.6451 Maîtres d'hôtel and Hosts/Hostesses (e.g. restaurant host/hostess)	315
G512.6452 Bartenders	349
G513.6453 Food and Beverage Servers	2,380
G715.6435 Hotel Front Desk Clerks	394
G721.6441 Tour and Travel Guides	51
G722.6442 Outdoor Sport and Recreational Guides (e.g., canoeing guide, rafting guide	45
G723.6443 Casino Occupations (e.g. croupier, keno runner, slot machine attendant, slc	295
G731.6671 Operators and Attendants in Amusement, Recreation and Sport (e.g. amus	181
G732.6672 Other Attendants in Accommodation and Travel (e.g. hotel guest services a	118
G93.666 Cleaners	2,715
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	3,040
Total of Selected Occupations	34,864

Source: RKA

5. Labour Supply Issues

As with other industries and with tourism activities elsewhere in BC and Canada, the question is how to obtain the labour supply that is needed to allow for industry growth.

We have shown, in Section 4, that over the period of 2009 to 2015 a total of 34,900 job openings are projected to be available in the Mainland/Southwest region for the core tourism related occupations in core tourism related industries. This translates to almost 5,000 positions per year on average. This is a conservative estimate as it does not include any additional openings during either the summer or winter seasonality requirements.

In this section, we first present information regarding general demographic trends in the Mainland/Southwest region, and also population migration patterns in the region. We then provide estimates and projections of the potential labour force growth in the region. We also discuss sources of labour supply in the tourism industries, along with other factors impacting labour supply in the industries.

5.1. Demographic Aspects

The demographics of those working in the tourism sector are somewhat different from the overall workforce. Youth, those aged between 15 and 24, accounts for 15% in the overall workforce in BC, those in the core working age population (age 25 to 44) account for over two-thirds, while older workers (those aged 55 and over) represent about 17% of the overall workforce.

For the Mainland/Southwest region, it is a similar age profile for the general workforce. Youth accounts for 14%, those in the core working age population account for over two-thirds (70%), and older workers account for 16% of the overall workforce.

For those in the core tourism related occupations we are studying, youth represent almost a third, the same as that group of workers in the Mainland/Coast region (31% vs. 31%). This is shown in Figure 15.

Figure 15: Age Profile of Tourism Workforce, BC and Mainland/Southwest Region – Youth

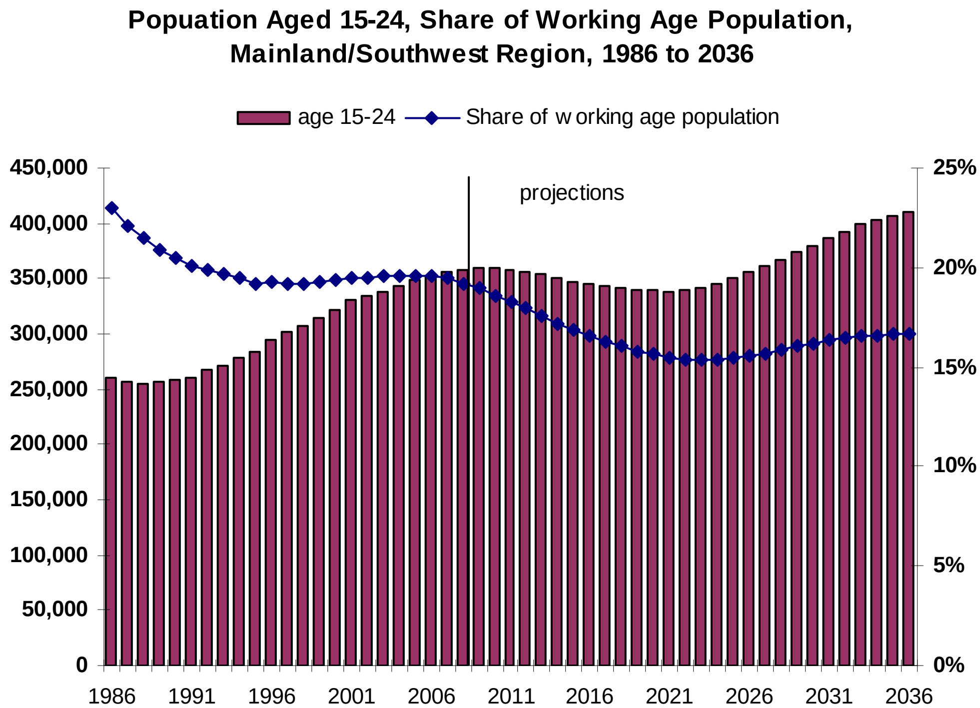
	BC	Mainland /Southwest
A211 Retail trade managers	6%	7%
A221 Restaurant and food service managers	8%	8%
A222 Accommodation service managers	4%	4%
B316 Conference and event planners	11%	10%
F154 Program leaders and instructors in recreation, sport and fitness	40%	43%
G011 Retail trade supervisors	21%	23%
G012 Food service supervisors	44%	42%
G013 Executive housekeepers	4%	5%
G211 Retail salespersons and sales clerks	33%	34%
G311 Cashiers	48%	49%
G411 Chefs	14%	15%
G412 Cooks	35%	33%
G511 Maîtres d'hôtel and hosts	77%	79%
G512 Bartenders	31%	34%
G513 Food and beverage servers	48%	46%
G715 Hotel front desk clerks	30%	27%
G721 Tour and travel guides	20%	19%
G722 Outdoor sport and recreational guides	15%	16%
G723 Casino occupations	12%	10%
G731 Operators and attendants in amusement, recreation and sport	41%	44%
G732 Other attendants in accommodation and travel	33%	23%
G93 Cleaners	14%	11%
G961 Food counter attendants, kitchen helpers and related occupations	60%	56%
Total of Selected Occupations	31%	31%

Source: Statistics Canada, 2006 Census

Comparing individual occupations in the list, there is generally not much difference between those in the Mainland/Southwest region and in BC. The only occupations where younger workers in the Mainland/Southwest region account for an even higher percentage than BC are Outdoor Sports and Recreation Guides, and Operators and Attendants in Amusement, Recreation and Sport.

The emphasis in the tourism sector on using younger workers in many of the core tourism related occupations has particular concern at this time. As we know, wider employment growth across all industries in the region, along with an aging population, means that there will be many openings for young people in the region in the long run. On the other hand, youth population in the region, as is the case in BC, are declining both in absolute number and in percentage of the working-age population (defined as those aged 15 to 64), as shown in Figure 16. This is not expected to improve until after 2020.

Figure 16:



Source: BC Stats, Population Estimates & Projections, PEOPLE 33

This will have major implications for the availability of workers overall and specifically for the tourism jobs that young people have traditionally filled. The direct impact on the tourism industry is that there will be fewer workers for the less skilled, volume jobs, which currently have a high proportion of workers aged 15 to 24. To some extent work in these jobs, especially filling summer job openings, has been compatible with the school and work patterns for those in their early years of post-secondary education. But the competition for the same pool of labour is increasing. This makes it even more important for the industry to have a long term plan to meet potential labour requirements.

Compared to the core tourism related workforce in the province, those in the region see an even larger proportion in the age 25 to 54 cohort. This is because the Lower Mainland and surrounding areas offer the largest number of employment opportunities in general.

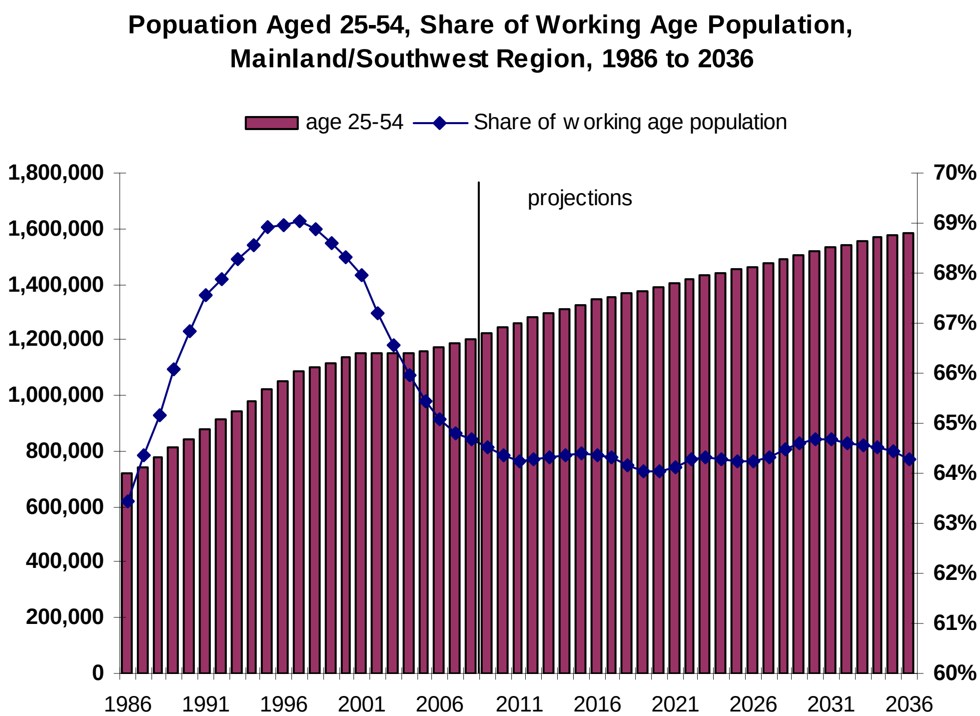
Figure 17: Age Profile of Tourism Workforce, BC and Mainland/Southwest Region – Core Working Age Population

	BC	Mainland /Southwest
A211 Retail trade managers	74%	76%
A221 Restaurant and food service managers	78%	80%
A222 Accommodation service managers	67%	72%
B316 Conference and event planners	82%	83%
F154 Program leaders and instructors in recreation, sport and fitness	53%	51%
G011 Retail trade supervisors	71%	70%
G012 Food service supervisors	50%	54%
G013 Executive housekeepers	82%	92%
G211 Retail salespersons and sales clerks	51%	52%
G311 Cashiers	45%	45%
G411 Chefs	76%	75%
G412 Cooks	54%	56%
G511 Maîtres d'hôtel and hosts	19%	18%
G512 Bartenders	61%	60%
G513 Food and beverage servers	49%	51%
G715 Hotel front desk clerks	61%	67%
G721 Tour and travel guides	62%	61%
G722 Outdoor sport and recreational guides	65%	67%
G723 Casino occupations	81%	84%
G731 Operators and attendants in amusement, recreation and sport	39%	36%
G732 Other attendants in accommodation and travel	61%	70%
G93 Cleaners	63%	66%
G961 Food counter attendants, kitchen helpers and related occupations	33%	36%
Total of Selected Occupations	56%	57%

Source: Statistics Canada, 2006 Census

In the long run, this pool of labour in the region is still increasing in absolute numbers, but its share in the core working-age population is essentially unchanged. It will remain between 64% and 65% up to 2036. This is shown in Figure 18. This means that for the industry there is still a healthy level of labour supply from this age group. Obviously, the industry will want to maintain this level of labour source.

Figure 18:



Source: BC Stats, Population Estimates & Projections, PEOPLE 33

Older workers in the region account for a slightly smaller than average proportion in the core tourism related workforce, compared to the province. This is shown in Figure 19. Compared with other regions in the province, older workers play a smaller role in filling in jobs in these core tourism occupations.

One occupation, though not unique to the region, where older workers account for more than one in five in the occupation, is cleaners (including house-keeping staff in accommodation services). This information from our data analysis is consistent with information we gathered from industry sources. In fact, input during the focus groups led to discussion of the imminent retirement of many individuals currently employed in the occupation of room attendant/housekeeping. It seems most Canadian young people have neither the work ethic nor the interest to pursue a career in this direction. Finding and retaining replacement workers for this essential component of the accommodation sector will require planning and ingenuity.

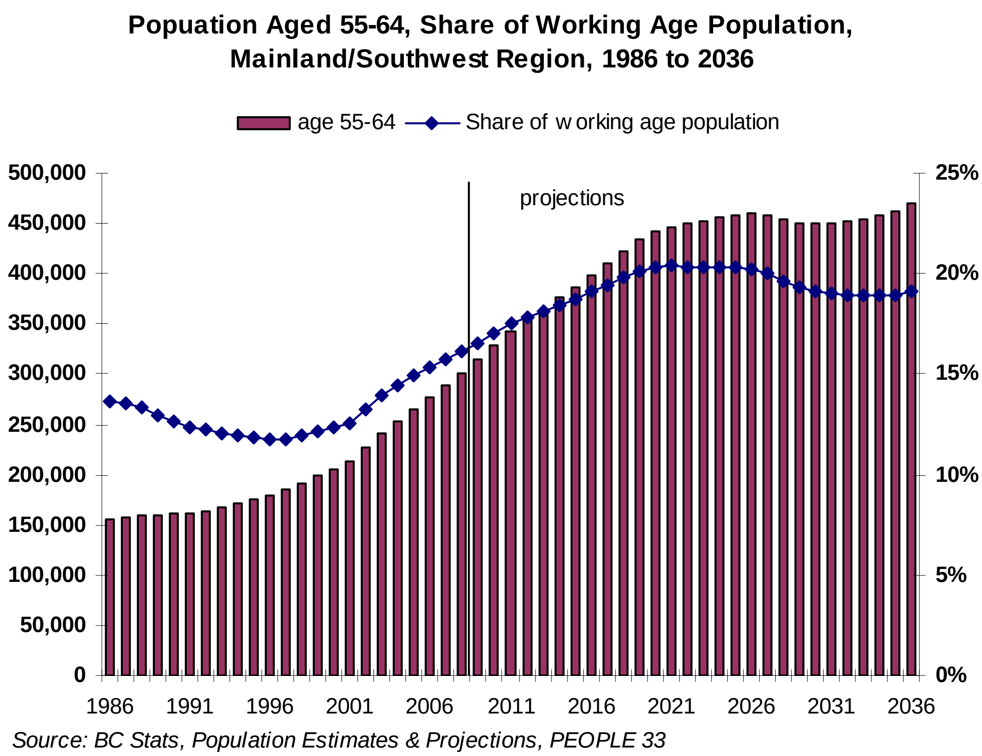
Figure 19: Age Profile of Tourism Workforce, BC and Mainland/Southwest Region – Older Workers

	BC	Mainland /Southwest
A211 Retail trade managers	19%	17%
A221 Restaurant and food service managers	14%	12%
A222 Accommodation service managers	29%	25%
B316 Conference and event planners	8%	7%
F154 Program leaders and instructors in recreation, sport and fitness	7%	6%
G011 Retail trade supervisors	8%	7%
G012 Food service supervisors	5%	5%
G013 Executive housekeepers	13%	0%
G211 Retail salespersons and sales clerks	15%	14%
G311 Cashiers	7%	6%
G411 Chefs	9%	9%
G412 Cooks	11%	12%
G511 Maîtres d'hôtel and hosts	4%	3%
G512 Bartenders	7%	6%
G513 Food and beverage servers	3%	3%
G715 Hotel front desk clerks	9%	6%
G721 Tour and travel guides	18%	20%
G722 Outdoor sport and recreational guides	20%	17%
G723 Casino occupations	7%	6%
G731 Operators and attendants in amusement, recreation and sport	19%	20%
G732 Other attendants in accommodation and travel	7%	8%
G93 Cleaners	22%	22%
G961 Food counter attendants, kitchen helpers and related occupations	7%	8%
Total of Selected Occupations	13%	12%

Source: Statistics Canada, 2006 Census

Figure 20 below shows that for the region, the pool of labour in the 55 to 64 age cohort will continue to rise in the near future until at least 2025, before starting to decline slightly. As a share of the overall working-age population, older workers will continue to increase to account for almost one in four workers of the working-age population in the region by 2020.

Figure 20:



This has important implications for tourism sector employers. There needs to be a long term strategy to keep older workers in the workplace work longer and even recruiting more older workers to their workplace to help alleviate the pressure of labour shortage. The older segment of the population is well-suited to many tourism and hospitality related occupations. These people have "life skills" and many appreciate the social element of working in the industry.

5.2. Potential Labour Force Growth to 2015

In this section, we will develop a labour force growth model to show the potential size of the labour force for those tourism-related occupations under analysis in our study. The purpose is to show that, given population growth patterns projected for the three major age cohorts in the previous section, and based on historic labour force participation patterns amongst males and females in the general population in different age groups, what the size of the occupational groups would likely be in the years up to 2015. Then we will be able to decide whether there are any labour supply-demand gaps over the period under analysis, among various occupations.

From population growth by age group data we presented in the previous section, we further apply gender and age specific labour force participation rates to arrive at the potential labour force of those aged 15 to 24, aged 25 to 54, and aged 55 to 69 in the Mainland/Southwest Development Region.[1] We have obtained these gender and age specific labour force participation rates from a 2007 BC Stats study entitled *British Columbia Labour Force Participation Rate Projections to 2031*. Specifically, we made use of labour force participation rates in 2006, and projected rates in 2011 and 2016. Rates for the years in between have been derived by simple interpolation.

Afterwards, we have used 2006 Census data to derive occupational distribution of the labour force in the region, and applied the same occupational shares to the estimated and projected labour force in the region to arrive at the labour force growth for the occupations we are studying to 2015. We have also made minor adjustments to ensure the consistency between the Census data and labor force averages for the year. Figure 21 below presents our estimates and projections of the labour force by occupation in the region in 2007 and 2008, and from 2009 onwards.

[1] We have netted out a portion of the labour force assumed to meet labour requirements in the Sea-to-Sky area.

Figure 21: Estimated and Projected Labour Force by Core Tourism Occupation in Mainland/Southwest Region (excluding Sea-to-Sky Area), 2006 to 2015

	Estimated Labour Force		Projections							
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
A211 Retail trade managers	28,482	29,026	29,557	30,215	30,827	31,435	31,960	32,476	32,989	33,491
A221 Restaurant and food service managers	10,341	10,525	10,703	10,926	11,128	11,329	11,503	11,673	11,842	12,007
A222 Accommodation service managers	2,245	2,293	2,340	2,398	2,454	2,510	2,558	2,605	2,653	2,699
B316 Conference and event planners	1,090	1,108	1,125	1,146	1,165	1,184	1,200	1,216	1,231	1,246
F154 Program leaders and instructors in recreation, sport and fitness	4,253	4,312	4,355	4,417	4,458	4,495	4,526	4,550	4,572	4,596
G011 Retail trade supervisors	3,294	3,345	3,390	3,448	3,496	3,542	3,581	3,617	3,653	3,688
G012 Food service supervisors	2,425	2,459	2,483	2,518	2,542	2,563	2,580	2,594	2,607	2,621
G013 Executive housekeepers	287	291	295	301	305	310	314	318	322	326
G211 Retail salespersons and sales clerks	47,935	48,713	49,346	50,209	50,884	51,518	52,052	52,527	52,982	53,449
G311 Cashiers	19,379	19,642	19,820	20,091	20,258	20,403	20,521	20,606	20,681	20,765
G411 Chefs	3,474	3,532	3,585	3,653	3,712	3,770	3,819	3,867	3,914	3,960
G412 Cooks	12,889	13,094	13,261	13,489	13,666	13,833	13,975	14,100	14,222	14,345
G511 Maîtres d'hôtel and hosts	2,065	2,088	2,096	2,116	2,120	2,120	2,118	2,111	2,103	2,097
G512 Bartenders	2,450	2,486	2,514	2,553	2,581	2,608	2,631	2,650	2,669	2,687
G513 Food and beverage servers	15,831	16,040	16,184	16,401	16,535	16,653	16,750	16,820	16,884	16,954
G715 Hotel front desk clerks	1,713	1,738	1,760	1,789	1,812	1,834	1,853	1,870	1,886	1,902
G721 Tour and travel guides	729	743	755	772	786	800	812	823	834	845
G722 Outdoor sport and recreational guides	311	317	322	329	335	341	346	351	356	361
G723 Casino occupations	1,508	1,532	1,555	1,584	1,610	1,635	1,657	1,678	1,699	1,719
G731 Operators and attendants in amusement, recreation and sport	1,098	1,117	1,131	1,151	1,166	1,180	1,192	1,202	1,211	1,221
G732 Other attendants in accommodation and travel	696	707	717	730	740	750	759	767	774	782
G93 Cleaners	28,015	28,572	29,106	29,773	30,392	31,002	31,525	32,038	32,545	33,045
G961 Food counter attendants, kitchen helpers and related occupations	21,050	21,334	21,515	21,798	21,961	22,096	22,203	22,269	22,322	22,389
Total of Selected Occupations	211,559	214,974	217,811	221,638	224,674	227,557	229,996	232,193	234,319	236,475

Source: RKA

There are limitations to this model, the biggest of which is our assumption that occupational shares within the labour force remain constant at 2006 levels. It is realistic to think that as economic activities grow in the region, individuals will make changes to their occupational (career) choices over the years. In any case, Figure 21 presents the likely size of the total labour supply in these occupations in the region.

In the following sections 5.3 through 5.7, we further discuss various factors and issues that could potentially change the flow and therefore the pool of labour supply.

5.3. Mobility and Labour Supply

Input from the focus group participants indicate that the majority of tourism and hospitality staff in the Vancouver, Coast and Mountains region originate and reside in the Vancouver area and regional communities. This is mostly the same for the Fraser Valley and Sunshine Coast. Only in the case of hiring for remote resorts or lodges is it necessary to recruit further afield.

Workers in the Vancouver, Coast and Mountains region have the opportunity to have already gained some work or career experience because of the wide variety of employment opportunities available throughout the region. Students still studying (i.e. and planning to back to school or university) are a main source of employees for many tourism operators.

Another important labour supply issue has to do with where workers come from. In addition to relying upon youth workers for many of the lesser skilled volume jobs, the region has also a higher than provincial average share of interprovincial migrants in these jobs.

Interprovincial migrant information from the 2006 Census refers to persons who moved into the area (in this case, the Mainland/Southwest Development Region) from 2001 to 2006 from another province or territory within Canada. Information on external migrants from the 2006 Census indicates movers from outside of Canada, usually immigrants. While such information gives a picture of who in the workforce had moved into the area and were still there in 2006, it does not measure the movement year by year of workers who might come for a period of time and then move away. Despite this gap, these mobility measures do give a sense of the extent of migration from outside the area, especially when compared to the BC average data.

In Figure 22 that follows, we show the percentage of the core tourism related occupations that were migrants from interprovincial or international sources, to give an indication of reliance in these occupations on the utilization of these migrants.

Figure 22: Labour Force Mobility Status Indicators for Tourism Workforce, BC and Mainland/Southwest Region

	Interprovincial BC	International BC	Interprovincial Mainland /Southwest	International Mainland /Southwest
A211 Retail trade managers	5%	4%	4%	5%
A221 Restaurant and food service managers	4%	4%	3%	6%
A222 Accommodation service managers	9%	5%	8%	7%
B316 Conference and event planners	7%	8%	7%	8%
F154 Program leaders and instructors in recreation, sport and fitness	6%	3%	5%	4%
G011 Retail trade supervisors	4%	3%	4%	5%
G012 Food service supervisors	3%	5%	2%	8%
G013 Executive housekeepers	6%	2%	0%	5%
G211 Retail salespersons and sales clerks	5%	5%	4%	6%
G311 Cashiers	3%	6%	2%	10%
G411 Chefs	6%	7%	4%	8%
G412 Cooks	5%	5%	4%	8%
G511 Maîtres d'hôtel and hosts	4%	3%	3%	3%
G512 Bartenders	9%	3%	7%	4%
G513 Food and beverage servers	7%	6%	6%	8%
G715 Hotel front desk clerks	10%	8%	6%	10%
G721 Tour and travel guides	7%	5%	7%	6%
G722 Outdoor sport and recreational guides	3%	4%	3%	9%
G723 Casino occupations	4%	8%	4%	10%
G731 Operators and attendants in amusement, recreation and sport	4%	2%	2%	3%
G732 Other attendants in accommodation and travel	4%	4%	3%	4%
G93 Cleaners	3%	5%	2%	8%
G961 Food counter attendants, kitchen helpers and related occupations	4%	7%	3%	10%
Total of Selected Occupations	5%	5%	4%	7%

Source: Statistics Canada, 2006 Census

Overall, the core tourism occupations in the region show a marginally lower reliance on interprovincial migrants than the provincial average, but a much higher reliance on international migrants. The 7% of international migrants in the core tourism workforce in the region is 40% higher than the provincial average, reflective of the large number of immigrants residing in Greater Vancouver working in these core tourism occupations.

Information presented in the Figure shows that even though as a percentage of the overall workforce, interprovincial migrants account for only 4% in the region, this source of labour supply is nevertheless an important one. The region being able to attract such a level of interprovincial migrants is probably due to the fact that people are willing to move to the region for its availability of work opportunities and the availability of educational facilities.

The larger number of international migrants moving there to work in these jobs does help to alleviate labour shortage to an extent, which is reflected in our industry sources' assessment of the labour market situation in the region.

One might argue that there may be more interprovincial migration within the youth population, because they tend to travel more frequently. Data in the following Figure 23 does not appear to support that. For the region, interprovincial migrants account for 4% of all in the workforce, and they also account for 4% of the youth workforce.

Figure 23: Labour Force Mobility Status Indicators for Tourism Workforce, BC and Mainland/Southwest Region – Youth (Age 15 to 24)

	Interprovincial BC	International BC	Interprovincial Mainland /Southwest	International Mainland /Southwest
A211 Retail trade managers	9%	3%	8%	3%
A221 Restaurant and food service managers	6%	4%	4%	5%
A222 Accommodation service managers	13%	4%	13%	0%
B316 Conference and event planners	9%	9%	7%	17%
F154 Program leaders and instructors in recreation, sport and fitness	5%	2%	3%	2%
G011 Retail trade supervisors	5%	2%	5%	4%
G012 Food service supervisors	2%	4%	1%	7%
G013 Executive housekeepers	0%	0%	0%	0%
G211 Retail salespersons and sales clerks	5%	4%	4%	5%
G311 Cashiers	3%	5%	2%	7%
G411 Chefs	8%	4%	7%	5%
G412 Cooks	5%	5%	4%	8%
G511 Maîtres d'hôtel and hosts	3%	2%	2%	3%
G512 Bartenders	10%	4%	7%	5%
G513 Food and beverage servers	6%	5%	6%	7%
G715 Hotel front desk clerks	9%	9%	6%	15%
G721 Tour and travel guides	3%	3%	6%	0%
G722 Outdoor sport and recreational guides	16%	10%	20%	30%
G723 Casino occupations	3%	3%	4%	5%
G731 Operators and attendants in amusement, recreation and sport	4%	2%	3%	3%
G732 Other attendants in accommodation and travel	4%	3%	0%	5%
G93 Cleaners	4%	6%	4%	9%
G961 Food counter attendants, kitchen helpers and related occupations	4%	6%	3%	9%
Total of Selected Occupations	5%	5%	4%	7%

Source: Statistics Canada, 2006 Census

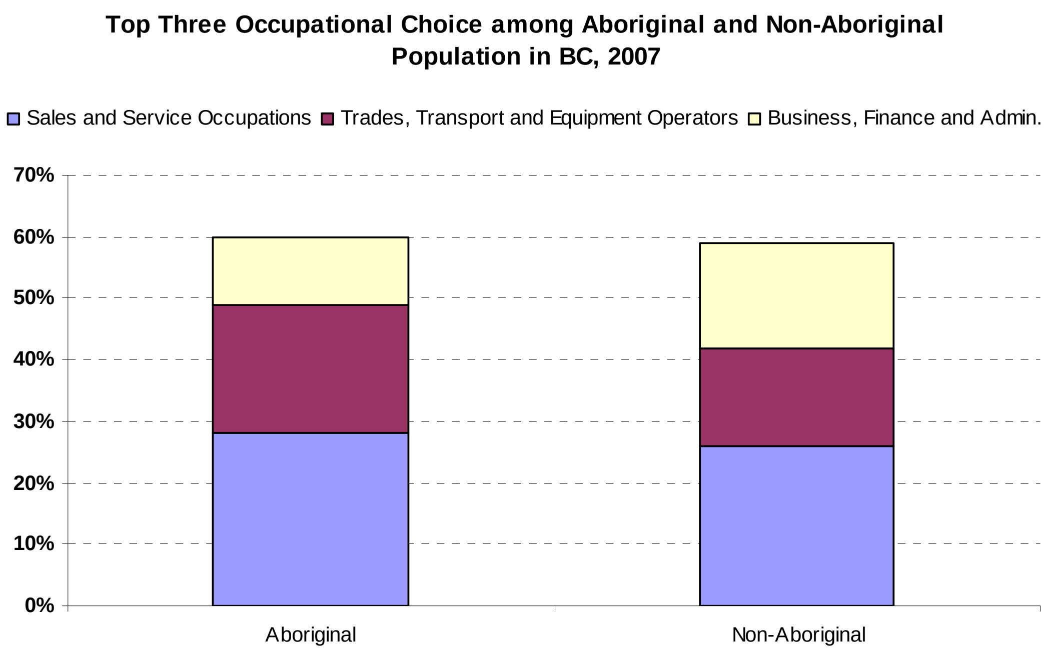
When we review occupation by occupation, there are higher concentrations of interprovincial migrants within the youth workforce than those in the workforce of all ages in these occupations: Retail Trade Managers and Accommodation Services Managers, and most notably, Outdoor Sport and Recreational Guides. The latter is reflective of the physical requirement of the occupation.

5.4. Aboriginal Peoples

Statistics Canada provides data through the monthly Labour Force Survey on the labour market status of Aboriginal peoples living off-reserve in the four western provinces. However, given that Aboriginal population accounts for only 4.8% of the overall population in BC (based on 2006 Census), the data available from the Labour Force Survey provides only a fairly general picture of labour market status of the Aboriginal population in the province.

In a recent article providing analysis of such data (Stock, 2008), it is shown that the top three occupational groups for Aboriginal peoples in BC are Sales and Service Occupations (28%), Trades, Transport and Equipment Operators (21%), and Business, Finance and Administration (11%). These three occupations account for 61% of the total Aboriginal workforce. For non-Aboriginal population, these three occupations also account for 60% of its overall workforce. However, the distribution of these three occupations among the non-Aboriginal population is quite different. This is shown in Figure 24.

Figure 24:



Source: Statistics Canada, Labour Force Survey

Aboriginal peoples are well represented in Sales and Service Occupations, which means that they are well represented in many of the core tourism occupations in our analysis in the report. Also, given that youth accounts for a higher percentage of the Aboriginal population than their non-Aboriginal counterparts, workers of Aboriginal identity are an important source of labour supply in the tourism and hospitality sector. Still, the size of the Aboriginal youth population is too small to make a large impact on the overall labour supply for the industry.

5.5. Unemployment

Data from the 2006 Census also provides some measures of unemployment for the core tourism occupations in the Mainland/Southwest region. It should be noted though that these unemployment rates are established by an individual reporting he or she being unemployed as of May 2006, and as such the data only provides a snapshot of employment status in the month of May. Because of the seasonality nature of many jobs in tourism, and the summer peak season being from June to August, unemployment rates shown in Figure 25 below are likely more reflective of the seasonality as opposed to the actual unemployment situation.

It should also be noted that not necessarily all unemployed in a specific occupation can be deemed “employable” as some of the unemployed could not find work because of lack of skills or other reasons.

Other information from Statistics Canada’s Labour Force Survey provides a measure of unemployment overall and over time for the region. This information shows that in 2001, the average unemployment rate for the region was 6.7%. By 2006, it dropped to 4.4%. In 2007 when industry sources considered the sector had the strongest employment growth in recent years, the overall unemployment rate in the region was 4.0%. This indicates that at times of strong economic growth in the region, the pool of labour available from the unemployed was limited.

Figure 25: Unemployment Rates for Core Tourism Occupations, BC and Mainland/Southwest Region, 2006

	BC	Mainland /Southwest
A211 Retail trade managers	2.2%	2%
A221 Restaurant and food service managers	2.8%	3%
A222 Accommodation service managers	5.1%	6%
B316 Conference and event planners	11.3%	4%
F154 Program leaders and instructors in recreation, sport and fitness	8.7%	8%
G011 Retail trade supervisors	3.6%	3%
G012 Food service supervisors	3.1%	2%
G013 Executive housekeepers	3.4%	5%
G211 Retail salespersons and sales clerks	5.4%	5%
G311 Cashiers	6.9%	7%
G411 Chefs	4.4%	4%
G412 Cooks	6.8%	6%
G511 Maîtres d'hôtel and hosts	5.9%	6%
G512 Bartenders	4.7%	4%
G513 Food and beverage servers	5.9%	5%
G715 Hotel front desk clerks	5.5%	5%
G721 Tour and travel guides	10.2%	11%
G722 Outdoor sport and recreational guides	14.5%	12%
G723 Casino occupations	2.3%	2%
G731 Operators and attendants in amusement, recreation and sport	13.8%	11%
G732 Other attendants in accommodation and travel	5.8%	6%
G93 Cleaners	5.8%	5%
G961 Food counter attendants, kitchen helpers and related occupations	7.3%	7%
Total of Selected Occupations	5.6%	5%

Source: Statistics Canada, 2006 Census

5.6. Foreign Workers

In situations where Canadian citizens and landed immigrants cannot fulfill the needs of labour demand, an employer may need to resort to bringing in workers temporarily from outside the country. In the province of BC, there are a number of ways for employers in the tourism sector to recruit workers in specific occupations from overseas to meet labour requirements.

According to information available from go2, the following four types of programs are available for tourism employers to bring in labour:

- Temporary Foreign Worker Program. This program is designed to assist tourism operators meet their labour requirements by hiring foreign workers under very specific circumstances and for a limited period of time. The program covers both skilled and unskilled workers and has been amended to help expedite the process for certain occupations where there is a demonstrated shortage of Canadian workers able to perform the work.

- Provincial Nominee Program. This is a joint program administered by Citizenship and Immigration Canada and British Columbia’s Ministry of Economic Development. This program is designed to expedite the permanent immigration of foreign skilled workers into Canada. A majority of nominees to this program are currently working in Canada with a temporary work visa.

- International Students Program. This program has a number of variations (Co-operative Education, Work Off-Campus and Post Graduation work visas) all of which are designed to provide international students studying in Canada with relevant work experience while in Canada.

- Working Holiday and Student Work Abroad Programs. These programs are designed to assist young people (usually between the ages of 18-35) in certain countries to come to Canada for a designated period of time to work and holiday. They are currently used by a number of ski resorts in Canada to increase their local labour pool.

Data from Citizenship and Immigration Canada (CIC) show that the number of entries of temporary foreign workers working in tourism related occupations more than quadrupled between 2000 and 2008 in the province. On an average annual growth basis, this represents a growth rate of 20% per year. Of all the occupations, Light Duty Cleaners, which include housekeeping staff and room attendants, as well as Food and Beverage Servers, increased the most. This is shown in Figure 26. Such data is consistent with the industry’s own feedback that these are potential occupations facing the biggest challenges in recruitment and retention within the region (see Section 6 that follows).

Figure 26: Temporary Foreign Worker Entries by Selected Tourism Related Occupation, BC, 2000 to 2008

Occupation	2000	2001	2002	2003	2004	2005	2006	2007	Q1-Q3 2008*	2008 **	Annual Growth Rate
0621 - Retail Trade Managers	18	23	33	25	42	39	39	43	41	55	14.9%
0631 - Restaurant and Food Service Managers Total	14	25	19	18	30	28	43	40	47	63	20.6%
0632 - Accommodation Service Managers	32	34	37	47	70	75	49	55	33	44	4.1%
1226 - Conference and Event Planners	9	--	--	7	--	6	7	14	10	13	5.0%
5254 - Program Leaders and Instructors in Recreation and Sport	341	372	439	398	435	463	499	564	183	244	-4.1%
6211 - Retail Trade Supervisors	--	39	5	--	36	5	15	15	8	11	
6212 - Food Service Supervisors	--	5	--	--	--	15	15	23	45	60	
6213 - Executive Housekeepers	--	--	0	--	--	--	--	--	--	--	
6241 - Chefs	32	32	47	13	24	45	60	40	51	68	9.9%
6242 - Cooks	67	50	80	95	127	160	258	377	472	629	32.3%
6421 - Retail Salespersons and Sales Clerks	29	47	30	24	24	73	56	105	133	177	25.4%
6435 - Hotel Front Desk Clerks	17	19	10	--	29	32	59	76	102	136	29.7%
6441 - Tour and Travel Guides	97	100	73	53	53	43	57	34	33	44	-9.4%
6442 - Outdoor Sport and Recreational Guides	43	38	51	39	11	15	10	10	6	8	-19.0%
6443 - Amusement Attraction Operators and Other Amusement Occupations	50	8	32	39	--	--	0	--	--	--	
6451 - Maîtres d'hôtel and Hosts/Hostesses	--	5	--	--	--	--	--	10	7	9	
6452 - Bartenders	0	--	--	--	--	--	--	5	--	--	
6453 - Food and Beverage Servers	5	6	14	12	17	29	78	188	225	300	66.8%
6641 - Food Service Counter Attendants and Food Preparers	--	--	--	0	--	16	43	184	814	1,085	
6661 - Light Duty Cleaners	5	9	11	5	9	30	59	159	300	400	72.9%
6662 - Specialized Cleaners	--	0	--	0	--	0	--	13	27	36	
6663 - Janitors, Caretakers and Building Superintendents	--	--	--	--	0	--	9	19	34	45	
6671 - Attendants in Recreation and Sport	10	--	6	--	--	--	8	5	8	11	0.8%
6672 - Other Attendants in Accommodation and Travel (Except Airline Travel)	36	33	35	--	7	29	14	12	--	--	
Grand Total	823	863	936	793	935	1,121	1,389	1,995	2,586	3,448	19.6%

Source Citizenship & Immigration Canada, RDM, 21 oct. 08

* 2008 data are approximate and subject to change, the cut used contains data up to the end of Sept. 2008 (end of Q3)

** annualized based on data for the first three quarters of the year.

In total, there were about 4,650 temporary foreign workers in the province in 2008 working in these tourism-related occupations. Data from the CIC also breaks down entries of temporary foreign workers by population centre within the province as a destination. Within the Mainland/Southwest Development Region, these population centres include Greater Vancouver, Abbotsford, and Chilliwack.

Data from the CIC indicates that the Census Metropolitan Area (CMA) of Vancouver, being the largest urban centre in the province, has substantial shares of the total number of temporary foreign workers in most of the occupational categories in our study. Here is a list of the occupations for which temporary foreign workers are most prevalent.

- Retail Trade Managers and Restaurant and Food Services Managers: Vancouver CMA has 40-70% of the provincial total temporary foreign workers in this category.

- Conference and Event Planner: Vancouver CMA has about 70% of the provincial total temporary foreign workers in this category.

- Retail Trade Supervisors: Vancouver CMA has about 70-80% of the provincial total temporary foreign workers in this category. It also has about 40-70% of the Food Services Supervisors category.

- Chefs and Cooks: Vancouver CMA had 33% of the provincial total temporary foreign workers in the Chefs category and 47% in the Cooks category in 2008, which are smaller than previous years. However, this is because other population centres outside the Vancouver CMA had strong growth in this category in 2008.

- Retail Trade Sales Clerks: Vancouver CMA has about 50-80% of the provincial total temporary foreign workers in this category.

- Tour and Travel Guides: Vancouver CMA has about 45-75% of the provincial total temporary foreign workers in this category.

- Food and Beverage Servers, Food Services Attendants and Food Preparers: Vancouver CMA has about half of the total in the category.

- Cleaners: Vancouver CMA had about 50-75% of the provincial total temporary foreign workers in the Light Duty Cleaners category.

It should be noted that CIC data also shows entries under “Census Metropolitan Areas (CMAs) not Stated” and “Not within CMAs of the Region”. Such data represents entries of foreign workers in smaller population areas. The data we have obtained does not allow us to know exactly where they work outside these major cities to draw definite conclusions. In any case, the data has shown that temporary foreign workers have been an important source of labour supply for the region's tourism sector for as far as the data in Figure 26 shows.

On those admitted to the province under the Provincial Nominee Program (PNP), data we have obtained from CIC also indicates strong growth in recent years. However, the total number is still extremely small, and the concentration of these workers appears to be Chefs and Cooks. There is no sub-provincial data available due to the small size of this category of workers. In 2008, there were altogether 95 persons (principal applicants) admitted to the province in these tourism-related occupations.

Finally, we note that because those admitted into the province under Working Holiday and Student Work Abroad Programs do not need a visa specifying intended occupations, it is possible many of them do work in tourism-related occupations.

Altogether, there were about 26,000 individuals in the province in 2008 who could potentially be temporary workers under the category of "Skills Not Stated". Of this total, those from Australia accounted for 28%, those from Japan accounted for 15%, and those from the UK and Colonies represented another 10%. It should also be noted that many of these workers tend to work in ski resorts in the province.

5.7. Earnings, Hours and Non-Wage Benefits

Wages and compensation are generally considered to be very important factors when evaluating the availability of labour in any given industry. Both secondary sources and our focus groups indicated that the relatively low wages paid in the tourism industry were a factor in attracting and retaining workers. Employers such as caterers in the government sector which offer better than average wages and working conditions attract and keep a better supply of workers. All are aware that market conditions including price limits on final demand for goods and services provided put a ceiling on wages, but wages also put a ceiling on the supply of available labour.

We do not have statistical data showing the level of compensation for the same occupation in various industries. However, industry sources we have been in touch with have informed us that people working as cooks, servers, and cleaners in the hospitality sector earn lower wages than those working in hospitals, care facilities, and correctional facilities. In many cases, they are not entitled to, or have only limited coverage for, non-wage benefits such as extended health benefits or pension plans.

With respect to working conditions, part-time work, or shift work, as well as long hours during busy times also make work arrangements difficult, especially for those with child care issues.

Lack of apprenticing opportunities for cooks is also cited by industry sources as one factor contributing to lack of supply.

Cost of living in Vancouver is amongst the highest in the country and thus detracts from the appeal of working in the tourism and hospitality industry. Earnings play an undeniable role in whether an individual can afford to work in this industry.

6. Assessing the Balance in the Tourism Labour Market

In this section, we will combine estimated and projected labour demand and labour supply for core tourism occupations in the Mainland/Southwest Development Region (excluding Sea-to-Sky Area) to derive supply-demand gaps. We will also present qualitative information and analysis we conducted through the industry consultation process.

In Figure 27, we present our findings on potential supply-demand gaps among occupations under analysis. Note that in the Figure, a negative value means no gaps for the occupation in the year, while a positive value represents a shortage in labour supply. We further note that even in cases where a negative value (i.e., surplus) exists, this only means there are enough “bodies” to meet labour demand needs.

Our analysis has found that overall, labour supply in the region is expected to keep up with labour demand with most of the core tourism related occupations in future years. This is mainly due to the age structure of the tourism workforce in the region and the large number of individuals who come and look for work in the Lower Mainland.

The only occupation within the group where a supply shortage is expected is Maîtres d'hôtel and Hosts/Hostesses in the future years starting 2013. We do note that labour surpluses with many of the occupations start to shrink beginning from 2013.

In Figure 28, we express the shortfall as a percentage of labour demand. Here we note that we only show values where there exists a shortage.

Figure 27: Estimated and Projected Supply Gap by Selected Tourism Related Occupation, Mainland/Southwest Region (excluding Sea-to-Sky), 2006 to 2015

	Estimated Gap		Projections							
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
A211 Retail trade managers	-1,213	-1,106	-1,867	-2,669	-2,911	-3,058	-3,114	-3,153	-3,204	-3,214
A221 Restaurant and food service managers	-440	-232	-521	-783	-884	-960	-1,008	-1,049	-1,095	-1,129
A222 Accommodation service managers	-96	-82	-158	-245	-299	-346	-386	-426	-466	-505
B316 Conference and event planners	-46	-35	-20	-48	-51	-50	-46	-41	-36	-30
F154 Program leaders and instructors in recreation, sport and fitness	-181	-32	-64	-145	-137	-114	-84	-46	-8	32
G011 Retail trade supervisors	-140	-105	-203	-279	-283	-274	-258	-238	-219	-196
G012 Food service supervisors	-103	-46	-94	-138	-138	-129	-117	-100	-83	-65
G013 Executive housekeepers	-12	-8	-12	-19	-20	-21	-21	-21	-21	-21
G211 Retail salespersons and sales clerks	-2,042	-1,461	-2,778	-3,884	-3,932	-3,783	-3,521	-3,186	-2,857	-2,488
G311 Cashiers	-825	-529	-1,060	-1,422	-1,351	-1,200	-1,017	-796	-575	-344
G411 Chefs	-148	-80	-165	-246	-271	-288	-295	-300	-307	-309
G412 Cooks	-549	-289	-592	-867	-921	-935	-922	-890	-860	-823
G511 Maîtres d'hôtel and hosts	-88	-32	-61	-88	-71	-46	-19	14	48	81
G512 Bartenders	-104	-58	-90	-138	-143	-140	-133	-122	-111	-100
G513 Food and beverage servers	-674	-291	-594	-870	-850	-777	-680	-554	-429	-298
G715 Hotel front desk clerks	-73	-34	-74	-110	-116	-117	-115	-111	-107	-102
G721 Tour and travel guides	-31	-17	-32	-63	-73	-79	-82	-85	-88	-90
G722 Outdoor sport and recreational guides	-13	-2	-17	-25	-28	-30	-32	-33	-34	-34
G723 Casino occupations	-64	2	-73	-129	-153	-168	-174	-179	-185	-189
G731 Operators and attendants in amusement, recreation and sport	-47	11	-17	-42	-45	-43	-39	-33	-27	-20
G732 Other attendants in accommodation and travel	-30	6	-9	-24	-29	-31	-32	-32	-33	-33
G93 Cleaners	-1,193	-1,026	-778	-1,620	-1,716	-1,675	-1,534	-1,368	-1,212	-1,004
G961 Food counter attendants, kitchen helpers and related occupations	-897	-366	-719	-1,052	-983	-840	-670	-456	-238	-19
Total of Selected Occupations	-9,011	-5,774	-9,895	-14,738	-15,146	-14,751	-13,859	-12,670	-11,517	-10,179

Source: RKA

Figure 28: Estimated and Projected Supply Gap as a % of Labour Demand by Selected Tourism Related Occupation, Mainland/Southwest Region (excluding Sea-to-Sky Area), 2006 to 2015

	Estimated Gap as % of Demand			Projections						
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
A211 Retail trade managers	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
A221 Restaurant and food service managers	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
A222 Accommodation service managers	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
B316 Conference and event planners	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
F154 Program leaders and instructors in recreation, sport and fitness	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
G011 Retail trade supervisors	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G012 Food service supervisors	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G013 Executive housekeepers	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G211 Retail salespersons and sales clerks	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G311 Cashiers	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G411 Chefs	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G412 Cooks	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G511 Maîtres d'hôtel and hosts	0%	0%	0%	0%	0%	0%	0%	1%	2%	4%
G512 Bartenders	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G513 Food and beverage servers	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G715 Hotel front desk clerks	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G721 Tour and travel guides	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G722 Outdoor sport and recreational guides	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G723 Casino occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G731 Operators and attendants in amusement, recreation and sport	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%
G732 Other attendants in accommodation and travel	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%
G93 Cleaners	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
G961 Food counter attendants, kitchen helpers and related occupations	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Total of Selected Occupations	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: RKA

The focus groups included considerable discussion around which job occupations are the most likely to experience shortages in the future.

Despite the current economic downturn, the majority of industry participants expressed concerns regarding the availability of labour to fill some specific tourism and/or hospitality jobs looking towards the year 2015.

Among the occupations of greatest concern are the following:

1. Culinary staff, specifically line cooks

2. Entry level restaurant (i.e. bus people) and kitchen (i.e. dishwashers), as well as food service attendants in quick service restaurants

Other occupations frequently mentioned as being difficult to fill and/or hold onto good, qualified staff include:

- Foodservers (the Vancouver area tourism and hospitality industry is in need of more people who are qualified/experienced). This includes foodservers working for caterers as well as banquet/event staff at the Tradex convention centre in the Fraser Valley. In some restaurants there is also a need for restaurant managers as many food servers do not wish to move into management positions due to the fact that the pay is less (no tips are provided to management).

- Housekeepers retiring in the near future will need to be replaced.

- There was also mention of the difficulty to retain semi-skilled building maintenance and janitorial people.

Additionally, Vancouver has a perpetual shortage of taxi drivers.

7. Potential Labour Market and HR Development Strategies

Both during times of tight labour supply, as well as during difficult economic times, businesses must find ways to "do more with less". In the tourism and hospitality industry, hiring the "wrong people" does not work for staff or customers. Therefore, employers must continue to find creative ways to increase efficiency in order to remain profitable while not reducing the visitor experience in any way.

This research study discussed the topics of Recruitment, Training and Retention of tourism and hospitality workers in the Vancouver, Coast and Mountains tourism region. Key topics are as follows.

Recruitment

- The internet is an inexpensive and effective way to recruit staff.
- The need to replace retiring staff must be addressed.
- The opportunity to hire mature workers or early-retirees on a part-time basis is an opportunity to be explored.
- Offering flexible work schedules and non-monetary incentives are likely to appeal.

Training

- Employee training and retention strategies must continue during economic downturn.
- Cross-training of staff is essential to maintaining operating efficiency and is generally beneficial to both employers and employees.
- Employers should participate in and develop tourism/hospitality industry training, internships and mentorship programs.
- Employers should participate in tourism and hospitality career education seminars for young people.

- There is a need to address the issue of attitude and work ethic with staff.
- Employees need to see a career path for themselves if they are going to stay in the industry.

Retention

- Employees appreciate when employers find ways to find as much full-time employment as possible for existing staff.
- With a slower economy and more choice in employee hiring, recruitment budget dollars can be moved into training and/or staff benefits to help with retention.
- Employers can provide shift work that makes sense for commuters.
- The industry needs to educate people on how exciting a career in tourism can be. For example, a well-trained cook can become a chef with additional training, and can even open his or her own restaurant to earn a better living.

Summary of Labour and Human Resource Issues and Recommendations for the Vancouver, Coast and Mountains Tourism Region (excluding Sea-to-Sky)

The research and analysis conducted through the course of this study suggests that the tourism and hospitality industry of the Vancouver, Coast and Mountains tourism region will benefit from long term planning and preparation in order to face a growing tourism demand in the face of a declining local labour supply.

The priority issues to be addressed include the following:

- **Seasonality** – With the exception of the ski industry, most operators are busier and require more staff during the summer. Many staff are laid-off after peak periods and then must be rehired, often at considerable expense, the following year.
- **Demographics** – Due to falling fertility rates, longer lifespans and the retirement of the baby boomer generation, the number of young people entering the workforce is insufficient to meet the demand for labour in Canada (all industries). Baby boomers are retiring – not only are they helping to push up the demand for tourism and travel but they are also a potential source of labour for the industry.

- **Mobility** – Employers are mainly reliant on a local work-force unless they can offer mobile workers affordable housing and cost of living alternatives.

- **Aboriginal Peoples** – This segment is a source of labour supply yet most operators do not actively recruit from this population.

- **Persons with Disabilities** – Most tourism and hospitality operators do not actively recruit from this group.

- **Unemployed** – Some workers are “unemployed’ during the off-season, including students returning to school. However, others find alternate employment because of the choices available to them in the urban regions and then decide not to return to the tourism and hospitality sector.

- **Foreign Workers** – The tourism and hospitality industry makes use of foreign workers, most often those on a temporary foreign worker or a working holiday visa more so outside of the main metro areas.

- **Compensation** – Relatively low wages paid throughout the tourism industry are a deterrent to attracting and retaining qualified workers.

- **Attitudes and experience** – Throughout the tourism regions, operators are faced with the challenge of finding employees who have the right attitude, experience and “willingness” to work hard and be successful in the tourism and hospitality industry. The problem is more acute in the metro area where there are more employment opportunities.

The research and analysis conducted here to date suggests that the following strategies be considered in preparing for future human resource needs in the Vancouver, Coast and Mountains tourism region:

1. **Utilize non-traditional labour**, including older workers, Aboriginals and people with disabilities. Employers must understand and create a work environment that suits the needs and characteristics of individual employee groups.

2. **Encourage young people to enter the industry.** Despite a drop in their overall numbers, young people remain a very important source of labour for the tourism and hospitality industry. Employers must continue to develop new and innovative ways to appeal to and attract this segment of the population. By recognising, understanding and working with technology and the other “cultural” characteristics of Generation Y and others within this segment, employers may be able to find untapped potential and develop the much needed work ethic and attitude at the same time. Continued communication and connections with schools is important. An incentive program to keep

youth in smaller communities and/or to encourage young people to recruit other youth could be developed.

3. **Tourism must have a voice in matters concerning affordable housing, cost-of-living and transportation.** Raising wages alone is not the simple answer to making a career in tourism and hospitality more attractive. Business owners and the visitor market must be able to sustain any wage increase, otherwise the result will be negative for all concerned. Tourism's needs must also be heard in matters concerning housing costs and transportation services. In the metro area, the industry should have a voice in encouraging more flexible residential zoning to increase the supply of affordable housing.

4. **Make non-monetary incentives attractive.** These "perks" have always been a draw of working in the tourism and hospitality industry. Input from operators has confirmed how important, as well as how varied they can be. Recognizing this reality and expanding the benefits offered to match the unique needs of different workers creates a positive working environment for everyone.

5. **There must be industry coordination with educational institutions at all levels.** Educators and students must be realistic to the needs of businesses, who seek graduates with hands-on experience and a willingness to learn on the job as well. Co-op programs are a good link between educational institutions and students and also provide hands-on experience.

6. **Retaining workers is a key human resource strategy.** This is true not just in tourism but throughout the economy. Tourism and hospitality businesses are particularly challenged by this due to the seasonality factor but must continue to face the issue in creative ways.

7. **Make ongoing improvements to staff efficiency and productivity.** This can be achieved through training programs as well as by multi-tasking and implementing cross-training initiatives. This will lead to greater cost effectiveness and staff efficiency, as well as provide a stepping stone to career experience and development, again a benefit to both employers and employees.

8. **Ensure the continuation of foreign worker programs.** Temporary foreign workers and working holiday visas are programs that have proved to be well-suited to filling the gaps in tourism and hospitality labour needs. This door to labour must remain open, even during recessionary times.

The Vancouver, Coast and Mountains tourism and hospitality industry will move forward in the direction of positive growth only if sufficient labour is available to staff the tourism product and experiences being developed and promoted. All levels of the industry must come together to ensure its success, i.e. employees, employers, government and its agencies. The coordinated development of a Vancouver, Coast and Mountains tourism and hospitality human resource plan would be the next step in that process.

8. Conclusions

In this report, we have examined available information regarding overall employment levels and human resource requirements for the tourism industry as a whole in the Mainland/Southwest region. We have also examined statistical data sources and survey reports to gain background information to the tourism industry in the province and in the Vancouver, Coast, and Mountains tourism region specifically.

We have then provided estimates of employment in core tourism related occupations in the region in year 2007 and 2008, and prepared projections for the same for the period from 2009 to 2015. We have also presented statistical data available concerning different sources of labour that provides for the workforce in the tourism and hospitality industry in the region. Therefore, we have been able to provide estimates and projections of the potential labour force growth in the region, and to conduct a labour supply-demand gap analysis.

Employment in core tourism occupations in this study in the region will continue to grow positively, despite a set-back in 2009. In addition, attrition will result in additional openings for replacement needs. Data analysis also indicates that labour force growth in the future years in the region is expected to be able to keep up with employment growth for almost all of the core tourism occupations in the region, and as such no general labour shortage in many of the occupations is expected to prevail in the future period up to 2015.

This report also presents the results from two focus group sessions that were conducted in Vancouver as well as interviews with industry stakeholders on current labour market conditions, projected future labour requirements, and challenges faced by employers in recruitment and retention.

We have found that in general, the industry has been able to find enough people to fill in most positions throughout the year, even during summer months. However, in many cases employers do report having to take a long time to fill in the positions, and some may have to take less experienced or qualified workers to fill vacancies. Among the occupations of greatest concern are the following:

- Culinary staff, specifically line cooks;
- Entry level restaurant (i.e. bus people) and kitchen (i.e. dishwashers), as well as food service attendants in quick service restaurants

Other occupations frequently mentioned as being difficult to fill and/or hold onto good, qualified staff include:

- Foodservers (the Vancouver area tourism and hospitality industry is in need of more people who are qualified/experienced). This includes foodservers working for caterers as well as banquet/event staff at the Tradex convention centre in the Fraser Valley. In some restaurants there is also a need for restaurant managers as many food servers do not wish to move into management positions due to the fact that the pay is less (no tips are provided to management).

- Housekeepers retiring in the near future will need to be replaced.

- There was also mention of the difficulty to retain semi-skilled building maintenance and janitorial people.

Additionally, Vancouver has a perpetual shortage of taxi drivers.

Many areas of the industry face a challenge in recruiting young people into the sector as well as maintaining a level of apprenticeship enrolment that is sustainable to the industry. It is important to communicate to young people the kinds of jobs available in the industry, including career and managerial positions that are in need of young recruits. High school career counsellors and parents also need to be involved to encourage more young people to enter these seemingly unskilled jobs but with potential career opportunities. Certain factors impacting apprenticeship training completions have been identified.

We have also examined other issues related to recruitment and retention of skilled workers for the industry. Utilization of non-traditional types of labour supply, temporary use of foreign workers, seasonal nature of the work, inconsistency of the availability of work, multi-tasking, wages and compensation, and other factors have been thoroughly explored and discussed throughout the report. We have also presented recommendations from industry stakeholders on potential ways to better utilize existing sources of labour, and to develop additional sources of labour supply to meet the industry's needs.

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Appendix I List of Focus Group Participants

Vancouver Focus Group
Wednesday March 11, 2009

Participants:

Name	**Organization**
Kim Haackstad Executive Director	ABLE BC
Kris Jonasson Executive Director	BC Golf Association
Mark Reynolds VP HR	Canlan Ice Sports
Nancy Hildebrand Asst. Marketing Manager	Fort Langley National Historic Site of Canada Parks Canada
Alison Wolfe Asst. Director, HR	Hyatt Hotel
Treva Gardner Human Resource Manager	Sandman Hotel Group
Sean Ross General Manager	Sonora Resort
Walt Judas VP, Visitor Services, Communications and 2010 Strategies	Tourism Vancouver
Pamela Thurston General Manager	Vancouver Whale Watch

Vancouver Focus Group
Thursday March 11, 2009

Participants:

Name	**Organization**
Mark Von Schellwitz Vice President, Western Canada	Canadian Restaurant and Foodservices Association
Mark Petrik HR Coordinator	Capilano Suspension Bridge
Kimberley Mulla HR Manager	Capilano Suspension Bridge
John McComber HR Director	Four Seasons Hotel
Chris Kanuka Vice President Operations	The Old Spaghetti Factory
Brent Hedin General Manager	Peake of Catering
Pete Moores Sales Manager	West Trek Tours

Appendix II Preliminary Employment Projections for Validation in Focus Group Sessions

For VCM, two scenarios of the future labour demand by selected occupation were presented at each of the two focus group sessions for discussion.

Vancouver, Coast and Mountains (excluding Sea to Sky)

Employment of Core Tourism Related Occupations

	Scenario 1 - Positive Growth to 2015				Scenario 2 - Negative Growth to 2015			
	Annual Growth 2001 to 2006	Employed 2006	Proj Emp 2011	Proj Emp 2015	Annual Growth 2001 to 2006	Employed 2006	Proj Emp 2011	Proj Emp 2015
A211.0621 Retail Trade Managers	0%	27,269	29,670	31,864	0%	27,269	27,050	26,876
A221.0631 Restaurant and Food Service Managers	-2%	9,900	11,054	12,106	-2%	9,900	8,781	7,977
A222.0632 Accommodation Service Managers	-1%	2,150	2,385	2,602	-1%	2,150	2,028	1,936
B316.1226 Conference and Event Planners	6%	1,043	1,138	1,222	6%	1,043	1,038	1,034
F154.5254 Program Leaders and Instructors in Recreation and Sport	6%	4,072	4,456	4,804	6%	4,072	4,051	4,035
G011.6211 Retail Trade Supervisors	8%	3,154	3,428	3,682	8%	3,154	3,138	3,125
G012.6212 Food Service Supervisors	2%	2,322	2,597	2,855	2%	2,322	2,311	2,301
G013.6213 Executive Housekeepers	0%	275	306	335	0%	275	272	270
G211.6421 Retail Salespersons and Sales Clerks	4%	45,893	49,988	53,686	4%	45,893	45,664	45,482
G311.6611 Cashiers	3%	18,553	20,271	21,856	3%	18,553	18,461	18,387
G411.6241 Chefs	8%	3,326	3,726	4,097	8%	3,326	3,310	3,296
G412.6242 Cooks	3%	12,340	13,791	15,164	3%	12,340	12,279	12,229
G511.6451 Maîtres d'hôtel and Hosts/Hostesses	1%	1,977	2,204	2,414	1%	1,977	1,957	1,942
G512.6452 Bartenders	-1%	2,346	2,620	2,870	-1%	2,346	2,240	2,159
G513.6453 Food and Beverage Servers	0%	15,156	16,937	18,550	0%	15,156	15,005	14,886
G715.6435 Hotel Front Desk Clerks	2%	1,640	1,836	2,018	2%	1,640	1,631	1,625
G721.6441 Tour and Travel Guides	1%	698	761	817	1%	698	691	686
G722.6442 Outdoor Sport and Recreational Guides	3%	298	322	347	3%	298	297	295
G723.6443 Casino Occupations	14%	1,443	1,593	1,731	14%	1,443	1,436	1,431
G731.6671 Operators and Attendants in Amusement, Recreation and Sport	2%	1,051	1,161	1,257	2%	1,051	1,046	1,042
G732.6672 Other Attendants in Accommodation and Travel	0%	667	745	816	0%	667	659	653
G93.666 Cleaners	3%	26,822	29,160	31,194	3%	26,822	26,688	26,581
G961.6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	2%	20,154	22,515	24,659	2%	20,154	20,053	19,973
Total of Selected Occupations	3%	202,549	222,663	240,184	3%	202,549	200,086	198,222

Source: 2001 and 2006 Census; REPM; RKA

Appendix III Geographic Boundaries of Tourism Regions and Development Regions

Appendix IV Techniques Applied to Derive Employment Estimates and Projections by Occupation

In Section 4 we estimated annual employment level in 2007 and 2008 for the core tourism occupations. We also provided projections for employment in these occupations from 2009 through 2015. Here is a description of the techniques applied to generate these estimates.

As year over year occupational data at a four-digit National Occupation Classification (NOC) level is not available, we have to rely on employment growth by industry in the region concerned to estimate employment growth with those occupations under analysis. We start from the notion that the most detailed occupational data by industry is available from the Census.

At the Development Region level, employment data available includes the following industry sub-sectors as defined by the North American Industry Classification System (NAICS):

- 111-112 Agriculture
- 113-115, 21 Forestry, fishing, mining, oil and gas
- 22 Utilities
- 23 Construction
- 31-33 Manufacturing
- 41, 44-45 Trade
- 48-49 Transportation and warehousing
- 52-53 Finance, insurance, real estate and leasing
- 54 Professional, scientific and technical services
- 55-56 Business, building and other support services
- 61 Educational services
- 62 Health care and social assistance
- 51, 71 Information, culture and recreation
- 72 Accommodation and food services
- 81 Other services
- 91 Public administration

The first step in estimating employment growth in core tourism occupations is to calculate each occupation’s distribution by industry using 2006 Census data, based upon industry aggregation as shown in the list above. Then, based upon employment growth in these industries in the Mainland/Southwest Development Region from 2006 to 2007 and from 2007 to 2008, we have been able to derive employment growth for each of the core tourism occupations.

It should be noted that employment level in 2006 for each of the occupations has been obtained from BC Stat's Regional Employment Projections Model (REMP).

For employment projections in 2009 through 2013, we have relied upon economy wide GDP and employment growth projections put forward by the Ministry of Finance in the provincial budget released on February 17, 2009:

Table 3.7 Ministry of Finance Economic Forecast: Key Economic Indicators

		Forecast				
	2008	2009	2010	2011	2012	2013
British Columbia Economic Indicators		Per cent change unless otherwise noted				
Real GDP	1.0 *	-0.9	2.4	2.6	2.6	2.6
Nominal GDP	3.9 *	-0.9	4.2	4.6	4.8	4.8
Employment	2.1	-0.5	1.3	1.5	1.6	1.6
Unemployment rate (per cent)	4.6	6.2	6.0	5.7	5.5	5.5
Total net in-migration (thousands of persons)	56.1 [1]	47.8	48.7	49.8	49.6	51.5
Personal income	5.1 *	1.7	3.5	4.3	4.5	4.5
Corporate pre-tax profits	-4.0 *	-24.7	1.5	3.2	4.4	4.4
Housing starts (thousands of units)	34.3	25.5	26.8	27.8	28.4	29.2
Retail sales	1.5 *	1.3	4.4	4.4	4.4	4.4

* Ministry of Finance estimate. [1] BC Stats estimate.

We have further extended potential growth projections for the year 2014 and 2015 by way of moving averages.

From these fundamental employment growth projections, we are able to derive potential employment growth in industries in the Mainland/Southwest region from 2009 to 2013 by comparing past employment growth patterns in industries in that region with provincial overall employment growth pattern in the same period (2000 to 2008). This way, we ensure that industry specific growth rates conform to overall employment growth in the region in a given year.

Therefore we have been able to calculate occupational growth rates in each year based on occupation distribution by industry and industry specific growth rates in a given year.

We have further adjusted specific occupational employment growth based upon information we have collected through primary research.