

**Regional
Tourism and Hospitality Industry
Labour Demand and Supply
Projections
Final Report**

Thompson Okanagan Region

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The views expressed in this paper are those of the author.
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1. Introduction

British Columbia's tourism and hospitality sector has experienced momentous growth over the past 25 years, since Expo '86 shot BC onto the global tourism destination marketplace. BC offers a highly unique combination of tourism products and visitor experiences in stunning locations. Six individual tourism regions comprise the BC offering, highlights of which include: mountains, parks and hot springs of the *Kootenay Rockies*; fruit-laden orchards and vineyards in the *Thompson Okanagan*; the proximity of urban life to all types of nearby nature in *Vancouver, Coast and Mountains*; coastal lifestyles on *Vancouver Island and the Gulf Islands*; the ranch lands of the *Cariboo Chilcotin Coast*; and; the wildlife of *Northern BC*.

New tourism opportunities and growth are vital economic and employment generators for communities throughout BC. Therefore, given the realities of continuing change in global and local economic conditions the BC tourism and hospitality sector must be able to plan ahead and make adjustments when, where and however needed. For the past several years, go2 – BC's tourism human resource association, has recognized the challenges associated with a changing labour market and workforce in the province, due in large part to overall demographics like an aging workforce with increased numbers of baby boomers entering retirement and proportionately fewer young people in the workforce. Labour market trends for the tourism and hospitality industry also include other industry specific challenges such as the need for accessible and affordable training options in remote and rural areas of the province; skilled workers being lured to other provinces with lower living costs; the increased need to look to immigration and alternative labour pools; and perceptions about tourism and hospitality as an industry for the young and perhaps not a viable option for a long-term career.

go2 continues to lead the way in understanding and addressing human resource needs and concerns for the BC tourism and hospitality sector. Most recently, in 2012, go2 prepared the Tourism Labour Market Strategy (TLMS) to serve as a roadmap for go2 and its industry stakeholders and partners to implement strategies and activities necessary to address the labour market challenges being faced in BC today and into the future. The document takes into account shifts in the socio-political, economic, and tourism and hospitality industry environments.

In 2012/13 go2 worked with Roslyn Kunin and Associates (RKA) to fine-tune projections for tourism related industries and occupations for each of the six (6) tourism regions of British Columbia out to the year 2020. This has involved determining labour market demand, supply, and imbalances for all 47 tourism-

related occupations and seven (7) industry groups within the provincial tourism regions. The proceeding Methodology section explains the modeling process in detail.

In addition to an overview of tourism sector activities in the region, the report provides further understanding of the region's employment projections in the following sub-sections:

- Labour Demand Projections by Industry and Occupation
- Labour Supply Projections by Industry and Occupation
- Supply and Demand Imbalances
- Summary of Findings

2. Methodology

In this Section, we will provide explanations of how the tourism sector can be defined, our approaches in developing a model to estimate labour demand, labour force supply and demand-supply imbalances, and data sources we relied upon for the purposes of establishing the model.

2.1. Defining Total Tourism and Hospitality Related Employment

A tourist, for the purposes of this analysis, is defined as someone “*who travels to and stays in a place outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated within the place visited*”.¹ Tourism activities involve those of visitors who are temporarily away from their permanent residence for a number of different reasons, such as:

- Travelling for leisure;
- Visiting family and friends;
- Visiting a vacation home;
- Travelling to obtain healthcare;
- Travelling on business;
- Temporarily away from home for other reasons.

As described in the 2009 BC Stats study “Measuring the Size of British Columbia’s Tourism Sector”, there are two ways of measuring the size of tourism sector – one approach of measuring tourism activities is through a commodity-based approach as represented by the Tourism Satellite Account, produced by Statistics Canada, and another approach is through an industry-based approach, which has been developed by BC Stats.

In the first approach, the measurement of tourism activities is through the products consumed by tourists. This approach relies on information from input-output tables, which describe in detail the goods and services consumed by individuals, businesses and government as either inputs into production or as final demand (consumer, business, government and non-resident purchases of goods and services). The Tourism Satellite Account, which is derived from input-output tables, comprises a set of statistical tables that describe the characteristics of the tourism sector at a given point in time. It includes estimates of visitor expenditures on tourism-specific products – i.e., goods and services which, in the absence of tourism, would probably cease to exist in meaningful quantities or for which the level of consumption would be significantly reduced.

¹ World Tourism Organization.

The Tourism Satellite Account encompasses a number of tables showing visitor final consumption expenditure by product and type of tourism (same-day and overnight visitors, domestic and international tourists), production accounts (outputs of tourism-specific and other products) of tourism industries, the domestic supply and consumption of tourism products, tourism employment, investment, and other tourism indicators. The Tourism Satellite Account also defines tourism proportions.

The BC Stats' approach to tourism estimation is based on supply-side indicators that are adjusted to exclude non-tourism-related activities. Adjustment factors – i.e., tourism proportions – are derived from time-series data for industries included in the tourism sector. These adjustment factors attribute a percentage of the activities of industries that produce services used by tourists to the tourism sector. This approach relies on information from standard data available on an annual basis from Statistics Canada.

A recent study analyzing Canada's tourism labour market conditions and potential human resources requirement (Canadian Tourism Research Institute, the Conference Board of Canada 2010) (hereafter referred to as the CTHRC/CBoC study) for tourism sector employment has been based on data published in Statistics Canada's Human Resource Module (HRM) of the Tourism Satellite Account. The Module includes data on the number of jobs in the tourism sector related to both tourism and non-tourism activities. Therefore, their projections involve all industries with a tourism related component, regardless of whether demand arises from tourism or non-tourism activities, and the resulting employment is the sum of tourism and non-tourism employment. For example, think of a restaurant serving tourists as well as locals.²³

Employment numbers derived using BC Stats' approach measure only those related to tourism activities, and, as such, measure direct tourism employment. For example, accommodation services essentially derive their revenue from tourists, but in a retail business the share that is attributed to tourists can be much smaller.

In our current study, we define tourism labour market in line with the approach adopted in the CTHRC/CBoC study.

² Note that in the CTHRC/CBoC study, there are employment data from the Human Resource Module for five industry groupings: transportation, accommodation, food and beverage services, recreation and entertainment, and travel services. In fact, the data is for 29 industries that for presentation purposes have been grouped into five categories. These detailed industries are shown in Appendix I.

³ Also note that in the CTHRC/CBoC study, data from the Human Resources Module are only available at the national level. As such, all provincial and other regional level data have been imputed.

2.2. Quantitative Approach

We explain below in detail the steps required to complete our projection of labour demand for, supply of - and imbalances of both - workers in the tourism and hospitality related industries and occupations for six tourism regions in BC.

Before we proceed, we note that because of data availability, the projections for each of the six tourism regions will be based on projections for Development Regions in the province. We note that although the geographic boundaries of the two categories of regions are not exactly the same, projections for development regions will serve as good proxies of projections in tourism regions.

Here is the concordance table showing the geographic areas of the two categories of regions.

<u>Tourism Regions</u>	<u>Development Regions</u>
Kootenay Rockies	Kootenay
Thompson-Okanagan	Thompson-Okanagan
Vancouver, Coast and Mountains	Mainland/Southwest
Vancouver Island	Vancouver Island/Coast
Cariboo Chilcotin Coast	Cariboo
Northern BC Region	North Coast, Nechako, Northeast

2.2.1. Defining Labour Demand, Labour Supply, and Potential Imbalances

Consistent with the recent study by Canadian Tourism Human Resources Council and the Conference Board of Canada (hereafter referred to as "CTHRC/CBoC") *The Future of Canada's Tourism Sector - 2012 Update*, labour demand is defined as the number of full-year jobs required to provide or fulfill the demand for tourism goods and services. The CTHRC/CBoC study states that in its current update, these employment totals at the provincial level have come from Statistics Canada's Human Resource Module of the Tourism Satellite Account, and benchmarked to 2010. The study research team has further broken down the employment totals to arrive at demand in full-year jobs by industry, by occupation.

Also consistent with the CTHRC/CBoC study, labour supply refers to the number of full-year jobs taken up by individuals to fulfill the labour demand. Labour supply is determined by population growth and labour force participation, as well as the likelihood of a particular person working in the tourism sector. In the current CTHRC/CBoC study, labour supply is benchmarked to 2010 based on data derived from Statistics Canada's Human Resource Module and the forecast is done based on CBoC's projections of demography and labour force in future years.

Potential labour imbalances are the differences between labour demand and labour supply in a given industry, or occupation, in the tourism sector. Next we further identify the steps necessary to apportion labour demand and labour supply by industry and by occupation in the CTHRC/CBoC study in the province into regional projections.

2.2.2. Labour Demand Projections by Industry and by Occupation

For each region, we will first estimate labour demand in the tourism sector by sub-industry (transportation including air transportation, rail transportation and other transportation, food and beverage services, accommodation services, recreation and entertainment, and travel services) in base year and up to year 2020 based on the BC regional labour market scenario model, in a similar fashion to our work on provincial estimates for industries, which RKA completed for go2 in 2011.

1. From the BC LMSM, employment by broad industry grouping has been projected from 2011 to 2020 for:
 - Transportation and Warehousing
 - Finance, Insurance, Real Estate and Leasing
 - Professional, Scientific & Managerial Services
 - Other Services
 - Accommodation and Food Services
2. Project employment in industries within these broader groupings that are tourism and hospitality related (for example, air transportation, rail transportation, other transportation, etc.).
3. For each sub-industry (for example, air transportation), examine its share of employment within the broader group and how these shares change over time
4. Fit a trend-line of these observed shares in the past, and calculate, based on the trend-line, what these shares may be in the projection period.
5. Multiply projected shares in each year with BC LMSM's broader industry total in a given year to arrive at projected employment demand in a sub-industry.
6. Repeat procedures 3 to 5 for each 3-digit sub-industry within the broader industry grouping to ensure sum of each sub-industry employment is the same or less than the broader grouping totals. (Less in the case to account for certain sub-industries whose annual employment is lower than 1500.)

Once these industry estimates are arrived, occupations within each sub-industry in 2010 will be arrived at by applying occupational shares from the CTHRC/CBoC data, and are assumed to grow at the same rate as the sub-industry throughout

the projection period. (This is the same assumption made in the CTHRC/CBoC study.) We will apply the growth rates derived as well as the regional employment shares to the CTHRC/CBoC's provincial labour demand projections in each year up to 2020 to arrive at regional labour demand by industry, by occupation. The sum of all regional labour demand values will be constrained by provincial total labour demand values in the current CTHRC/CBoC study.

2.2.3. Labour Supply Projections by Industry and by Occupation

We will follow a similar procedure as outlined in the CTHRC/CBoC study on deriving labour supply by industry and by occupation at the province and city level based on Statistics Canada's Human Resource Module and CBoC's demographic and labour force projections, except that in this case we are deriving regional level labour supply by industry and by occupation.

Following the steps above, details are described below:

7. For each of the region, first calculate regional employment shares relative to BC total employment.
8. To do that, we note that labour force projections for all industries from 2011 to 2020 are available from the BC LMSM, for each development region. Also available from the BC LMSM are projected unemployment rates for all industries in each of the years from 2011 to 2020.
9. Hence, employment for all industries in each of the development regions can be calculated, which is the projected labour supply available in each region. Also regional employment shares are calculated.
10. From the labour supply projections for BC (in full-year jobs) from the CTHRC/CBoC study, we can calculate the shares of the total labour supply that are available for industries and occupations within.
11. The shares derived in the previous step serve as proxies to penetration rates indicating the likelihood of someone working in a tourism related industry or occupation.
12. These shares are further applied to the total labour supply in each region (calculated in step 10) to arrive at labour supply by industry and by occupation in each region.
13. Once regional labour supply values in each sub-industry have been derived we need to ensure that they sum to the total labour supply in the CTHRC/CBoC study.

Once labour demand by industry and by occupation has been derived, and labour supply by industry and by occupation derived, we can compare the difference in supply and demand to be able to analyze if there are any gaps between the two (gap analysis).

We will further calculate labour demand in industry and occupation due to the need to replace those who have left the labour force (for retirement or because of death). Attrition rates by occupation are available from the BC Regional Labour Market Scenario Model. These rates are more detailed than the ones in the CTHRC/CBoC study.

2.2.4. Update to 2011 BC Labour Market Outlook

In light of recent employment growth changes in the region and in the province, and along with current economic conditions and outlook, we have updated potential employment growth rates for all industries in the region, the province, as well as employment growth rates in the five tourism and hospitality related industries:

- Transportation and Warehousing
- Finance, Insurance, Real Estate and Leasing
- Professional, Scientific & Managerial Services
- Other Services
- Accommodation and Food Services

In order to derive potential employment growth rates in the province from 2013 to 2020, we have referred to the 2013 Budget document for forecasted employment growth rates in 2013 through 2017.⁴ Growth rates from 2018 to 2020 are assumed to remain the same as those in the *BC Labour Market Outlook: 2010-2020*, published in 2011.

Update to projected labour force growth rates in the province for all industries, and projected unemployment rates from 2013 to 2017 has been derived based on the 2013 Budget document. For 2018, 2019, and 2020, we have assumed that labour force growth will remain the same as those in the *BC Labour Market Outlook: 2010-2020*, published in 2011.

To summarize, actual rates in 2010 through 2012 and projected rates from 2013 onwards for key provincial labour market indicators are presented here:

⁴ Refer to http://www.bcbudget.gov.bc.ca/2013/bfp/2013_Budget_Fiscal_Plan.pdf

	Actual		Projected								
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Labour Force ('000)	2,442.7	2,458.0	2,478.9	2,514.8	2,547.9	2,583.6	2,623.0	2,663.0	2,681.6	2,697.7	2,713.9
% Change	1.7%	0.6%	0.9%	1.4%	1.3%	1.4%	1.5%	1.5%	0.7%	0.6%	0.6%
Employment ('000)	2,256.5	2,274.7	2,312.5	2,338.6	2,369.4	2,405.6	2,442.6	2,479.0	2,499.9	2,515.1	2,533.9
% Change	7.6%	0.8%	1.7%	1.1%	1.3%	1.5%	1.5%	1.5%	0.8%	0.6%	0.7%
Unemployment Rates	7.6%	7.5%	6.7%	7.0%	7.0%	6.9%	6.9%	6.9%	6.8%	6.8%	6.6%

2.3. Qualitative Approach

This project reviewed secondary research documents that included more than 100 Tourism Plans, Tourism Assessments, Situation Analyses and Workshop reports prepared for individual communities throughout all six BC tourism regions as part of the Tourism British Columbia Community Tourism Foundations program. The Community Foundations program assists communities to develop a comprehensive multi-year tourism plan for their area.

In addition, a total of 10 structured and open-ended interviews were conducted by telephone with a selection of stakeholders including representatives from the following organizations:

- Six regional tourism associations; and
- Four tourism sector associations (food and beverage, hotel, ski, and wilderness tourism)

A complete list of interview respondents can be found in Appendix IV.

The purpose of these stakeholder interviews was to gain first-hand insight into each region's specific labour market supply and demand issues and trends, such as challenges, pressures, shortages, growth factors etc. for priority industries and related occupations. Highlights of the qualitative analysis are summarized for each region in the sub-sections "Regional Tourism Priorities".

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

3. Thompson Okanagan

In this Section we will first describe general background information of the tourism region, what we have learned from industry stakeholders on how best to develop tourism related activities. Then we will review what employment growth in the tourism and hospitality sector has been, and present our projections of labour demand, supply and implications of the supply-demand gap.

3.1. Regional Tourism Priorities

The Thompson Okanagan is one of six tourism regions in British Columbia. It gets its name from the Thompson River and Okanagan Lake and stretches from Christina Lake and the Shuswap to the east, Cache Creek and Princeton to the west, Mount Robson in the north, and Osoyoos in the south. The landscape of the Thompson Okanagan includes mountains, valleys, desert, waterways, and beaches.

The variety of tourism products in the Thompson Okanagan draws on the diversity of the natural surroundings of the region and appeal to a wide range of visitors. For example, the orchards and vineyards bring in food and wine connoisseurs; families and leisure travelers are attracted to the lakeside beaches, campgrounds and resorts; and, outdoor enthusiasts visit for the golfing, hiking, biking and skiing. Four of BC's major ski resorts are located in Thompson Okanagan. Apex, Big White, Silver Star and Sun Peaks each attract regional, national and international visitors. The Thompson Okanagan also has abundant history and culture, representing Aboriginal peoples to European fur traders to wine makers and food producers. The importance of the land base is reflected in many of the area's museums, heritage sites, interpretive centres and artwork.

In addition, the region contains two of the province's regional centres, Kamloops and Kelowna, which also function as educational and training hubs for the region. Traveling to the Thompson Okanagan was enhanced substantially for visitors in 2012, with the introduction of direct air service between Kelowna and Los Angeles, California via United Airlines. One of the key reasons for this new opportunity is the growth in the technology sector which the Okanagan area has experienced, thus the new air service provides ease of access to/from Silicon Valley. Airport representatives continue to investigate a European air connection as well. German visitors in particular offer good growth potential for the region.

However, it is the strength of the regional markets, mostly BC and also Alberta, that have sustained the Thompson Okanagan recently during an otherwise difficult economy. The Thompson Okanagan has experienced visitor and revenue increases stronger than the BC average over the past 10 years. As a result, this region is quite bullish about the future and looks forward to visitor and revenue growth as solid as 3-5% per annum.

The Thompson Okanagan Tourism Association (TOTA) recently developed a ten year tourism strategy for the region (2012-2022). Its goal is to overcome a fairly severe seasonality issue and become a true year-round destination delivering “exceptional visitor experiences” which will strengthen the region’s identity and also its approach to strategic planning. Drawing from the strategy, TOTA intends to build upon “experience-based themes”. This means:

- identifying the iconic and most memorable and unique elements of the region to build *recognition*;
- enriching local flavours and ingredients, both epicurean and natural, to create “*intimacy and romance*” and also to spread economic benefits around the region;
- revealing local historical and cultural “stories” to create *emotional connection*;
- expanding personal horizons by creating “*learning experiences*” (TOTA’s research shows “learners” makeup 35% of the global market); and,
- building *authenticity* by enabling visitors to connect with local history, culture, heritage and land-use.

The Thompson Okanagan region has already been successful at seizing new market opportunities and developing new products and experiences, as evidenced by the vibrant agri-tourism sub-sector. More opportunities lie on the horizon with further expansion of Aboriginal tourism in the Osoyoos area, potential UNESCO and/or Geo-Park designation of Wells Grey Park over the next 5 to 10 years, and possible new attractions in Kamloops and Kelowna. Although still several years away, the latter, called Kelowna Mountain, would be a year-round attraction proposed to include: a winterpark, winery, mountain bike park, suspension bridges and golf plus a residential component. Sports tourism (i.e. major tournaments and events) is another identified concept for product development during the Thompson Okanagan shoulder season.

To accomplish all that TOTA has set out for the tourism region will depend highly on a tourism and hospitality workforce that is committed and capable of delivering the right kind of quality experience. This will require having a properly trained workforce available and then recruiting and retaining individuals who can provide high level knowledge, interpretation and quality customer service skills.

3.2. Labour Demand Projections by Industry and by Occupation

3.2.1. Regional Employment Growth in the Recent Past

There are five industry groupings that have been selected to represent the tourism and hospitality sector: transportation (including air transportation, rail

transportation, and other transportation providing services to tourists), accommodation, food and beverage services, recreation and entertainment services, and travel services. The exact composition of standardized industry classifications (using the North American Industry Classification System, or NAICS) that defines each of these five industries can be found in Appendix I. These groupings are consistent with those presented in the CTHRC/CBC study.

Due to the lack of data at the regional level, we use employment data available from the Labour Force Survey conducted by Statistics Canada to describe tourism and hospitality related employment change in the following five broader industry groupings:

- Transportation and Warehousing
- Finance, Insurance, Real Estate and Leasing
- Business, Building and Other Support Services
- Information, Culture and Recreation
- Accommodation and Food Services

Within BC between the years of 2010 and 2012, overall employment in the economy grew at an average growth rate of 1.2% per year. Of employment growth in the tourism and hospitality related industries, the one that has experienced strongest growth was transportation and warehousing, at an annual growth rate of 4.3%. Next were business, building and other support services industry and information, culture and recreation industry, at an annual growth rate of 3.6%. The accommodation and food services industry also experienced growth stronger than the provincial average, at 2.8% per year. The only industry that experienced slower than average employment growth was finance, insurance, real estate and leasing, with little change of employment between 2010 and 2012.

By comparison, overall employment in the Thompson Okanagan development region has been of flat growth (a mixture of -1.0% in 2011 and 0.8% in 2012), compared with 1.2% per year positive growth in the province. However, the accommodation and food services industry in the Thompson Okanagan development region, and the business, building and other support services industry, have experienced much stronger employment growth than the provincial averages in the same industries (10.9% compared with 2.8%, and 15.7% compared with 3.6%). Employment in the transportation and warehousing industry, finance, insurance, real estate and leasing industry, and information, culture and recreation industry has experienced decline over the 2010 to 2012 period.

Figure 1: Employment in Tourism and Hospitality Related Industries, Thompson Okanagan Development Region and BC

Employment ('000s)	BC			Annual Growth Rate 2010-12	Thompson Okanagan			Annual Growth Rate 2010-12
	2010	2011	2012		2010	2011	2012	
All Industries	2,256.5	2,274.7	2,312.5	1.2%	257.2	254.7	256.7	-0.1%
Goods-Producing Sector	442.7	447.4	459.1	1.8%	64.5	60.3	57.4	-5.7%
Agriculture	31.8	26.1	26.0	-9.6%	7.3	5.9	5.9	-10.1%
Forestry, Fishing, Mining, Oil and Gas	40.6	40.1	46.1	6.6%	8.0	5.4	7.4	-3.8%
Utilities	14.0	12.8	14.9	3.2%	1.8	2.8	x	
Construction	190.5	204.6	192.9	0.6%	26.7	25.4	25.5	-2.3%
Manufacturing	165.8	163.9	179.2	4.0%	20.6	20.9	17.3	-8.4%
Services-Producing Sector	1,813.8	1,827.2	1,853.4	1.1%	192.7	194.4	199.3	1.7%
Trade	370.1	355.0	356.6	-1.8%	42.0	41.4	40.1	-2.3%
Transportation and Warehousing	118.6	124.1	128.9	4.3%	12.2	10.5	11.0	-5.0%
Finance, Insurance, Real Estate and Leasing	141.8	139.4	141.8	0.0%	14.3	11.7	14.1	-0.7%
Professional, Scientific and Technical Services	174.3	182.1	173.0	-0.4%	16.1	14.2	16.3	0.6%
Business, Building and Other Support Services	91.0	94.2	97.6	3.6%	7.1	8.6	9.5	15.7%
Educational Services	167.3	167.1	177.3	2.9%	16.3	16.0	17.6	3.9%
Health Care and Social Assistance	264.2	261.3	274.5	1.9%	29.7	34.3	34.4	7.6%
Information, culture and recreation	108.1	109.4	116.0	3.6%	13.3	10.7	11.6	-6.6%
Accommodation and food services	162.3	181.8	171.6	2.8%	18.7	22.2	23.0	10.9%
Other services	104.7	103.9	113.9	4.3%	11.6	14.2	12.6	4.2%
Public administration	111.4	108.9	102.4	-4.1%	11.4	10.7	8.9	-11.6%

Note: Values less than 1.5 (1,500 persons) are suppressed (x).

Source: Statistics Canada, Labour Force Survey

3.2.2. Regional Employment Projections

In light of recent employment growth changes in the region and in the province, and along with current economic conditions and outlook, we have updated potential employment growth rates for all industries in the region, the province, as well as employment growth rates in the five tourism and hospitality related industries (these are the broader industry groupings in the BC Labour Market Scenario Model from which tourism and hospitality sector sub-industries employment can be estimated):

- Transportation and Warehousing
- Finance, Insurance, Real Estate and Leasing
- Professional, Scientific & Managerial Services
- Other Services
- Accommodation and Food Services

In order to derive potential employment growth rates in the province from 2013 to 2020, we have referred to the 2013 Budget document for forecasted employment growth rates in 2013 through 2017. Growth rates from 2018 to 2020 are assumed to remain the same as those in the *BC Labour Market Outlook: 2010-2020*, published in 2011.

For the Thompson Okanagan development region, employment for all industries is projected to grow at an average rate of 0.8% per year between 2010 and 2020, compared with the projected provincial average of 1.2% per year. Of the five broad tourism and hospitality related industry groups, accommodation and food

services is projected to grow the fastest, and faster than the provincial average for that industry. The other four industry groups are projected to grow at rates slower than the provincial averages in the same industries. This has been summarized in Figure 2.

Figure 2: Projected Employment Growth Rates in Tourism and Hospitality Related Industries, Thompson Okanagan Development Region and BC

	Projected Annual Growth Rate 2010-2020	
	<u>BC</u>	<u>Thompson Okanagan</u>
All Industries Total	1.2%	0.8%
Transportation & Warehousing	1.4%	-0.2%
Finance, Insurance & Real Estate	0.8%	-0.1%
Professional, Scientific & Managerial	1.8%	1.6%
Other Services	1.6%	0.7%
Accommodation & Food Services	1.7%	2.2%

Source: BC Labour Market Scenario Model; Updated by RKA

Within each industry, certain occupations have been selected for analysis as they represent the ones that will have a long term impact on the success of the industries.

As described in the Methodology Section, the underlying occupational shares within each industry have been derived based on the CTHRC/CBoC study.

In Figure 3 we present employment demand projections by industry and by occupation for the tourism and hospitality sector.

Figure 3: Estimated (2010-2012) and Projected (2013-2020) Labour Demand (in Full-Year Jobs) by Industry and by Occupation in Tourism and Hospitality Related Industries, Thompson Okanagan

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	1,214	1,026	1,055	1,125	1,153	1,179	1,186	1,193	1,208	1,219	1,248
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	267	226	232	248	254	260	261	263	266	269	275
Pursers and Flight Attendants (G712)/(NOC6432)	204	173	178	190	194	199	200	201	204	205	210
Airline Sales and Service Agents (G713)/(NOC6433)	254	215	220	235	241	247	248	249	253	255	261
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	84	71	73	78	80	81	82	82	83	84	86
Air Transport Ramp Attendants (H737)/(NOC7437)	70	59	61	65	66	68	68	69	70	70	72
All other Air Transportation Occupations	335	283	291	310	318	325	327	329	333	336	344
Rail transportation	64	53	54	58	59	60	60	59	59	58	58
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	29	24	24	26	27	27	27	27	27	26	26
Railway Conductors and Brakemen/women (H722)/(NOC7362)	35	29	30	32	32	33	33	32	32	32	32
Other Transportation	2,361	1,951	2,008	2,152	2,207	2,264	2,275	2,292	2,319	2,333	2,363
Transportation Managers (A373)/(NOC0713)	46	38	39	42	43	44	44	45	45	45	46
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	43	35	36	39	40	41	41	41	42	42	43
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	101	84	86	92	95	97	98	98	100	100	102
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	719	595	612	656	673	690	694	699	707	711	720
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	301	249	256	275	282	289	291	293	296	298	302
All other Transportation Occupations (excl. air)	1,150	950	978	1,048	1,075	1,102	1,108	1,116	1,129	1,136	1,150
Accommodation	6,254	6,690	7,456	7,022	7,209	7,366	7,441	7,505	7,602	7,691	7,803
Accommodation Service Managers (A222)/(NOC0632)	449	480	535	504	518	529	534	539	546	552	560
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	306	327	365	344	353	361	364	367	372	376	382
Chefs (G411)/(NOC6241)	117	126	140	132	136	139	140	141	143	145	147
Cooks (G412)/(NOC6242)	185	198	220	207	213	218	220	222	225	227	231
Bartenders (G512)/(NOC6452)	74	79	88	83	85	87	88	89	90	91	92
Food and Beverage Servers (G513)/(NOC6453)	677	725	808	761	781	798	806	813	823	833	845
Hotel Front Desk Clerks (G715)/(NOC6435)	733	784	873	823	844	863	872	879	890	901	914
Light Duty Cleaners (G931)/(NOC6661)	1,196	1,279	1,425	1,343	1,379	1,409	1,423	1,435	1,454	1,471	1,493
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	266	285	318	299	307	314	317	320	324	328	333
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	254	272	303	286	293	300	303	305	309	313	317
All other occupations in accommodation	1,996	2,135	2,380	2,241	2,301	2,351	2,374	2,395	2,426	2,454	2,490

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	14,817	15,835	17,650	16,584	16,931	17,285	17,482	17,662	17,912	18,136	18,370
Restaurant & food service manager (A221)/(NOC0631)	1,151	1,230	1,371	1,288	1,315	1,342	1,357	1,371	1,391	1,408	1,426
Food Service Supervisors (G012)/(NOC6212)	401	428	477	448	458	467	473	477	484	490	497
Cashiers (G311)/(NOC6611)	928	992	1,106	1,039	1,061	1,083	1,095	1,106	1,122	1,136	1,151
Chefs (G411)/(NOC6241)	646	690	769	723	738	754	762	770	781	791	801
Cooks (G412)/(NOC6242)	2,064	2,206	2,459	2,311	2,359	2,409	2,436	2,462	2,497	2,528	2,561
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	474	506	564	530	541	552	559	564	572	580	587
Bartenders (G512)/(NOC6452)	475	508	566	532	543	555	561	567	575	582	589
Food and Beverage Servers (G513)/(NOC6453)	3,222	3,443	3,838	3,606	3,681	3,758	3,801	3,840	3,894	3,943	3,994
Bakers (G942)/(NOC6252)	153	163	182	171	175	178	180	182	185	187	189
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	4,144	4,428	4,936	4,638	4,735	4,833	4,888	4,939	5,008	5,071	5,136
Delivery drivers (H714)/(NOC7414)	129	138	154	145	148	151	153	154	156	158	160
All other Food and Beverage occupations	1,031	1,102	1,229	1,154	1,178	1,203	1,217	1,229	1,246	1,262	1,278
Recreation and Entertainment	5,364	5,239	4,769	5,193	5,314	5,391	5,361	5,408	5,459	5,551	5,630
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	143	140	128	139	142	144	143	145	146	148	151
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	67	65	59	64	66	67	67	67	68	69	70
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	621	607	553	602	616	625	621	626	632	643	652
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	318	311	283	308	316	320	319	321	324	330	335
Cashiers (G311)/(NOC6611)	175	171	155	169	173	176	175	176	178	181	183
Security Guards and Related Occupations (G631)/(NOC6651)	84	82	75	81	83	84	84	84	85	87	88
Casino Occupations (G723)/(NOC6443)	332	324	295	321	329	334	332	335	338	344	348
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	328	321	292	318	325	330	328	331	334	340	344
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	93	91	82	90	92	93	93	94	94	96	97
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	163	159	145	158	162	164	163	165	166	169	171
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	263	256	233	254	260	264	262	265	267	272	276
All other Recreation and Entertainment occupations	2,776	2,712	2,469	2,688	2,751	2,791	2,775	2,799	2,826	2,874	2,915
Travel Services	892	861	1,010	956	962	972	966	966	971	978	981
Retail Trade Managers (A211)/(NOC0621)	60	58	68	64	64	65	65	65	65	66	66
Travel Counsellors (G711)/(NOC6431)	333	322	377	357	359	363	361	361	363	365	367
All other Travel Services Occupations	499	482	565	535	538	544	540	540	543	547	549
Total Tourism and Related Industries	30,965	31,655	34,002	33,090	33,835	34,517	34,770	35,086	35,531	35,967	36,454

Source: RKA based on BC Labour Market Scenario Model and Conference Board of Canada 2011 Update

The model assumes that all occupations within each industry grow at the same pace as the industry itself. Therefore, occupations in the accommodation and food services industry are projected to grow the fastest. Similarly, because of the large sizes of accommodation and food and beverage services industries, occupations in these industries are projected to generate the largest number of new openings due to increase in economic activities.

When occupations are combined from different industries represented here, the 10 occupations expected to generate the largest number of new openings (i.e., full-year job openings due to increase in economic activities) are:

- Food counter attendants and kitchen helpers (1,064);
- Food and beverage servers (940);
- Cooks (543);
- Light duty cleaners (297);
- Restaurant and food service managers (275);
- Cashiers (231);
- Chefs (185);
- Hotel Front Desk Clerks (181);
- Bartenders (132); and
- Accommodation services managers (111).

3.2.3. Replacement Needs

We note that employment projections by industry and by occupation shown above indicate the level of employment required according to changes in real economic growth in the economy. From these levels of employment in different years we can calculate new openings due to economic expansion. However, we note that even in the absence of any new jobs, there are and will be jobs available because of the need to replace those workers who have left the labour force due to retirement or death. This is referred to as openings due to attrition.

In Figure 4, we have shown total number of new jobs as well as replacement jobs from 2011 and 2020, by industry and by occupation.

Figure 4: Total Job Openings (Expressed in Full-Year Jobs) in Tourism and Hospitality Related Industries, Thompson Okanagan, 2011 to 2020

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Air transportation	35	379	413
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	8	88	96
Pursers and Flight Attendants (G712)/(NOC6432)	6	58	64
Airline Sales and Service Agents (G713)/(NOC6433)	7	72	79
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	2	29	32
Air Transport Ramp Attendants (H737)/(NOC7437)	2	25	26
All other Air Transportation Occupations	9	107	116
Rail transportation	-6	22	16
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	-3	10	7
Railway Conductors and Brakemen/women (H722)/(NOC7362)	-3	12	9
Other Transportation	2	711	714
Transportation Managers (A373)/(NOC0713)	0	17	17
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	0	9	9
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	0	25	25
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	1	231	232
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	0	97	97
All other Transportation Occupations (excl. air)	1	334	335
Accommodation	1,549	1,650	3,199
Accommodation Service Managers (A222)/(NOC0632)	111	170	281
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	76	67	143
Chefs (G411)/(NOC6241)	29	22	52
Cooks (G412)/(NOC6242)	46	35	81
Bartenders (G512)/(NOC6452)	18	9	27
Food and Beverage Servers (G513)/(NOC6453)	168	82	249
Hotel Front Desk Clerks (G715)/(NOC6435)	181	257	438
Light Duty Cleaners (G931)/(NOC6661)	297	413	710
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	66	92	158
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	63	29	92
All other occupations in accommodation	494	474	968

Industry/Occupation	Growth Demand	Replacement Demand	Total Job Openings
Food & Beverage Services	3,553	2,529	6,082
Restaurant & food service manager (A221)/(NOC0631)	275	434	709
Food Service Supervisors (G012)/(NOC6212)	96	106	202
Cashiers (G311)/(NOC6611)	222	190	412
Chefs (G411)/(NOC6241)	156	123	278
Cooks (G412)/(NOC6242)	497	392	889
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	114	57	170
Bartenders (G512)/(NOC6452)	114	57	171
Food and Beverage Servers (G513)/(NOC6453)	772	386	1,158
Bakers (G942)/(NOC6252)	37	43	80
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	993	468	1,461
Delivery drivers (H714)/(NOC7414)	31	52	83
All other Food and Beverage occupations	247	223	470
Recreation and Entertainment	267	1,247	1,514
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	7	55	62
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	3	22	25
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	31	114	145
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	16	70	86
Cashiers (G311)/(NOC6611)	9	30	39
Security Guards and Related Occupations (G631)/(NOC6651)	4	27	32
Casino Occupations (G723)/(NOC6443)	17	96	113
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	16	57	73
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	5	27	32
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	8	16	24
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	13	57	70
All other Recreation and Entertainment occupations	138	676	814
Travel Services	89	307	396
Retail Trade Managers (A211)/(NOC0621)	6	23	29
Travel Counsellors (G711)/(NOC6431)	33	107	140
All other Travel Services Occupations	50	177	226
Total Tourism and Related Industries	5,489	6,845	12,334

Source: RKA based on BC Labour Market Scenario Model and Conference Board of Canada 2011 Update

As can be seen in Figure 4, openings due to replacement needs are greater than new job openings. It should also be noted that replacement jobs presented here do not include those due to workforce turnover, and therefore actual number of openings due to replacement needs including turnover is much higher. Recent analysis by the CTHRC demonstrates that for B.C., turnover-related employment demand will be responsible for approximately 85% of total labour shortages in the projection period.⁵ Turnover-related employment demand will thus have a significant impact on the ability of employers to attract and recruit quality staff to fill vacancies during the projection period.

When occupations are combined from different industries represented, the 10 occupations expected to generate the largest number of replacement openings are:

- Food counter attendants and kitchen helpers (513);
- Food and beverage servers (467);
- Restaurant and food service managers (434);
- Cooks (427);
- Light duty cleaners (413);
- Hotel front desk clerks (257);
- Bus drivers (231);
- Cashiers (220);
- Accommodation Service Managers (170); and
- Chefs (145).

3.3. Labour Supply Projections by Industry and by Occupation

Our research, based on the BC Regional Labour Market Scenario Model (in 2011) along with information from Statistics Canada's Labour Force Survey and the BC Government's 2013 Budget, has shown that overall, the labour force in the province is projected to grow from 2,442,700 in 2010 to approximately 2,713,900 by 2020, representing an average compound growth rate of 1.1% per year during this period. By comparison, employment growth is projected at 1.2% per year over the same period.

For the Thompson Okanagan development region, labour force growth is projected to be at an average rate of 0.6% per year between 2010 and 2020, compared with the projected employment growth rate of 0.8% per year in the region during the same period.

⁵ See The Future of Canada's Tourism Sector: Shortages to Resurface as Labour Market Tightens, p. 21. March 2012.
http://cthrc.ca/en/research_publications/~/_media/Files/CTHRC/Home/research_publications/labour_market_information/Supply_Demand/SupplyDemand_Report_Current_EN.ashx

Adopting the approaches as described in the Methodology Section, we have projected labour supply by industry and by occupation, using the same industry and occupation classifications as the ones in the labour demand projections.

Figure 5: Estimated (2010-2012) and Projected (2013-2020) Labour Supply (in Full-Year Jobs) by Industry and by Occupation in Tourism and Hospitality Related Industries, Thompson Okanagan

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	1,222	1,020	1,046	1,111	1,127	1,146	1,149	1,153	1,162	1,165	1,177
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	267	223	229	243	247	251	251	252	253	253	255
Pursers and Flight Attendants (G712)/(NOC6432)	207	173	178	189	192	195	196	198	200	201	203
Airline Sales and Service Agents (G713)/(NOC6433)	256	213	217	230	233	236	236	236	238	238	240
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	84	70	72	77	78	79	80	80	81	81	82
Air Transport Ramp Attendants (H737)/(NOC7437)	70	59	61	65	66	68	68	68	69	70	71
All other Air Transportation Occupations	338	282	289	307	312	317	318	319	321	322	326
Rail transportation	62	51	53	56	57	58	57	57	57	57	58
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	28	23	24	25	26	26	26	26	26	26	26
Railway Conductors and Brakemen/women (H722)/(NOC7362)	34	28	29	31	31	31	31	31	31	31	31
Other Transportation	2,352	1,963	2,012	2,137	2,169	2,205	2,211	2,219	2,238	2,243	2,267
Transportation Managers (A373)/(NOC0713)	46	38	39	42	42	43	43	43	44	44	44
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	42	35	36	39	39	40	40	40	41	41	42
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	101	85	87	92	94	95	96	96	97	98	99
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	718	598	611	648	656	666	666	667	670	670	675
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	301	254	264	283	291	300	304	308	314	319	326
All other Transportation Occupations (excl. air)	1,145	953	975	1,033	1,046	1,061	1,062	1,064	1,071	1,072	1,081
Accommodation	6,292	6,752	7,522	7,038	7,134	7,195	7,228	7,256	7,317	7,375	7,456
Accommodation Service Managers (A222)/(NOC0632)	453	487	544	511	519	525	528	531	536	541	547
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	309	331	368	344	348	351	352	353	355	358	361
Chefs (G411)/(NOC6241)	118	126	140	131	133	134	134	135	136	136	138
Cooks (G412)/(NOC6242)	185	198	220	206	209	210	211	212	213	214	216
Bartenders (G512)/(NOC6452)	75	80	88	82	83	83	83	82	83	83	83
Food and Beverage Servers (G513)/(NOC6453)	682	731	812	758	767	771	774	776	781	786	793
Hotel Front Desk Clerks (G715)/(NOC6435)	739	791	878	820	829	834	836	838	843	848	856
Light Duty Cleaners (G931)/(NOC6661)	1,194	1,288	1,443	1,358	1,384	1,403	1,417	1,430	1,449	1,468	1,492
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	269	288	320	299	302	304	304	304	305	306	308
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	256	274	305	285	288	289	290	291	292	294	296
All other occupations in accommodation	2,013	2,158	2,402	2,245	2,273	2,290	2,299	2,306	2,324	2,340	2,364

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	14,921	15,994	17,784	16,607	16,800	16,909	16,991	17,062	17,207	17,346	17,541
Restaurant & food service manager (A221)/(NOC0631)	1,163	1,248	1,390	1,301	1,318	1,329	1,334	1,338	1,347	1,357	1,370
Food Service Supervisors (G012)/(NOC6212)	404	432	480	447	451	453	455	456	460	463	467
Cashiers (G311)/(NOC6611)	936	1,007	1,123	1,052	1,067	1,077	1,090	1,102	1,119	1,136	1,156
Chefs (G411)/(NOC6241)	646	694	773	724	734	740	744	747	753	759	767
Cooks (G412)/(NOC6242)	2,065	2,218	2,472	2,314	2,345	2,366	2,377	2,387	2,407	2,426	2,453
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	476	510	565	527	531	534	537	541	546	552	559
Bartenders (G512)/(NOC6452)	480	511	565	524	527	527	526	524	524	524	526
Food and Beverage Servers (G513)/(NOC6453)	3,247	3,470	3,845	3,580	3,610	3,621	3,631	3,638	3,661	3,683	3,716
Bakers (G942)/(NOC6252)	154	166	185	173	176	177	179	180	182	184	186
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	4,177	4,465	4,951	4,610	4,651	4,668	4,683	4,696	4,728	4,759	4,805
Delivery drivers (H714)/(NOC7414)	130	140	155	144	146	147	147	147	148	148	150
All other Food and Beverage occupations	1,043	1,134	1,279	1,212	1,244	1,270	1,289	1,307	1,331	1,355	1,384
Recreation and Entertainment	5,365	5,402	4,915	5,265	5,291	5,300	5,232	5,231	5,229	5,261	5,289
Recreation and Sport Program and Service Directors (A343)/(NOC0531)	144	145	133	143	144	145	143	143	143	144	145
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	67	67	61	65	66	66	65	65	65	66	66
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	623	626	567	606	607	606	598	597	597	600	603
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	319	323	294	316	319	320	317	317	318	320	322
Cashiers (G311)/(NOC6611)	175	177	161	173	174	175	173	174	175	176	178
Security Guards and Related Occupations (G631)/(NOC6651)	83	84	76	81	82	82	80	80	80	80	80
Casino Occupations (G723)/(NOC6443)	332	334	304	326	328	329	325	325	325	327	329
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	326	328	298	319	321	321	317	317	318	320	322
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	93	94	85	92	92	93	92	92	92	93	93
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	163	165	150	161	161	162	160	160	160	161	162
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	263	263	238	253	253	252	246	244	242	241	240
All other Recreation and Entertainment occupations	2,777	2,797	2,547	2,729	2,744	2,751	2,716	2,716	2,717	2,734	2,750
Travel Services	896	863	1,017	968	978	990	992	1,000	1,014	1,027	1,041
Retail Trade Managers (A211)/(NOC0621)	60	58	69	66	67	68	68	69	70	71	72
Travel Counsellors (G711)/(NOC6431)	335	322	379	361	364	368	369	372	377	382	387
All other Travel Services Occupations	501	482	569	541	547	554	555	559	567	574	581
Total Tourism and Related Industries	31,110	32,046	34,349	33,182	33,556	33,803	33,862	33,978	34,225	34,473	34,828

Source: RKA based on BC Labour Market Scenario Model and Conference Board of Canada 2011 Update

A slower labour force supply growth rate implies that employers will increasingly face pressure to draw those who otherwise would have been unemployed into the labour pool. Alternatively, employers can use less staff, increase productivity, retain better their existing staff, etc.

Within industries, occupational labour supply shows average annual growth rates different from the industry they fall into. This is in line with the underlying assumptions regarding potential labour supply growth patterns from the CTHRC/CBoC study.

It is also noted that labour supply growth rates in the occupations of restaurant and food services managers and chefs have been adjusted downwards in line with local labour market intelligence.

3.4. Supply and Demand Imbalances

When labour demand in an industry or an occupation outpaces labour supply, labour shortage arises. In the table that follows, we show the results of combining labour supply and labour demand by industry and by occupation as described in the previous two sub-sections. It is noted that a positive sign represents labour shortage in that industry or occupation in a given year, while a negative sign represents labour surplus.

Figure 6: Estimated (2010-2012) and Projected (2013-2020) Labour Shortage (in Full-Year Jobs) by Industry and by Occupation in Tourism and Hospitality Related Industries, Thompson Okanagan

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Air transportation	-9	6	9	15	26	33	37	41	46	55	71
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	0	3	3	5	7	9	10	11	13	15	19
Pursers and Flight Attendants (G712)/(NOC6432)	-2	0	0	1	2	3	3	3	4	5	7
Airline Sales and Service Agents (G713)/(NOC6433)	-2	2	3	5	8	11	12	13	15	17	21
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	0	1	1	1	2	2	2	2	3	3	4
Air Transport Ramp Attendants (H737)/(NOC7437)	0	0	0	0	0	0	0	0	0	1	1
All other Air Transportation Occupations	-4	1	2	3	6	8	9	10	12	14	18
Rail transportation	2	2	1	2	2	2	2	2	1	1	0
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	1	1	0	1	1	1	1	1	0	0	0
Railway Conductors and Brakemen/women (H722)/(NOC7362)	1	1	1	1	1	1	1	1	1	1	0
Other Transportation	8	-12	-4	14	37	58	64	73	81	90	96
Transportation Managers (A373)/(NOC0713)	0	0	0	0	1	1	1	1	2	2	2
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	1	0	0	0	1	1	1	1	1	1	1
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	0	-1	0	0	1	2	2	2	2	3	3
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	2	-3	1	8	16	24	28	32	37	41	45
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	1	-5	-7	-9	-9	-10	-13	-16	-18	-21	-24
All other Transportation Occupations (excl. air)	5	-3	3	15	28	41	46	52	58	64	69
Accommodation	-37	-62	-66	-16	75	171	212	249	285	316	347
Accommodation Service Managers (A222)/(NOC0632)	-4	-7	-9	-7	-2	3	6	8	10	11	13
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	-3	-3	-3	0	5	10	12	14	17	19	21
Chefs (G411)/(NOC6241)	0	0	0	1	3	5	6	6	7	8	9
Cooks (G412)/(NOC6242)	0	0	0	1	4	7	9	10	12	13	14
Bartenders (G512)/(NOC6452)	-1	-1	0	1	3	4	5	6	7	8	9
Food and Beverage Servers (G513)/(NOC6453)	-5	-6	-5	2	14	26	32	37	42	47	52
Hotel Front Desk Clerks (G715)/(NOC6435)	-6	-7	-5	3	16	29	36	41	47	53	58
Light Duty Cleaners (G931)/(NOC6661)	2	-9	-18	-15	-5	6	6	6	5	3	0
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	-2	-3	-2	0	5	10	13	16	19	22	25
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-2	-2	-2	1	5	10	13	15	17	19	21
All other occupations in accommodation	-17	-23	-22	-4	28	61	76	89	102	114	126

Industry/Occupation	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Food & Beverage Services	-103	-159	-134	-23	131	376	490	601	705	790	829
Restaurant & food service manager (A221)/(NOC0631)	-12	-19	-20	-13	-3	13	24	34	43	51	56
Food Service Supervisors (G012)/(NOC6212)	-3	-4	-2	1	7	14	18	21	25	27	29
Cashiers (G311)/(NOC6611)	-8	-15	-17	-13	-7	5	5	4	3	1	-5
Chefs (G411)/(NOC6241)	0	-4	-4	-1	4	13	18	23	28	32	34
Cooks (G412)/(NOC6242)	-1	-13	-13	-3	14	43	59	75	90	103	108
Maîtres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	-3	-3	-1	3	10	19	21	24	26	28	28
Bartenders (G512)/(NOC6452)	-4	-3	1	8	16	27	35	43	50	57	63
Food and Beverage Servers (G513)/(NOC6453)	-25	-26	-8	26	72	137	170	202	233	260	278
Bakers (G942)/(NOC6252)	-1	-2	-3	-2	-1	1	2	2	3	3	3
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	-33	-37	-15	27	84	166	205	243	280	311	331
Delivery drivers (H714)/(NOC7414)	-1	-1	-1	0	2	4	6	7	9	10	11
All other Food and Beverage occupations	-11	-32	-51	-58	-66	-67	-73	-78	-85	-94	-106
Recreation and Entertainment	-2	-163	-146	-73	24	91	129	177	230	291	341
Recreation and Sport Program and Service Directors (A343)/(NOC0531)	0	-5	-5	-4	-2	-1	0	1	3	4	5
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	0	-2	-2	-1	0	1	1	2	3	3	4
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	-2	-19	-15	-4	9	19	23	29	35	43	49
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	-1	-11	-11	-8	-3	0	2	4	7	10	12
Cashiers (G311)/(NOC6611)	0	-6	-6	-4	-1	1	1	2	3	5	6
Security Guards and Related Occupations (G631)/(NOC6651)	0	-2	-2	0	1	3	4	5	6	7	8
Casino Occupations (G723)/(NOC6443)	0	-10	-9	-5	1	5	7	10	13	17	20
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	2	-7	-6	-1	5	9	11	14	16	20	23
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	0	-3	-3	-2	0	0	1	2	2	3	4
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	0	-5	-5	-2	0	2	3	5	6	8	10
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	-1	-7	-4	1	7	12	16	21	26	31	36
All other Recreation and Entertainment occupations	-1	-86	-78	-42	7	40	59	83	109	140	165
Travel Services	-4	-2	-7	-12	-16	-18	-26	-34	-42	-49	-59
Retail Trade Managers (A211)/(NOC0621)	0	0	-1	-2	-2	-3	-4	-4	-5	-6	-7
Travel Counsellors (G711)/(NOC6431)	-2	-1	-2	-3	-5	-5	-8	-11	-14	-16	-20
All other Travel Services Occupations	-2	-1	-4	-6	-9	-10	-15	-19	-23	-27	-32
Total Tourism and Related Industries	-145	-391	-347	-92	279	714	909	1,108	1,306	1,494	1,626

Source: RKA based on BC Labour Market Scenario Model and Conference Board of Canada 2011 Update

3.5. Summary of Findings

In this Section, we have provided a general overview of the tourism market and products in the Thompson Okanagan region, along with industry stakeholders' expectation on the regional strength and development priorities in the near future. We then examined recent employment growth patterns for industries within the tourism and hospitality sector. Then we presented our projections of potential labour demand, labour supply, and supply-demand gaps for five tourism and hospitality industries (transportation including air, rail and other transportation; accommodation; food and beverage services; recreation and entertainment; and travel services), as well as occupations within each industry.

Overall, labour demand in the tourism and hospitality sector in the Thompson Okanagan region is projected to grow at an average compound rate of 1.6% per year between 2010 and 2020, which is about the same as the labour demand growth in the tourism and hospitality sector in BC over the same period.

Within the sector in the region, employment in the accommodation industry and the food and beverage services industry are expected to grow faster than the average rate of the entire sector, while employment in transportation as well as in the recreation and entertainment industry is expected to grow much more slowly than the sector average. In total, about 5,480 new full-year jobs are expected to be generated in the region as a result of increased tourism activities between 2010 and 2020.

In addition, we have shown that a total of 6,860 full-year jobs may become available in the region as employers seek replacement for those who will leave the workforce due to retirement or death. Replacement jobs in the tourism and hospitality sector in the region account for 56% of all potential job openings. By comparison, replacement jobs in the tourism and hospitality sector across all regions account for 57% of all potential job openings. This implies that the average age of workers in the Thompson Okanagan region tourism and hospitality sector is about the same as their provincial counterparts.

Figure 7: Summary of Potential Labour Demand (in Full-Year Jobs), both due to Growth and Replacement Needs, by Industry and by Occupation in Tourism and Hospitality Related Industries, Thompson Okanagan and the Province

Industry/Occupation	Thompson Okanagan			BC		
	Growth Demand	Rplcmnt Demand	Annual Grwth Rt	Growth Demand	Rplcmnt Demand	Annual Grwth Rt
Air transportation	30	380	0.3%	2,360	4,100	1.8%
Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)	10	90		520	960	
Pursers and Flight Attendants (G712)/(NOC6432)	10	60		400	670	
Airline Sales and Service Agents (G713)/(NOC6433)	10	70		490	830	
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)	0	30		150	290	
Air Transport Ramp Attendants (H737)/(NOC7437)	0	20		130	220	
All other Air Transportation Occupations	10	110		660	1,130	
Rail transportation	-10	20	-1.0%	30	230	0.6%
Railway and Yard Locomotive Engineers (H721)/(NOC7361)	0	10		10	100	
Railway Conductors and Brakemen/women (H722)/(NOC7362)	0	10		20	130	
Other Transportation	0	710	0.0%	3,850	7,260	1.6%
Transportation Managers (A373)/(NOC0713)	0	20		80	200	
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	0	10		70	80	
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)	0	20		150	270	
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)	0	230		1,180	2,290	
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)	0	100		510	990	
All other Transportation Occupations (excl. air)	0	330		1,840	3,430	
Accommodation	1,550	1,650	2.2%	7,560	11,030	1.7%
Accommodation Service Managers (A222)/(NOC0632)	110	170		520	1,090	
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)	80	70		340	360	
Chefs (G411)/(NOC6241)	30	20		170	190	
Cooks (G412)/(NOC6242)	50	40		220	260	
Bartenders (G512)/(NOC6452)	20	10		80	50	
Food and Beverage Servers (G513)/(NOC6453)	170	80		780	560	
Hotel Front Desk Clerks (G715)/(NOC6435)	180	260		840	1,650	
Light Duty Cleaners (G931)/(NOC6661)	300	410		1,720	2,840	
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	70	90		310	630	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	60	30		290	240	
All other occupations in accommodation	490	470		2,300	3,160	

Industry/Occupation	Thompson Okanagan			BC		Annual Grwth Rt
	Growth Demand	Rplcmnt Demand	Annual Grwth Rt	Growth Demand	Rplcmnt Demand	
Food & Beverage Services	3,550	2,530	2.2%	25,250	24,720	1.7%
Restaurant & food service manager (A221)/(NOC0631)	280	430		1,980	3,780	
Food Service Supervisors (G012)/(NOC6212)	100	110		680	890	
Cashiers (G311)/(NOC6611)	220	190		1,580	1,520	
Chefs (G411)/(NOC6241)	160	120		1,350	1,340	
Cooks (G412)/(NOC6242)	500	390		3,530	4,070	
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)	110	60		790	550	
Bartenders (G512)/(NOC6452)	110	60		770	540	
Food and Beverage Servers (G513)/(NOC6453)	770	390		5,390	3,690	
Bakers (G942)/(NOC6252)	40	40		270	370	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	990	470		6,960	5,570	
Delivery drivers (H714)/(NOC7414)	30	50		220	390	
All other Food and Beverage occupations	250	220		1,740	2,010	
Recreation and Entertainment	270	1,260	0.5%	6,420	10,990	1.3%
Recreation and Sport Program and Service Directors (A343)/(NOC0513)	10	50		170	440	
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)	0	20		70	180	
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)	30	110		740	850	
Retail Salespersons and Sales Clerks (G211)/(NOC6421)	20	70		430	610	
Cashiers (G311)/(NOC6611)	10	30		210	250	
Security Guards and Related Occupations (G631)/(NOC6651)	0	30		80	240	
Casino Occupations (G723)/(NOC6443)	20	100		520	1,040	
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)	20	60		390	580	
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)	0	30		100	280	
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)	10	20		200	200	
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)	10	60		300	540	
All other Recreation and Entertainment occupations	140	680		3,220	5,780	
Travel Services	90	310	1.0%	1,240	3,450	1.2%
Retail Trade Managers (A211)/(NOC0621)	10	20		80	250	
Travel Counsellors (G711)/(NOC6431)	30	110		450	1,240	
All other Travel Services Occupations	50	180		700	1,960	
Total Tourism and Related Industries	5,480	6,860	1.6%	46,700	61,800	1.6%

Source: RKA based on BC Labour Market Scenario Model and Conference Board of Canada 2012 Update

Overall, labour surpluses existed in 2010, 2011, and 2012, and are expected in 2013. The shortages are expected to resume starting 2014 and will last through the end of the projection period. Such a pattern is in line with occupational labour supply and demand gaps in the CTHRC/CBoC study.

In absolute terms, because of the size of the sub-industries, the accommodation industry, the food and beverage services industry and the recreation and entertainment industry are expected to generate the largest share of the projected labour shortages. For example, by 2020, expected labour shortages in the accommodation industry and in the recreation and entertainment industry account for 21% (each) of all shortages in that year in the tourism and hospitality sector, while shortage in the food and beverage services industry accounts for 51% of all shortages in that year in the sector.

When expressed as a percentage of potential labour supply, the overall labour shortages are projected to be about 1% of labour supply (or equivalent to 280 full year jobs) in 2014, gradually increasing to almost 5% of labour supply (or equivalent to 1,630 full year jobs) by 2020.⁶ Again such a pattern is in line with the occupational labour imbalance patterns in the CTHRC/CBoC study.

In relative terms, the air transportation industry and the recreation and entertainment industry are expected to experience shortages more intensely than the sector average, with shortages reaching 6% of labour supply by 2020. On the other hand, the travel services industry is not expected to experience any labour shortages at all. Occupation wise, bartenders; security guards; landscaping and ground maintenance labourers; janitors, caretakers and building superintendents; and airline sales and service agents are expected to experience most severe shortages.

We emphasize that these results are based upon a continuation of the historical and current patterns of occupational and industry distribution within the work force. That is the assumption that approximately the same percentage of workers will choose to work in the tourism and hospitality sector and occupations as in the past, and is in line with those adopted in the CTHRC/CBoC study. We have no data on which to base a change of this assumption. If, for any reason such as the availability of higher paying jobs in other sectors, a smaller percentage of workers choose to enter tourism and hospitality, shortages would be much greater.

It is important to remember that even in the absence of labour shortage in a given year, the tourism and hospitality sector generates a significant number of full-year jobs for employers to fill. As we showed in Figure 4, over the 10 year period there are expected to be a total of 6,860 full-year job openings for replacement

⁶ The reason to express shortages (or surpluses) as a percentage of labour supply is to normalize the shortage (or surplus) values so that comparisons across industries and/or occupations are made easy.

needs, or about 680 openings to fill per year. This is in addition to a total of 5,500 full-year jobs (or about 550 full-year jobs per year) expected as a result of labour demand due to increased economic activities.

Also, recent analysis by the CTHRC demonstrates that for B.C., turnover-related employment demand will be responsible for approximately 85% of total labour shortages in the projection period.⁷ Turnover-related employment demand will thus have a significant impact on the ability of employers to attract and recruit quality staff to fill vacancies during the projection period.

⁷ See The Future of Canada's Tourism Sector: Shortages to Resurface as Labour Market Tightens, p. 21. March 2012.
http://cthrc.ca/en/research_publications/~//media/Files/CTHRC/Home/research_publications/labour_market_information/Supply_Demand/SupplyDemand_Report_Current_EN.ashx

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More than 100 Tourism Plans, Assessments, Situation Analyses and Workshop reports prepared for individual communities throughout all six BC tourism regions as part of the Tourism British Columbia Community Tourism Foundations program. The Community Foundations program assists communities to develop a comprehensive multi-year tourism plan for their area.

Appendix I List of Industry Included in Total Tourism and Hospitality Employment Conforming to HRM

Detailed list of tourism industries by North American Industry Classification System (NAICS) 2002

Transportation

- **Air transportation**
- 4811 Scheduled air transport
- 4812 Non-scheduled air transport
- **All other transportation industries**
- 4821 Rail transportation
 - of which:
 - **Tourism sub-industries**
 - 482114 Passenger rail transportation
 - **Non-tourism sub-industries**
 - 482112 Short-haul freight rail transportation
 - 482113 Mainline freight rail transportation
- 4831 Deep sea, coastal and great lakes water transportation
- 4832 Inland water transportation
- 4851 Urban transit systems
- 4852 Interurban and rural bus transportation
- 4853 Taxi and limousine service
- 4854 School and employee bus transportation
- 4855 Charter bus industry
- 4859 Other transit and ground passenger transportation
- 4871 Scenic and sightseeing transportation, land
- 4872 Scenic and sightseeing transportation, water
- 4879 Scenic and sightseeing transportation, other
- 5A0510 Automotive equipment rental and leasing
 - of which:
 - **Tourism sub-industries**
 - 532111 Passenger car rental
 - 532120 Truck, utility trailer and RV (recreational vehicle) rental and leasing
 - **Non-tourism sub-industries**
 - 532112 Passenger car leasing

Accommodation

- 7211 Traveller accommodation
- 721A RV (recreational vehicle) parks and recreational camps
 - of which:
 - **Tourism sub-industries**

- 721211 RV (recreational vehicle) parks and campgrounds
- 721212 Hunting and fishing camps
- 721213 Recreational (except hunting and fishing) and vacation camps
- **Non-tourism sub-industries**
- 721310 Rooming and boarding houses

Food and beverage services

- 7220 Food services and drinking places
 - of which:
 - **Tourism sub-industries**
 - 72211 Full-service restaurants
 - 72221 Limited-service eating places
 - 72241 Drinking places (alcoholic beverages)
 - **Non-tourism sub-industries**
 - 72231 Food service contractors
 - 72232 Caterers
 - 72233 Mobile food services

Recreation and entertainment

- 51213 Motion picture and video exhibition
- 7110 Performing arts, spectator sports and related industries
 - of which:
 - **Tourism sub-industries**
 - 7111 Performing arts companies
 - 7112 Spectator sports
 - 7115 Independent artists, writers and performers
 - **Non-tourism sub-industries**
 - 7113 Promoters (presenters) of performing arts, sports and similar events
 - 7114 Agents and managers for artists, athletes, entertainers and other public figures
- 7121 Heritage institutions
- 713A Amusement and recreation industries
- 7131 Amusement parks and arcades
- 7132 Gambling industries
- 7139 Other amusement and recreation industries
 - of which:
 - **Tourism sub-industries**
 - 71391 Golf courses and country clubs
 - 71392 Skiing facilities
 - 71393 Marinas
 - 71395 Bowling centres
 - 71399 All other amusement and recreation industries
 - **Non-tourism sub-industries**
 - 71394 Fitness and recreational sports centres

Travel services

5615 Travel arrangement and reservation services

**Appendix II List of Occupations within Each Tourism and
Hospitality Industry Conforming to HRM**

Air transportation

Air Pilots, Flight Engineers and Flying Instructors (C171)/(NOC2271)
Pursers and Flight Attendants (G712)/(NOC6432)
Airline Sales and Service Agents (G713)/(NOC6433)
Aircraft Mechanics & Aircraft Inspectors (H415)/(NOC7315)
Air Transport Ramp Attendants (H737)/(NOC7437)
All other Air Transportation Occupations

Rail transportation

Railway and Yard Locomotive Engineers (H721)/(NOC7361)
Railway Conductors and Brakemen/women (H722)/(NOC7362)

Other Transportation

Transportation Managers (A373)/(NOC0713)
Retail Salespersons and Sales Clerks (G211)/(NOC6421)
Motor Vehicle Mechanics, Technicians & Mechanical Repairers (H421)/(NOC7321)
Bus Drivers and Subway and Other Transit Operators (H712)/(NOC7412)
Taxi and Limousine Drivers and Chauffeurs (H713)/(NOC7413)
All other Transportation Occupations (excl. air)

Accommodation

Accommodation Service Managers (A222)/(NOC0632)
Program Leaders and Instructors in Rec'n, Sport and Fitness (F154)/(NOC5254)
Chefs (G411)/(NOC6241)
Cooks (G412)/(NOC6242)
Bartenders (G512)/(NOC6452)
Food and Beverage Servers (G513)/(NOC6453)
Hotel Front Desk Clerks (G715)/(NOC6435)
Light Duty Cleaners (G931)/(NOC6661)
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)
All other occupations in accommodation

Food & Beverage Services

Restaurant & food service manager (A221)/(NOC0631)
Food Service Supervisors (G012)/(NOC6212)
Cashiers (G311)/(NOC6611)
Chefs (G411)/(NOC6241)
Cooks (G412)/(NOC6242)
Maitres d'hôtel and Hosts/Hostesses (G511)/(NOC6451)
Bartenders (G512)/(NOC6452)
Food and Beverage Servers (G513)/(NOC6453)
Bakers (G942)/(NOC6252)
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)
Delivery drivers (H714)/(NOC7414)
All other Food and Beverage occupations

Recreation and Entertainment

Recreation and Sport Program and Service Directors (A343)/(NOC0531)
Technical Occupations Related to Museums and Art Galleries (F112)/(NOC5212)
Program Leaders and Instructors in Recreation and Sport (F154)/(NOC5254)
Retail Salespersons and Sales Clerks (G211)/(NOC6421)
Cashiers (G311)/(NOC6611)
Security Guards and Related Occupations (G631)/(NOC6651)
Casino Occupations (G723)/(NOC6443)
Attendants in Amusement, Recreation and Sport (G731)/(NOC6671)
Janitors, Caretakers and Building Superintendents (G933)/(NOC6663)
Food Counter Attendants and Kitchen Helpers (G961)/(NOC6641)
Landscaping and Grounds Maintenance Labourers (I212)/(NOC8612)
All other Recreation and Entertainment occupations

Travel Services

Retail Trade Managers (A211)/(NOC0621)
Travel Counsellors (G711)/(NOC6431)
All other Travel Services Occupations

Appendix III Concordance between Industry Groupings in BC Labour Market Scenario Model and NAICS

3 Digit BC LMSM Industries

Agriculture
 Other Primary
 Utilities
 Construction
 Manufacturing
 Trade
 Transportation and Warehousing
 Finance and Insurance

 PSM
 Education services
 Health Services

 Other Services
 Accommodation and Food Services
 Government Services

NAICS Codes

Agriculture (111, 112, 1151, 1152)
 Forestry and logging (113, 1153)&Fishing, hunting and trapping (114)& Mining, Quarrying, and Oil and Gas Extraction (21)
 Utilities (22)
 Construction (23)
 Manufacturing (31-33)
 Wholesale Trade (41)& Retail Trade (44-45)
 Transportation and Warehousing (48-49)
 Finance and Insurance (52)& Real Estate and Rental and Leasing (53)
 Professional, Scientific and Technical Services (54) & Management of Companies and Enterprises (55) & Administrative and Support, Waste
 Management and Remediation Services (56)
 Educational Services (61)
 Health Care and Social Assistance (62)

 Information and Cultural Industries (51) & Arts, Entertainment and Recreation (71) & Other Services (except Public Administration) (81)
 Accommodation & Food Services (72)
 Public Administration (91)

Appendix IV List of Stakeholders Interviewed

- Emilie Cayer-Huard
Community Development Specialist
Kootenay Rockies Tourism
- Anthony Everett
CEO
Northern BC Tourism
- Jennifer Houillebecq
Industry Development and Research Specialist
Thompson Okanagan Tourism Association
- Shawna Leung
Director Community Relations
Vancouver, Coast and Mountains Tourism Region
- David Lynn
President & CEO
Canada West Ski Areas Association
- Evan Loveless
Executive Director
Wilderness Tourism Association of BC
- Cailey Murphy
Director, Communications and Business Relations
British Columbia Hotel Association
- Dave Petryk
President and Chief Executive Officer
Tourism Vancouver Island
- Amy Thacker
CEO
Cariboo Chilcotin Coast Tourism Association
- Ian Tostenson
President and CEO
British Columbia Restaurant and Foodservices Association